



# Canadian Telecommunications Market Report 2025





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## Executive summary

The Canadian Radio-television and Telecommunications Commission (CRTC) is pleased to present the 2025 Canadian Telecommunications Market Report (CTMR).

Every day, Canadians rely on telecommunications services to work, find information, access public services and connect with others. To best serve Canadians, the telecommunications industry must continue to grow and invest, so that providers compete for their business with affordable and innovative services. Every Canadian should be able to connect to reliable services, no matter where they live. Canadians also deserve to be treated fairly by their providers and have options when they are not.

The Canadian Telecommunications Market Report assists the CRTC, industry stakeholders, and the public in assessing progress toward these goals. This year's edition introduces a new approach to reporting on how the telecommunications markets are serving Canadians that includes an expanded range of data sources. The report also provides metrics on the Internet and cellphone markets in several key categories, such as: market growth and investment; competitive intensity; prices and affordability; network coverage and evolution; network performance; and consumer empowerment.

### Market size and investment

In 2023, the Canadian telecommunications sector generated \$59.6 billion in total revenues, a 4.3% year-over-year increase. This was mainly due to a \$2.1 billion increase in cellphone revenues, which was 6.7% greater than in 2022.

Service providers must make large, long-term capital investments in their networks to provide reliable and innovative telecommunications services. Investment in both Internet and cellphone services remain high at \$9.7 and \$3.7 billion, respectively, but declined slightly from their most recent peaks in 2022. A central challenge for the CRTC is to incentivize providers to invest, while allowing new competitors access to their networks to provide more affordable choices to Canadians.

### Competition

Canada's telecommunications industry has expanded to several Internet and cellphone service providers. However, a small group of large service providers maintain commanding market shares and continue to report high profit margins.

The Internet access market remains concentrated between legacy incumbent providers (phone and cable), and the market share of smaller competitors continues to decline. Despite continued concentration, we are seeing market shifts between the largest service providers as they roll out advanced cable and fibre services with faster speeds. In rural areas, new low Earth orbit (LEO) satellite technology has introduced faster speeds and more competition to rural and remote regions of Canada.

With respect to cellphone service, three providers continue to dominate the market, though a fourth provider is expanding service nationally. Regional competitors have also made use of the CRTC's Mobile Virtual Network Operator (MVNO) framework to launch services and improve competition in new areas.

### Prices and affordability

Service providers have improved plans by increasing speeds and data limits, even while prices have declined. In the last two years, Internet and cellphone prices have declined nearly 10%, and roughly 25% respectively. However, Canadians have noted the opposite, with many seeing higher bills. This may be explained by some Canadians paying for more data and faster speeds.

## Network coverage

Network investment in Canada is among the highest in the world and we have one of the most advanced telecommunications infrastructures. Over 95% of Canadians have access to the universal service obligation (USO) speeds of 50 megabits per second (Mbps) for download and 10 Mbps for upload. Almost 90% of Canadians have the option of even faster gigabit Internet speeds, and nearly 60% of Canadians have an option from two competitors (fibre and cable). The fastest mobile service, 5G, has quickly rolled out to most Canadians as well.

However, these stats provide no comfort to those still not connected or those who suffer from poor coverage. The coverage for those living in rural, remote, Indigenous communities and northern areas is still too low. This coverage will continue to improve with public investments (like the Broadband Fund and the Universal Broadband Fund) in fibre expansion and technological advancement in terrestrial fixed wireless and satellite services.

While data submitted by service providers suggests that cellphone coverage reaches more than 99% of Canadians. The lived experiences of many Canadians—evident in public opinion research studies and complaints submitted to the CRTC—indicate that there are more coverage gaps than service providers report. The CRTC is working on a new coverage reporting standard and obtaining new data to better identify and fill gaps in coverage, and enhance reliability of cellphone services.

## Network performance

According to third-party measurements, Canada's network performance continues to increase in both Internet and cellphone services. Average download speeds have reached 200 Mbps for Internet and 80 Mbps for cellphone. In fact, Canada's Internet and cellphone performance ranks among one of the top countries internationally. Of course, Canadians' lived experience differs greatly, as public opinion research indicates that only 56% of Canadians agree they have a reliable Internet service and 54% agree they have a reliable cellphone service.

## Consumer empowerment

Increased competition has given Canadians the chance to demand not only lower prices, but also better customer service. Canadians' level of satisfaction with their telecommunications service providers varies greatly between providers, as indicated in customer satisfaction surveys and complaints. For new competitors in an area, effective customer service has made a difference and improved consumer perceptions of their service. When customer service fails, Canadians are using the Commission for Complaints for Telecom-television Services (CCTS) more than ever to resolve their issues, although more awareness of the CCTS is needed.

Public opinion research and data on rates of customer turnover (churn) show that Canadians are switching service providers. A key challenge for the CRTC is to eliminate barriers to make it easier for Canadians to choose the Internet and cellphone plans that are best for them, as well as ensuring that providers are complying with consumer protection codes. Canadians deserve to have the flexibility they need when choosing, switching or cancelling Internet and cellphone plans.

# 1. Introduction

This is the CRTC's first CTMR, reflecting the most recent data collected by the CRTC from the industry and third-party sources on the telecommunications sector. This report replaces the CRTC's *Annual Highlights of the Telecommunications Sector* reports published on the CRTC's [Communications Market Reports](#) site. The CTMR contains:

- insights on the structure of the Canadian telecommunications service sector;
- analysis of telecommunications market health, competitiveness, prices and affordability, network performance, network coverage; and
- data on consumer empowerment in Canadian telecommunications services.

In publishing the CTMR, the CRTC has the following objectives:

- openly and transparently communicate the CRTC's analysis of the telecommunications sector, with a particular focus on Internet (fixed Internet) and cellular (mobile wireless) services; and
- provide the Canadian public, industry and other stakeholders with an understanding of the Canadian telecommunications sector's challenges and achievements.

Definitions of key terms and abbreviations used in this report are provided in section 7.

## Background to this report

In publishing the CTMR, the CRTC is delivering on one of the key objectives established by the Governor in Council in its 2023 [Order Issuing a Direction to the CRTC on a Renewed Approach to Telecommunications Policy](#) (the Order). According to the Order, "The Commission should further develop strong and timely market monitoring, research and strategic foresight skills and use the results that it obtains from these activities in the exercise of its powers and the performance of its duties."

The CTMR continues to feature the main metrics from the *Annual Highlights of the Telecommunications Sector* on the telecommunications service sector, based primarily on data the CRTC collects through its annual and quarterly surveys of the industry (the most recent annual survey data reflect the year ending December 31, 2023). In addition, through the CRTC's strong and timely research, monitoring and strategic foresight capacity, the CTMR presents data from an expanded range of sources, including the CRTC's public opinion research (POR) tracker, Statistics Canada, the Media Technology Monitor (MTM), the Commission for Complaints for Telecom-Television Services (CCTS), Ookla and others. Data from these sources are from 2024. In addition, the CTMR provides 2024 high-speed Internet and mobile wireless revenue and subscriber estimates, based on the CRTC's latest annual and quarterly surveys.

The Order contains considerations specific to fixed Internet and mobile wireless services, as well as consumer matters, deployment and universal access. These considerations are also covered in various sections of the CTMR. It contains core metrics on market health, competition, prices and affordability, the coverage and performance of Canada's networks, and consumer empowerment. As well, the CTMR contains spotlights, which focus on more detail on aspects of Internet and mobile wireless services.

## 2. Overview of the telecommunications sector

Canada's telecommunications service sector comprises several service sectors: traditional telephone services, wired home and business Internet, and various wireless technologies for cellular phones, satellite, and fixed wireless Internet. In 2025, Internet and mobile wireless services account for the vast majority of the sector, a reflection of how central they are to Canada's connectivity needs. The following section provides insights on the telecommunications service sector as a whole, including traditional telephone services, while other sections of the CTMR are devoted to Internet and mobile wireless (or cellphone) services.

### 2.1 Revenues

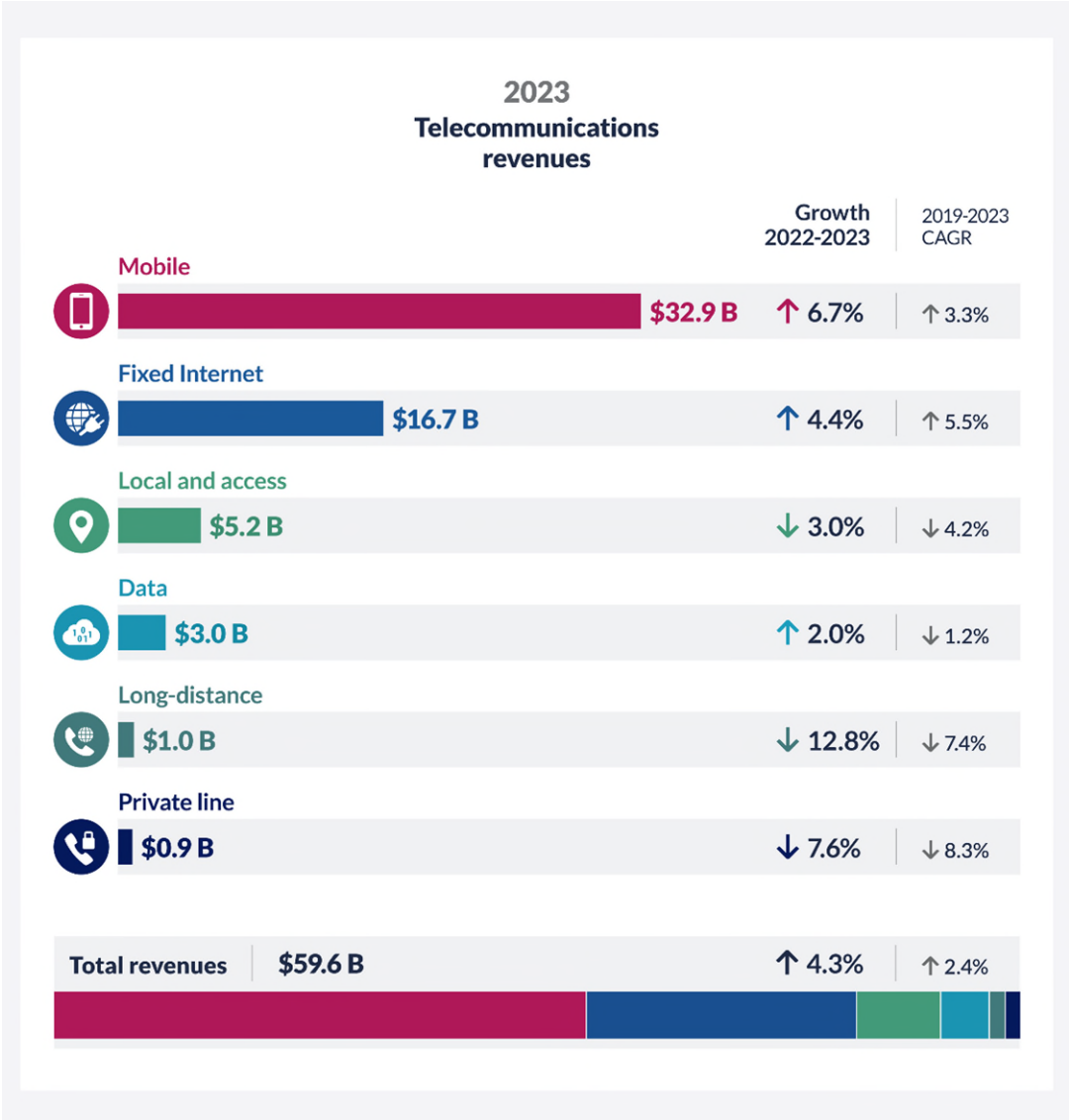
This section covers revenues of the Canadian telecommunications service sector, broken down into the following components:

- Mobile - includes mobile voice and data
- Wireline - fixed Internet (which includes various wireline technologies, as well as satellite and fixed wireless access, or FWA), data, private line, local and access, and long distance

In 2023, the Canadian telecommunications service sector experienced a 4.3% year-over-year increase in total revenue. This was mainly due to a \$2.1 billion increase in mobile revenues, which were 6.7% greater than in 2022.

Traditional telephone services represent an ever-dwindling share of telecommunications revenues in Canada, while the most significant growth has occurred in Internet and mobile wireless services. For example, revenue from wireline local access and long-distance services decreased nearly 18% since 2019, with a compound annual growth rate (CAGR) of -4.8%. By contrast, overall mobile revenues have increased nearly 14% since 2019, while fixed Internet revenues increased 23.7% during the same time.

Infographic 1: Revenues by sector, annual growth, CAGR

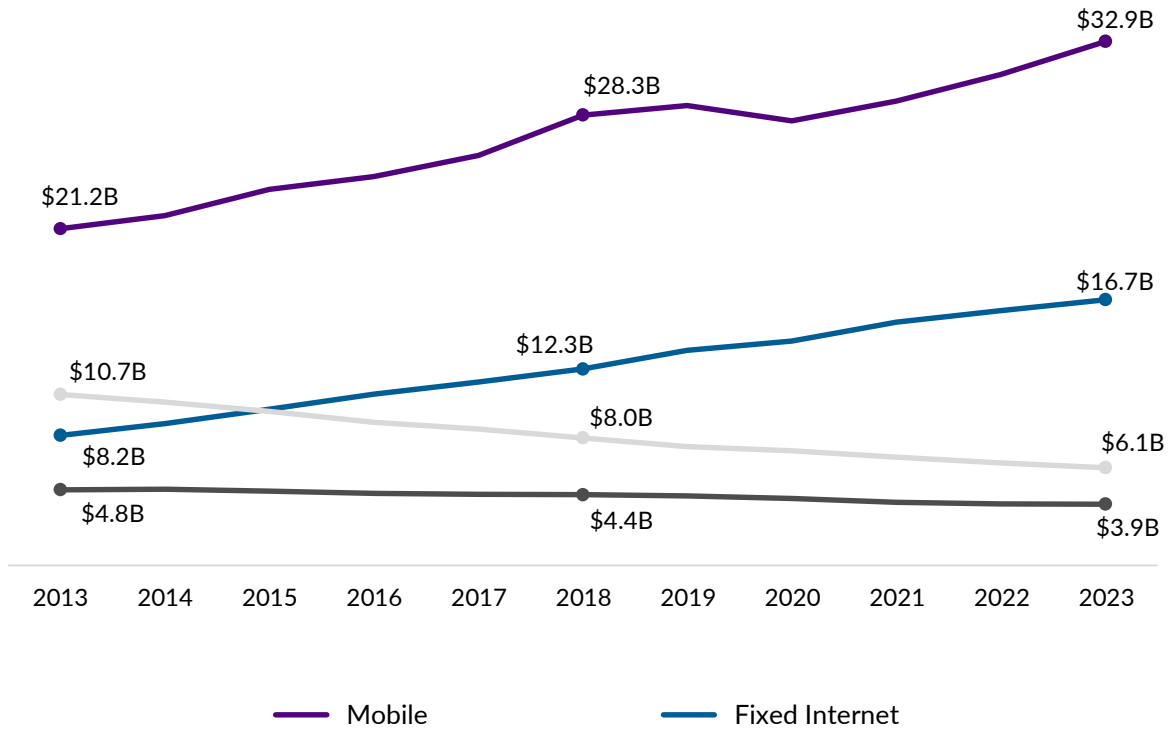


Source: CRTC data collection

### Spotlight – Telecommunications revenues 2013 to 2023

The telecommunications service sector has seen major shifts over the last decade that have resulted in mobile and fixed Internet becoming the dominant telecommunication services, representing over 80% of total telecommunications revenues in 2023. Mobile revenues have grown by over 50% to \$33 billion since 2013 and fixed Internet has doubled to nearly \$17 billion. All other telecommunication service revenues are declining.

**Figure 1: Long-term telecommunications revenues (\$ billions), 2013 to 2023**

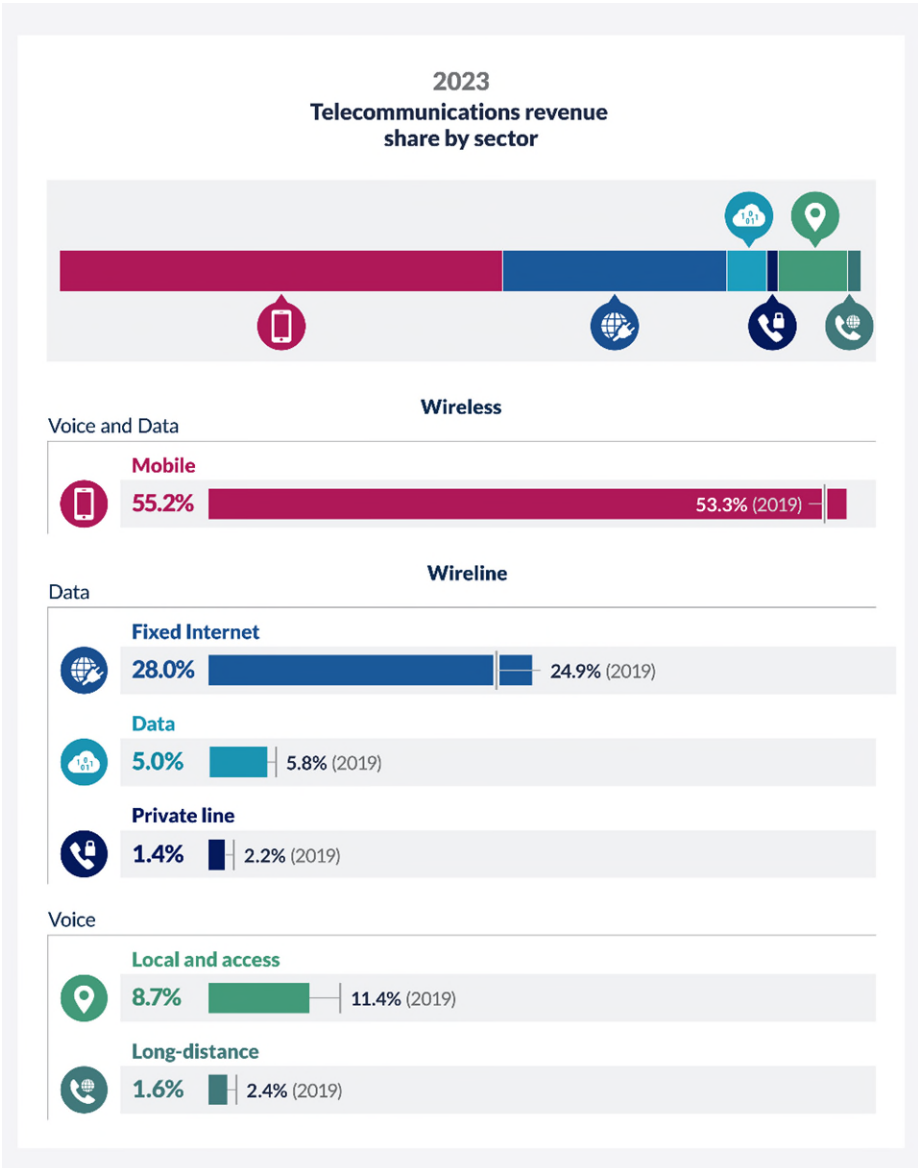


Source: CRTC data collection

## Revenue share

Mobile services represented the largest share of total revenues, at 55.2% in 2023. Fixed Internet made up over a quarter (28%) of all telecommunications revenues and showed a 4.4% increase over the previous year. Revenue shares have been declining continuously since 2000-2001 for local and access and long distance, since 2013 for private line, and since 2014 for data.

Infographic 2: Telecommunications revenue share by sector (%), 2023

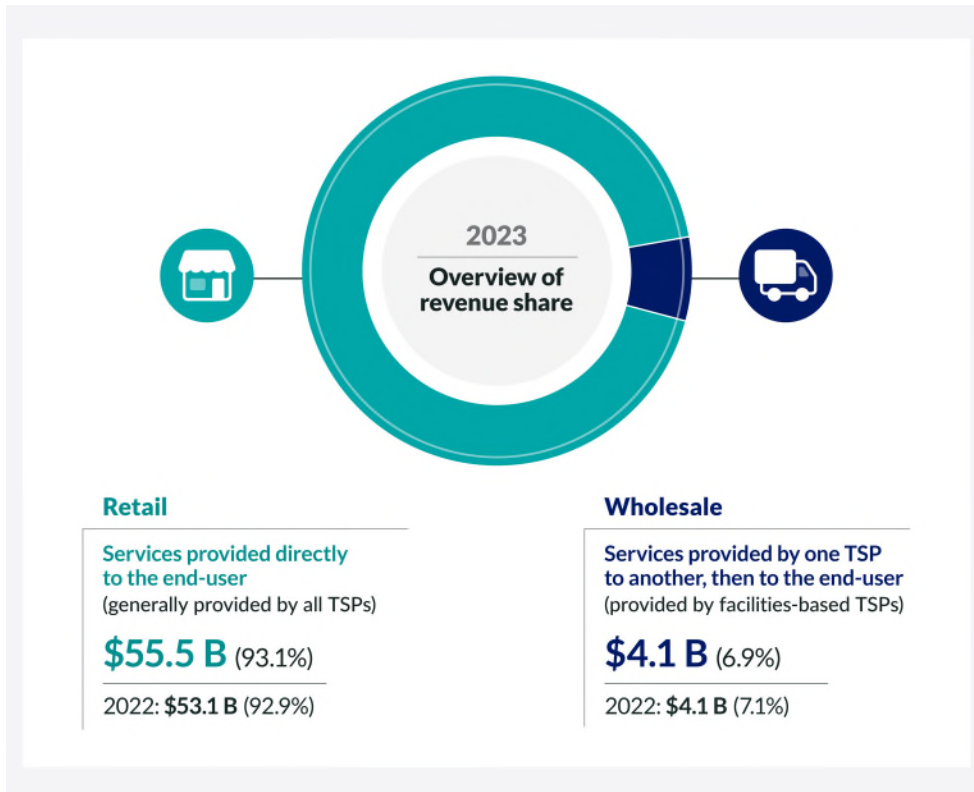


Source: CRTC data collection

## 2.2 Retail and wholesale

Telecommunications service revenues come from both retail sales (i.e., sales to residential consumers and business customers) and wholesale sales (i.e., sales to other providers of telecommunications services). Retail revenues were \$55.5 billion in 2023, an increase of more than 4% from the previous year, while wholesale revenue was essentially flat. Approximately 93% of the telecommunications service sector’s revenues over the past five years has been from retail services.

**Infographic 3:** Retail and wholesale revenue share (\$ billions and %), 2022 to 2023



Source: CRTC data collection

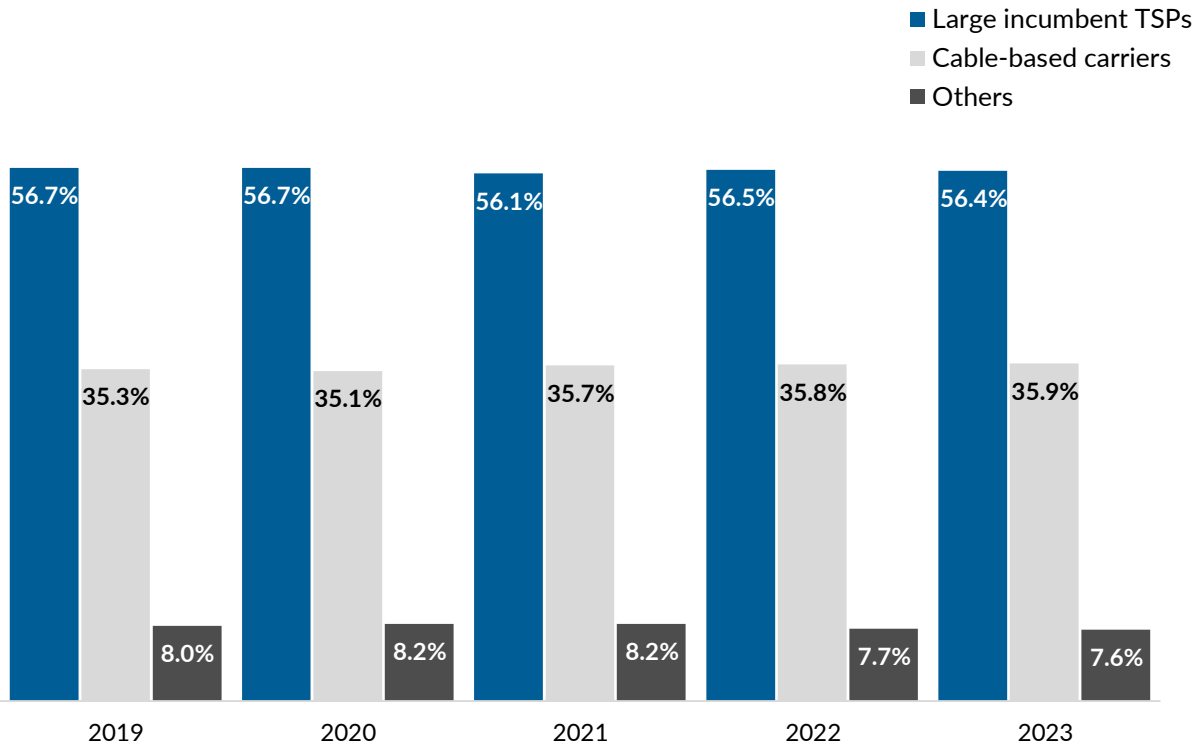
## Spotlight – Telecommunication revenue share by type of provider

Telecommunications service providers (TSPs) are divided into the following categories:

- Incumbent TSPs, which provided local telephony services on a monopoly basis prior to competitors entering the market, and primarily use their own facilities
- Cable-based carriers, which are the former cable monopolies that currently also provide telecommunications services, and which primarily use their own facilities
- Other providers, namely:
  - Other facilities-based service providers, such as satellite and fixed wireless operators
  - Wholesale-based service providers, whose services primarily use other companies' facilities, mainly those of incumbent TSPs and cable-based carriers.

As a group, large incumbent TSPs made up 56.4% of Canada's telecommunications revenues in 2023, a 0.3 percentage point decrease since 2019. Cable-based carriers made up 35.9% of total revenues in 2023, a 0.6 percentage point increase since 2019.

**Figure 2: Telecommunications revenue share by type of provider (%), 2019 to 2023**



Source: CRTC data collection

The four largest service providers in Canada (Bell Group, TELUS Group, Rogers Group, Quebecor Group and their respective secondary or “flanker” brands) accounted for 85.6% of total telecommunications service revenues in 2023.<sup>1</sup>

### 2.3 Competition and forbearance

The CRTC’s role is to implement the laws and regulations set by Parliamentarians who create legislation and departments that set policies. As an administrative tribunal that regulates and supervises broadcasting and telecommunications in the public interest, the CRTC may choose not to regulate when it finds that a service is subject to sufficient competition to protect the interests of users and is consistent with the policy objectives in section 7 of the [Telecommunications Act](#) (the Act). This practice is called forbearance. Where a service is forborne, the CRTC does not set prices for it. The CRTC has forborne from regulating most retail rates; however, if the CRTC considers that a service lacks sufficient competition, it may choose to regulate these rates. In 2023, approximately 97% of telecommunications revenues were generated from forborne services.

### 2.4 Canadian ownership

Section 16 of the Act requires that telecommunications companies that own or operate telecommunications transmission equipment and whose annual revenues from providing telecommunications services in Canada represent more than 10% of the total annual revenues from telecommunications services in Canada, be Canadian-owned and controlled. Total telecommunications

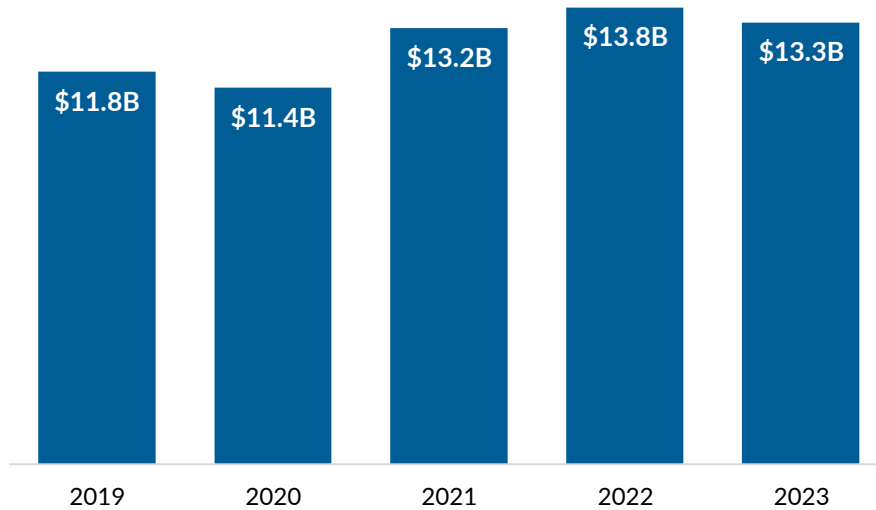
<sup>1</sup> Total telecommunications includes both retail and wholesale.

services revenues in Canada were \$59.6 billion in 2023, and therefore, for the purposes of applying provisions of section 16, 10% of total revenues represents \$5.96 billion.

## 2.5 Investment

After reaching a 10-year high in 2022, Canadian telecommunications operators' capital expenditures (CAPEX), on network equipment and infrastructure, declined slightly in 2023.

**Figure 3:** Total telecommunications CAPEX (\$ billions), 2019 to 2023

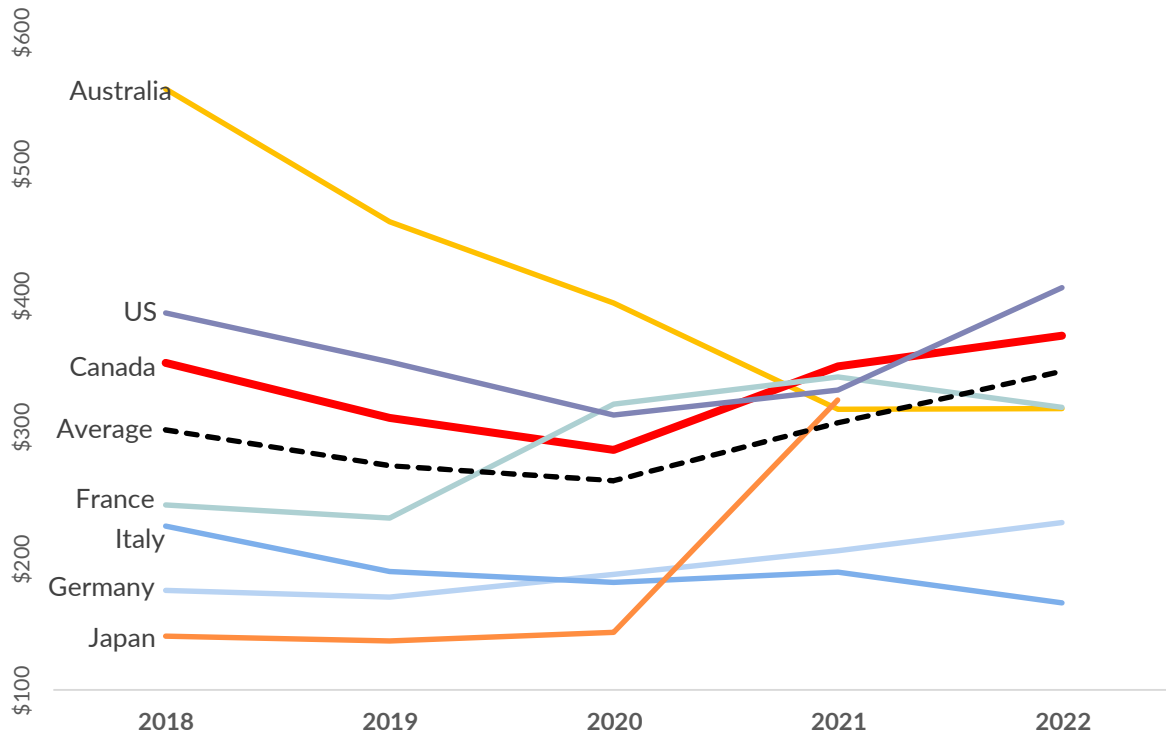


Source: CRTC data collection

### Spotlight – International comparison of investments in telecommunications

Canadians benefit from high levels of capital investment in telecommunications services, both wireline and wireless. Among comparator countries, Canada's telecommunications service sector shows among the highest levels of capital expenditures (CAPEX), although from 2018 to 2020 Australia and the US surpassed Canada's per capita CAPEX. Most of the CAPEX growth for these countries in the period 2018 to 2022 results from investments to support fibre and 5G deployment.

**Figure 4: Annual investment in telecommunications services per capita (in CAD), 2018 to 2022**



**Annual Investment in telecommunications services per capita (in CAD), 2018 to 2022**

Country	2018	2019	2020	2021	2022
Australia	\$557	\$456	\$394	\$314	\$314
Canada	\$349	\$307	\$283	\$346	\$370
France	\$241	\$231	\$317	\$338	\$315
Germany	\$176	\$171	\$188	\$206	\$227
Italy	\$225	\$190	\$182	\$190	\$166
Japan	\$141	\$137	\$144	\$321	Not available
US	\$387	\$350	\$309	\$328	\$406
Average	\$298	\$271	\$259	\$303	\$342

Sources: Population data and most CAPEX data from ITU DataHub (CAPEX data unavailable for Japan for 2022). US CAPEX for 2022 from USTelecom, 2022 Broadband CAPEX Report. France CAPEX data for 2022 from Arcep, Observatoire des marchés des télécommunications, résultats provisoires année 2023. Currency conversions from Bank of Canada (at December 31 of each year).

### 3. Tracking fixed Internet and mobile wireless services: outcomes and metrics

Fixed Internet and mobile wireless services represent a significant and growing share of telecommunications revenue and activity. Consequently, the CTMR contains detailed coverage of these two services. In the following sections, the CTMR explores these services under six broad themes. The themes are informed by the policy objectives of the Act, the considerations described in the Order, and the CRTC's [Departmental Plan](#) and [Strategic Plan](#). Together, these key documents provide the basis for the CTMR to track six outcomes – results that would benefit Canadians – and core metrics related these outcomes. The CRTC will adjust or add to these metrics as circumstances merit (e.g. improved or new data, policies, market developments).

The table below presents the themes, outcomes and core metrics presented in sections 4 and 5 below.

**Table 1:** Themes, outcomes and core metrics

Theme	Outcome	Core Metrics
<b>Market size and investment</b>	Market demand is growing and there is an investment in the quality and reliability of networks	Subscribers, revenue, capital expenditure, funding
<b>Competition</b>	There is a range of service options and providers of various sizes competing in the market	Revenue and subscriber shares, earnings, subscriber churn
<b>Prices and affordability</b>	Prices are reasonable for Canadians' needs, and services are affordable	Prices, inflation, average revenues per user, consumer perceptions of affordability, switching providers or services, service stacking
<b>Network coverage</b>	Canadians can access networks where they need to, on the latest suitable technologies, and faster options are expanding	Population coverage of various technologies
<b>Network performance</b>	Network speeds and usage are increasing, and networks are reliable	Network speeds, consumer data usage, consumer perceptions of network reliability and service outages
<b>Consumer empowerment</b>	Canadians are satisfied with their service provider and can easily switch providers	Issues raised by consumers, net promoter score, consumers' perception of choice

## 4. Perspectives on fixed Internet services

Over the past two years, Canada's fixed Internet services have shown continued increases in subscribers and revenues resulting from population growth and greater take-up of faster service in previously underserved areas and populations. Fixed Internet is dominated by two major network technologies, fibre and cable, with incumbent local exchange carriers (ILECs) and cable-based operators sharing over 80% of the sector's revenues. However, fixed Internet also includes wholesale-based providers using DSL, fibre and cable; and other facilities-based providers offering Internet services to homes and businesses using wireless technologies such as 5G home Internet and satellite using technologies such as low earth orbit, or LEO, satellites.

Network investment by operators may have peaked in 2023, as capital investment declines and profit margins soften slightly. Services meeting Canada's universal service objective (USO) target and gigabit-speed services are available to more of the population, and network performance and speeds are higher, particularly for urban Canada. Rural and First Nations reserve areas, though, which are more reliant on FWA and satellite Internet, may continue to experience challenges in achieving higher-speed service.

Funding and technology can fill some remaining coverage and service gaps. Proceedings on network resilience, telecommunications services in the Far North,<sup>2</sup> and the development of an Indigenous stream under the Broadband Fund (BBF) can also help fill gaps and empower underserved communities.

For consumers, downward price trends that started in 2022 have continued. It remains to be seen whether these trends will persist longer term. Data show that Canadians have made changes to their Internet plans likely to benefit from higher speeds and/or price decreases; nonetheless, half of Canadians consider Internet services to have become less affordable in the past year.

[Telecom Regulatory Policy CRTC 2024-180](#), *Competition in Canada's Internet service markets*, and related follow-up activities, are intended to help alleviate concerns about cost and competition by enabling competitors to use the fibre networks of the large telephone companies. Consumer-related measures such as updated consumer codes should make it easier for consumers to switch to more affordable providers or packages. These measures in turn could help increase Canadians' satisfaction with their providers and services.

### 4.1. Market size and investment

Growth in the fixed Internet market can sustain continued investment in network quality and reliability, so that that all Canadians benefit from improved connectivity. The CRTC tracks the following metrics relating to market size and investment:

- Retail (home and business) subscribers and revenues
- Investments in wireline networks, measured in terms of wireline CAPEX and capital intensity
- Government of Canada broadband funding

These metrics show that market demand is growing, and private and public funds are being invested in the network. Recent CAPEX declines could signal the end of an investment cycle for telecommunications companies. Government of Canada broadband funding programs, such as the BBF, continue to support projects to build or upgrade access and transport infrastructure to provide Internet access services in eligible underserved areas across Canada.

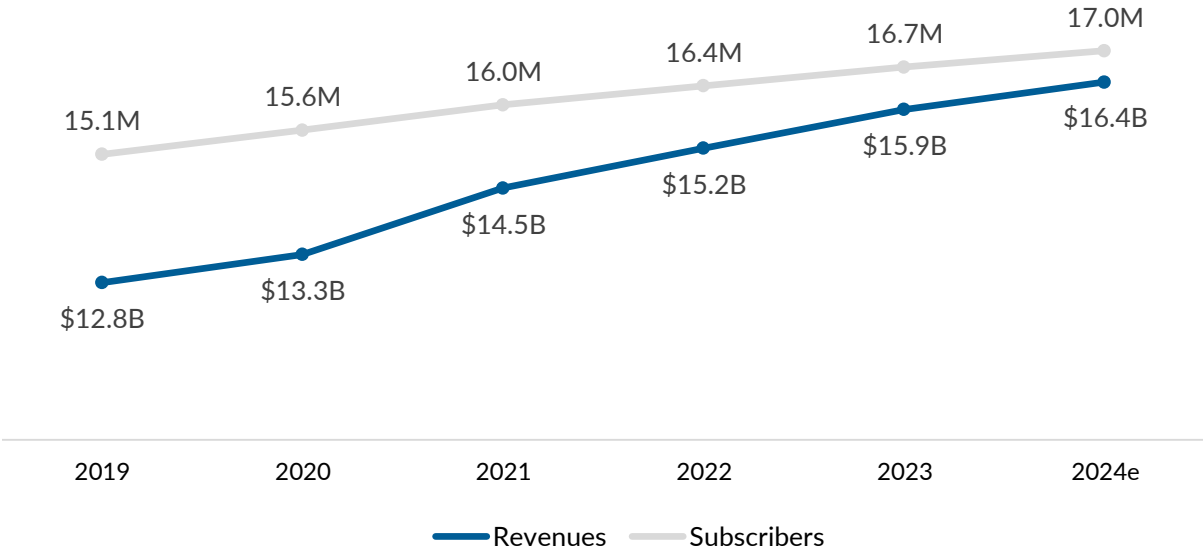
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<sup>2</sup> The Far North refers to all of the Northwest Territories, Nunavut, and Yukon, parts of northern British Columbia and Fort Fitzgerald, Alberta.

## Retail Internet subscribers and revenues

Retail fixed Internet revenues continued on an upward trajectory sustained, among other things, by Canada’s population growth. Facilities-based carriers saw the most substantial revenue increase from 2019 to 2023, with revenues rising by 24%, outpacing other service provider types. Subscriber levels also continued to grow, though at a slower pace than revenue.

Figure 5: Retail fixed Internet subscribers (millions) and revenues (\$ billions), 2019 to 2024e

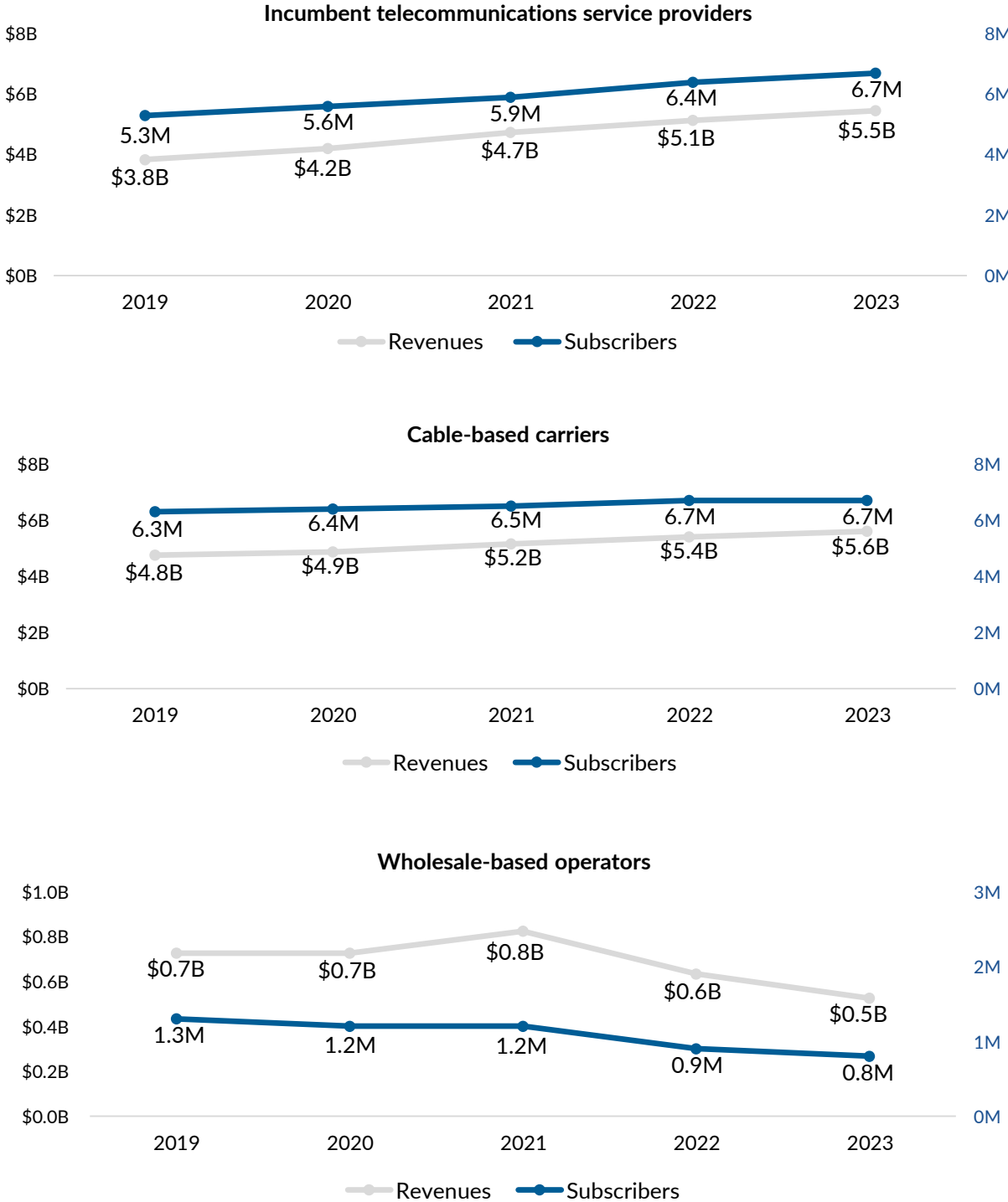


Source: CRTC data collection

## Spotlight – Home Internet subscribers and revenues

Incumbent telecommunications providers have closed the gap with cable companies in home Internet subscriptions, and both have experienced consistent revenue growth since 2019. Meanwhile, companies that generally acquire telecommunications services from other providers and resell those services, also known as wholesale-based operators, have seen declining revenues since 2022, reflecting a steady drop in their home Internet subscriber base.

**Figure 6: Residential Internet revenues (\$ billions) and subscribers (millions) by type of service provider, 2019 to 2023**

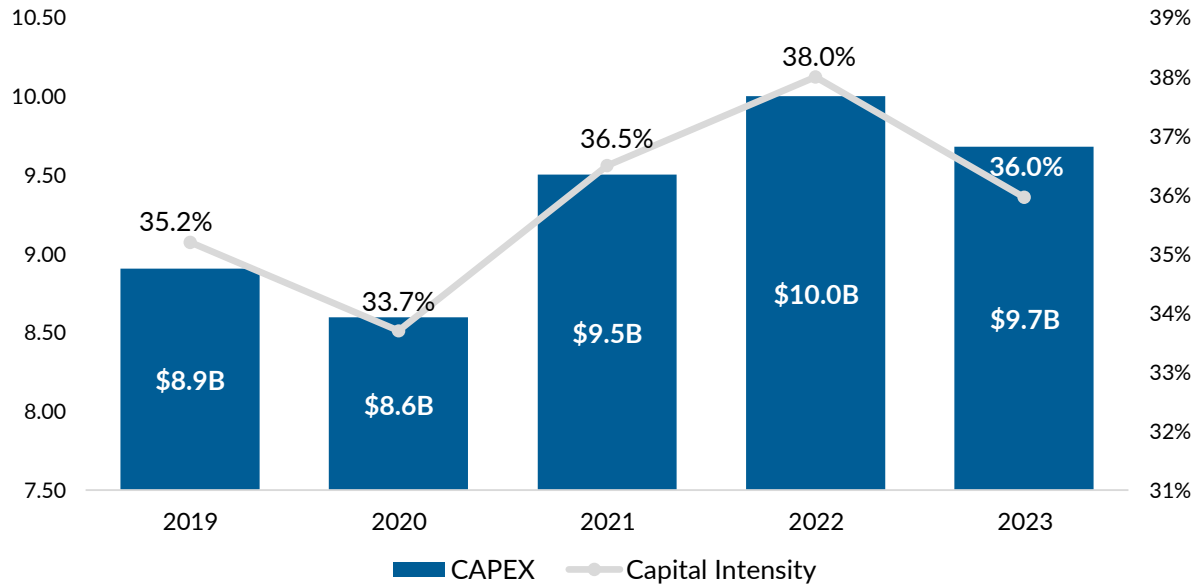


Source: CRTC data collection

## Investments in wireline networks

Investments in wireline networks, measured using wireline CAPEX and capital intensity, experienced a decrease in 2023, as some of the largest providers reduced investments in their networks.

**Figure 7: Wireline CAPEX (\$ billions) and capital intensity (%), 2019 to 2023**

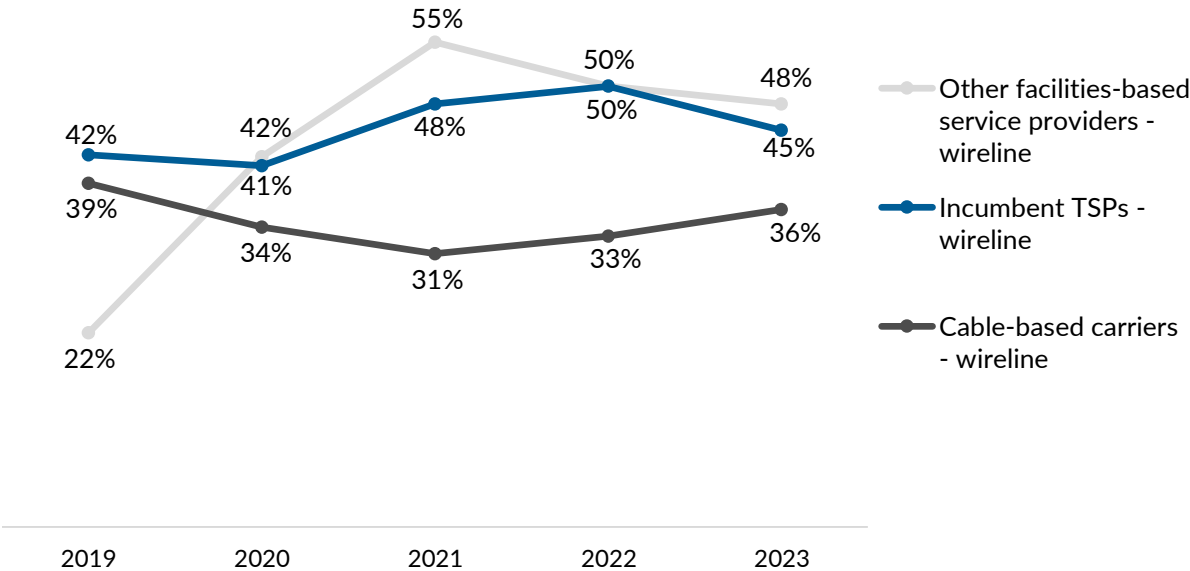


Source: CRTC data collection

### Spotlight – Capital intensity

While capital intensity for cable-based carriers has been increasing since 2021, the capital intensity of other types of operators (incumbent TSPs and other facilities-based providers) has declined. CAPEX by large operators may have peaked as fibre rollouts are reaching targeted levels, although cable-based carriers may roll out new DOCSIS 4.0 technology.

**Figure 8: Capital intensity by type of service provider (%), 2019 to 2023**

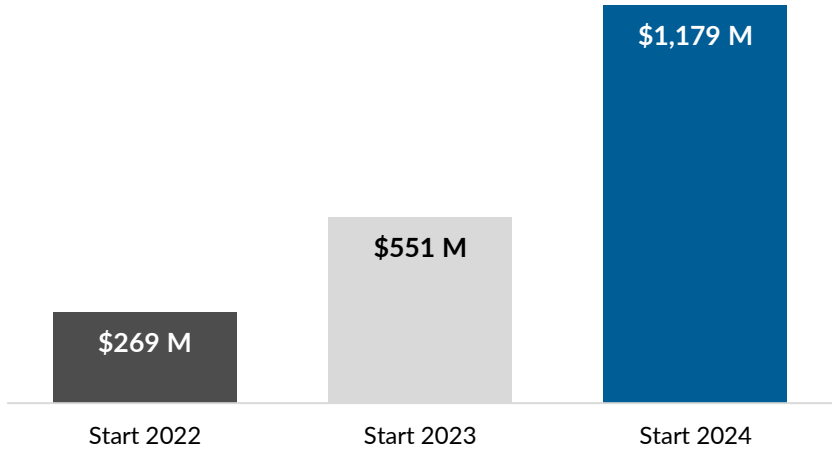


Source: CRTC data collection

### Government of Canada broadband funding

While representing only a portion of the public funding available through federal, provincial, territorial and local initiatives, the BBF, UBF and Connect to Innovate (CTI) combined allocated a cumulative total of \$1,179 million in funding from 2022 to the start of 2024. This reflects an increase of approximately \$628 million compared to the amount provided at the start of 2023.

**Figure 9: Government of Canada broadband funding (\$ millions), 2022 to 2024**



Source: CRTC Broadband Fund reports and ISED

## 4.2. Competition

Canadians benefit from competition when there is a range of service options and providers of various sizes competing in the market. The CRTC tracks the following metrics relating to competition in Internet services:

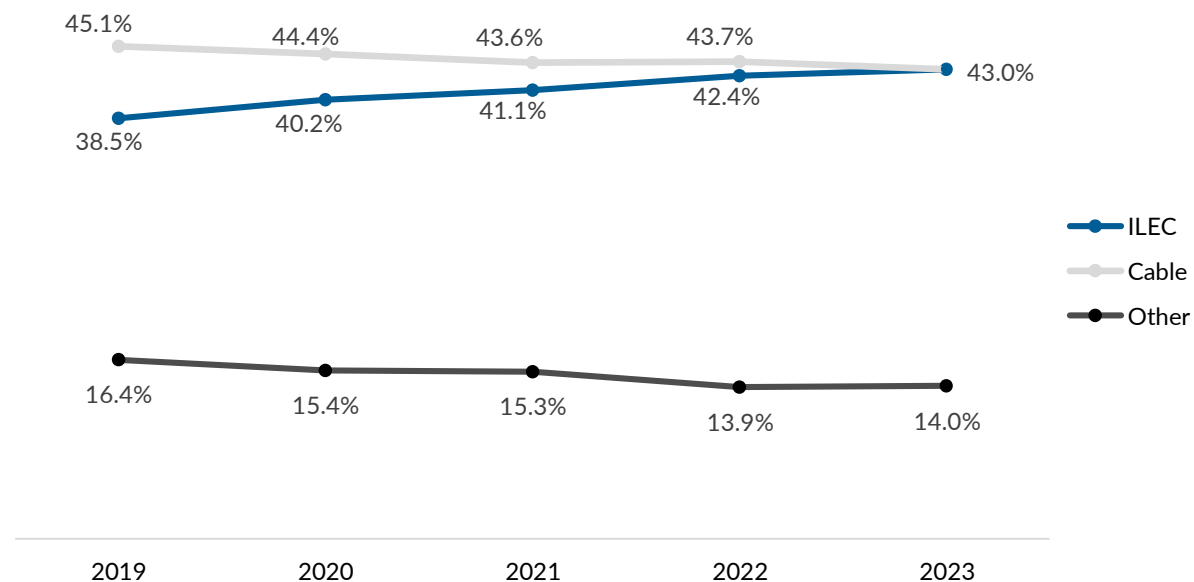
- Revenue share - share of retail (business and home) high-speed Internet revenues earned by different types of operators
- Subscriber share - wholesale-based operators' share of retail (business and home) subscribers to high-speed Internet
- Profit margin, using earnings before interest, taxes, depreciation and amortization (EBITDA) as a measure of operating profits, of wireline operators
- Subscriber turnover – the share of retail (business and home) high-speed Internet customers that cancel their subscriptions with a given provider

The analysis below illustrates that larger facilities-based providers are competing for market share. It also shows that wholesale-based operators have seen their market shares decline steadily mostly due to the acquisition of a number of them by larger national and regional operators.

### Revenue share by type of operator

As their fibre rollouts have progressed, ILECs are competing vigorously with and now match cable-based operators' share of high-speed Internet revenues, at 43%. Facilities-based operators other than ILECs and cable-based operators gained market share while wholesale-based operators lost revenue share to larger operators.

Figure 10: Share of revenues by type of operator (%), 2019 to 2023

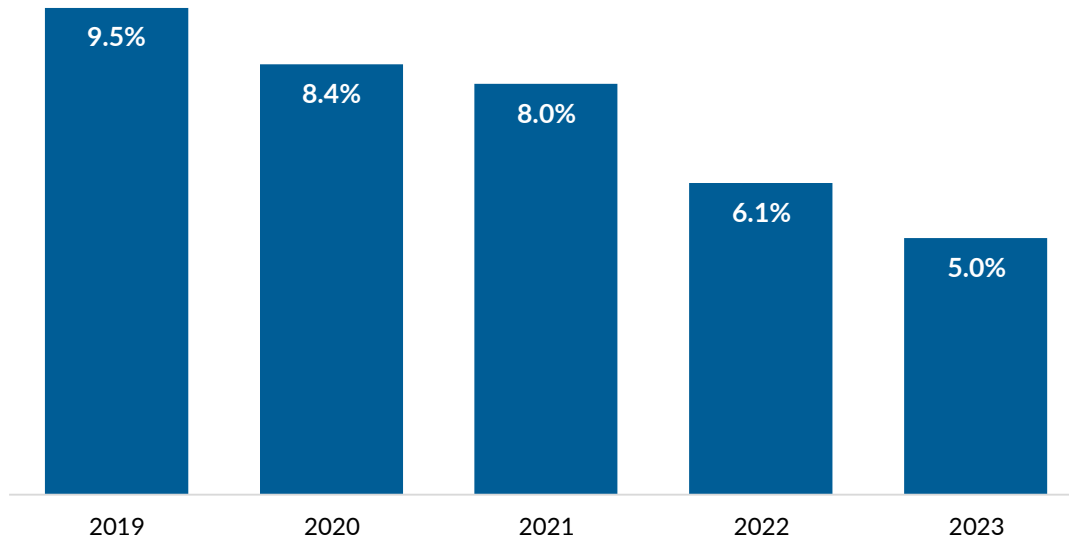


Source: CRTC data collection

## Share of subscribers – Wholesale-based operators

The share of high-speed Internet subscribers with subscriptions to wholesale-based operators' service has declined steadily since 2019, reaching 5% in 2023. Part of the decline resulted from large facilities-based operators that gained over 450,000 subscribers by acquiring wholesale-based Internet service providers (ISPs) in 2022 and 2023. Some wholesale-based operators that were not acquired by other operators saw their subscriber levels decline.

**Figure 11:** Share of subscribers – Wholesale-based operators (%), 2019 to 2023

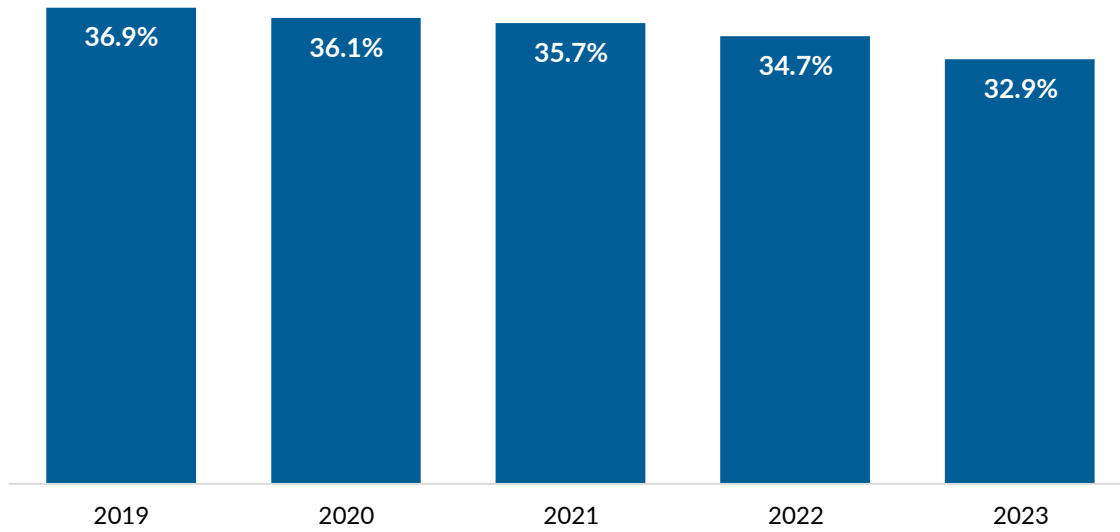


Source: CRTC data collection

## Profit margins – Wireline operators

Wireline profit margins, using EBITDA as a measure of operating profit, show a slow and steady decline since 2019. Three operators account for over 90% of wireline EBITDA and weigh heavily in aggregate wireline EBITDA margins.

Figure 12: Wireline EBITDA margins (%), 2019 to 2023

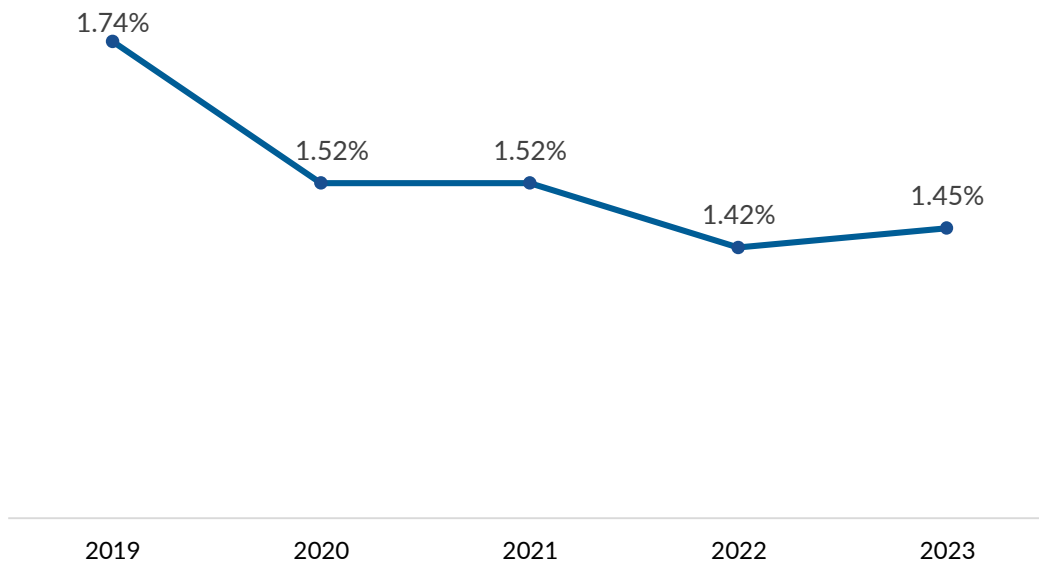


Source: CRTC data collection

## Subscriber turnover

The share of retail high-speed Internet customers that cancelled their subscriptions with a given provider, defined as the churn rate, increased slightly over the past year in both the home and business segments. Retail churn is considerably higher than average for wholesale-based operators than other types of operators.

Figure 13: Retail high-speed Internet subscriber churn (%), 2019 to 2023

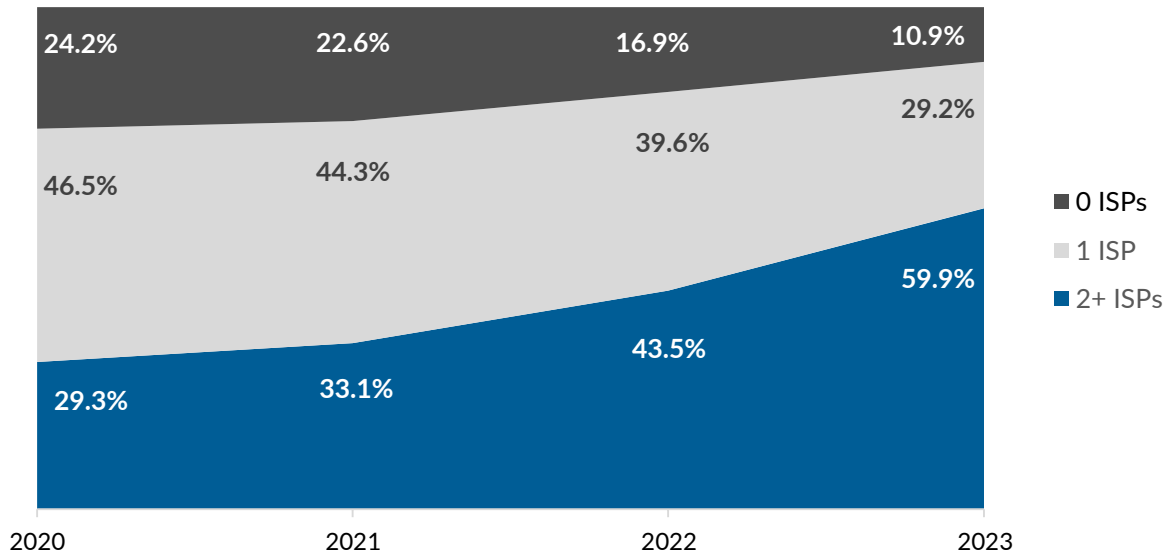


Source: CRTC data collection

## Spotlight – Competition in gigabit-speed Internet

Close to 60% of dwellings have access to two or more ISPs offering gigabit-speed or faster Internet, especially in urban areas. 11% of dwellings do not have access to an ISP offering these speeds.

Figure 14: Dwellings with access to gigabit-speed Internet (%), 2020 to 2023



Source: CRTC data collection

### 4.3. Prices and affordability

Internet services benefit Canadians when prices are affordable and reasonable for Canadians' needs. The CRTC considers prices and affordability in terms of the following metrics:

- Prices – for plans of 50 Megabits per second (Mbps) download and 10 Mbps upload with unlimited data (50/10 Mbps unlimited), and gigabit-speed Internet<sup>3</sup>
- The Consumer Price Index (CPI) – for all items and Internet services
- Revenue per subscriber, measured as average revenue per user or ARPU
- POR on affordability
- POR on consumers making changes to their Internet plans due to affordability concerns
- POR on Canadians' confidence in their ability to pay for Internet services

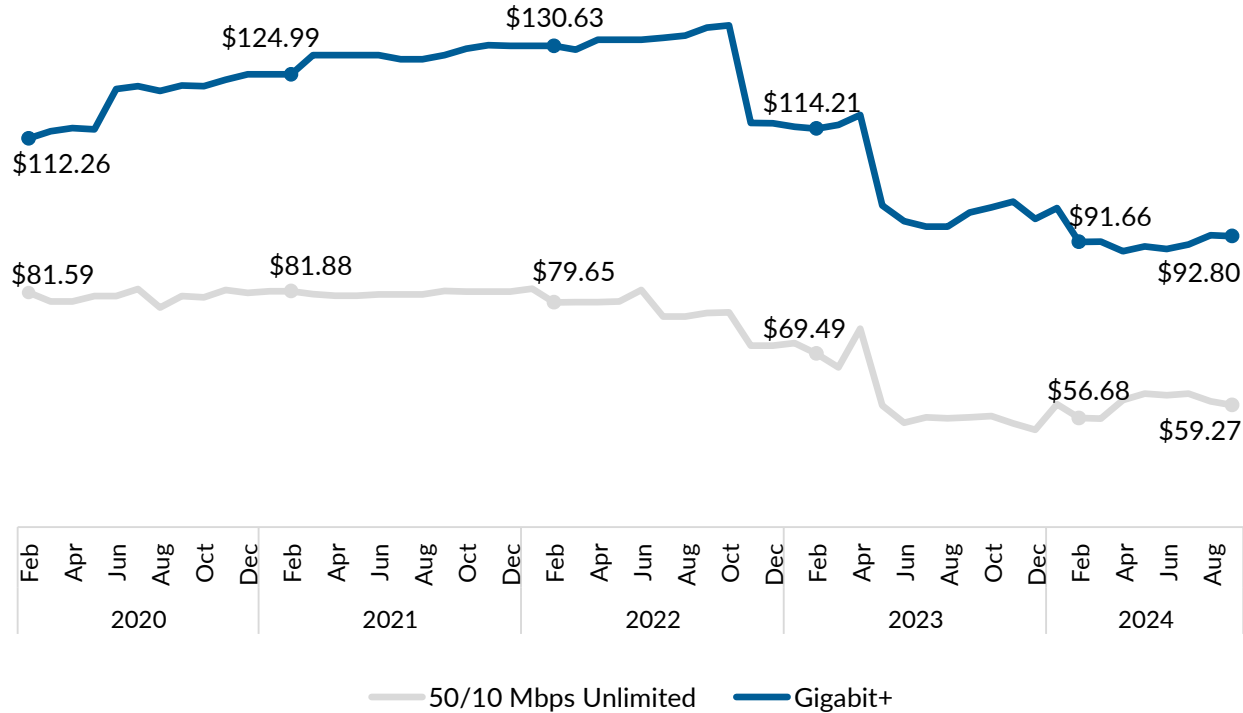
The Internet service CPI and plan prices behind it appear to be declining overall, including in the Territories and rural areas, but price declines are recent and are being tracked over time. Consumers continue to switch to faster speed plans; therefore ARPU (which includes the price of the service and all related fees) continues to increase while perceptions of affordability have improved slightly. The review of telecommunications services in the Far North is intended to address affordability issues in this region, while recently announced measures and consultations aim to protect Canadian consumers with regard to fees and prices.

<sup>3</sup> Gigabit-speed Internet services include all connections with speeds of 940 Mbps or more.

## Prices for 50/10 Mbps and gigabit-speed Internet

Prices for plans offering gigabit speeds of or faster have decreased, while 50/10 Mbps unlimited plan pricing increased in 2024.

Figure 15: Prices for 50/10 Mbps and gigabit-speed Internet (\$), 2020 to 2024<sup>4</sup>



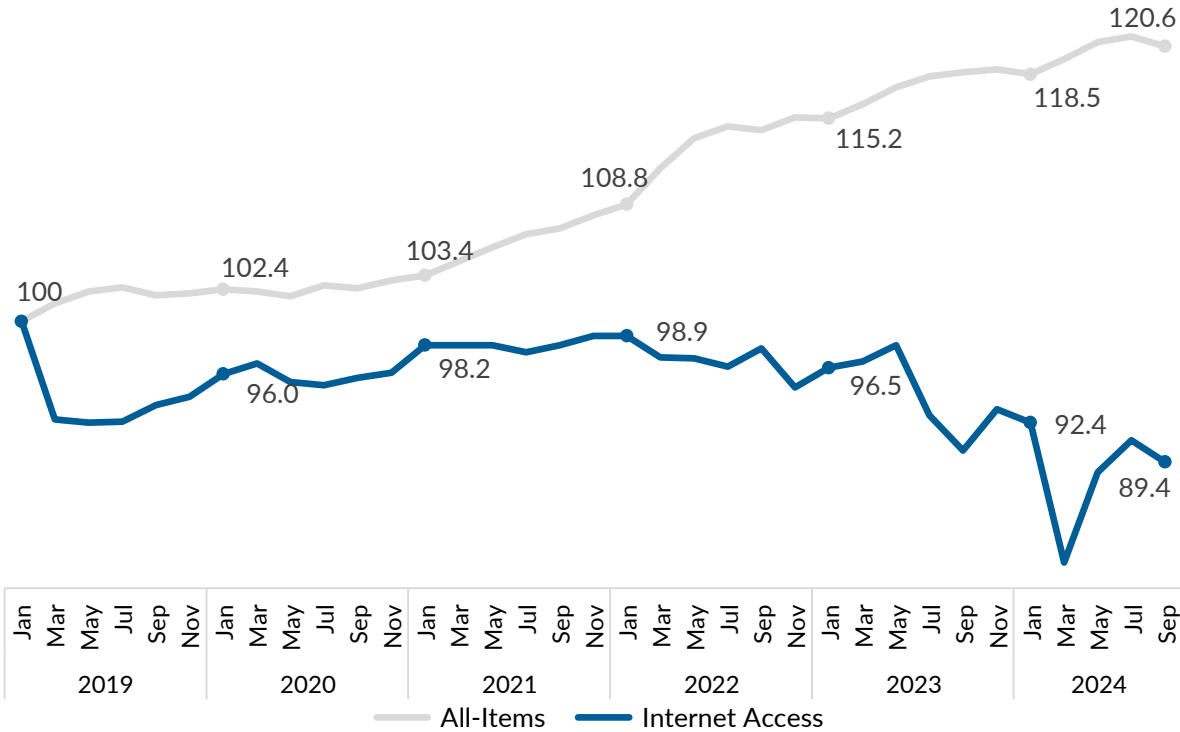
Data labels apply to February each year, with the addition of September 2024.  
 Source: Statistics Canada

## Consumer Price Index (CPI)

Inflation in Canada increased early in 2024 after levelling off in mid-2023, while the CPI for Internet access services decreased nearly 10% between 2023 and 2024.

<sup>4</sup> Prices for Gigabit+ Internet services for the months of June to September 2024 data were revised in October 2025.

Figure 16: Consumer Price Index – All-items and Internet access services, 2019 to 2024



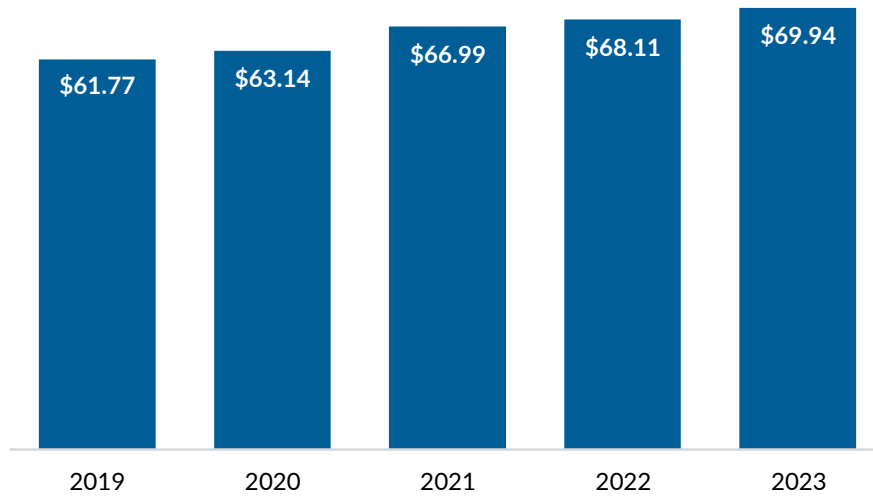
Data labels apply to January each year, with the addition of September 2024. The base period for this chart is January 2019, which may differ from other presentations of CPI.

Source: Statistics Canada

### Revenue per subscriber

Telecommunications operators use Average Revenue per User, ARPU, as a key performance indicator to understand how revenues are evolving on a per-subscriber basis. This metric enables operators to see how their pricing strategies drive revenues, and compare these results to other operators or other time periods. Monthly ARPU for Internet services continues to rise. This is occurring as consumers upgrade to more expensive higher-speed packages, although the prices of these packages have declined in the past year.

**Figure 17: Internet ARPU (\$), 2019 to 2023**

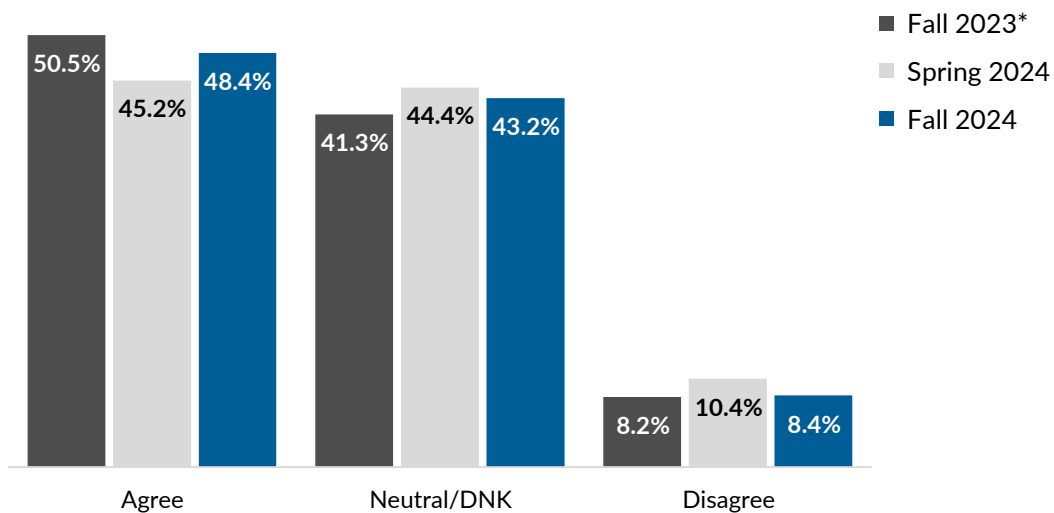


Source: CRTC data collection

## POR – Affordability

In the most recent Fall 2024 POR survey, more Canadians said that home Internet had become *less* affordable over the past year, approximately a 3-percentage point increase since the Spring 2024 Survey.

**Figure 18: POR – “Internet services became less affordable over the year” (% of respondents), 2023 to 2024**



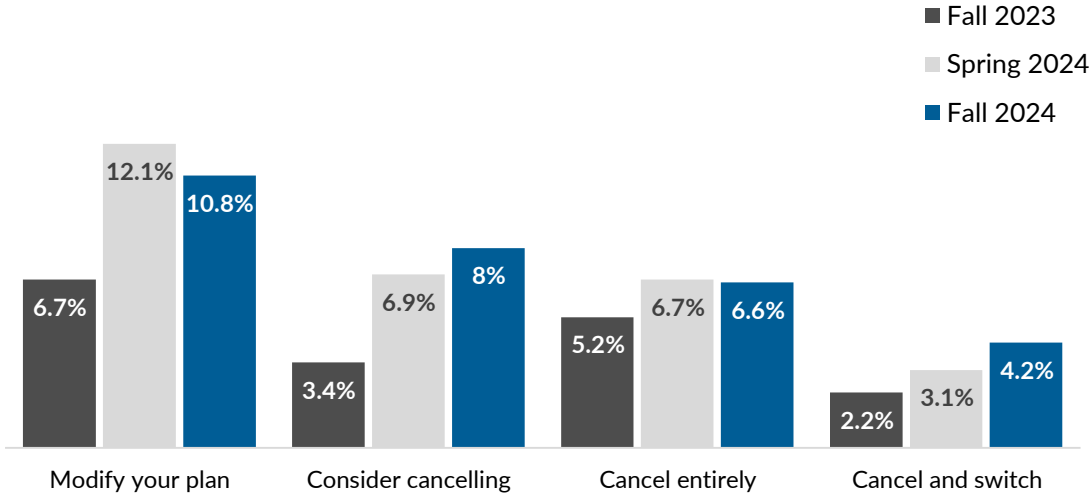
\*Fall 2023 survey question was based on “telecom services”, not “Internet services”.

Source: Ipsos, Public Opinion Research Tracker: Baseline Survey, October 2023; Public Opinion Research Tracker: Wave 2, May 2024; and Public Opinion Research Tracker: Wave 3, October 2024

### POR – Changes to plans

In the Fall 2024 POR Survey, approximately 11% of Canadians said they had changed plans to make their service more affordable, which was down from the Spring 2024 Survey, but higher than in 2023.

**Figure 19:** POR – “This month, the affordability of Internet service caused you to:” (% of respondents), 2023 to 2024

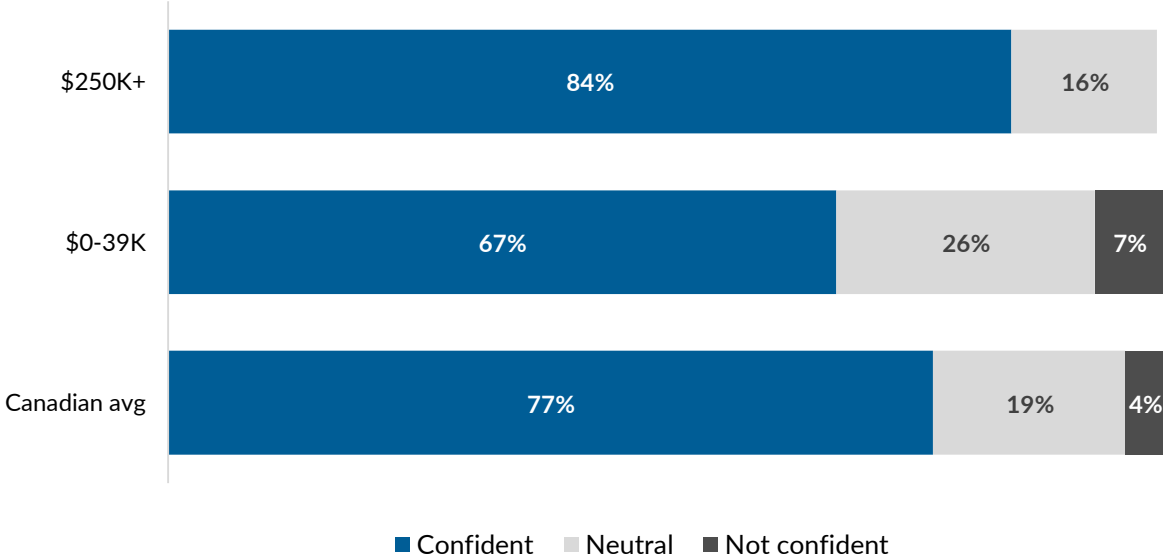


Source: Ipsos, Public Opinion Research Tracker: Baseline Survey, October 2023; Public Opinion Research Tracker: Wave 2, May 2024; and Public Opinion Research Tracker: Wave 3, October 2024

### POR – Confidence in ability to pay

In the Fall 2024 POR Survey, 77% of Canadians said they were confident they could pay their home Internet bills over the next three months (a 2-percentage point increase since the Spring 2024 Survey). However, only 67% of consumers in the lowest income bracket were confident.

**Figure 20: POR – Confidence in ability to pay for Internet service over the next three months, by income bracket (% of respondents), 2024**

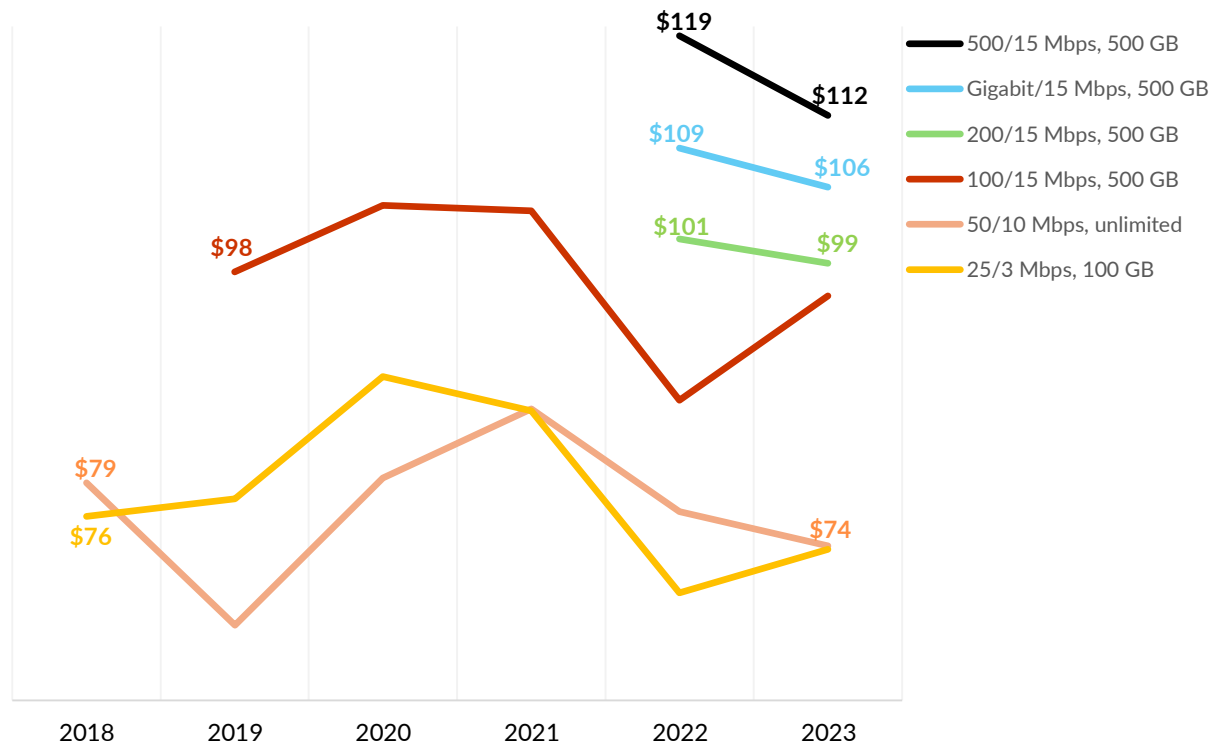


Source: Ipsos, Public Opinion Research Tracker: Wave 3, October 2024

### Spotlight – Lowest average Internet prices in Canada

Downward price trends that started in 2022 have continued for most packages. Advertised prices are declining for lower and mid-range speed tiers. Internet plans with download speeds of 100 Mbps or less have been declining since 2021 (faster plans have been widely available and tracked only since 2022).

**Figure 21: Lowest average reported monthly Internet prices by speed (\$), 2018 to 2023**



Source: CRTC data collection

#### 4.4. Network coverage

Canada’s target for USO coverage is for 100% of Canadian households to have access to Internet service of at least 50/10 Mbps unlimited. Canadians should therefore be able to access Internet networks where they need to, on the latest technologies offering at least USO-level service.

The CRTC tracks the following metrics relating to network coverage and evolution:

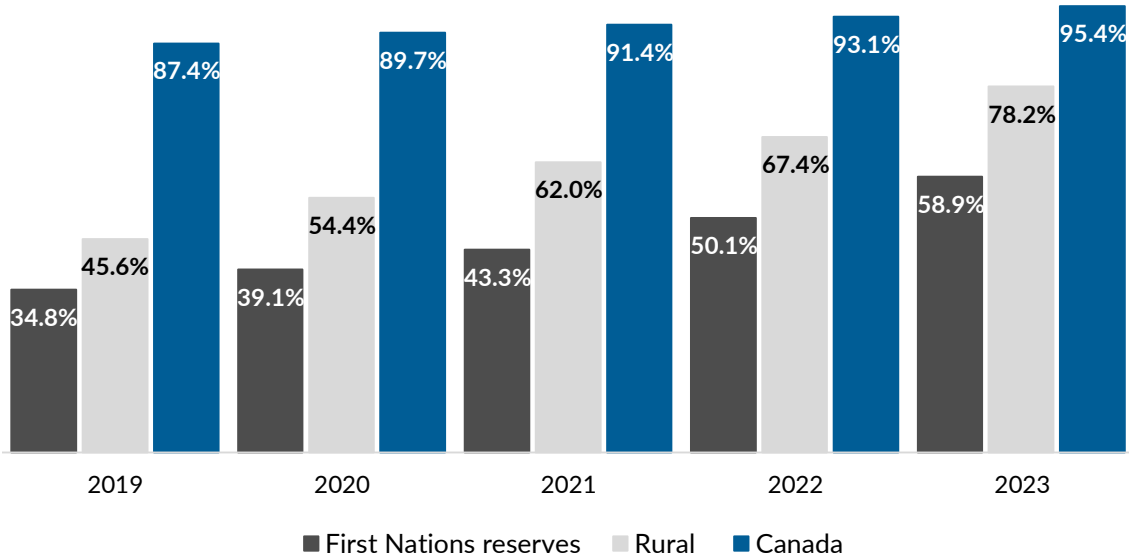
- 50/10 Mbps unlimited service – the proportion of Canadian households that have access to Internet service that meets or exceeds the USO
- Gigabit-speed service – the proportion of Canadian households that have access to Internet service at download speeds of at least 1 gigabit per second (Gbps)
- Home Internet subscribers to FWA and satellite Internet

These metrics detailed below illustrate that, while too many Canadians are still underserved, USO-level broadband continues to expand. Deployment of fibre and other gigabit-speed capable technologies is making better Internet service available, particularly to urban Canada. Coverage also increased in rural communities and First Nations reserve areas, partially because FWA proved to be a viable option in sparsely populated areas. The development of an Indigenous stream under the BBF can also help fill gaps and empower underserved communities.

## 50/10 Mbps unlimited service

More than 95% of Canadians have access to USO-level Internet. Although there are some rural areas, the Territories and First Nations reserve areas remain underserved, coverage in these regions is increasing steadily due, among other things, to targeted funding available through the BBF and other federal, provincial, territorial and local initiatives.

Figure 22: Households with access to 50/10 Mbps unlimited service (%), 2019 to 2023

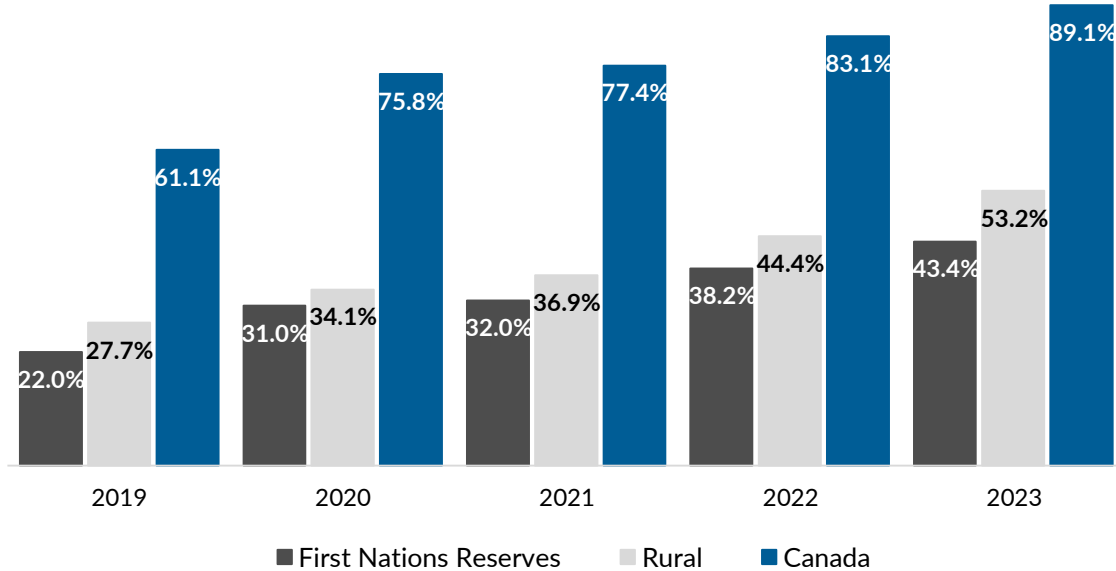


Excludes FWA coverage data that are under evaluation.  
Source: CRTC data collection

## Gigabit-speed service

Nearly 90% of households have access to gigabit speeds, though rural communities and First Nations reserve areas are below the Canadian average. Gaps in access to gigabit speeds are likely to persist as FWA and satellite remain the core technologies serving these areas. While offering major improvement in coverage and service speed, the current limits of these technologies mean that some rural communities and First Nations reserve areas will not yet experience the same level of service as Canadians in urban areas.

**Figure 23:** Households with access to gigabit-speed service (% of households), 2019 to 2023

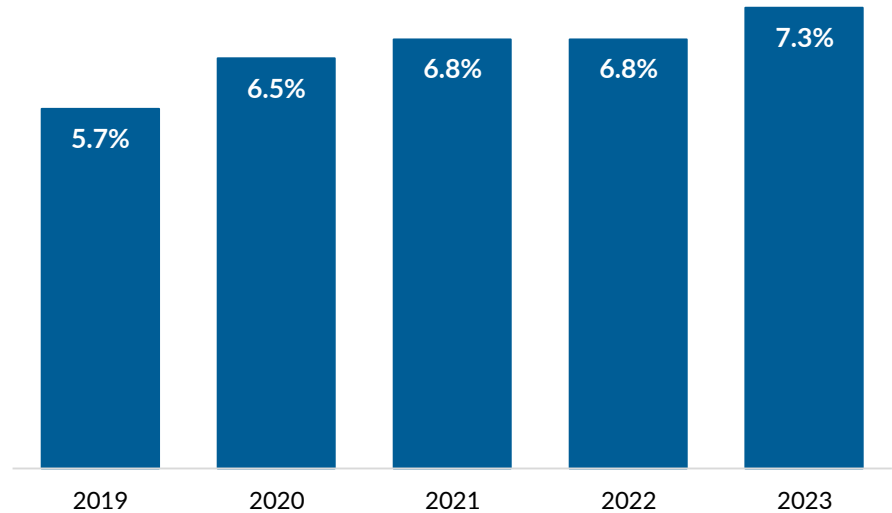


Source: CRTC data collection

### Subscribers to FWA and satellite Internet service

Residential subscriptions to this category continue to increase, spurred partly by public incentives aimed at completing full Internet coverage through satellite service.

**Figure 24:** FWA and satellite residential Internet subscriptions (% of total subscriptions), 2019 to 2023

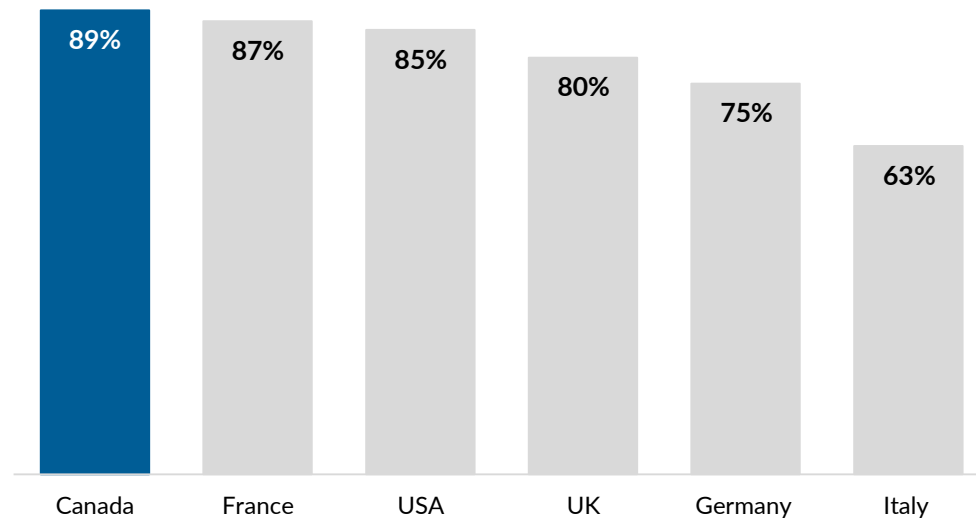


Source: CRTC data collection

## Spotlight – Gigabit speeds in Canada and peer countries

Canada is among the leading countries in its peer group in achieving gigabit-speed coverage. Coverage at this network speed level is significant, given the geographic scope of the country and the scale of investment needed to cover it.

**Figure 25:** Homes covered by gigabit-speed Internet in Canada and peer countries (% of homes), 2023 and 2024



Sources: Canada – CRTC data collection (at December 31, 2023); US – FCC data collection (at December 31, 2023); EU and UK – Cullen International High-Speed Broadband Coverage Table (at July 9, 2024)

## 4.5. Network performance

To meet Canadians' growing demands for connectivity, network speeds should be increasing, while networks remain reliable and resilient. The CRTC tracks the following indicators of network performance:

- Percentage of subscribers by plan speeds
- Median broadband download and upload speeds
- Monthly data consumption
- Canadians' perspectives on the reliability of their home Internet service
- Canadians' perspectives on service outages experienced

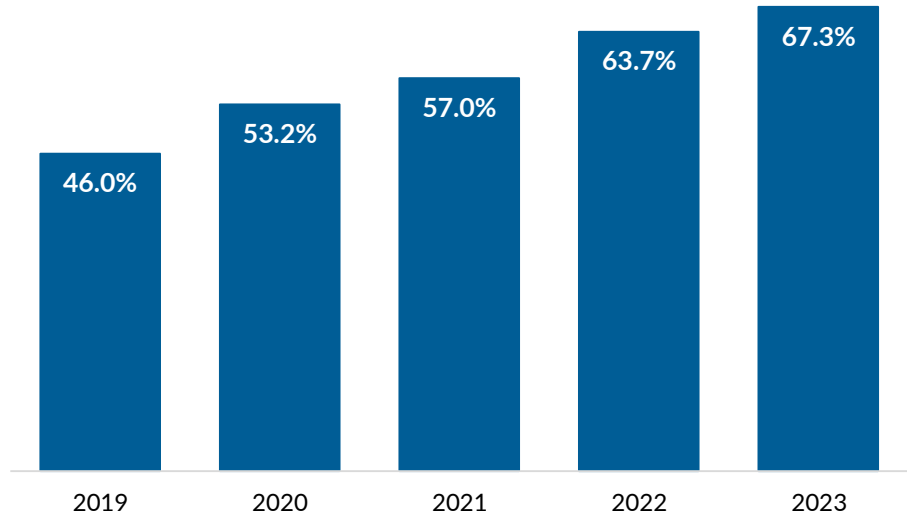
As illustrated by the data presented in this section, Canada has world-class performance in terms of network speed. Speeds are increasing and usage continues to grow. Major outage incidents, and the potential for future weather-related events, underscore the critical importance of reliability. The CRTC's ongoing proceeding and follow-up work on network resilience will contribute to the development of a regulatory framework to improve network reliability and resiliency.<sup>5</sup>

<sup>5</sup> See [Telecom Notice of Consultation CRTC 2023-39, Call for comments – Development of a regulatory framework to improve network reliability and resiliency – Mandatory notification and reporting about major telecommunications service outages](#).

### Percentage of subscribers by plan speeds

Subscribers are increasingly choosing USO-level and faster plans. In 2019, less than half of subscriptions were to USO-level or faster plans; this level increased to two-thirds of subscriptions in 2023.

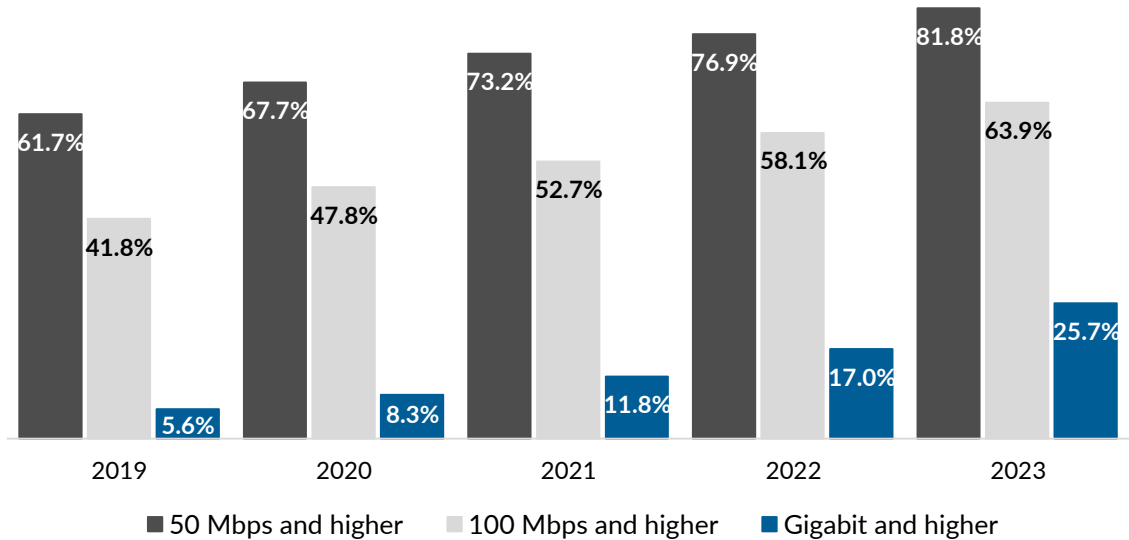
**Figure 26:** High-speed home Internet service subscriptions with USO-level or higher speed service (%), 2019 to 2023



Source: CRTC data collection

More than 25% of Canadian households subscribed to speeds of 1 Gbps or faster at the end of 2023.

**Figure 27:** Subscribers by download speed (%), 2019 to 2023

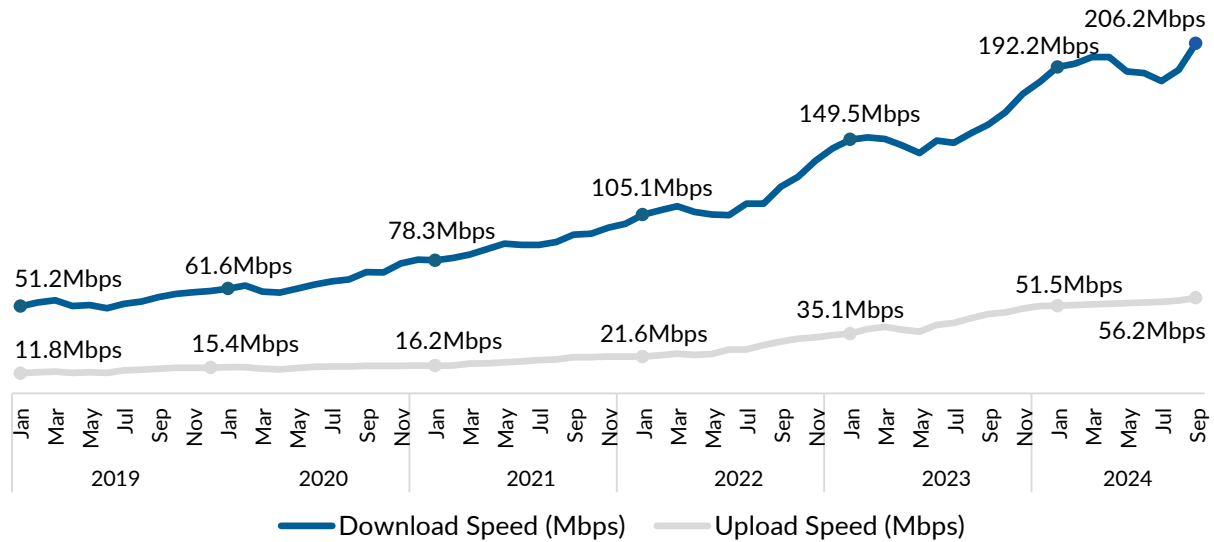


Includes plans with data caps.  
Source: CRTC data collection

## Median download and upload speeds

Median speeds increased by around 30% annually between 2019 and 2023, driven by cable network improvements and major rollouts of fibre optic networks.

**Figure 28:** Median download and upload speeds in Canada (in Mbps), 2019 to 2024

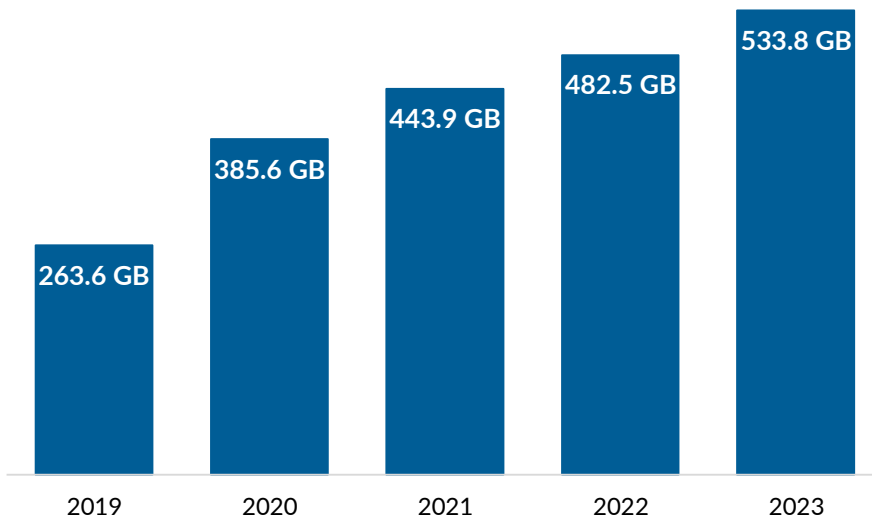


Source: Based on CRTC analysis of Ookla, Speedtest Intelligence®

## Monthly data consumption

Data consumption in gigabytes (GB) doubled since 2019 for both downloads and uploads due, in part, to increasing online gaming and use of HD and 4K subscription video on demand (SVOD) services.

**Figure 29:** Average monthly data usage (upload and download) by residential Internet subscribers (in GB), 2019 to 2023

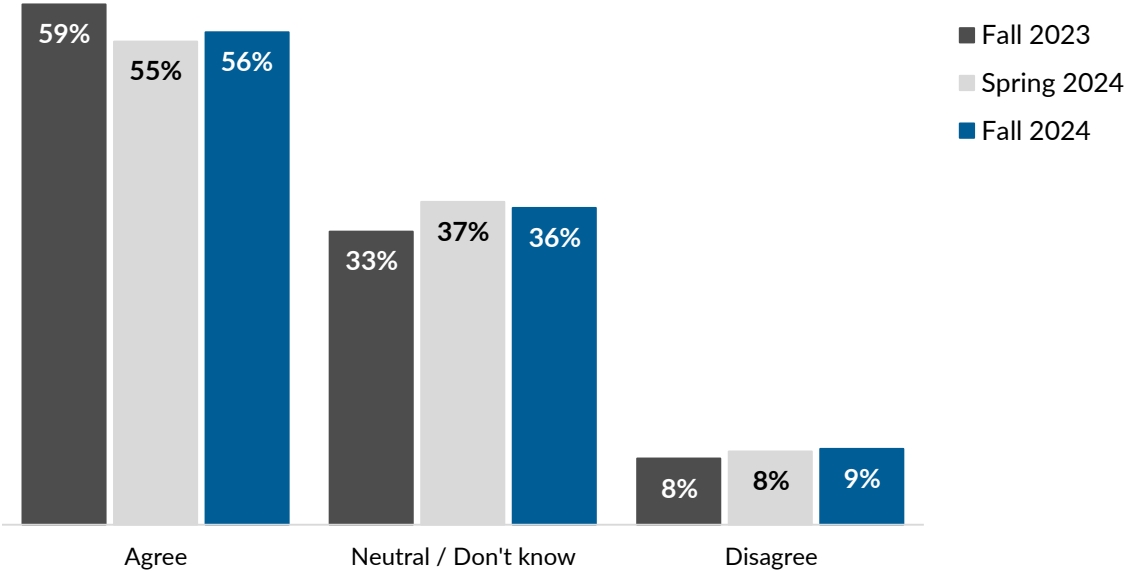


Source: CRTC data collection

## Canadians' perspectives on the reliability of their home Internet service

A majority of respondents consider that their home Internet service is reliable and these results are consistent with previous POR surveys.

Figure 30: POR – “I can count on a reliable high-speed network where I live” (% of respondents), 2023 to 2024

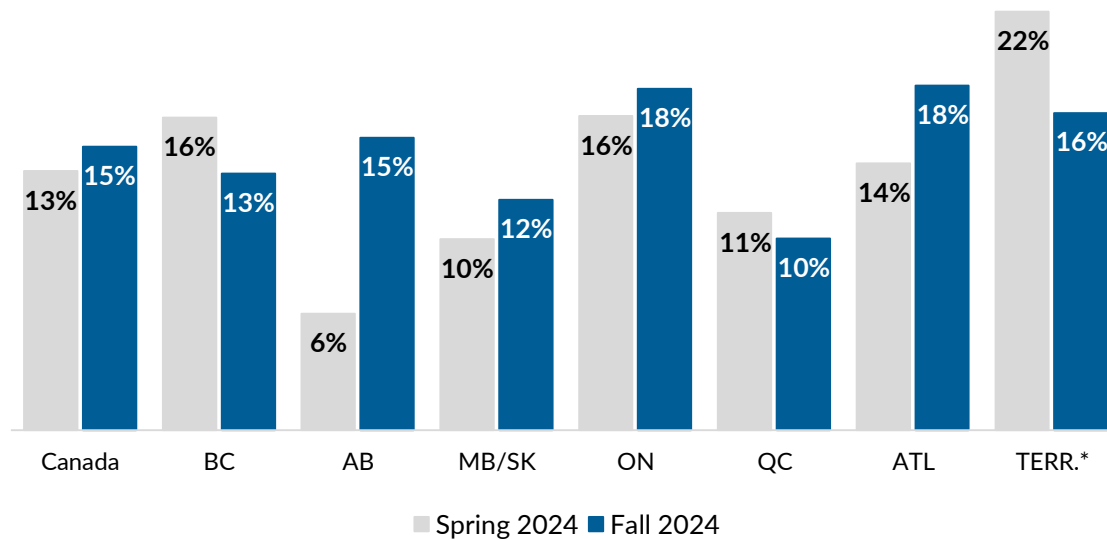


Source: Ipsos, Public Opinion Research Tracker: Baseline Survey, October 2023; Public Opinion Research Tracker: Wave 2, May 2024; and Public Opinion Research Tracker: Wave 3, October 2024

## Canadians' perspectives on service outages experienced

More Canadians in some areas reported experiencing service outages between the Spring and Fall 2024 POR surveys, while in other regions, fewer Canadians reported experiencing outages. These regional variations seem to be more closely correlated with natural disaster or harsh weather occurrences in a specific region than with the type of technology used to deliver home Internet.

**Figure 31: POR – Consumers experiencing a home Internet service outage of 24 hours or more (% of respondents), 2024**



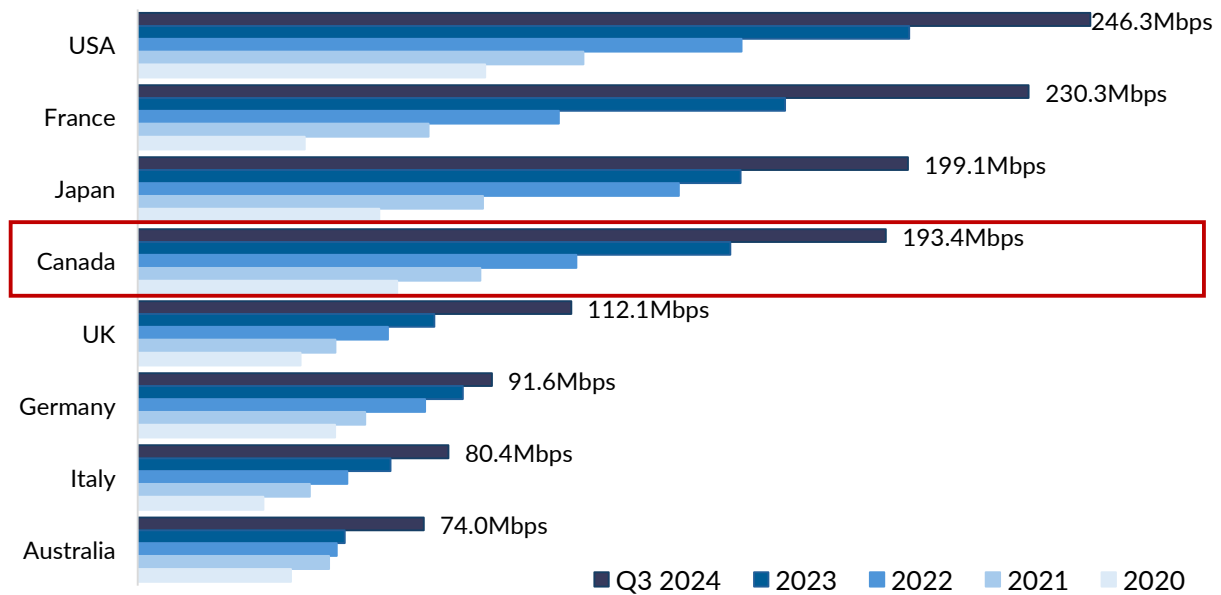
\*Small base of respondents

Source: Ipsos, Public Opinion Research Tracker: Wave 2, May 2024; and Public Opinion Research Tracker: Wave 3, October 2024

### Spotlight – Internet download speed by country – 2020 to 2024

Canada continues to rank well among peer countries for Internet speeds. From 2020 to 2024, Canada’s median download speed increased by 188%. During this time, the median US download speed rose 174%.

**Figure 32: Median Internet download speeds – G7 countries plus Australia (in Mbps), 2020 to 2024**



Source: Based on CRTC analysis of Ookla Speedtest Intelligence®

## 4.6. Consumer empowerment

Indicators of consumer empowerment look at whether Canadians are satisfied with their service and can choose the Internet service plans that are best for them. In this regard, the CRTC tracks the following:

- CCTS Internet-related issues
- Canadians' likelihood of recommending their Internet provider, as expressed in the Net Promoter Score (NPS)
- Canadians' perceptions of choice of home Internet providers

Overall, the NPS remains neutral, but there is notable divergence among regions. Customer relationships are a source of dissatisfaction for some telecommunications providers, but other providers stand out with positive consumer perceptions. As reflected in the types of issues raised with the CCTS, Canadians are most preoccupied with issues relating to billing and service quality. However, issues raised with the CCTS do not reflect the full scale or scope of concerns that Canadians have about their providers: not all service providers are registered with the CCTS, and Canadians' awareness of the CCTS is relatively low.<sup>6</sup> In response, the CCTS 2024-2029 Strategic Plan puts a priority on growing public awareness of the organization. The CRTC's review and updating of consumer-related measures such as consumer codes should make it easier for Canadians to switch providers. Work in progress includes the possibility of requiring home Internet providers to post standardized labels with their plans to improve transparency and simplify provider-to-provider comparisons.

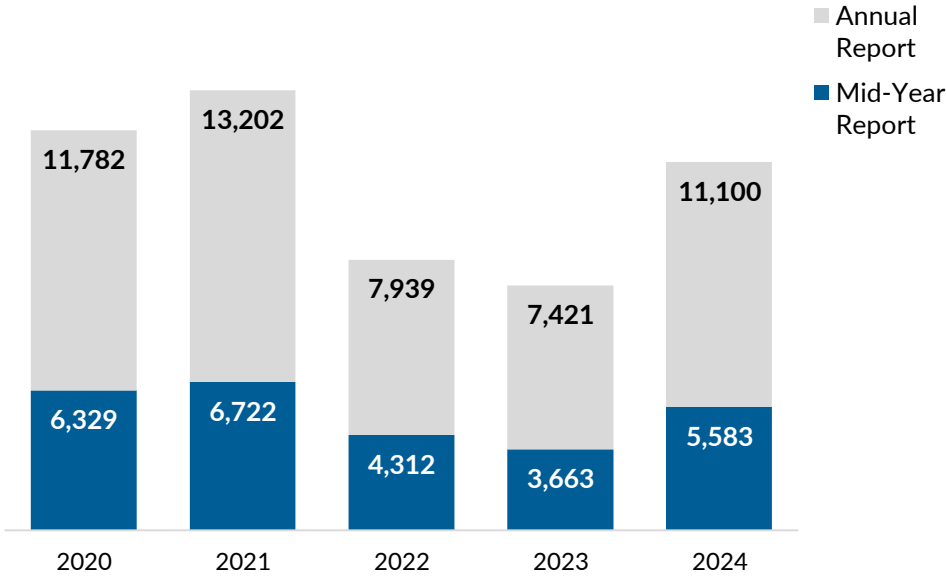
### CCTS Internet-related issues

There was a significant increase in Internet-related issues reported to the CCTS in 2024, nearing 2019 levels, with many issues relating to one service provider. Billing issues, up 84% from 2023, became the top concern for Internet customers, while service delivery now ranked second, with quality of service remaining a key issue in this category.

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<sup>6</sup> According to a CRTC-commissioned survey, 18% of survey respondents had heard of the CCTS. See Nanos Research, *Understanding consumer awareness and satisfaction with the Commission for Complaints for Telecom-television Services (CCTS) – Final Report*, March 2024.

Figure 33: CCTS Internet-related issues (number of issues), 2020 to 2024



Source: CCTS Annual and Mid-Year Reports

### Net Promoter Score

The NPS remains in a neutral zone at 0.63, though it declined slightly since spring 2023.<sup>7</sup> Customers of flanker brands tend to report significantly higher NPS compared to their main brand counterparts, while Quebec remains the region with consistently high NPS compared to other parts of Canada.

<sup>7</sup> NPS: Less than 0 = “needs improvement”, 0 to 19 = “good”, 20 to 49 = “very good”, 50 to 69 = “excellent”, 70 and above = “outstanding”

**Infographic 4: Net Promoter Score – Subscriber likelihood of recommending their Internet service provider, 2022 to 2024**

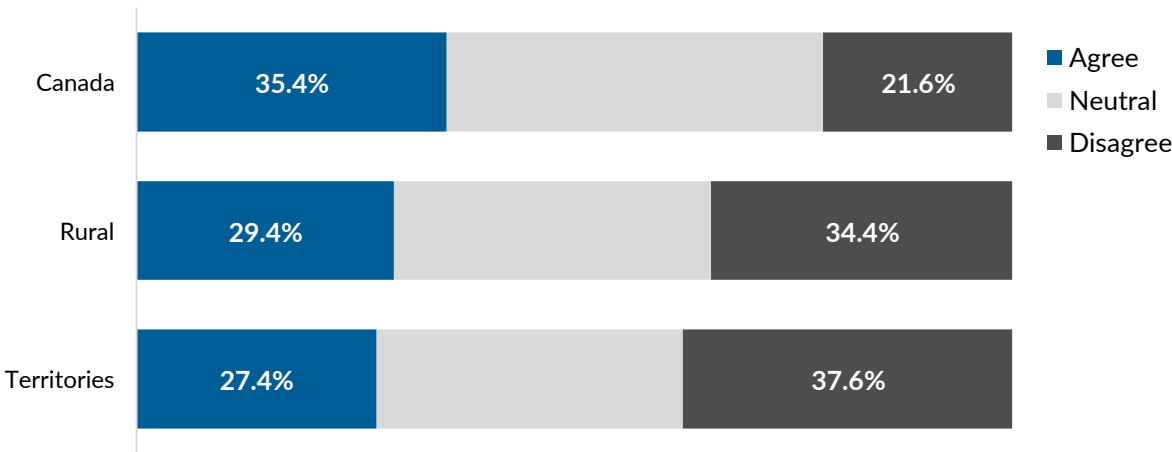


Source: MTM 18+

**Canadians’ perception of choice of home Internet providers**

More than a third of Canadians agree that they have enough choice of providers where they live, particularly people residing in Quebec. Canadians in the Territories and living in rural areas are more likely to disagree that they have enough choice.

**Figure 34: POR – “I feel I have enough choice of Internet providers where I live” (% of respondents), 2024**



Excludes “do not know” responses.  
Source: Ipsos, Public Opinion Research Tracker: Wave 3, October 2024

## 5. Perspectives on mobile wireless services

Canada's mobile wireless subscriber and revenue levels have grown faster than inflation, and the three largest operators still account for nearly 90% of the market. As take-up of the mobile virtual network operator (MVNO) service increases and Videotron integrates Freedom Mobile, Canadians could see greater competition, particularly in Ontario, Alberta and British Columbia.

Mobile wireless prices decreased by an average of 40% for 10 GB and 50 GB plans between 2023 and 2024 (January to September of each year). In a period where the all-items CPI has increased, revenue on a per-subscriber basis increased less than the rate of inflation. Compared to last year, Canadians generally are more satisfied with their providers and with their choice of providers. Some are changing services to better manage their expenses and have raised more issues with the CCTS about incorrect service charges. CRTC measures underway relating to consumer codes and international roaming are intended to address these concerns.

Capital investment decreased among the largest operators that have achieved high 5G coverage and strong network performance. Having achieved nearly universal mobile coverage<sup>8</sup> and over 90% 5G coverage, operators are drawing customers to more data-rich packages at similar prices with better performance. Rural and remote mobile and 5G coverage has been accelerating to reduce gaps relative to the Canadian averages. Compared to peer countries, Canada's mobile wireless networks score consistently high on performance metrics such as speed and latency,<sup>9</sup> despite Canada's often greater geographic and climate-related challenges of maintaining such networks.

CRTC proceedings to address network reliability (e.g., such as next generation 9-1-1 and network resiliency) combined with public and private investments in networks, could address concerns of Canadians that have experienced outages or quality issues.

### 5.1. Market size and investment

For Canadians to benefit from ever-higher quality networks and ever-expanding connectivity, markets need to grow to support the required investments. The CRTC tracks the following metrics relating to market size and investment:

- Retail mobile phone subscribers and revenues
- Investments in wireless networks, measured in terms of wireless CAPEX and capital intensity
- Investments on a per-subscriber basis, measured in terms of average wireless CAPEX per user

Analysis of these metrics, below, shows continued subscriber and revenue growth over past year, driven in part by newcomers to Canada. Operators are moderating their CAPEX, suggesting 5G investment peaked in 2022, but deployment continues. The CRTC continues to monitor operator take-up of the MVNO service, a measure intended should-encourage investment by smaller operators expanding their footprint. Ongoing funding programs for buildouts to rural and remote areas can spur additional private investment.

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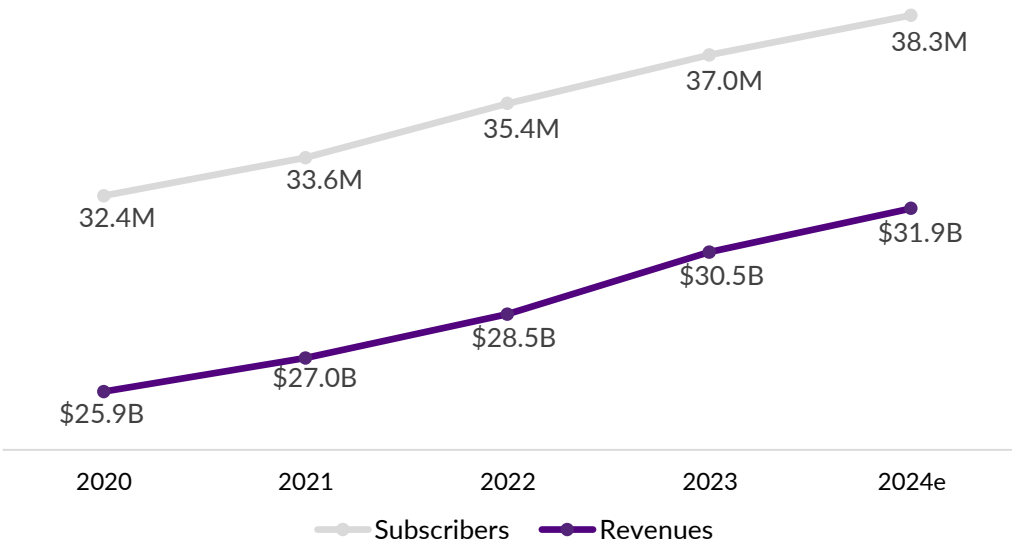
<sup>8</sup> Combined coverage of HSPA+, LTE, LTE-A and 5G networks.

<sup>9</sup> Latency refers to the time data takes to travel on a network. High latency means the user's device receives a slower response from the network. Even as network speeds increase, high latency can detract from a user's online experience, especially where timing is key to an application.

### Retail mobile phone subscribers and revenues

Retail mobile phone subscribers and revenues have both increased steadily over the past five years. From 2020 to 2023, operators gained 4.6 million subscribers and earned \$4.6 billion more in revenue. Revenues and subscriber levels are estimated to show increases for 2024.

Figure 35: Retail mobile phone subscribers (millions) and revenues (\$ billions), 2020 to 2024e

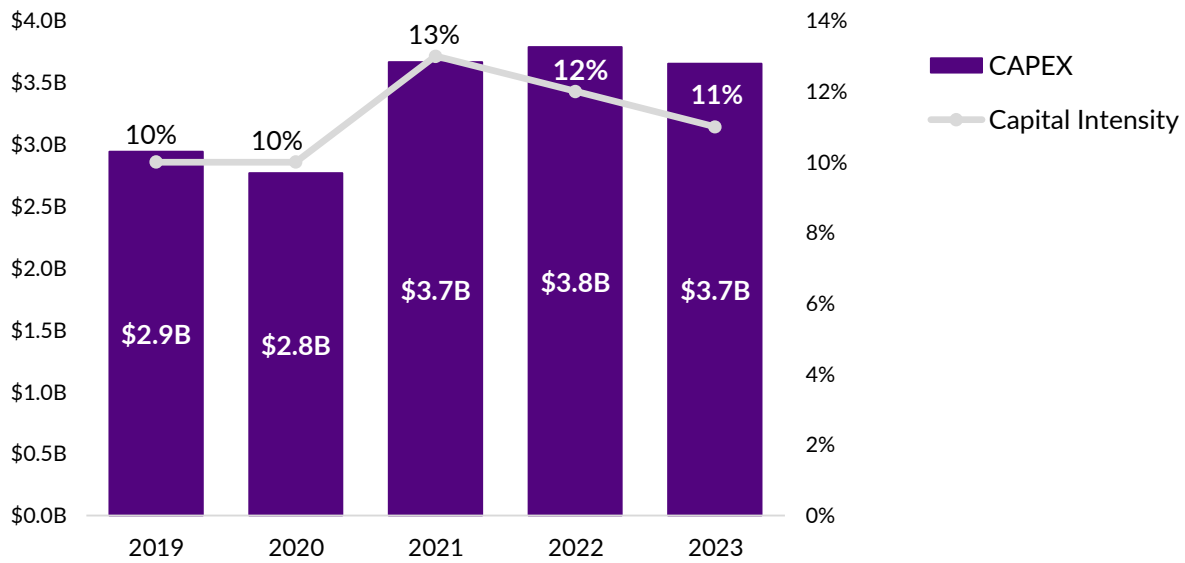


Source: CRTC data collection

### Investments in wireless networks

Decreased wireless CAPEX and increased revenue led to lower wireless capital intensity in 2023 than 2022, although both CAPEX and capital intensity remained above 2019 levels.

**Figure 36: CAPEX (\$ billions) and capital intensity (%), 2020 to 2023**



Source: CRTC data collection

### Average wireless network investment per user

Between 2020 and 2022, average CAPEX per user grew 25.1%, before decreasing 7.5% in 2023. This was a result of lower CAPEX combined with higher subscriptions (which grew by 4.5%) in 2023.

**Figure 37: Average CAPEX per user (\$), 2020 to 2023**

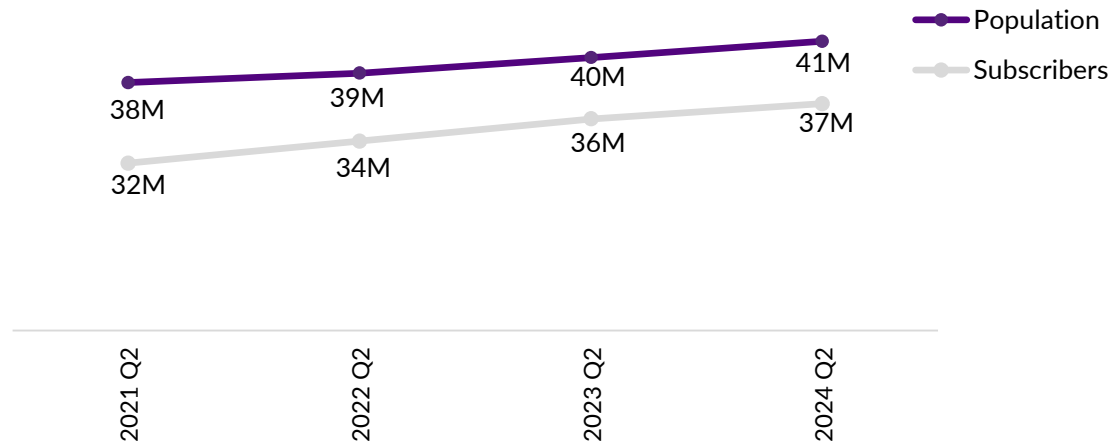


Source: CRTC data collection

## Spotlight – Mobile subscriptions and population growth

Growth in mobile subscriptions is following Canada’s population growth. Canada’s population grew by 1.2 million people between Q2 2023 and Q2 2024. Over the same time, there were 1.1 million more mobile phone subscriptions.

**Figure 38:** Mobile phone subscribers and Canadian population (millions), 2021 to 2024



Sources: Statistics Canada, CRTC data collection

## 5.2. Competition

Canadians benefit from competitive intensity when there is a range of service options and providers of various sizes competing in the mobile wireless market. The CRTC tracks the following metrics relating to competitive intensity in this market:

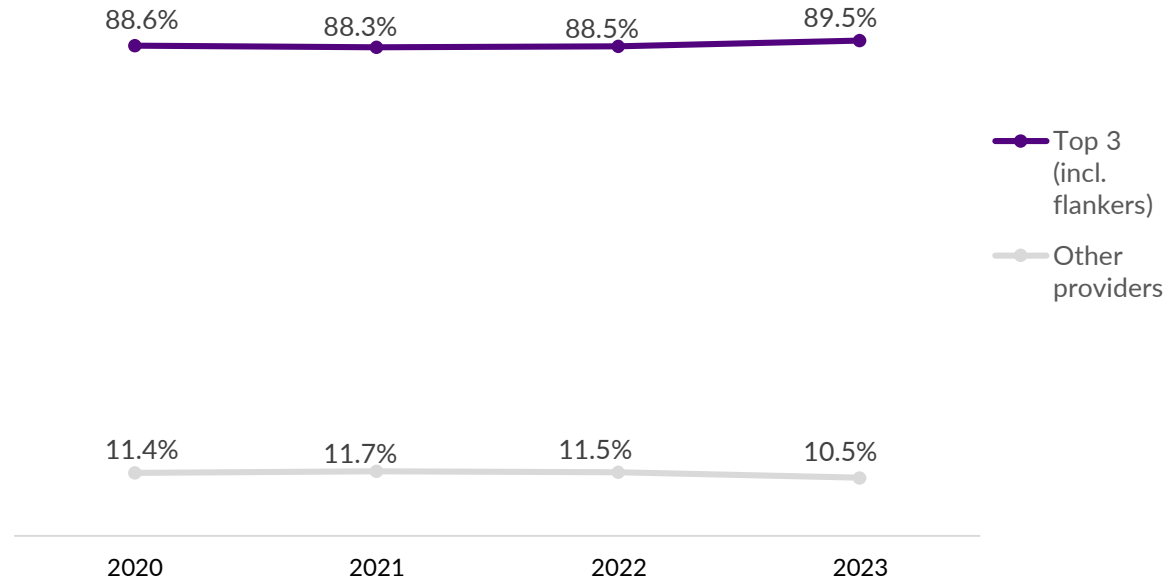
- Revenue share - share of retail mobile revenues earned by the three largest operators compared to other operators
- Subscriber share - share of retail mobile subscribers to the three largest operators compared to other operators
- Profit margins of wireless operators, using EBITDA as a measure of operating profit
- Subscriber turnover – the percentage of retail subscribers that cancel their mobile phone service with their provider

The metrics point to a high concentration of revenue and subscriber market share held by the three largest operators. EBITDA margins declined slightly from their 2022 peak. While subscriber churn grew, given high subscriber market shares of the Top 3 operators, it appears that the churn came from subscribers switching among these three operators. The MVNO framework, the potential emergence of a strong fourth national operator, and a proceeding on access to support structures could all help smaller regional operators expand their service areas and compete with larger operators.

## Revenue share

The Top 3 operators, which includes their flanker brands, in the aggregate earned nearly 90% of retail mobile phone revenues. That share has grown slightly since 2020.

**Figure 39:** Revenue share (%) – Top 3 operators compared to other operators, 2020 to 2023

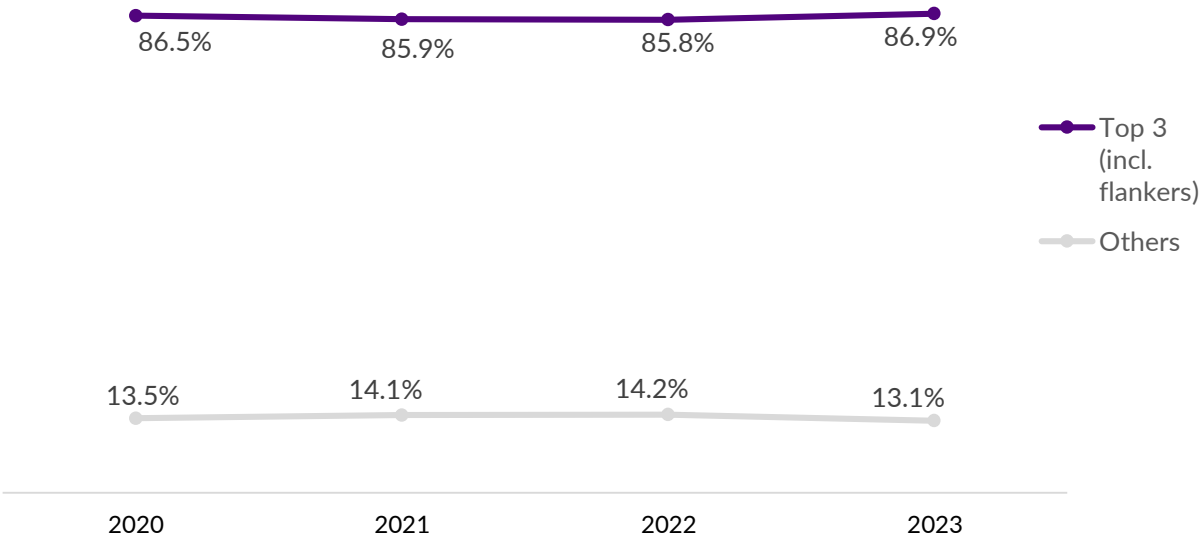


Source: CRTC data collection

## Subscriber share

Combined, the Top 3 operators increased their subscriber market share to 86.9% in 2023, which is up from 85.8% in 2022. These figures include results for flanker brands owned by these companies. In BC and Alberta, Rogers saw growth in its market share, mainly from its acquisition of Shaw Mobile but also from the migration of subscribers from other providers. TELUS grew its market share in the Territories. In other parts of Canada, market shares remained relatively stable between 2022 and 2023.

Figure 40: Subscriber share (%) – Top 3 operators compared to other operators, 2020 to 2023

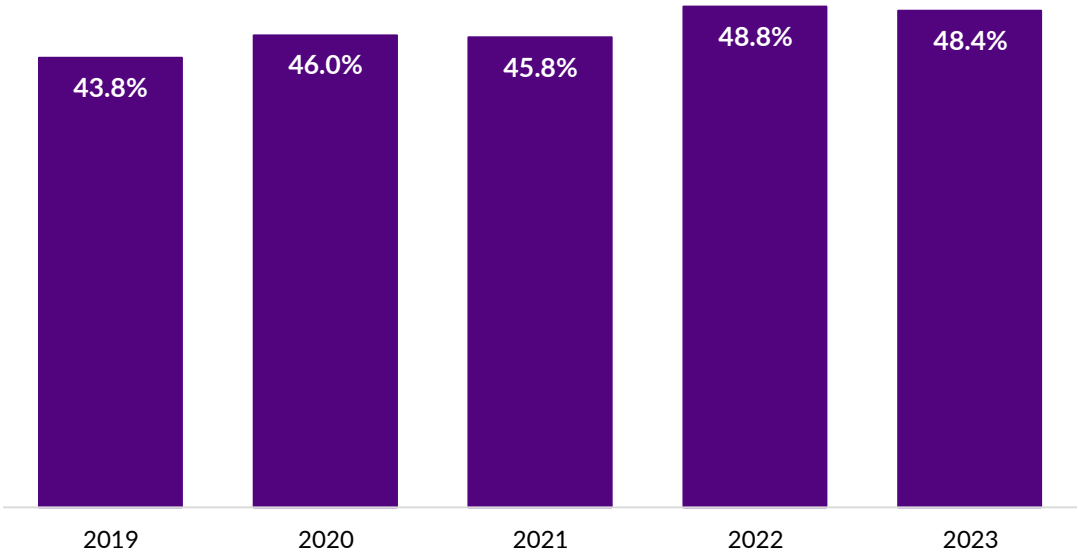


Source: CRTC data collection

### Profit margins

Wireless operators' profit margins, measured in EBITDA, decreased slightly from 2022 to 2023. The three largest operators account for more than 90% of wireless EBITDA. Wireless operators whose total revenues are derived largely from non-wireless business lines are excluded from these figures.

Figure 41: Wireless EBITDA margins (%), 2019 to 2023

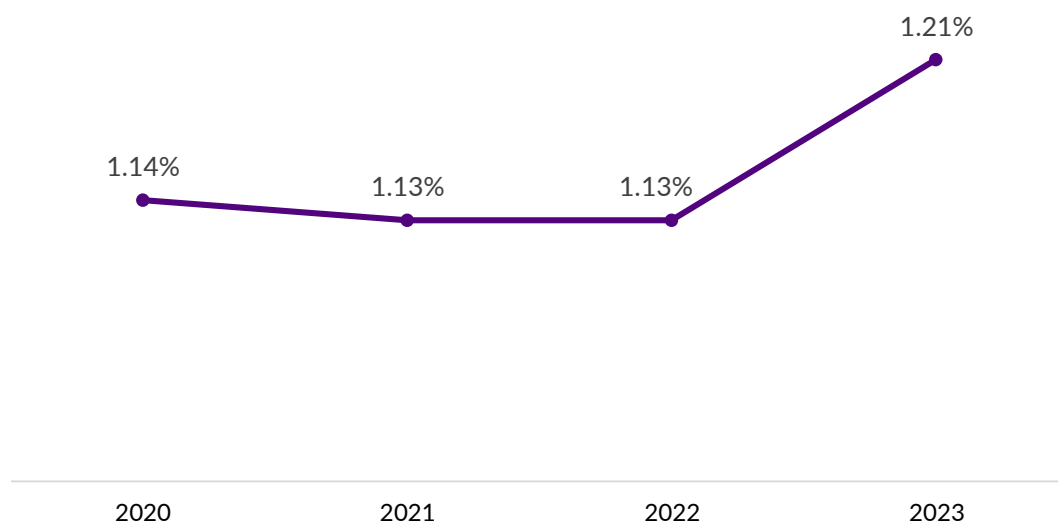


Source: CRTC data collection

## Subscriber turnover

The share of retail customers that cancelled their subscriptions with a given provider, defined as the churn rate, increased from 2022 to 2023 as growing numbers of Canadians shopped for more advantageous plans and prices. Since 2021, the three largest operators have experienced increasing subscriber churn, while other operators' churn is lower and has declined in the same period.

Figure 42: Retail mobile phone subscriber churn (%), 2020 to 2023



Source: CRTC data collection

## 5.3. Prices and affordability

Canadians benefit when cellular prices are reasonable and affordable for their needs. The CRTC looks at prices and affordability using the following indicators:

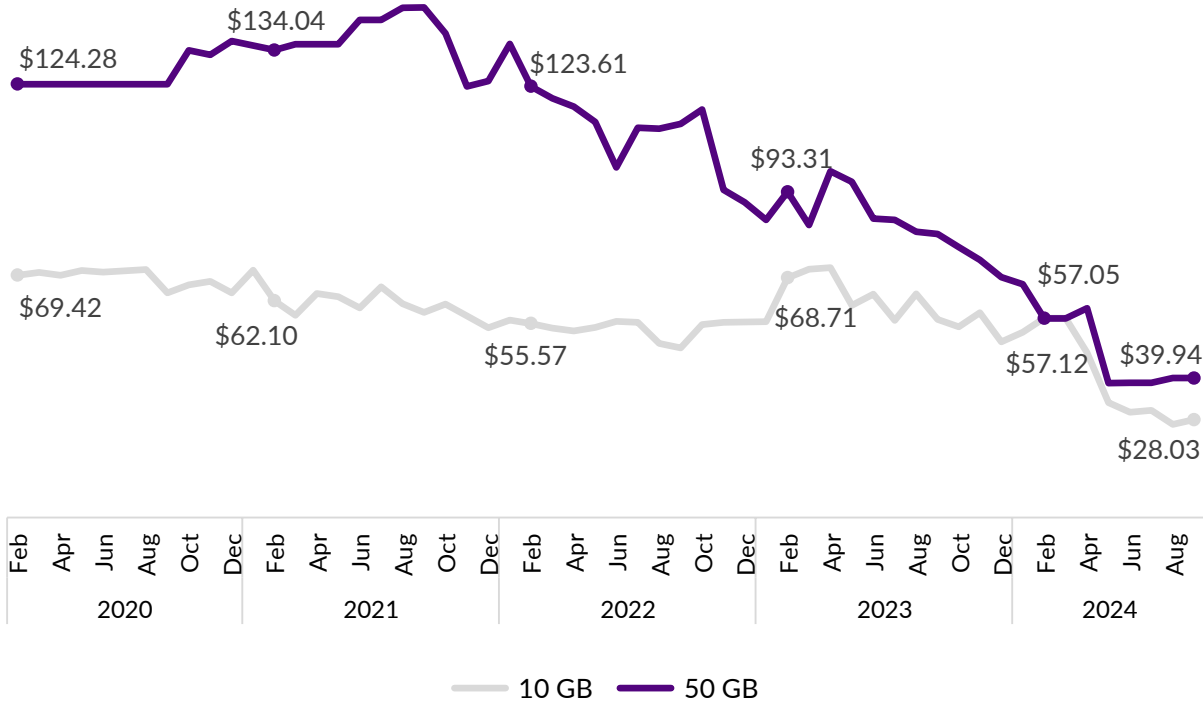
- Prices – for plans with 10 GB and 50 GB of data
- CPI – All-items and cellular services
- Revenue per subscriber, measured as average revenue per user or ARPU
- Mobile operators' revenue per GB of data consumed by subscribers
- POR on perceived affordability
- POR on consumers changing their cellular plans due to affordability concerns
- POR on Canadians' confidence in their ability to pay for cellular service

Over the past four years, Canadians have seen a high but declining cellular services CPI. Canada's mobile CPI compares favourably to other countries. Prices, while comparatively high, are coming down. Mobile wireless ARPU increased slightly, possibly from high device costs included in monthly fees. More Canadians have changed their mobile plans because of affordability concerns. Consumer-focused regulatory policy measures, including a review of consumer codes and international roaming rates, could reduce prices for some consumers.

### Prices for 10 GB and 50 GB plans

Cellphone plan prices have been decreasing over the past several years. Prices for larger and smaller data packages are converging as providers offer plans with greater data capacity. In 2023, 30% of subscribers with a data plan were subscribed to 50 GB or more, which was 25 percentage points higher than in 2020.

Figure 43: Monthly prices for 10 GB and 50 GB plans (\$), 2020 to 2024

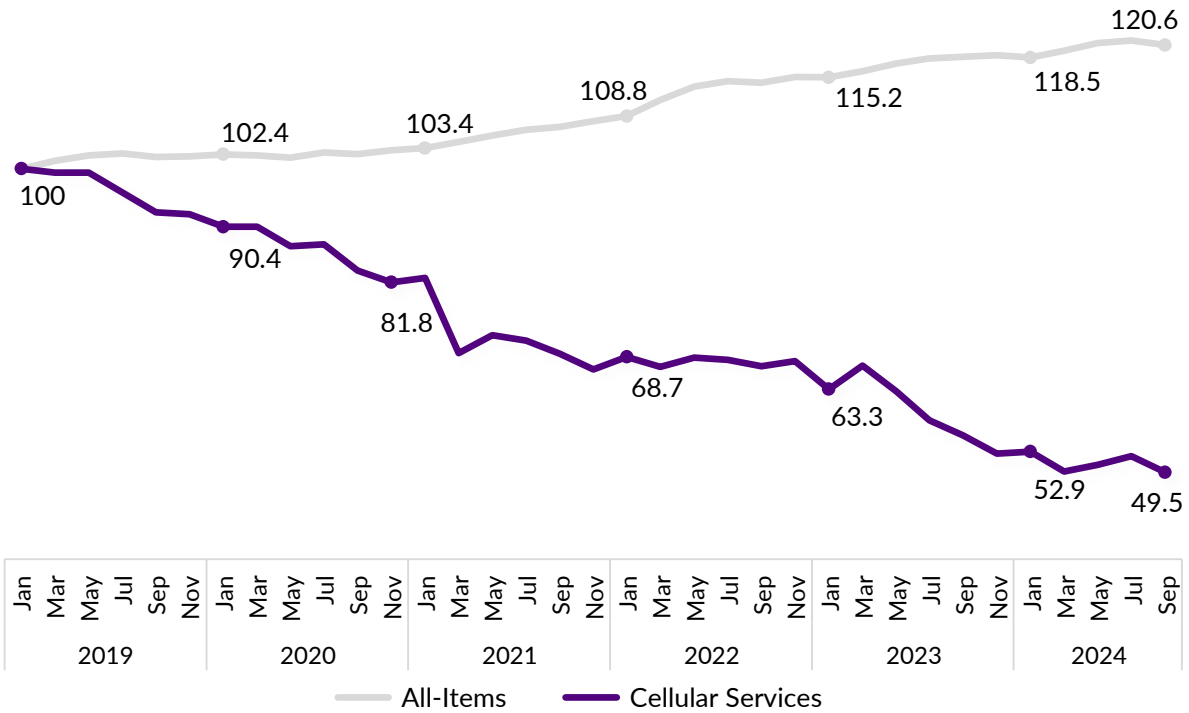


Source: Statistics Canada

### Consumer Price Index (CPI)

Inflation in Canada increased after levelling out in 2023, while the cellular services price index decreased over the past year.

**Figure 44: Consumer Price Index – All-items and cellular services, 2019 to 2024**

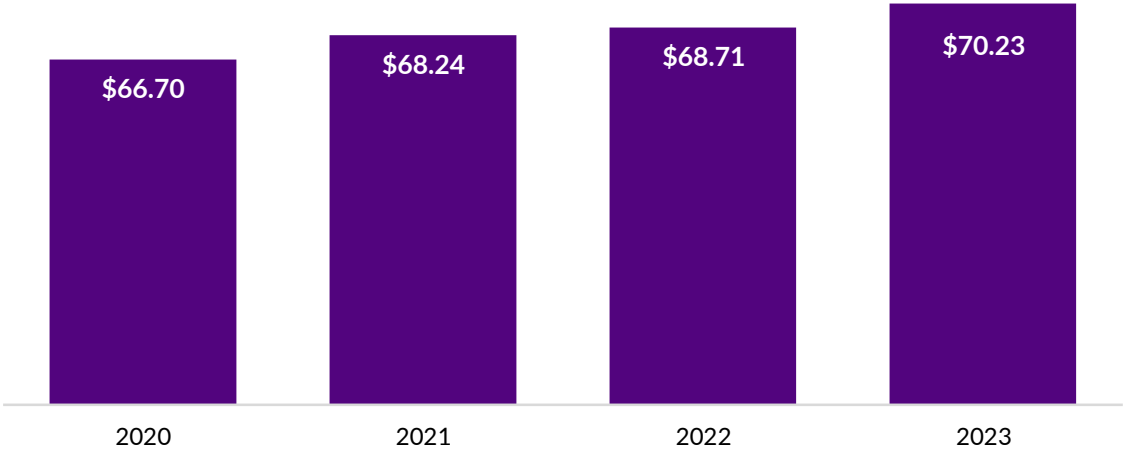


For August 2024 and beyond, Statistics Canada updated its cellular services price index (CSPI) methodology. The base period for this chart is January 2019, which may differ from other presentations of CPI.  
 Source: Statistics Canada

## Revenue per subscriber

Revenue per subscriber, measured in terms of mobile phone ARPU, includes the price of the subscriber’s monthly plan and mobile device, and other fees. It has increased progressively since 2020 as consumers buy plans with larger amounts of data.

Figure 45: Mobile phone ARPU (\$), 2020 to 2023

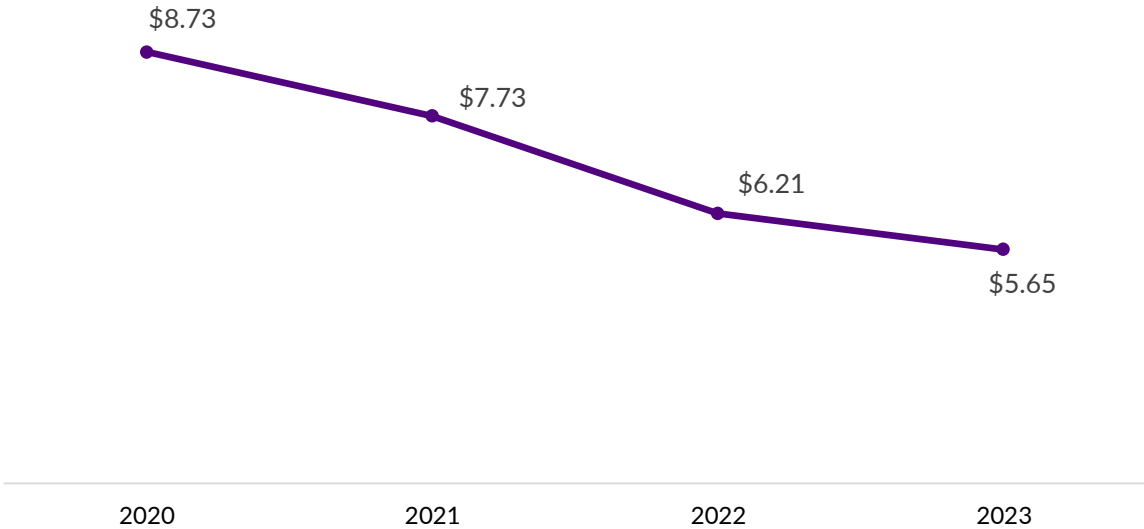


Source: CRTC data collection

### Revenue per GB

In 2023 Canadians' data consumption increased more than operators' revenues: revenues grew by 7% from 2022 to 2023, while average monthly data consumption grew by more than 20%. As a result, operators' revenue per GB declined in 2023, and has been in decline since 2020. During this period, providers have been offering larger data packages at lower prices – for example, 50 GB plans averaging \$40 in September 2024, compared to double that price a year earlier.

Figure 46: Average revenue per GB of data (\$), 2020 to 2023

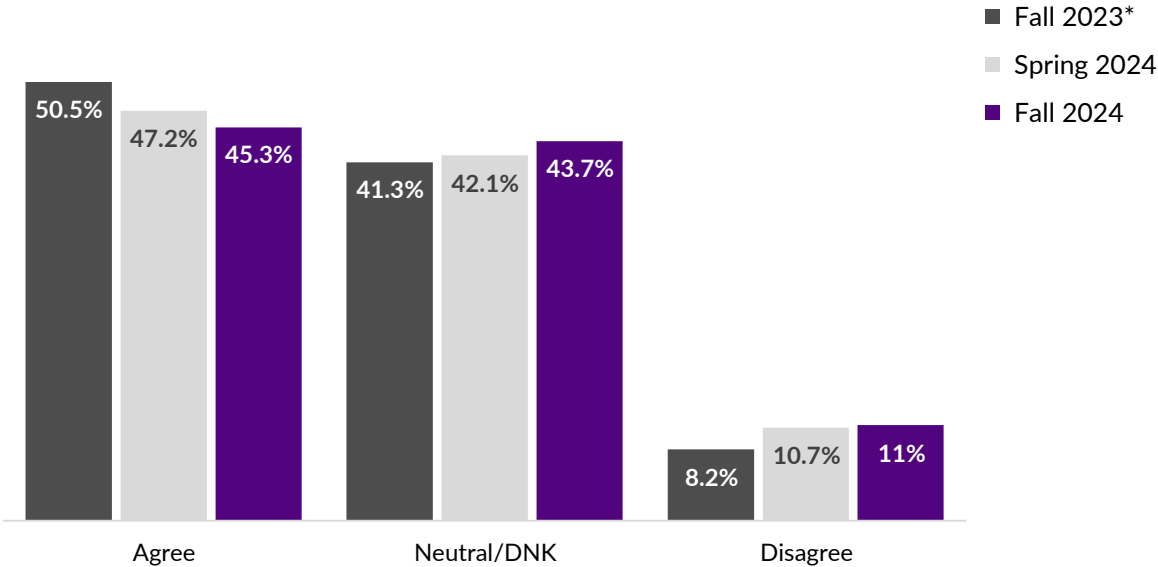


Source: CRTC data collection

## POR – Affordability

According to the Fall 2024 POR survey, fewer Canadians now say that cellular services have become less affordable, approximately 2 percentage points lower than in the Spring 2024 survey.

**Figure 47:** POR – “Cellular services became less affordable over the year” (% of respondents), 2023 to 2024



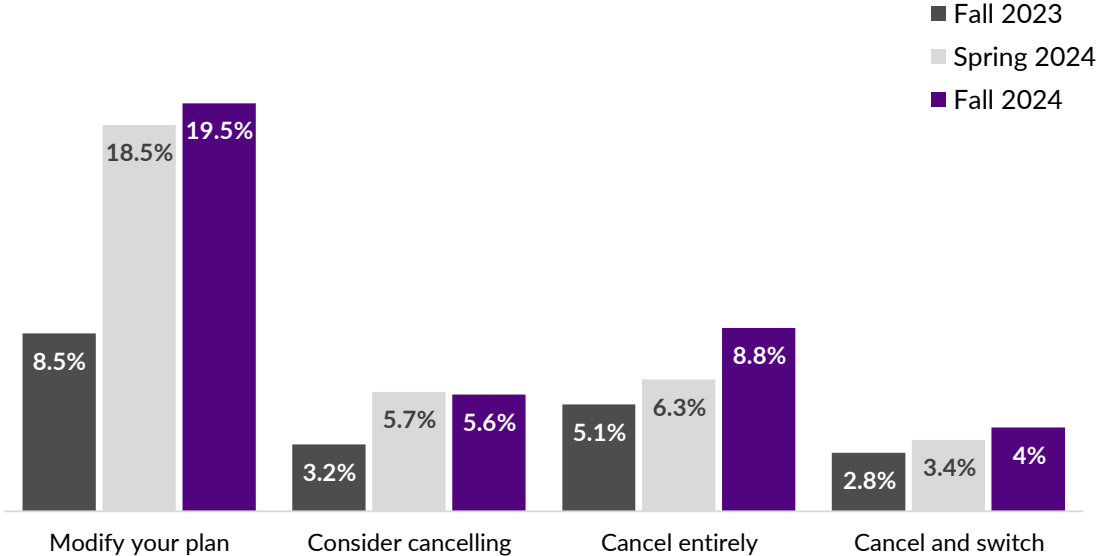
\*Fall 2023 survey question was based on “telecom services”, not “cellular services”.

Source: Ipsos, Public Opinion Research Tracker: Baseline Survey, October 2023; Public Opinion Research Tracker: Wave 2, May 2024; and Public Opinion Research Tracker: Wave 3, October 2024

## POR – Changes to plans

In the Fall 2024 POR survey, nearly 20% of Canadians said they had changed plans to make their cellular services more affordable, more than in the Spring 2024 survey, and more than twice the level of 2023 (8.5%).

**Figure 48:** POR – “This month, the affordability of cellular service caused you to:” (% of respondents), 2023 to 2024

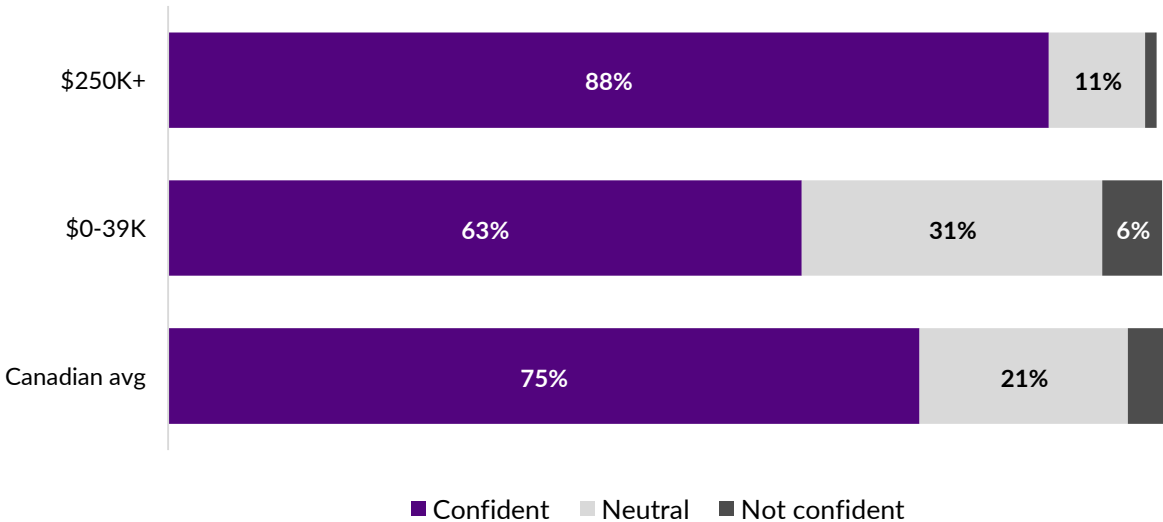


Source: Ipsos, Public Opinion Research Tracker: Baseline Survey, October 2023; Public Opinion Research Tracker: Wave 2, May 2024; and Public Opinion Research Tracker: Wave 3, October 2024

**POR – Confidence in ability to pay**

In the Fall 2024 POR survey, 75% of Canadians were confident they could pay their cellular service bill over the next three months, while only 63% Canadians in the lowest annual income bracket expressed confidence, a decrease of four percentage points since the Spring 2024 survey.

**Figure 49:** POR – Confidence in ability to pay for cellular service over the next three months, by income bracket (% of respondents), 2024

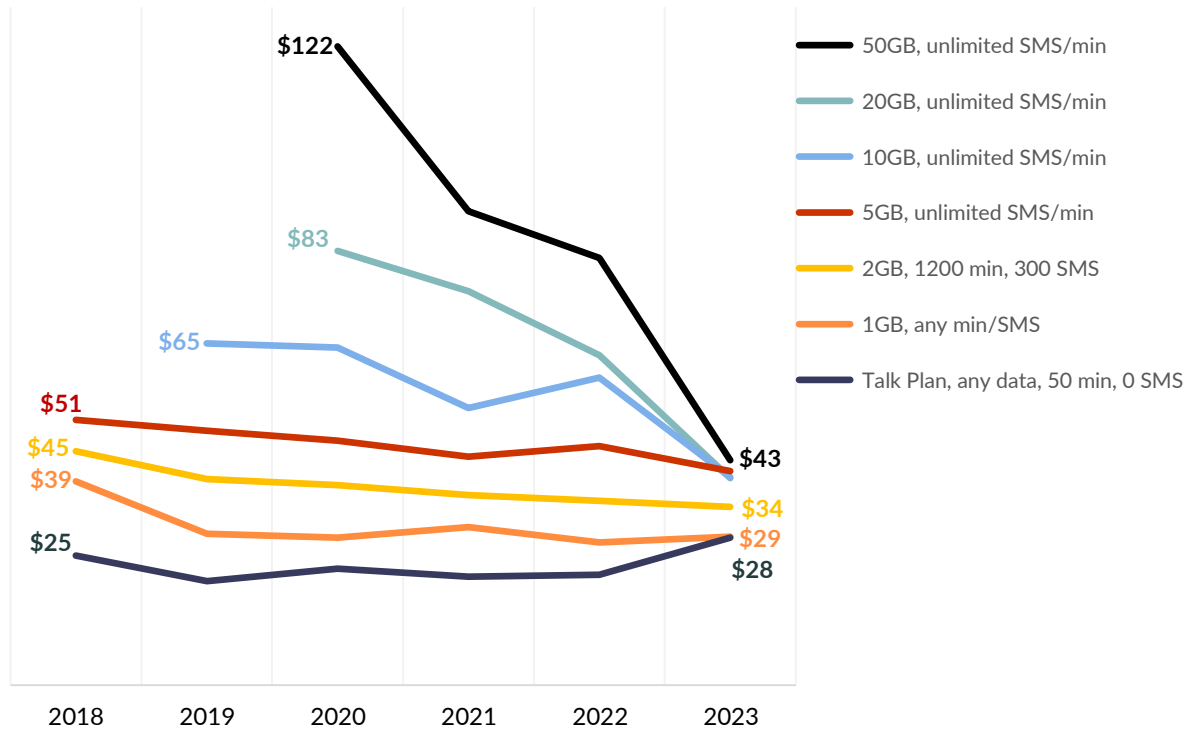


Source: Ipsos, Public Opinion Research Tracker: Wave 3, October 2024

## Spotlight – Lowest average mobile service prices in Canada

Prices for most advertised plans have been declining, while usage has been increasing. The most significant price decreases have been for plans with greater than 10 GB of data. These are also the most popular plans: in 2023, 77% of data plan subscribers had plans with more than 10 GB of data.

Figure 50: Lowest average reported monthly prices of mobile plans (\$), 2018 to 2023



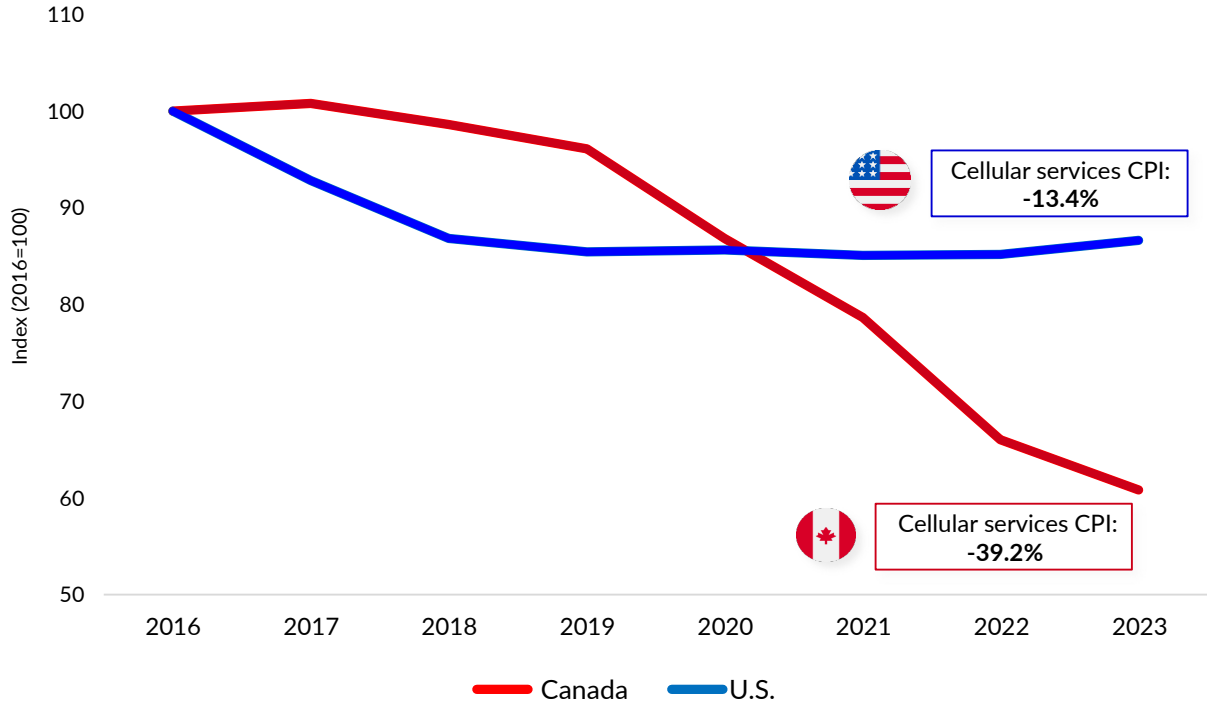
Source: CRTC data collection

## Spotlight – Cellular service prices in Canada and United States

The CPI for cellular services declined faster in Canada than the U.S. in recent years. The overall cost of cellular services fell nearly 40% in Canada between 2016 and 2023; by comparison, it fell 13.4% in the U.S. during the same time.<sup>10</sup>

<sup>10</sup> The cellular services CPI is distinct from the price, or popularity, of any specific plan.

Figure 51: Cellular services CPI, Canada and U.S., 2016 to 2023



Sources: Statistics Canada, Consumer Price Index; Bureau of Labor Statistics, CPI

### 5.4. Network coverage

Canadians should be able to access mobile wireless networks where they need to, on the latest technologies. This outcome statement reflects the target established by CRTC: for 100% of the population and as many major highways and roads to have access to the latest generally deployed mobile wireless technology (4G LTE) by 2026.

The CRTC tracks the following metrics relating to mobile wireless network coverage and evolution:

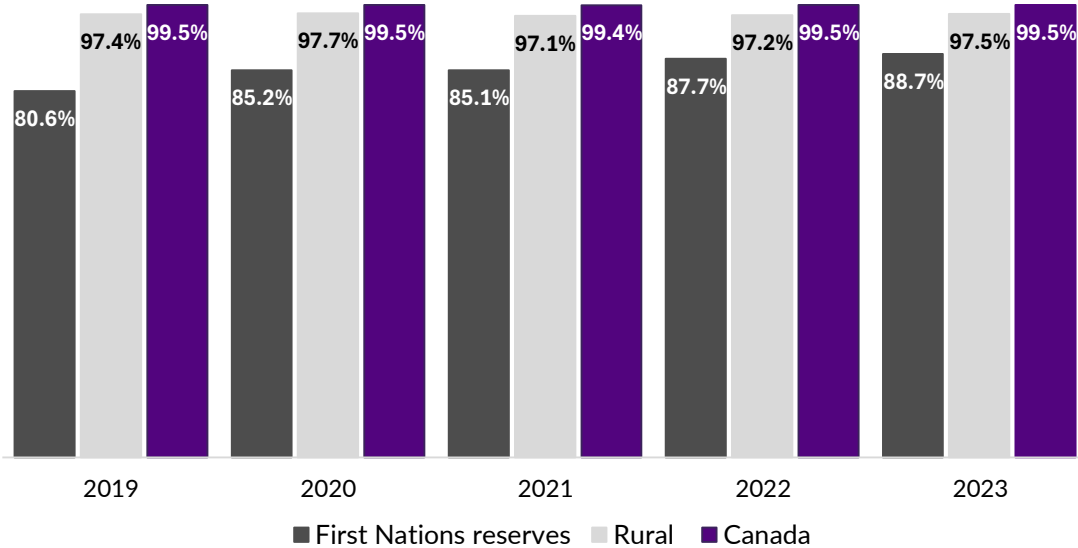
- Mobile coverage – the proportion of the Canadian population with access to the combined coverage of HSPA+, LTE, LTE-A and 5G networks
- Coverage (5G) – the proportion of the Canadian population with access to 5G networks
- Coverage (roads) – the proportion (share of total kilometres) of major roads and highways with mobile coverage
- Data plan subscribers – the proportion of Canadian retail mobile phone subscribers with a data plan of 10 GB or more

According to these metrics, 5G has expanded rapidly. Canada’s coverage compares favourably to peer countries, but rural and underserved areas have not yet reached the high coverage levels achieved in urban Canada. Funding through the BBF and other sources supports the expansion of mobile broadband in rural and remote areas. The CRTC continues to work with ISED and other levels of government on reporting standards to better identify coverage gaps.

# Mobile coverage

Since 2019, nearly all Canadians have had access to the latest generally deployed mobile wireless technology. Slight variations in annual results are due to improved data quality and not coverage declines.

Figure 52: Population with access to mobile networks (%), 2019 to 2023

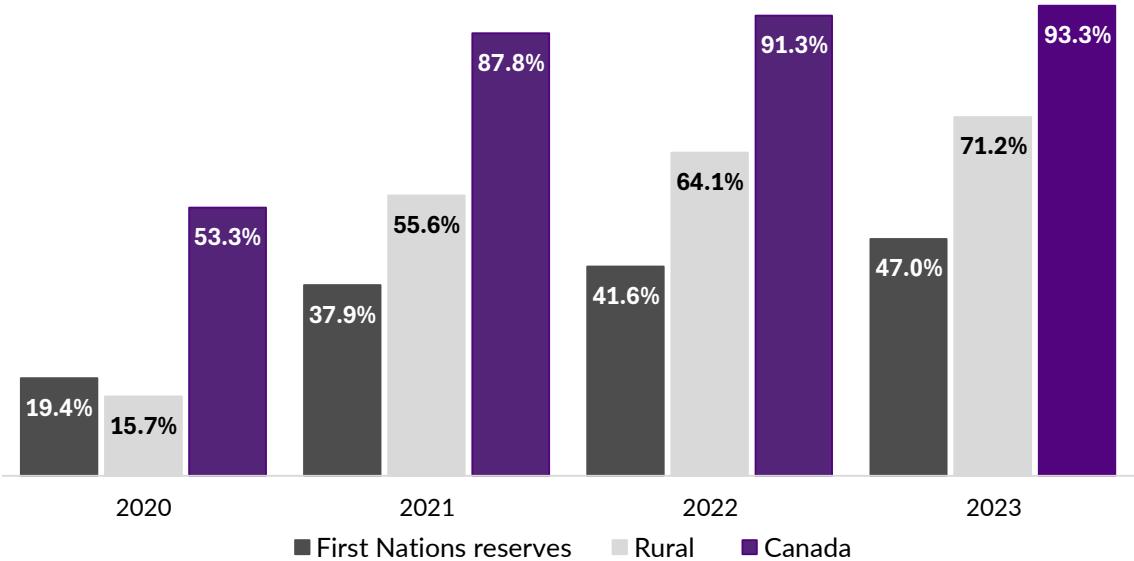


Combined coverage of LTE networks.  
Source: CRTC data collection

# Coverage (5G)

Since their launch in Canada in 2020, 5G networks are available to 93% of the Canadian population. Coverage in rural communities and First Nations reserve areas is expanding but is significantly below the Canadian average.

Figure 53: Population with access to 5G networks (%), 2020 to 2023

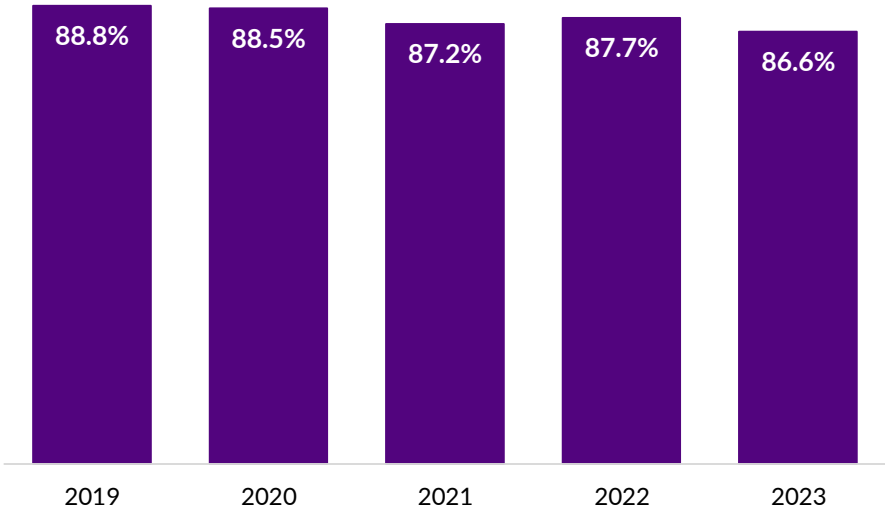


Source: CRTC data collection

Coverage (roads)

In 2023, over 100,000 kilometres (87%) of major roads and highways were served by mobile networks. The slight decrease in coverage from 2022 to 2023 is mostly due to improved data quality and revised criteria for identifying major provincial highways.

Figure 54: Major roads and highways covered by mobile networks (%), 2019 to 2023

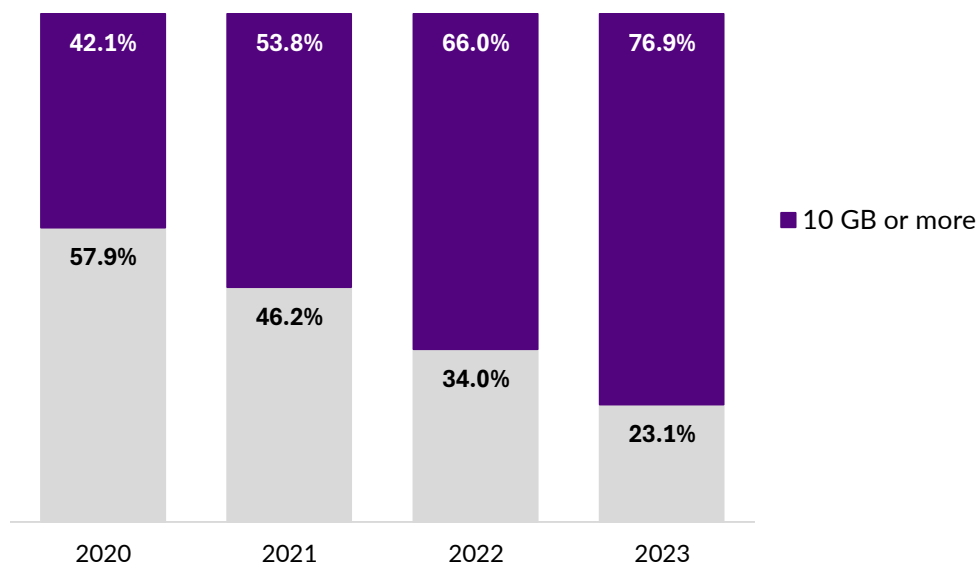


Combined coverage of LTE and LTE-A networks.  
 Source: Road Network File, 2023. Statistics Canada Catalogue no. 92-500-X

## Data plan subscribers

More than three-quarters of subscribers with mobile phone data plans now have plans with 10 GB or more of monthly data. Among data plan subscribers, 30% have a plan offering 50 GB or more of data, a category which has seen growth while the share of subscribers with plans of 10-20 GB of data has declined.

**Figure 55:** Share of mobile phone subscribers by type of data plan (%), 2020 to 2023



Source: CRTC data collection

## 5.5. Network performance

As Canadians rely more on their mobile phones and networks, Canada's networks need to be reliable and network speeds need to be increasing to meet these growing demands. The CRTC tracks the following metrics relating to network performance:

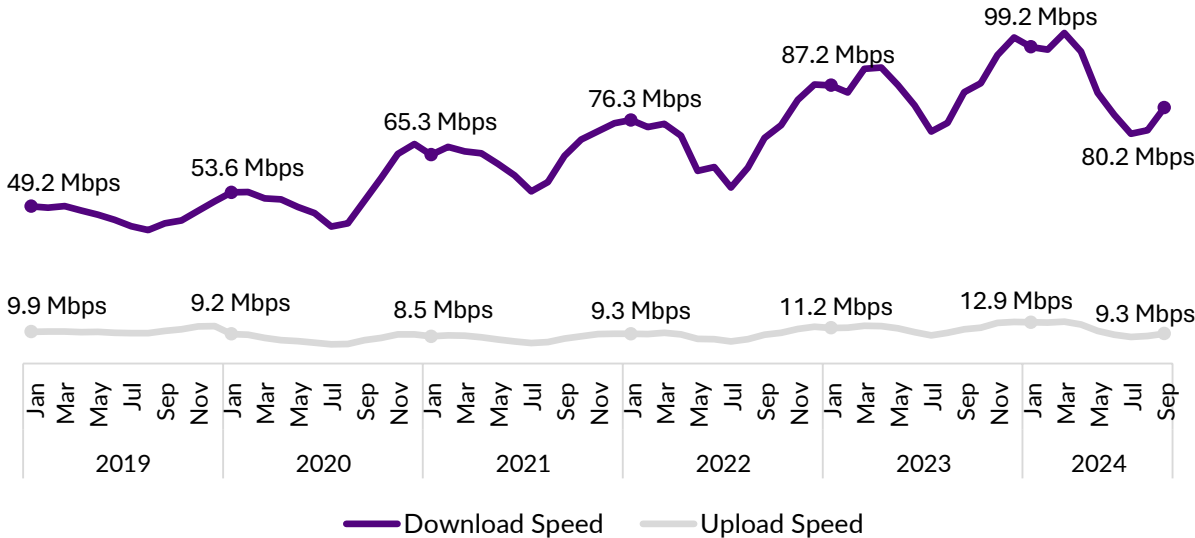
- Median mobile network download and upload speeds
- Latency of mobile networks
- Average monthly data usage for mobile data subscribers
- Canadians' perspectives on the reliability of their mobile service
- Canadians' perspectives on service outages experienced

These metrics show that Canadian networks support steady growth in usage and take-up of larger data plans. Speeds and latency are improving and analysis below shows that Canada's speeds compare favourably with those of peer countries. Though they consider their mobile networks reliable, Canadians continue to experience and report outages. The CRTC is taking measures relating to service outage notifications and reporting, and a proceeding relating to network resiliency will examine network reliability and resiliency.

### Mobile network download and upload speeds

Median mobile download speeds have increased by 63% and have been growing at a compound annual growth rate (CAGR) of approximately 13% since 2019. In contrast, mobile upload speeds have remained stable at around 10 Mbps over the same period.

Figure 56: Median mobile network download and upload speeds (in Mbps), 2019 to 2024

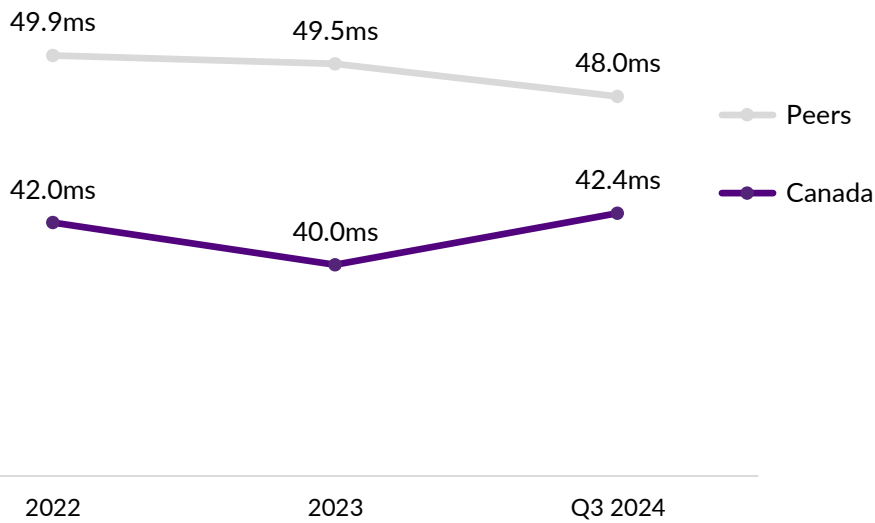


Source: Based on CRTC analysis of Ookla Speedtest Intelligence®

### Latency of mobile networks

Canada’s mobile network latency, measured in milliseconds (ms) has improved by 23% since 2020. This was 3.3 percentage points better than improvements seen in peer countries (the G7 and Australia) from 2020 to 2024.

**Figure 57: Multi-server mobile network latency (in ms), Canada and peer countries, 2022 to 2024**



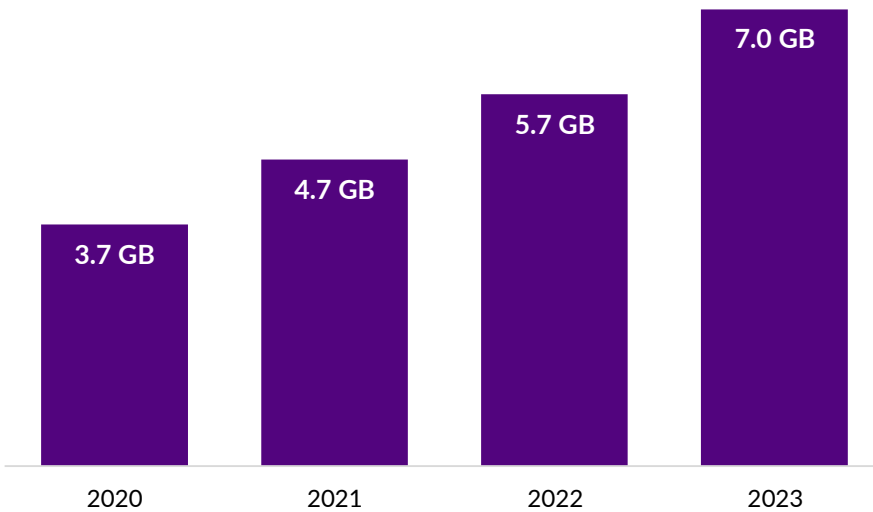
Peer countries include G7 countries plus Australia.

Source: Based on CRTC analysis of Ookla Speedtest Intelligence®

### Average monthly data usage for mobile data subscribers

As more Canadians subscribe to plans with larger data allowances – demonstrated by a nearly 35 percentage point increase in subscribers to plans with more than 50 GB of data since 2020 – average monthly data use nearly doubled from 2020 to 2023.

**Figure 58: Average monthly usage for mobile data subscribers (in GB), 2020 to 2023**

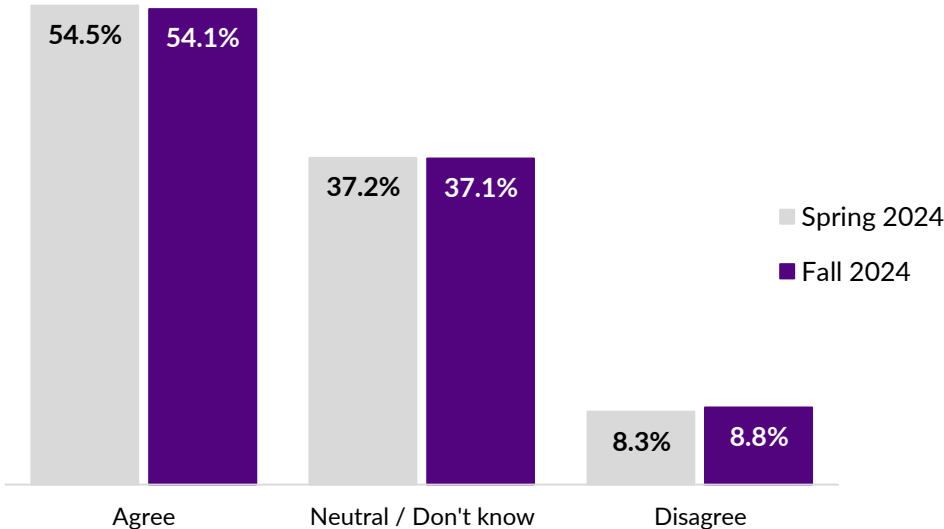


Source: CRTC data collection

### Canadians' perspectives on the reliability of their mobile service

Most respondents consider that their mobile service is reliable; these results were consistent over 2024.

Figure 59: POR – “I can count on a reliable mobile network where I live” (% of respondents), 2024

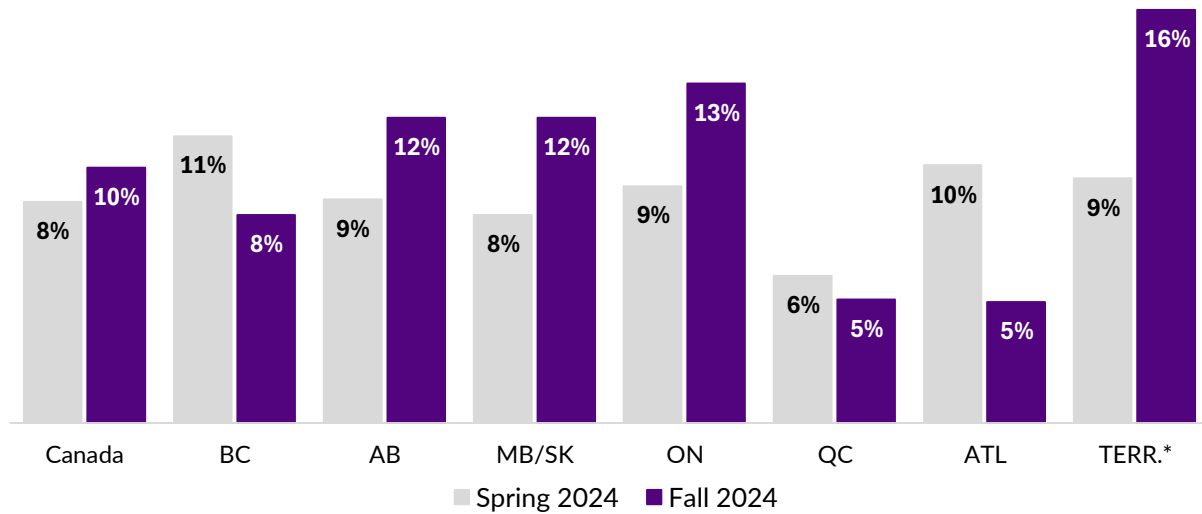


Source: Ipsos, Public Opinion Research Tracker: Wave 2, May 2024; and Public Opinion Research Tracker: Wave 3, October 2024

### Canadians' perspectives on service outages experienced

As with home Internet, more Canadians in certain regions reported experiencing cellular service outages between the Spring and Fall 2024 POR surveys, while in other areas, fewer outages were reported.

**Figure 60:** POR – Subscribers experiencing a cellular service outage of 24 hours or more (% of respondents), 2024



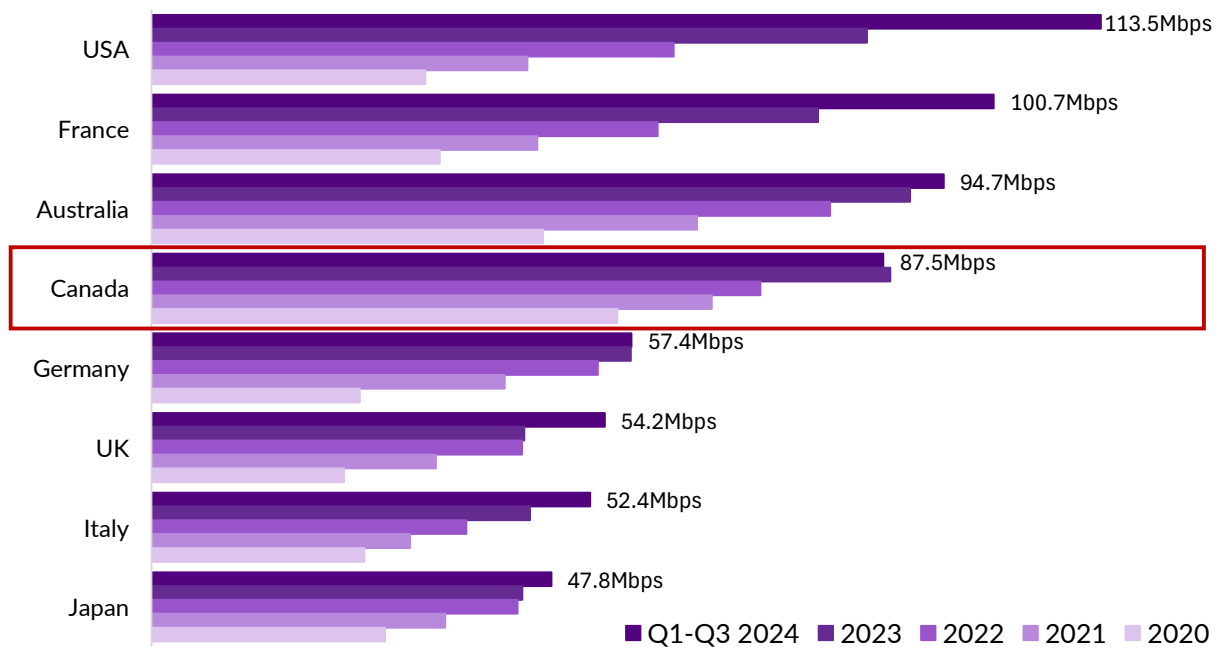
\*Small base of respondents.

Source: Ipsos, Public Opinion Research Tracker: Wave 2, May 2024; and Public Opinion Research Tracker: Wave 3, October 2024

### Spotlight – Mobile network speed by country

Canada continues to compare favourably with peer countries on network speeds, which have increased in all these countries since 2020. Between 2020 and 2024, Canada’s median download speed rose 78%.

**Figure 61:** Median mobile network download speeds (in Mbps) – G7 countries plus Australia, 2020 to 2024



Source: Based on CRTC analysis of Ookla Speedtest Intelligence®

## 5.6. Consumer empowerment

Indicators of consumer empowerment relate to whether Canadians are satisfied with their service and can easily switch providers to obtain the best plan for their needs. In this regard, the CRTC tracks the following:

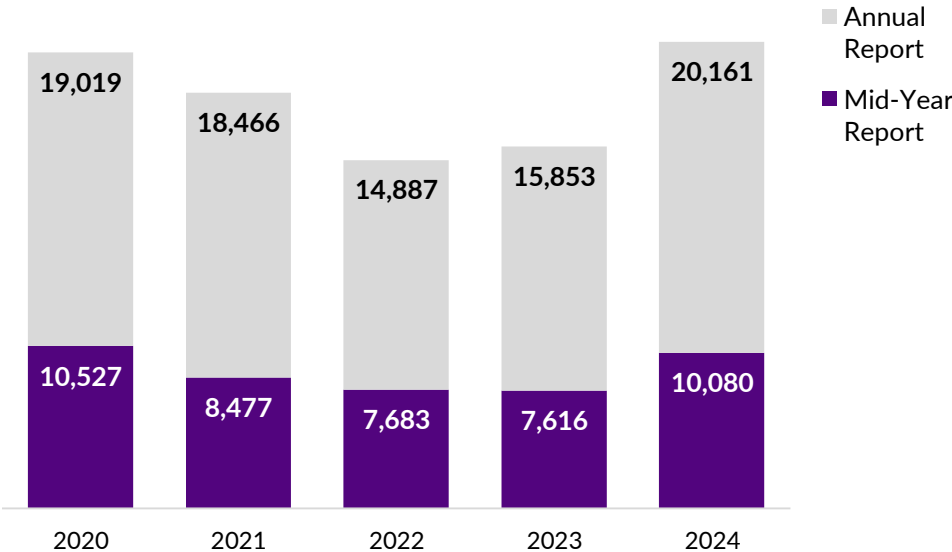
- CCTS wireless-related issues
- Canadians' likelihood of recommending their cellphone service provider, as expressed in the NPS
- Canadians' perceptions of choice of cellphone service providers

Canadians have mixed perceptions of their cellphone service providers. Overall, the NPS has been slowly increasing, an indication of Canadians' general satisfaction with their providers. Billing and service quality account for the largest number of issues raised with the CCTS. Affordability remains a key concern for Canadians, who have a higher level of satisfaction with lower-cost providers and flanker brands than with major brands. A plurality of Canadians feel they have sufficient choices, while rural and Indigenous Canadians are less inclined to agree. Policy measures such as the review of consumer codes should foster greater consumer empowerment.

### CCTS wireless-related issues

There was a significant increase in wireless-related issues reported to the CCTS in 2024, reaching a five-year high and driven largely by concerns about a single provider. Billing, up 39% from last year, continued to lead as the top concern for wireless customers, while service delivery ranked second, with quality of service remaining a key issue in this category.

Figure 62: Wireless-related issues reported to the CCTS (number of issues), 2020 to 2024

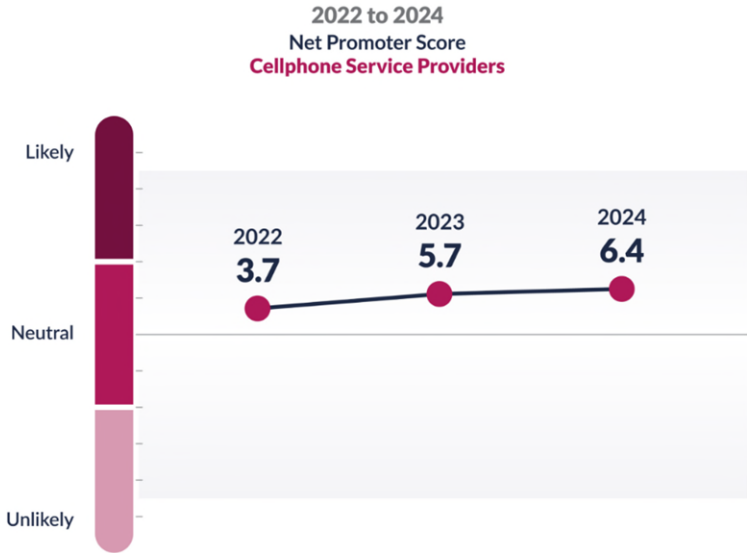


Source: CCTS Annual and Mid-Year Reports

# Net Promoter Score

The NPS has increased since spring 2022, an indication of Canadians' slight likelihood of recommending their service provider. As with home Internet, customers of flanker brands report significantly higher NPS compared to their main brand counterparts, while Quebec continues to show consistently high NPS compared to other parts of Canada.

**Infographic 5: Net Promoter Score – Subscriber likelihood of recommending their cellphone provider, 2022 to 2024**

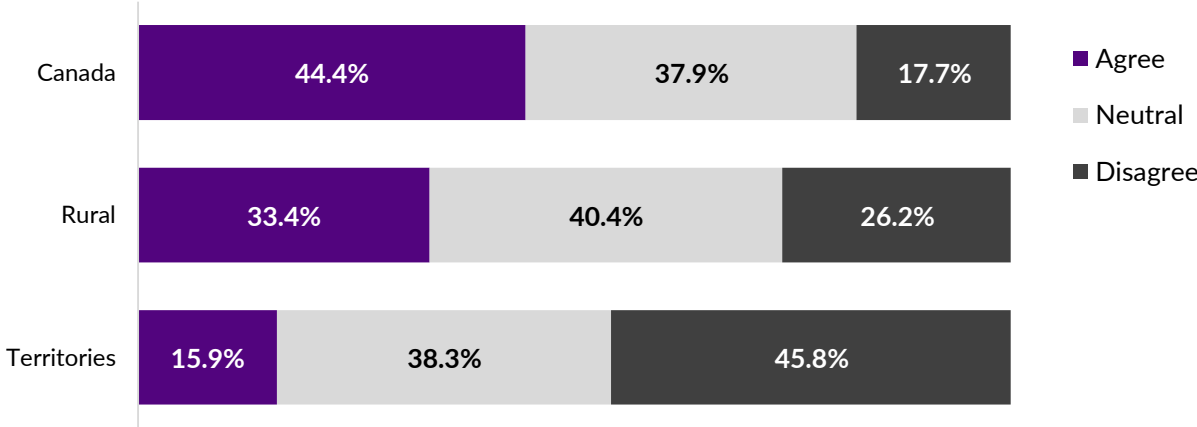


Source: MTM 18+

## Canadians' perceptions of choice of cellphone service providers

Over 40% of Canadians agree that they have enough choice of providers where they live; agreement is higher among people in Quebec, Francophones, and new Canadians. People in the Territories and older working-aged Canadians are more likely to disagree that they have enough choice.

Figure 63: POR – “I feel that I have enough choice of cellphone providers” (% of respondents), 2024



Excludes “do not know” responses.  
Source: Ipsos, Public Opinion Research Tracker: Wave 3, October 2024

## 6. For more information

The CRTC's [Communications Markets Reports](#) site provides additional data and insights through quarterly current trends reports on the high-speed broadband, mobile wireless, and other telecommunications sectors, and on economic indicators. In addition, the CRTC publishes Excel workbooks and CSV zips containing the data used in this report and additional data on the CRTC [Open Data portal](#).

## 7. Definitions

**Average Revenue per User (ARPU)** is a measure of revenue generated per subscriber. This is calculated by dividing the whole-year total revenue by the average number of subscribers from the current and previous year. The number of subscribers is taken from year-end data. ARPU includes revenue earned by the operator from services (such as monthly mobile wireless or home Internet plans), devices (such as mobile phone purchases or modem rentals) and other fees (such as activation charges).

**Broadband** refers to Internet services with download speeds of 1.5 megabits per second (Mbps) or faster that are accessed via digital subscriber line, cable, FTTH, FTTP, satellite, and FWA technologies.

The **Broadband Fund (BBF)** is administered by the CRTC to help provide all Canadians with access to broadband Internet and mobile wireless services at USO levels. The source of BBF funding is contributions made by large Canadian TSPs whose total annual Canadian revenues are \$10 million or greater.

**Cable-based carriers** are former cable monopolies that also provide telecommunications services (e.g., wireline local access and long distance, Internet, data and private line, and wireless services).

**Capital expenditures (CAPEX)** are the costs associated with procuring, constructing, and installing new assets of telecommunications networks, to replace or add to existing assets, or to lease to others. The CAPEX metric in this report includes data only from companies which supplied both telecommunications revenue and capital expenditure data. Wireline CAPEX generally refers to CAPEX on all fixed telecommunications networks including those providing local, long distance, Internet, private line, and data services. Wireless CAPEX refers to CAPEX on wireless telecommunications networks, excluding expenditures on spectrum licences.

**Capital intensity** is the ratio of CAPEX to revenues. The capital intensity metric of the telecommunications sector found in this report was derived by dividing the total annual CAPEX by the annual telecommunications revenues of companies that reported CAPEX.

The **churn rate (churn)** is derived by dividing the number of subscribers that have left their TSP in a month by the total number of service subscribers over the same period. The higher the number, the more subscribers are leaving the provider.

**Connect to Innovate (CTI)** is a fund administered by ISED. It supports projects that bring improved Internet speeds to rural and remote communities in Canada, primarily for new backbone infrastructure to connect institutions like schools and hospitals. A portion of the funding also supports upgrades and last-mile infrastructure to households and businesses.

**Data services** are sold by telecommunications service providers to business customers providing private and highly secure communications channels between locations. Data services are packet-based services that intelligently switch data through carrier networks.

**Data over Cable Service Interface Specification (DOCSIS)** is an international telecommunications standard that permits the addition of high-bandwidth data transfer to an existing cable television (CATV) system.

**Dwelling** refers to a set of living quarters which may be occupied or unoccupied. A dwelling that is occupied by a person or a group of persons is considered a **household**.

**Earnings before interest, taxes, depreciation, and amortization (EBITDA)** is the operating revenue after having subtracted operating expenses but before subtracting charges for interest payments, taxes, depreciation, and amortization. **EBITDA margins** are determined by dividing the total EBITDA by the total operating revenues. EBITDA margins were calculated for companies for which at least 80% of total revenues are represented by Canadian telecommunications services.

The **estimated number of households in Canada** is calculated by dividing Statistics Canada's population estimate for the fourth quarter of the calendar year by the population-to-dwelling ratio. In turn, the population-to-dwelling ratio is calculated by dividing the population of Canada by the number of households reported in the Statistics Canada Census 2021.

A **facilities-based service provider** is any entity that owns or operates transmission facilities.

**Fibre-to-the-home (FTTH)** refers to fibre optic communication delivery system where fibre extends from a concentrator, remote or central office to a residence.

**Fibre-to-the-premises (FTTP)** is similar to FTTH but refers to fibre extending to a "premise" which includes fibre extended to a business instead of a residence.

**Fixed Internet services** refers to Internet access using dial-up, DSL, cable, fibre, fixed wireless access, satellite, and other technologies such as Wi-Fi where access is provided to a precise and geographically constrained location; Internet transport service; and other non-connectivity Internet-related services such as equipment, web hosting, data centre services, etc.

**Fixed wireless access (FWA)** service provider refers to any entity that provides its services over a wireless network that uses either licensed or unlicensed spectrum to provide communications services, where the service is intended to be used in a fixed location.

**High-speed access (HSA)** refers to Internet services with download speeds of 256 kilobits per second (Kbps) or faster that are accessed via DSL, cable, FTTH, FTTP, satellite, and fixed wireless technologies. This access excludes dial-up and mobile wireless services.

**Household** coverage data are calculated based on **pseudo-households**. This term refers to points representing the population in an area. These points are placed along roadways within each area, and the population of the area, determined by Statistics Canada, is distributed among these points. Additional data regarding addresses and the position of dwellings are used to guide this distribution. The use of pseudo-households aims to improve the accuracy of the availability indicators over the use of the assumption that the population within an area is located at the centre of the area.

**Incumbent local exchange carriers (ILECs)** are incumbent entities providing local voice services.

An **incumbent telecommunications service provider (TSP)** is a company that provided local telecommunications services on a monopoly basis prior to the introduction of competition. These can be further categorized as large and small incumbent TSPs.

An **independent Internet service provider (ISP)** refers to a company providing Internet services that is not a cable-based carrier or an incumbent TSP.

**Large incumbent TSPs** serve relatively large geographical areas, usually including both rural and urban populations, and provide wireline voice, Internet, data and private line, wireless, and other services.

**Local and Access** wireline services include local calling and access to the public circuit-switched telephone network (PSTN). This term generally refers to all PSTN-related wireline voice services other than long-distance.

**LTE, LTE-Advanced (LTE-A), 5G:** Long-Term Evolution (LTE), referred to as 4G (fourth generation) cellular, is a protocol or standard used for communications between a mobile phone and cell towers in mobile networks. It is the current standard now widely deployed in most mobile networks. LTE-Advanced (LTE-A) is an enhancement of the LTE standard. 5G is the newest technology protocol or standard being deployed and is referred to as the fifth generation.

**Mobile phone** (cellular) revenues and subscribers are derived from handheld devices that are used mainly for voice and data communications, such as cellphones and smartphones.

**Mobile broadband** revenues include revenues from subscribers using built-in and portable access devices such as hubs, dongles, tablets, laptops, and netbooks; this category excludes revenues derived in relation to Internet access over mobile phone or handheld devices such smartphones.

**Net Promoter Score (NPS)** is a metric used in customer experience programs. NPS measures the loyalty to a brand. NPS scores are measured with a single question (How likely are you to recommend the brand to a friend or colleague?) and reported with a number from the range -100 to +100, where a higher score is desirable. Respondents give a rating between 0 (not at all likely) and 10 (extremely likely). “Promoters” are respondents giving a rating of 9 or 10; “Detractors” give a rating of 0 to 6. The NPS is calculated as  $[\text{Promoters (9-10)} - \text{Detractors (0-6)}] \times 100$ . Positive scores mean that there are more Promoters than Detractors in the sample.

**Other plans for mobile connected devices** should include revenues and the number of plans for all other connected peripherals and devices, machine-to-machine (M2M) services (cars, smart meters, trains, consumer electronics/connected ancillary devices) that are not included in or part of the mobile phones and mobile broadband categories.

**Other facilities-based carriers** refers to providers of telecommunications services that are not incumbent providers, but which own and operate telecommunications networks.

**Private line services** are services sold by telecommunications service providers to business customers providing private and highly secure communications channels between locations. Private line services provide non-switched, dedicated communications connections between two or more points to transport data, video and/or voice traffic.

**Small incumbent TSPs** serve relatively small geographical areas. Due to the limited size of their serving areas, these companies do not typically provide facilities-based long-distance services. However, they provide a range of wireline voice, Internet, data and private line, and wireless services.

A **telecommunications service provider (TSP)** provides wireline or wireless telecommunications services and may sell or lease telecommunications facilities or related equipment.

The **top three operators (Top 3)** for mobile and Internet services, in terms of revenues and subscribers, are the Bell Group, Rogers and TELUS. Data for the Top 3 include their flanker brands and TSPs acquired by the Top 3.

The **universal service objective (USO)** was established by the CRTC in [Telecom Regulatory Policy CRTC 2016-496 - Modern telecommunications services – the path forward for Canada’s digital economy](#). It states that Canadians, in urban areas as well as in rural and remote areas, should have access to voice services and broadband Internet access services, on both fixed and mobile wireless networks. To measure the successful achievement of this objective, the CRTC’s criteria include: Canadian residential and business fixed broadband Internet access service subscribers should be able to access speeds of at least 50 megabits per second (Mbps) download and 10 Mbps upload, and to subscribe to a service offering with an unlimited data allowance; and the latest generally deployed mobile wireless technology should be available not only in Canadian homes and businesses, but on as many major transportation roads as possible in Canada.

The **Universal Broadband Fund (UBF)** is administered by ISED. It supports projects to bring Internet at speeds of 50/10 Mbps to rural and remote communities, including support for mobile Internet projects that primarily benefit Indigenous peoples; projects along highways and roads where mobile connectivity is lacking; high-impact projects; and a Rapid Response Stream for shovel-ready projects that can be completed quickly.

**Wholesale-based service providers** or **non-facilities-based service carriers** refers to companies that generally acquire telecommunications services from other providers and either resell those services or create their own network from which to serve their customers. A company that owns a small number of facilities but has the vast majority of its operations on leased facilities may also be classified as non-facilities based.