

# Canadian Telecommunications Market Report

2026



Canadian Radio-television and  
Telecommunications Commission

Conseil de la radiodiffusion et des  
télécommunications canadiennes

Canada 

ISSN 2819-1153

Cat. No. BC9-43E-PDF

Unless otherwise specified, you may not reproduce materials in this publication, in whole or in part, for the purposes of commercial redistribution without prior written permission from the Canadian Radio-television and Telecommunications Commission's (CRTC) copyright administrator. To obtain permission to reproduce Government of Canada materials for commercial purposes, apply for Crown Copyright Clearance by contacting:

The Canadian Radio-television and Telecommunications Commission (CRTC)  
Gatineau, Quebec  
Canada  
K1A 0N2

For more information on this report, please contact: [donnees-data@crtc.gc.ca](mailto:donnees-data@crtc.gc.ca)

<https://applications.crtc.gc.ca/contact/eng/library>

© His Majesty the King in Right of Canada, as represented by the Canadian Radio-television and Telecommunications Commission, 2026

Aussi disponible en français

# Table of contents

Executive summary.....	1
1. Introduction.....	3
Background to this report .....	3
2. Overview of the telecommunications sector .....	3
2.1 Revenues.....	4
2.2 Retail and wholesale .....	6
2.3 Investment.....	8
2.4 Competition and forbearance .....	8
2.5 Canadian ownership .....	8
3. Tracking fixed Internet and mobile wireless services: outcomes and metrics .....	9
4. Perspectives on fixed Internet services .....	10
4.1. Market size and investment .....	10
4.2 Competitive intensity .....	14
4.3 Prices and Affordability .....	17
4.4 Network coverage .....	22
4.5 Network performance.....	25
4.6 Consumer empowerment .....	28
5. Perspectives on mobile wireless services .....	30
5.1 Market size and investment .....	31
5.2 Competitive intensity .....	33
5.3 Prices and affordability .....	35
5.4 Network coverage .....	41
5.5 Network performance.....	44
5.6 Consumer empowerment .....	47
6. For more information.....	52
7. Definitions.....	52

---

## Figures, infographics and tables

<b>Infographic 1:</b> Revenues by sector, annual growth, CAGR .....	4
<b>Figure 1:</b> Long-term telecommunications revenues (\$ billions) and growth rates (%), 2015 to 2024 .....	5
<b>Infographic 2:</b> Telecommunications revenue share by sector (%), 2024 .....	5
<b>Infographic 3:</b> Retail and wholesale revenues (\$ billions) and revenue share (%), 2023 to 2024 .....	6
<b>Figure 2:</b> Telecommunications revenue share by type of provider (%), 2020 to 2024 .....	7
<b>Figure 3:</b> Index of consumer spending on communications products and services, 2015 to 2023 .....	7
<b>Figure 4:</b> Total telecommunications CAPEX (\$ billions), 2020 to 2024 .....	8
<b>Table 1:</b> Themes, outcomes, and core metrics .....	9
<b>Figure 5:</b> Retail fixed Internet revenues (\$ billions) and subscribers (millions), 2020 to 2024 .....	11
<b>Figure 6:</b> Home Internet subscribers (millions) by type of provider, 2020 to 2024 .....	12
<b>Figure 7:</b> Home Internet revenues (\$ billions) by type of provider, 2020 to 2024 .....	12
<b>Figure 8:</b> Wireline CAPEX (\$ billions) and capital intensity (%), 2020 to 2024 .....	13
<b>Figure 9:</b> Wireline capital intensity by type of service provider (%), 2020 to 2024 .....	13
<b>Figure 10:</b> Government of Canada cumulative broadband funding (\$ millions), 2022 to 2025 .....	14
<b>Figure 11:</b> Share of revenues by type of operator (%), 2020 to 2024 .....	15
<b>Figure 12:</b> Share of subscribers – wholesale-based operators (%), 2020 to 2024 .....	15
<b>Figure 13:</b> Wireline EBITDA margins (%), 2020 to 2024 .....	16
<b>Figure 14:</b> Retail high-speed Internet subscriber monthly churn (%), 2020 to 2024 .....	16
<b>Figure 15:</b> Prices for 50/10, 940/15 and 2,500/15 Mbps plans (\$), 2021 to 2025 .....	17
<b>Figure 16:</b> High-speed Internet plan prices in Ontario, by speed (\$), 2021 to 2025 .....	18
<b>Figure 17:</b> Consumer Price Index – All-items and Internet access services, 2021 to 2025 .....	19
<b>Figure 18:</b> Internet ARPU (\$), 2020 to 2024 .....	20
<b>Figure 19:</b> “Internet services became less affordable over the year” (% of respondents), 2023 to 2025 .....	20
<b>Figure 20:</b> Made changes to home Internet plan due to affordability this month (%), 2023 to 2025 .....	21
<b>Figure 21:</b> Confidence in ability to pay for Internet service over next 3 months (%), 2023 to 2025 .....	21
<b>Figure 22:</b> Share of household spending on Internet by income quintile (%), 2015 to 2023 .....	22
<b>Figure 23:</b> Households with access to 50/10 Mbps unlimited service (%), 2020 to 2024 .....	23
<b>Figure 24:</b> Households with access to gigabit-speed service (%), 2020 to 2024 .....	24
<b>Figure 25:</b> Percentage of total households covered by a fibre network (%), 2021 to 2025 .....	24
<b>Figure 26:</b> Total residential Internet access service subscriptions – FWA and satellite (%), 2020 to 2024 .....	25
<b>Figure 27:</b> Subscribers by download speed (%), 2020 to 2024 .....	26
<b>Figure 28:</b> Median download and upload speeds in Canada and rural areas (in Mbps), 2020 to 2025 .....	26

<b>Figure 29:</b> Average monthly data usage (download and upload) by residential Internet subscribers (in GB), 2020 to 2024.....	27
<b>Figure 30:</b> “I can count on a reliable high-speed network where I live” (% of respondents), 2023 to 2025.....	27
<b>Figure 31:</b> Consumers experiencing a home Internet service outage of 24 hours or longer (% of respondents), 2024 to 2025 .....	28
<b>Figure 32:</b> CCTS Internet-related issues, 2020 to 2025.....	29
<b>Infographic 4:</b> Subscriber likelihood of recommending their Internet provider, 2021-22 to 2024-25.....	29
<b>Figure 33:</b> “I feel I have enough choice of Internet service providers where I live” (%), 2023 to 2025 .....	30
<b>Figure 34:</b> Retail mobile phone subscribers (millions) and revenues (\$ billions), 2020 to 2024 .....	31
<b>Figure 35:</b> Wireless CAPEX (\$ billions) and capital intensity (%), 2020 to 2024 .....	32
<b>Figure 36:</b> Average wireless CAPEX per user (\$), 2020 to 2024 .....	32
<b>Figure 37:</b> Revenue share – Top 3 operators compared to other operators (%), 2020 to 2024 .....	33
<b>Figure 38:</b> Subscriber share – Top 3 operators compared to other operators (%), 2020 to 2024 .....	34
<b>Figure 39:</b> Wireless EBITDA margins (%), 2020 to 2024.....	34
<b>Figure 40:</b> Retail mobile phone subscriber monthly churn (%), 2020 to 2024 .....	35
<b>Figure 41:</b> Monthly prices for 10 GB, 50 GB and 100 GB plans (\$), 2021 to 2025 .....	36
<b>Figure 42:</b> Consumer Price Index – All-items and cellular services, 2021 to 2025.....	36
<b>Figure 43:</b> Mobile phone ARPU, with and without device cost (\$), 2020 to 2024 .....	37
<b>Figure 44:</b> Prices of a new mobile phone in Canada (\$), 2015 to 2025.....	37
<b>Figure 45:</b> Revenue per GB of data, Top 3 and other providers (\$), 2020 to 2024 .....	38
<b>Figure 46:</b> “Cellular services became less affordable over the past year” (% respondents), 2023 to 2025.....	39
<b>Figure 47:</b> Made changes to cellular services due to affordability this month (%), 2023 to 2025.....	39
<b>Figure 48:</b> Confidence in ability to pay for cellular services over next 3 months (%), 2023 to 2025 .....	40
<b>Figure 49:</b> Share of household spending on mobile services by income quintile (%), 2015 to 2023 .....	41
<b>Figure 50:</b> Population with access to mobile networks (%), 2020 to 2024 .....	42
<b>Figure 51:</b> Population with access to 5G networks (%), 2020 to 2024.....	42
<b>Figure 52:</b> Major roads and highways covered by mobile networks (%), 2020 to 2024 .....	43
<b>Figure 53:</b> Share of mobile phone subscribers by type of data plan (%), 2020 to 2024.....	43
<b>Figure 54:</b> Median mobile network download and upload speeds (in Mbps), 2020 to 2025.....	44
<b>Figure 55:</b> Multi-server mobile network latency (in ms), 2022 to 2025 .....	45
<b>Figure 56:</b> Average monthly usage for mobile data subscribers (in GB), 2020 to 2024.....	45
<b>Figure 57:</b> “I can count on a reliable mobile network where I live” (% of respondents), 2023 to 2025 .....	46
<b>Figure 58:</b> Consumers experiencing a mobile network service outage lasting 24 hours or longer (% of respondents), 2024 to 2025 .....	47
<b>Figure 59:</b> Wireless-related issues reported to the CCTS, 2020 to 2025 .....	48

**Infographic 5:** Subscriber likelihood of recommending their cellphone provider, 2021-22 to 2024-25..... 48

**Figure 60:** “I feel that I have enough choice of cellphone providers” (% of respondents), 2023 to 2025 ..... 49

**Figure 61:** “The cellphone rates Canadians pay while travelling outside of Canada are reasonable” (% of respondents), 2023 to 2025 ..... 49

**Figure 62:** Reasons for “bill shock” reported by Canadian consumers (% of respondents), 2019 to 2025 ..... 50

**Figure 63:** Use of roaming options while travelling outside Canada (% of respondents), 2025 ..... 51

**Figure 64:** International roaming – average monthly revenue per subscriber (\$), 2023 to 2024 ..... 51

## Executive summary

The Canadian Radio-television and Telecommunications Commission (CRTC) is pleased to present the 2026 edition of the Canadian Telecommunications Market Report (CTMR). The CTMR is intended to support the CRTC, industry stakeholders, and the public in better understanding how Canada's telecommunications markets are serving Canadians, and to monitor the impact of related policies and regulations. The report provides insights that can help identify areas where additional measures may be needed to foster a competitive market that is responsive to consumers' needs, and where there may be opportunities to reduce the administrative burden on the industry. This year's edition builds on last year's work by expanding the range of data sources to assess the performance of the Canadian market, and by providing additional metrics and analytical spotlights to explore areas of topical interest.

Telecommunications – especially high-speed Internet and cellphone services – have never been as central to Canadians' daily lives and livelihoods as they are now. Canadian telecommunications networks have never been as extensive or advanced as they are today. These are undeniable successes, attesting to Canadians' embrace of digital technology, to innovation and investment by the telecommunications industry, and to policy frameworks that support better network quality, coverage, and service. As we look ahead, however, the market is shifting, and the Canadian industry is facing significant challenges.

### ***Will Canadians change how they use and spend on telecommunications in inflationary times?***

For the past five years, Canadians have faced higher levels of inflation, as the consumer price index (CPI) has climbed 19% since the start of 2021. Despite this overall trend, Canadians have seen lower prices for their Internet and cellphone services. The Internet price index declined by 6%, and the mobile service index by nearly 40%, during the same period.

Yet, depending on their income level, Canadians have been devoting more of their household spending to telecommunications services, as they opt for faster Internet speeds and cellphone plans with more data. The CTMR shows that nearly a third of Canadians have signed up for gigabit-speed Internet service, and more than half have cellphone plans with over 50 gigabits of data per month.

Though they may be spending more, generally, Canadians believe telecommunications services have become more affordable, or that they have the opportunity to switch to more affordable or suitable options. And those options are increasing. The share of Canadians who said they had enough choice of service providers increased three percentage points for mobile services, and eight points for Internet services, since fall 2024. In rural Canada, the share increased nearly five points during the same period.

### ***What's driving Canadians' satisfaction – or dissatisfaction – with their providers?***

While telecommunications prices, choice and affordability are improving for certain consumers, Canadians have diverse opinions about their Internet and cellphone service providers. Empowered consumers are raising more issues with the Commission for Complaints for Telecom-television Services (CCTS), especially when it comes to the accuracy of billing. Canadians are also increasingly switching plans and providers to address affordability concerns. Though overall perceptions of telecommunications service providers tend to be neutral, opinions are positive about new, smaller, or regional operators that often compete for subscribers on the basis of price and customer service.

### ***Can telecommunications companies continue to invest and grow while competing for subscribers?***

Internet and cellphone service operators are at an inflection point: revenue and subscriber growth are slowing, and could remain flat. This is occurring as Canada's population growth rate slows. With a plateauing base of subscribers, operators have more limited avenues for growth. Already, operators have signalled that

they are moderating their investments in telecommunications networks. This is partly a response to pressure on their revenues and partly because wired and wireless networks now reach virtually the entire population. In fact, over \$64 billion in network investment over the past five years has given Canadians a wide choice of technologies - from fibre and cable to satellite and 5G home Internet - and a wide range of plans and price points. Network investments in both Internet and mobile service continue. Looking ahead, service providers are developing innovative offerings such as satellite-to-device mobile service that will enhance choices for consumers.

### ***How will policy measures affect consumers and the industry?***

Regulation and policy in recent years have sought to balance competitive intensity - ensuring that Canadians benefit from vigorous and diverse competitive options - with the need for ongoing network investment. The CRTC's 2023 Mobile Virtual Network Operator (MVNO) framework allows regional cellphone providers to compete in new markets using the networks of Canada's largest mobile wireless companies. In 2024 and 2025, various regional providers reached agreements with these companies and began offering services, particularly in western Canada and Ontario.

In the past year, the CRTC took a major step forward to improve competition in Canada's Internet access market by giving competitors a more workable way to sell Internet services using the fibre-to-the-home networks of large telephone companies nationwide. This access further encourages Internet competition and empowers Canadians with more robust choices for Internet service. Preliminary data showing that numerous providers are using this wholesale service is encouraging. As the CRTC continues to monitor the market, it will be mindful of the balance between increased competition in Internet services, and ongoing investment in high-quality networks.

And other consumer-focused measures, such as those intended to improve the information available to consumers about their service plan features and prices, the ease of switching providers, and the effectiveness of consumer notifications, will make it easier for Canadians to choose Internet and cellphone plans that best meet their needs.

The CRTC and the Government of Canada have implemented additional policy measures targeting better coverage and affordability for Canadians, particularly in underserved areas and populations. Such measures include the CRTC's Broadband Fund, one of Canada's public connectivity programs. Combined, these investments have collectively provided \$1.4 billion to high-speed Internet and mobile connectivity projects. They have helped to expand broadband coverage to over 80% of the population in rural Canada - a 30 percentage point increase since 2020.

Through the CTMR and other tools on its Communications Market Reports website, the CRTC will monitor and report on the Canadian telecommunications market in light of these and related policies. At the same time, the CRTC is engaged in the Government of Canada's red tape review initiative. In this regard, while reporting on metrics that matter to Canadians, the CRTC is rationalizing its registration and data collection processes to reduce the reporting burden on telecommunications operators.

# 1. Introduction

This is the CRTC's second annual CTMR, reflecting the most recent data collected by the CRTC from the industry and third-party sources. This report is part of the suite of telecommunication monitoring data, insights and visualizations published on the CRTC [Communications Market Reports](#) website. The CTMR contains:

- insights on the structure of the Canadian telecommunications 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 Order contains considerations specific to fixed Internet and mobile wireless services, as well as consumer matters, deployment, and universal access. These considerations are covered in various sections of the CTMR. As well, the CTMR contains spotlights, which focus in more detail on aspects of Internet and mobile wireless services.

The CTMR relies 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, 2024). In addition, the 2026 CTMR presents data and insights from other sources, including CRTC-commissioned public opinion research (POR) by Ipsos from 2023 to 2025; Statistics Canada's Survey of Household Spending from 2015 to 2023; Statistics Canada's CPI and pricing data from January 2021 to September 2025; Ookla's Speedtest data from January to September 2025; and the Media Technology Monitor (MTM) from fall 2021 to spring 2025.

## 2. Overview of the telecommunications sector

Canada's telecommunications sector comprises several segments: traditional telephone services, wired home and business Internet, and various wireless technologies for mobile services, satellite, and fixed wireless Internet access (FWA). Internet and mobile wireless services account for the vast majority of this sector, reflecting how central they have become to Canada's connectivity needs. The following section provides insights on the telecommunications sector as a whole – including traditional telephone services – while other sections of the CTMR will be devoted to Internet and mobile wireless (cellphone) services, in particular.

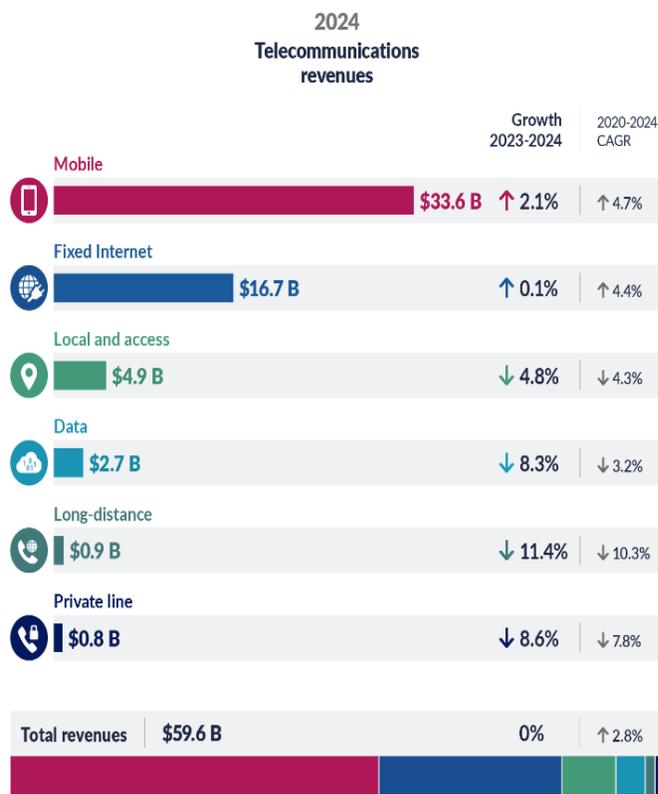
## 2.1 Revenues

This section covers revenues from 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 FWA), data, private line, local and access, and long distance

The entire telecommunications service sector generated \$59.6 billion in 2024, unchanged compared to 2023 revenue. A 2.1% rise in mobile revenues was offset by year-over-year declines in local access and long distance (-4.8% and -11.4%, respectively), as well as decreased revenues from data (-8.3%). Fixed Internet revenue remained essentially flat with a growth rate of 0.1%. Since 2020, telecommunications service revenue as a whole increased at a 2.8% compound annual growth rate (CAGR).

**Infographic 1:** Revenues by sector, annual growth, CAGR

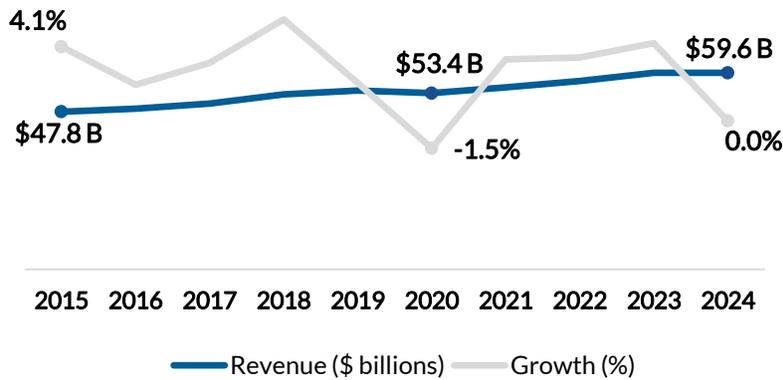


Source: CRTC data collection

### Spotlight – Telecommunications revenues 2015 to 2024

Canadian telecommunications service revenues remained flat in 2024, and saw their lowest growth rate since 2020. Between 2015 and 2024, revenues experienced a 2.5% CAGR.

**Figure 1: Long-term telecommunications revenues (\$ billions) and growth rates (%), 2015 to 2024**

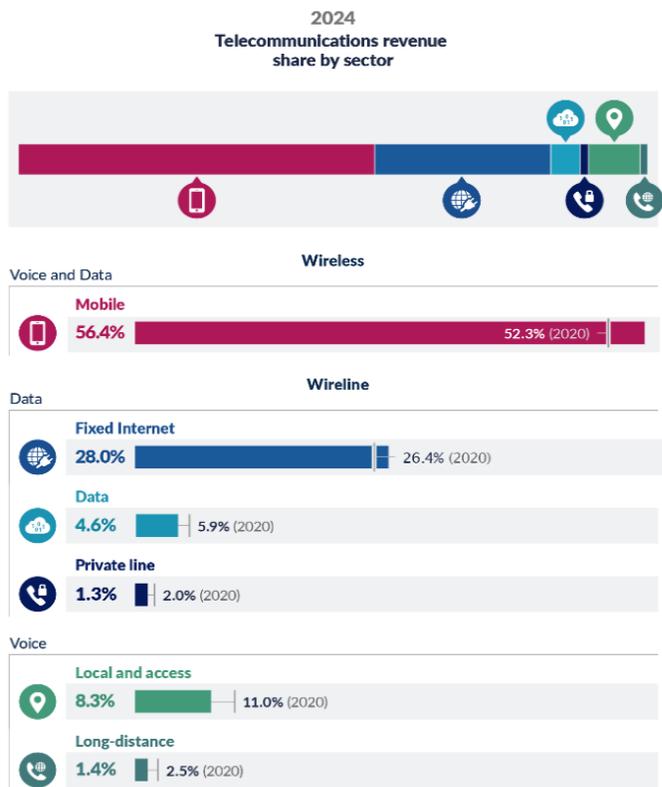


Source: CRTC data collection

## Revenue Share

Mobile services represented 56.4% of telecommunications revenues in 2024, an increase of 4.1 percentage points since 2020. Fixed Internet accounted for the same share of total revenues as it did in 2023 (28.0%). The contributions of local access, long-distance and data to total service revenues continued to decrease in 2024, falling 2.7, 1.1 and 1.3 percentage points respectively since 2020.

**Infographic 2: Telecommunications revenue share by sector (%), 2024**

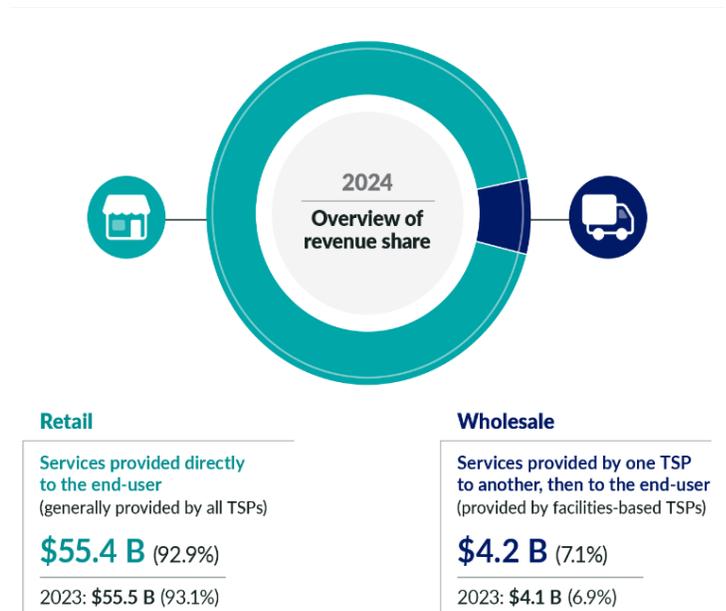


Source: CRTC data collection

## 2.2 Retail and wholesale

Retail services, that is, services provided directly to residential and business customers, accounted for 92.9% of service revenues in 2024. This was essentially the same as the previous year when retail accounted for 93.1%. Revenue from wholesale services (services sold to other telecommunications providers) made up 7.1% of revenues in 2024. Among the types of services exchanged by telecommunications providers, high-speed Internet represented 18.9% of wholesale revenues, two percentage points more than in 2020.

**Infographic 3:** Retail and wholesale revenues (\$ billions) and revenue share (%), 2023 to 2024



Source: CRTC data collection

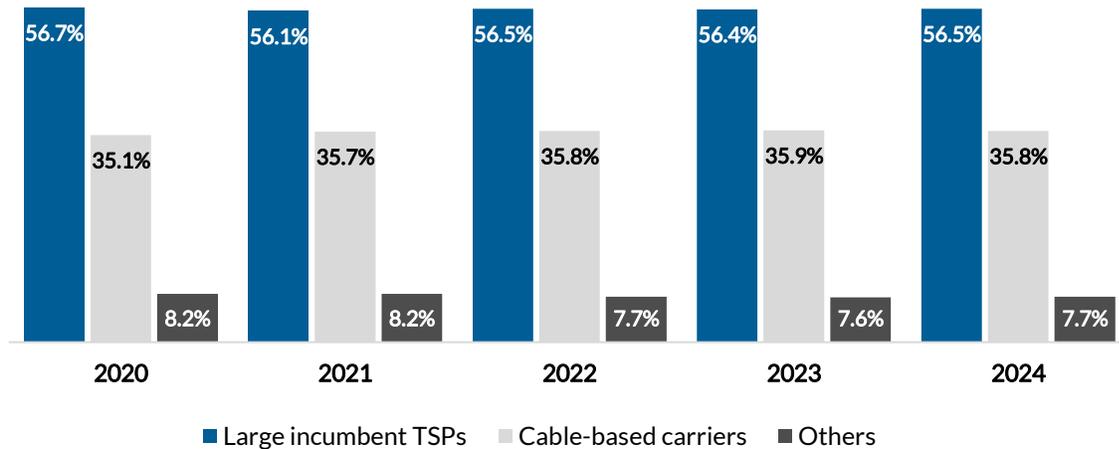
### Spotlight – Telecommunication revenue share by type of provider

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.

While large incumbent TSPs accounted for 56.5% of total telecommunications revenues in 2024, cable-based carriers accounted for 35.8%, with the remaining 7.7% being attributable to other service providers. The proportion of revenue attributed to each type of TSP has remained largely steady since 2020.

**Figure 2: Telecommunications revenue share by type of provider (%), 2020 to 2024**

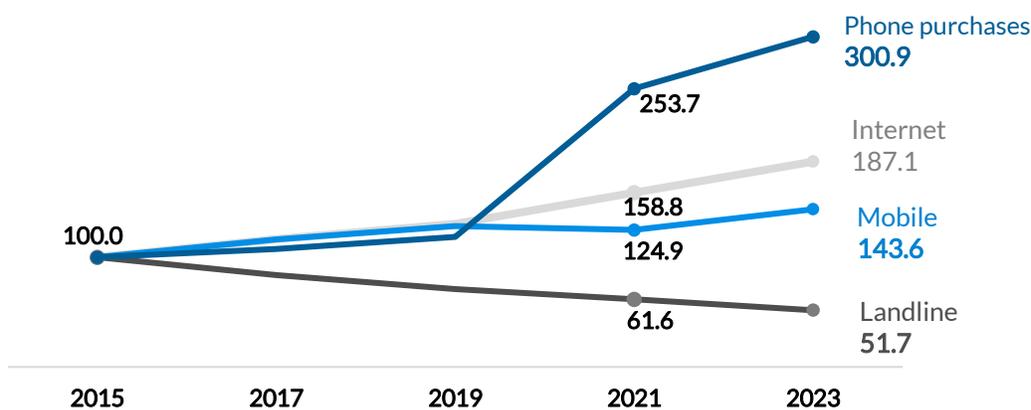


Source: CRTC data collection

### Spotlight – Consumer spending on telecommunications

This year’s CTMR provides insights from the Survey of Household Spending, published by Statistics Canada.<sup>1</sup> From 2015 to 2023, Canadians’ spending on communications outpaced many other categories and exceeded overall consumption growth. This spending pattern could be a result of consumers making more extensive use of Internet or mobile telecommunications services, as well as opting for higher-capacity plans with greater data allotments or download speeds. Within the communications category specifically, Canadian spending on the purchase of cellphones tripled, with spending growth particularly noticeable after 2019. Canadians have also decreased their spending on landline telecommunications products by almost half compared to 2015, while spending on Internet and mobile services increased by 87% and 44%, respectively, in the same period.

**Figure 3: Index of consumer spending on communications products and services, 2015 to 2023**



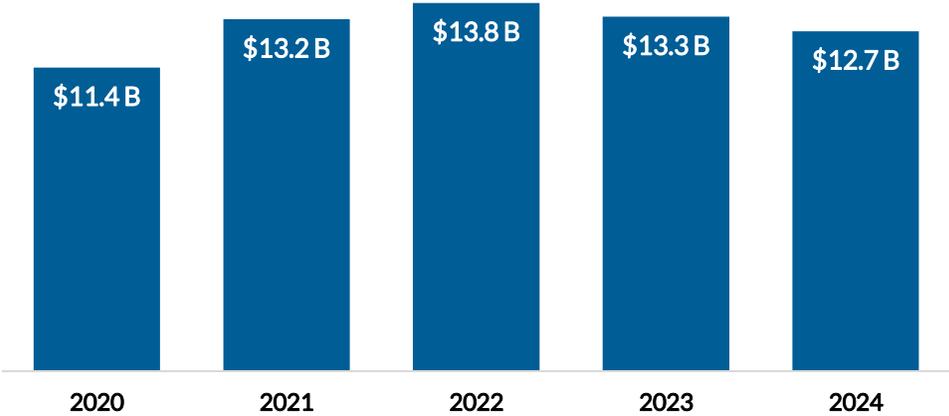
Source: Statistics Canada, Table 11-10-0223-01, 2025

<sup>1</sup> This survey primarily collects detailed information on household expenditures on goods and services. It reports on expenditures on food; shelter; household operations, furnishings and equipment (including telecommunications services and equipment); recreation; health and personal care; and other categories. The survey is conducted in the 10 provinces and the three territorial capitals every two years, starting with the 2017 reference year.

### 2.3 Investment

Over the past five years, telecommunications operators have deployed fibre and 5G networks extensively, and since 2020 they have invested a cumulative \$64.4 billion in their networks. Their capital expenditures (CAPEX) on network equipment and infrastructure declined slightly in 2023 and 2024.

Figure 4: Total telecommunications CAPEX (\$ billions), 2020 to 2024



Source: CRTC data collection

### 2.4 Competition and forbearance

The CRTC is an independent quasi-judicial tribunal that regulates the telecommunications and broadcasting sectors in the public interest. It has a wide range of responsibilities, including under various pieces of legislation. As an administrative tribunal, when dealing with matters like rates for telecommunications services, the CRTC will 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, prices are determined in the competitive marketplace. 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 2024, 97% of telecommunications revenues were generated from forborne services, the same percentage as the previous year.

### 2.5 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 services revenues in Canada were \$59.62 billion in 2024, and therefore, for the purposes of applying provisions of section 16, 10% of total revenues represents \$5.96 billion.

### 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, now representing 84% of total telecommunications revenues. 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 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
Market size and investment	Market demand is growing and there is an investment in the quality and reliability of networks	Subscribers, revenue, capital expenditure, funding
Competitive intensity	There is a range of service options and providers competing in the market	Revenue and subscriber shares, earnings, subscriber turnover
Prices and affordability	Prices are reasonable for services that meet Canadians' needs, and services are affordable	Prices, inflation, average revenues per user, consumer perceptions of affordability, switching providers or services
Network coverage	Canadians can access networks where they need to, on the latest suitable technologies, and faster options are expanding	Population coverage of various technologies
Network performance	Network speeds and usage are increasing, and networks are reliable	Network speeds, consumer data usage, consumer perceptions of network reliability and service outages
Consumer empowerment	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

The fixed Internet services market in 2024 saw continued growth in subscriber levels and revenues, though this overall result masks differences among operators of different sizes and types. ILECs, cable-based operators and other facilities-based operators (particularly satellite) saw modest or sizeable gains in revenues and subscribers, while independent wholesale-based operators saw declines. This picture could shift in coming years: the CRTC's Telecom Regulatory Policy [CRTC 2024-180](#) (*Competition in Canada's Internet service markets*) extends wholesale access to large telephone companies' fibre across Canada is intended to improve the competitive landscape for Canadians by allowing operators without a network footprint in a given territory to offer service using competitors' fibre. During 2025, various operators made announcements about their intention to offer competitive fixed Internet services outside their traditional serving territories.

Canadians access fixed Internet on technologies including DSL, fibre, cable, satellite, and FWA. Today, through these technologies, more than 96% of Canadian dwellings have access to fixed Internet service at speeds that meet or exceed the CRTC's universal service objective (USO) target – an increase from 2023 coverage. The CRTC's 2031 target to achieve universal broadband availability is therefore in clear sight. And 90% of the population has access to even faster gigabit-speed service. In addition to population coverage, subscriber levels and revenues also increased in 2024. Despite decreases in some large operators' capital investment, rural areas and First Nations reserve areas saw higher-than-average gains in USO-level coverage. Moreover, Canada's fixed networks continued to perform at higher speeds and sustained Canadians' ever-growing appetite for data.

Prices for all services, including premium and very high-speed services, should be reasonable, and there should be service options available in the market that are affordable for Canadians, including Canadians working with tight household budgets. In 2024 and well into 2025, consumers experienced fairly flat Internet price growth compared to 2023. This was particularly true for plans at speeds lower than one gigabit per second (1 Gbps), although higher-speed plans were slightly more expensive in 2024 and into 2025. Nonetheless, more and more, Canadians – even those in lower income brackets – are perceiving Internet plans to be affordable. When they have affordability concerns, more Canadians are making changes to their plans, and more Canadians are raising issues about billing with the CCTS.

### 4.1. Market size and investment

Sustained investment in fixed internet networks can improve quality, reliability and ultimately, connectivity. The CRTC tracks the following metrics relating to market size and investment:

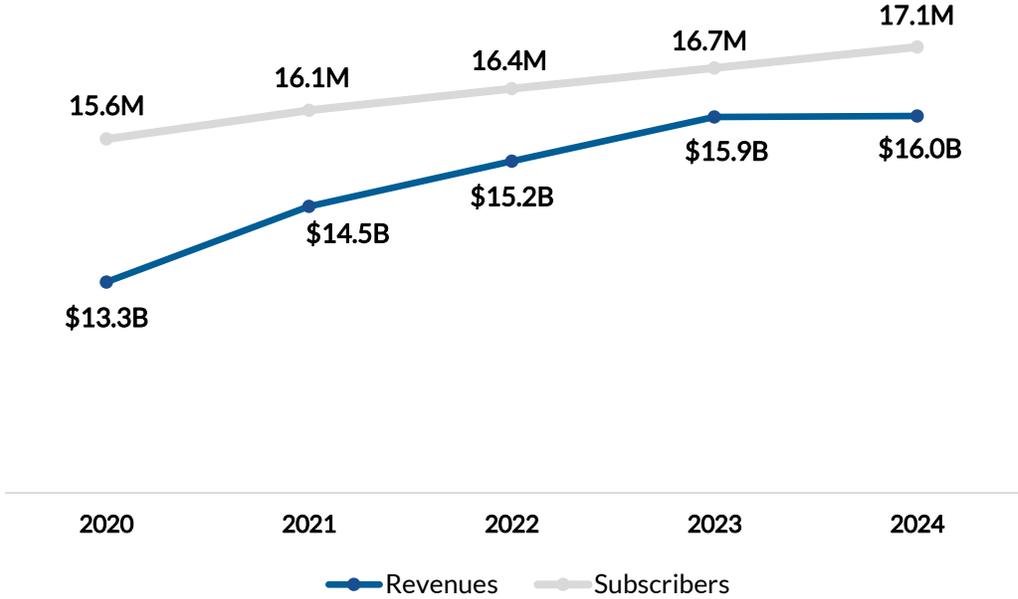
- Retail (home and business) subscribers and revenues
- Investments in wireline networks, measured in terms of wireline CAPEX and capital intensity
- Government of Canada broadband funding

Broadband revenues flattened in 2024, and major incumbents have been slowing their investments as they near the completion of their fibre rollouts, even though subscriber numbers continue to grow. Meanwhile, cable-based carriers and other facilities-based providers have been investing more in their networks. The CRTC will monitor these trends closely to determine how its policy on competition in Canada's Internet service markets (Telecom Regulatory Policy CRTC 2024-180) might affect future investment, subscriber growth, and revenue growth.

# Retail Internet subscribers and revenues

Retail (business and home) fixed Internet revenue growth slowed overall in 2024; accounting changes at one major operator further led to a flattening of Internet revenue for the year.

Figure 5: Retail fixed Internet revenues (\$ billions) and subscribers (millions), 2020 to 2024

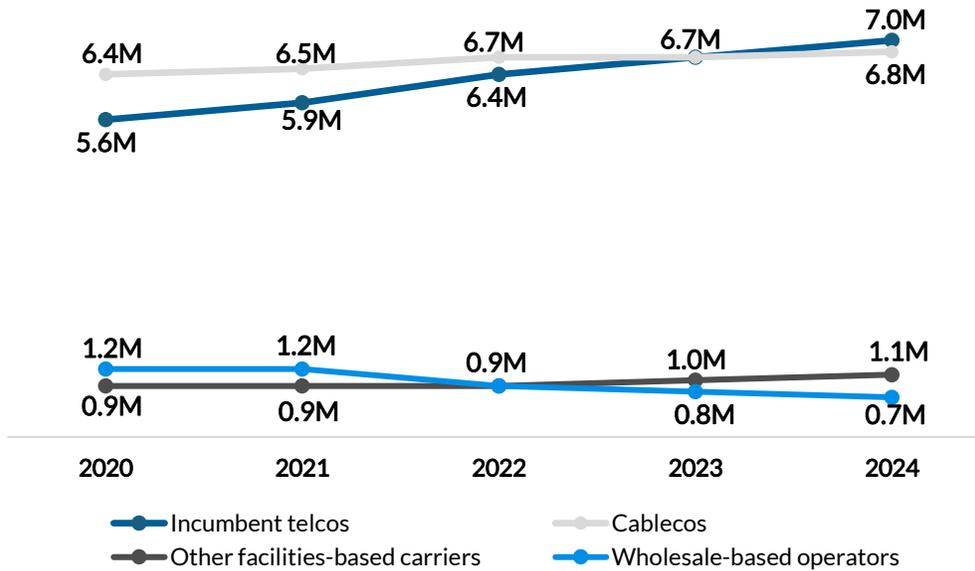


Source: CRTC data collection

## Spotlight – Home Internet subscribers and revenues

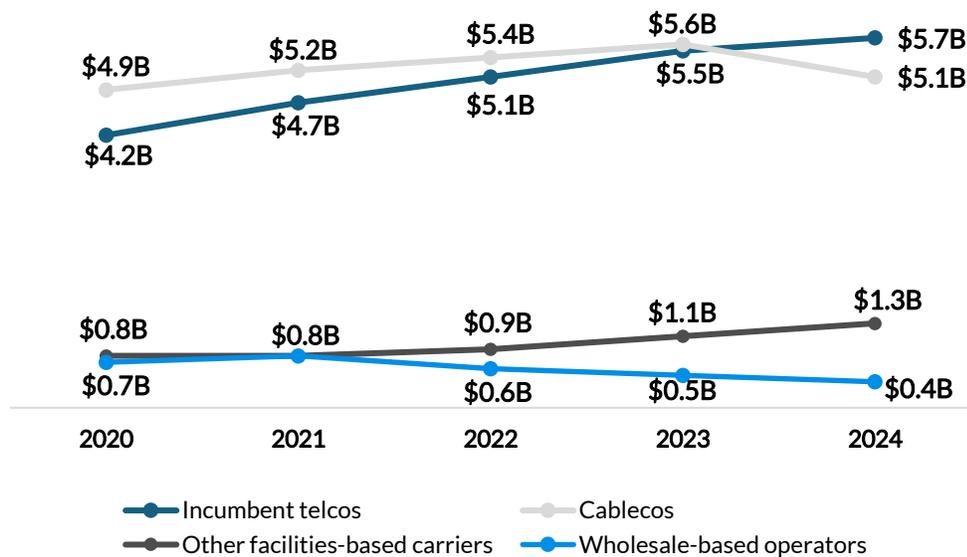
In 2024, residential Internet subscriber and revenue levels for incumbent telecommunications operators grew, and at a faster pace than for cable-based operators. Independent wholesale-based operators continued to lose both subscribers and revenue, continuing a downward trend that started in 2022. Other facilities-based carriers such as Low Earth Orbit (LEO) satellite, by contrast, have steadily increased both subscribers and revenue over the past two years.

**Figure 6: Home Internet subscribers (millions) by type of provider, 2020 to 2024**



Source: CRTC data collection

**Figure 7: Home Internet revenues (\$ billions) by type of provider, 2020 to 2024**

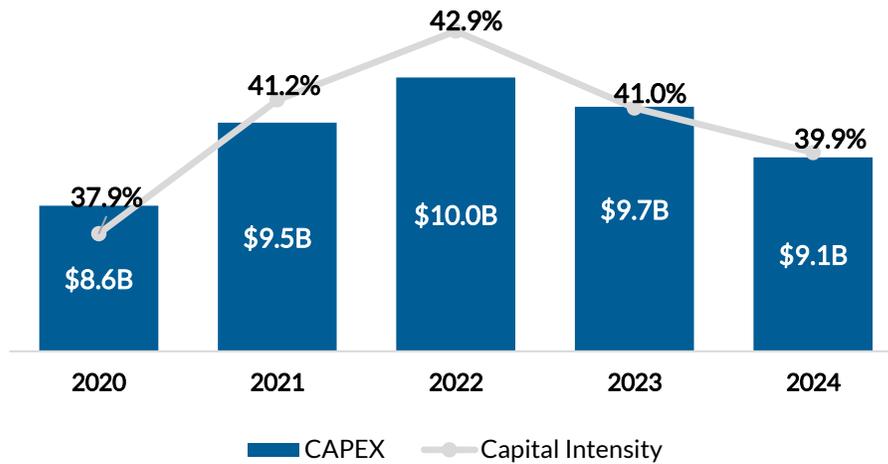


Source: CRTC data collection

## Investments in wireline networks

Wireline CAPEX and capital intensity declined in 2024, reflecting a large pullback by one of Canada’s major operators and more modest reductions by other operators. These reductions occurred as fibre deployment progressed, albeit at a slower pace in 2024 compared to previous years. Meanwhile, other facilities-based carriers increased their network investments, with one showing significant year-over-year growth.

**Figure 8: Wireline CAPEX (\$ billions) and capital intensity (%), 2020 to 2024**

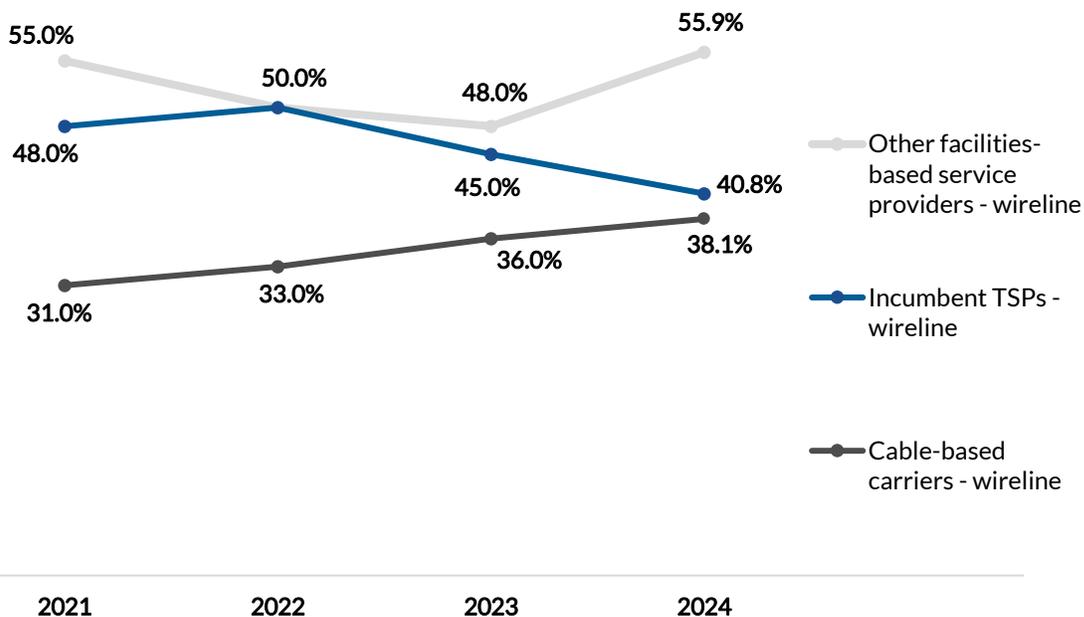


Source: CRTC data collection

### Spotlight – Capital intensity

After spending a cumulative \$47 billion on CAPEX over the past five years, which peaked in 2022, wireline operators appear to be reaching the end of an investment cycle. This cycle, combined with the slowing of Internet revenue growth, led in 2024 to a decline in wireline capital intensity, that is, the ratio of CAPEX to revenue. Incumbents neared completion of their planned fibre rollouts, and their capital intensity declined in 2024. Cable-based and other facilities-based operators, however, have made a significant increase in their capital intensity through their investments in fibre, cable, and fixed wireless technologies to compete with incumbents.

**Figure 9: Wireline capital intensity by type of service provider (%), 2020 to 2024**

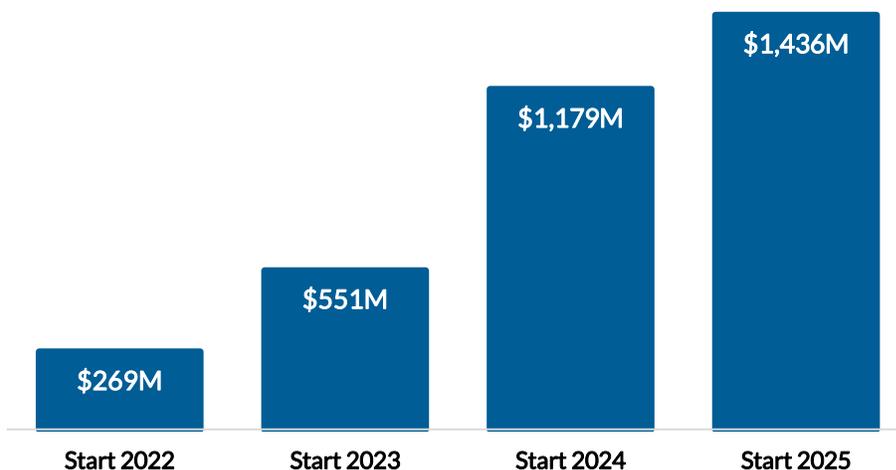


Source: CRTC data collection

## Government of Canada broadband funding

Broadband funding through the CRTC's Broadband Fund, and ISED's Universal Broadband Fund and Connect to Innovate program, has totalled over \$1.4 billion since the start of 2022. Funding growth slowed as USO targets are closer to being met, and gaps are narrowing for rural and remote broadband coverage.

**Figure 10:** Government of Canada cumulative broadband funding (\$ millions), 2022 to 2025



Source: CRTC Broadband Fund reports and ISED

## 4.2 Competitive intensity

Canadians benefit from better choice, prices, services, and network quality when the marketplace sustains competitive intensity. It is important that Canadians can choose from providers that can compete effectively, vigorously and in a sustained manner over time.

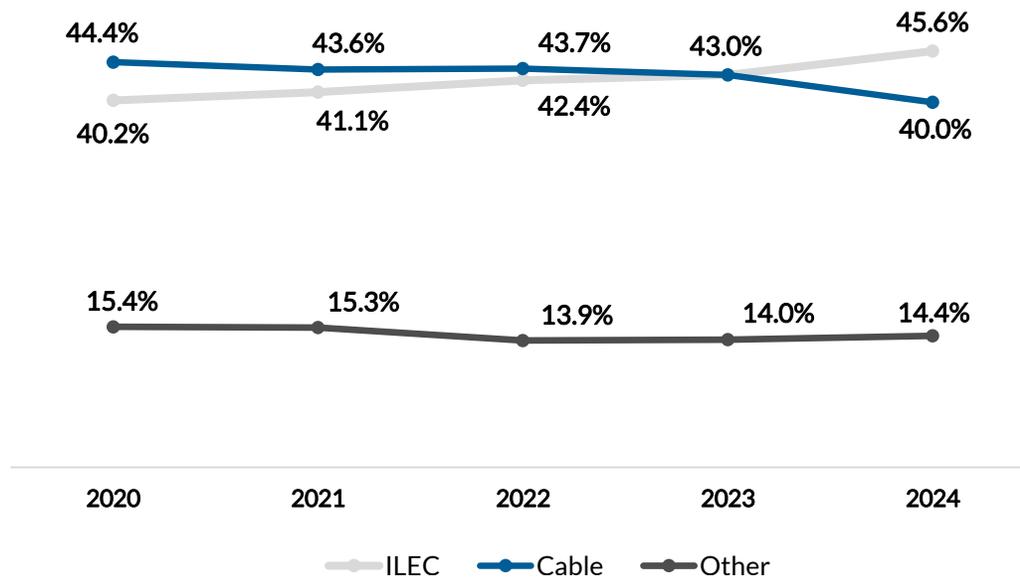
When assessing Internet service competition, the CRTC tracks metrics which include revenue share for various types of providers, subscriber share (with a distinct analysis of independent wholesale-based operators' share of the market), profit margins and subscriber turnover in the form of customers leaving their Internet service provider (referred to, in aggregate, as churn).

ILECs have gained market share over cable-based operators, thanks to fibre deployment and take-up, while independent wholesale-based operators saw declines. In future reports, the CRTC will track the use of wholesale fibre services by large ISPs, following Telecom Regulatory Policy CRTC 2024-180.

### Revenue share by type of operator

ILEC revenue shares overtook cable operators' shares, as subscribers opted for ILECs' faster fibre-based broadband and as ILECs expanded their fibre rollout. Growth in revenue share for other facilities-based operators was driven primarily by satellite services.

**Figure 11:** Share of revenues by type of operator (%), 2020 to 2024

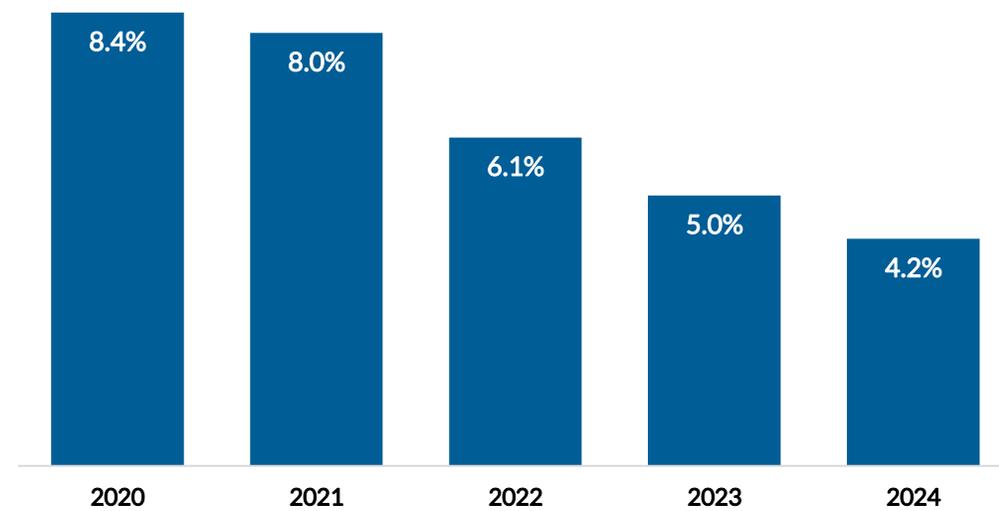


Source: CRTC data collection

### Share of subscribers – independent wholesale-based operators

Independent wholesale-based ISPs – not owned by ILECs or cable-based operators - continue to lose market share. With shifts in the Internet service market and in response to recent policy decisions, the wholesale model is evolving and other types of wholesale-based providers are emerging. The CRTC continues to monitor these shifts and their impact on competition.

**Figure 12:** Share of subscribers – wholesale-based operators (%), 2020 to 2024

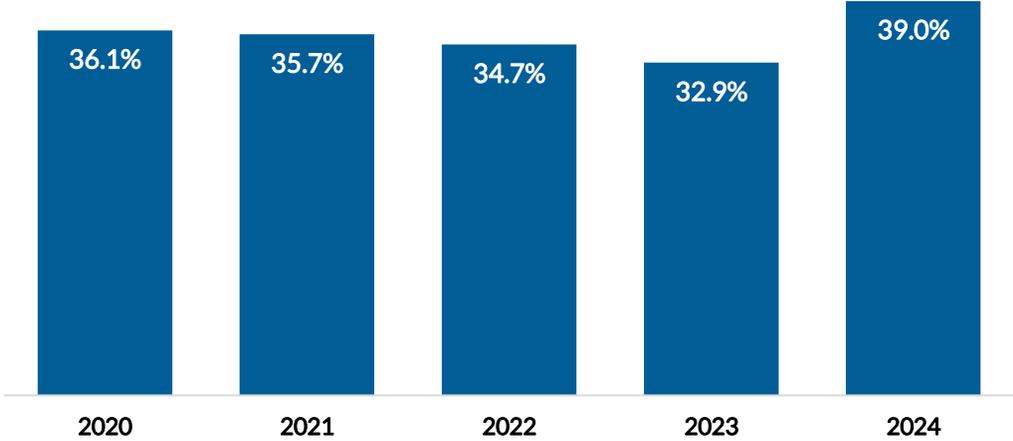


Source: CRTC data collection

## Earnings – wireline operators

The year 2024 saw a notable increase in wireline operators' earnings (EBITDA). However, three companies account for more than 90% of Canada's wireline EBITDA, and in 2024 one company generated significant operating efficiencies that affected its, and the wireline sector's, overall profit margins.

Figure 13: Wireline EBITDA margins (%), 2020 to 2024

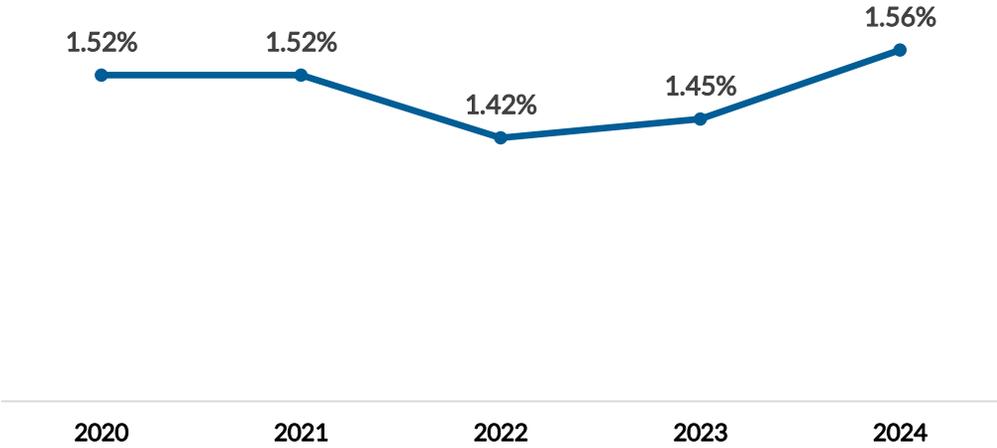


Source: CRTC data collection

## Subscriber turnover

Retail subscriber turnover, also known as retail churn, grew slightly in 2024, particularly for certain large incumbents and independent wholesale-based operators. Other facilities-based operators saw lower churn than the average, and their churn rates are declining.

Figure 14: Retail high-speed Internet subscriber monthly churn (%), 2020 to 2024



Source: CRTC data collection

### 4.3 Prices and Affordability

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

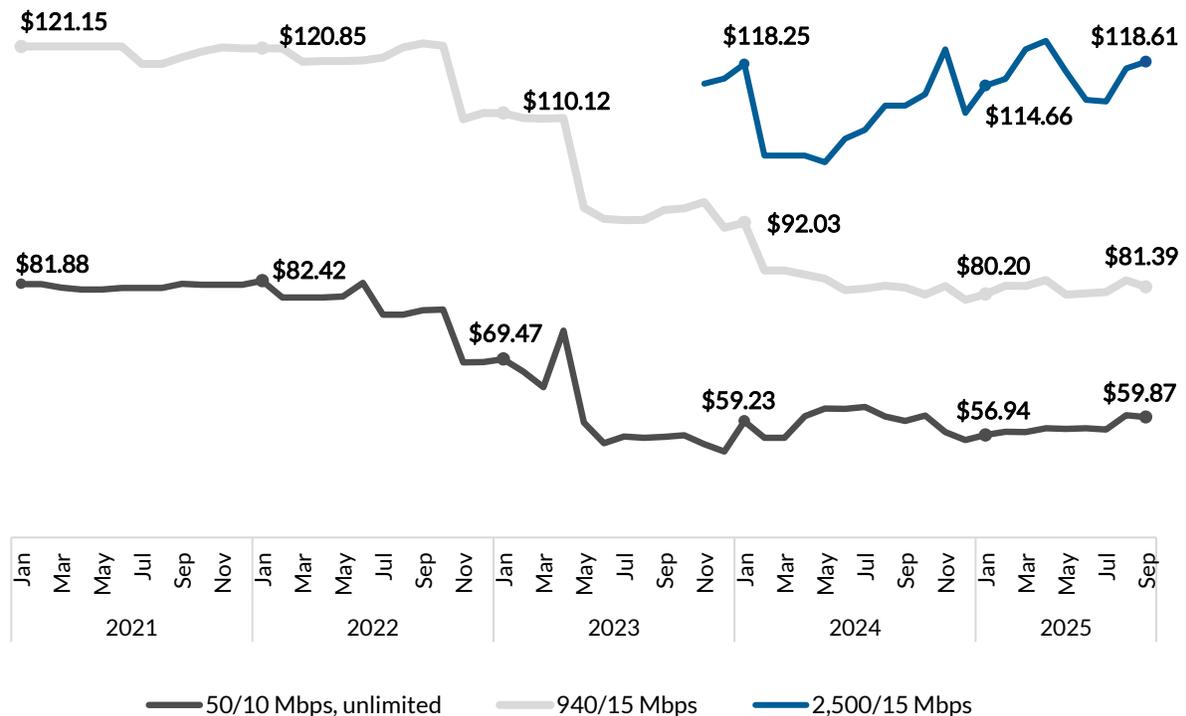
- Prices – for plans of 50 Megabits per second (Mbps) download and 10 Mbps upload with unlimited data (50/10 Mbps unlimited), 940/15 Mbps, and 2,500/15 Mbps
- The Consumer Price Index (CPI) – for all items and Internet services
- Revenue per subscriber, measured as average revenue per user or ARPU
- 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

Internet service prices and the Internet services CPI remained flat in 2024 and well into 2025, while inflation continued to increase. ARPU decreased in 2024 as providers focused on obtaining subscribers with lower priced plans. Public perception on pricing improved over 2024. However, broadband represents an increasing share of household spending, particularly for those with lower incomes.

#### Prices for 50/10, 940/15 and 2,500/15 Mbps speed plans

Internet prices have remained relatively stable until the last quarter of 2025. Higher speed plans have increased over the past year while 50/10 Mbps prices remained flat.

**Figure 15:** Prices for 50/10, 940/15 and 2,500/15 Mbps plans (\$), 2021 to 2025



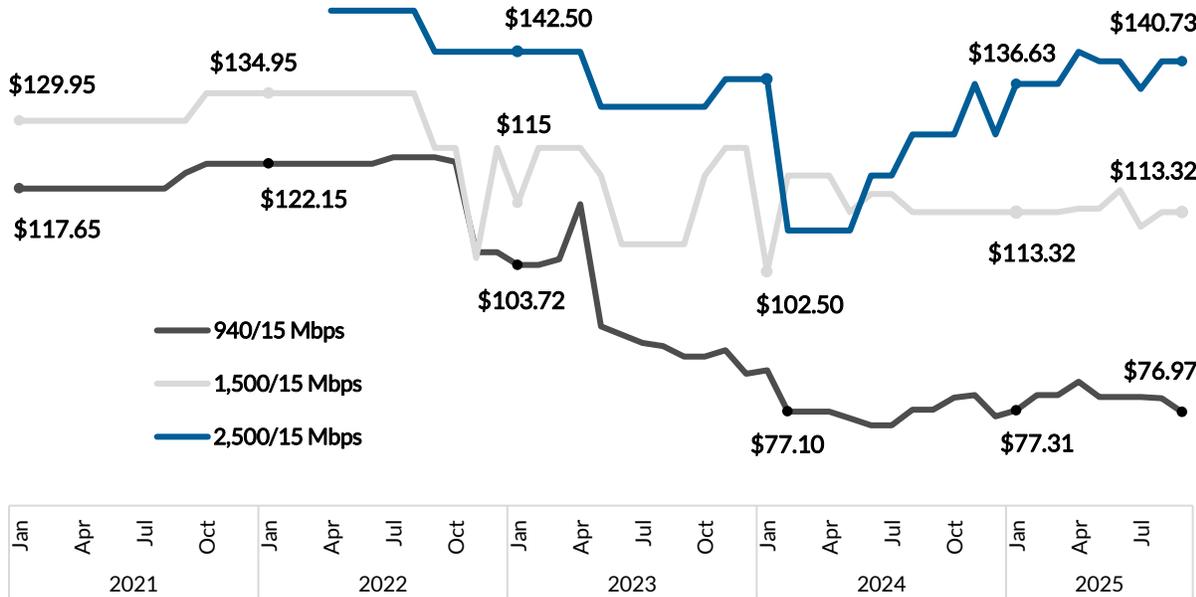
Data labels apply to January each year, with the addition of September 2025.

Source: Statistics Canada

## Spotlight – Market snapshot of Internet prices in Ontario

Prices for high-speed Internet plans in Ontario decreased after November 2023. However, while pricing has remained relatively stable for 940/15 Mbps and 1,500/15 Mbps plans, prices have increased for 2,500/15 Mbps plans since the second quarter of 2024.

**Figure 16:** High-speed Internet plan prices in Ontario, by speed (\$), 2021 to 2025



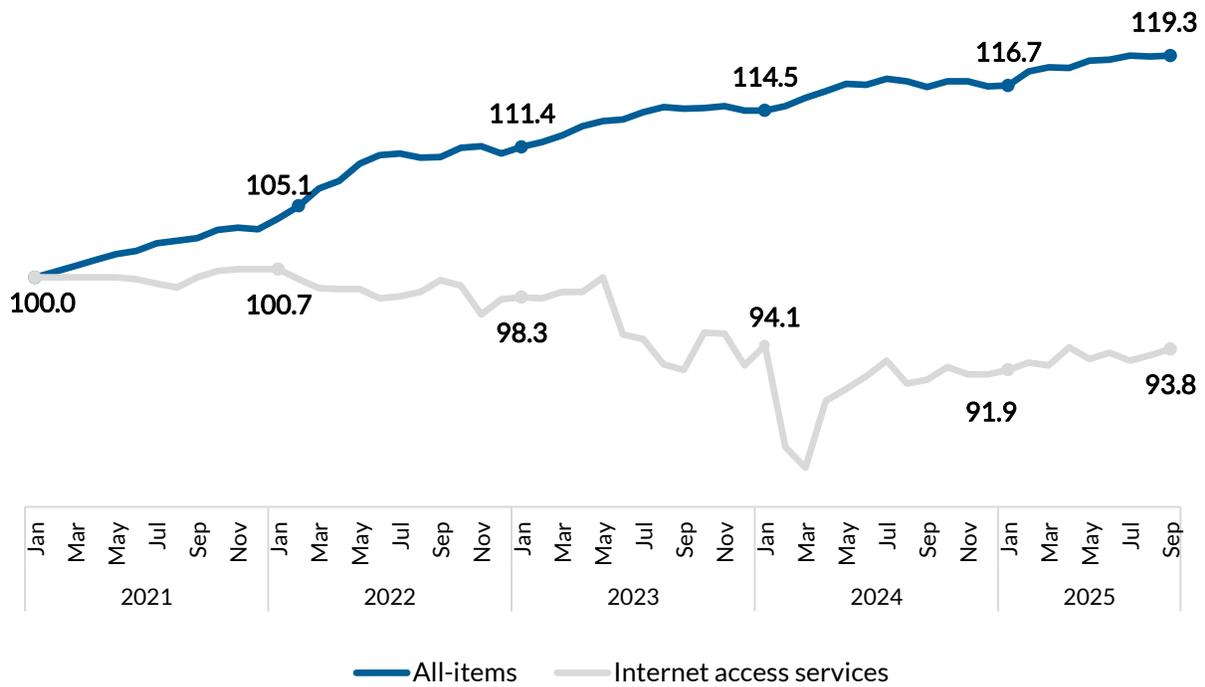
Data labels apply to January each year, with the addition of September 2025.

Source: Statistics Canada

## Consumer Price Index (CPI)

Inflation on average, reflected in the CPI’s “all items” category, continues to rise in Canada. The CPI for Internet access services increased only slightly in 2025.

**Figure 17:** Consumer Price Index – All-items and Internet access services, 2021 to 2025



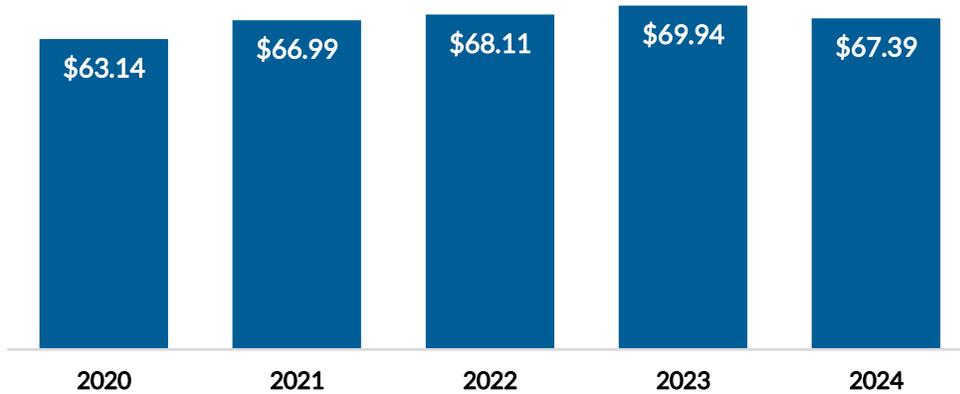
Data labels apply to January each year, with the addition of September 2025. The base period for this chart is January 2021, which may differ from other presentations of the CPI.

Source: Statistics Canada

## Revenue per subscriber

ISPs use Average Revenue per User (ARPU) to understand how revenues evolve on a per-subscriber basis. This enables them to track how pricing strategies drive revenues, and compare their own results to other companies, or other time periods. Internet ARPU declined in 2024 as the number of subscribers increased and revenues flattened; operators appeared to be focused on competing for subscribers with lower prices.

**Figure 18:** Internet ARPU (\$), 2020 to 2024

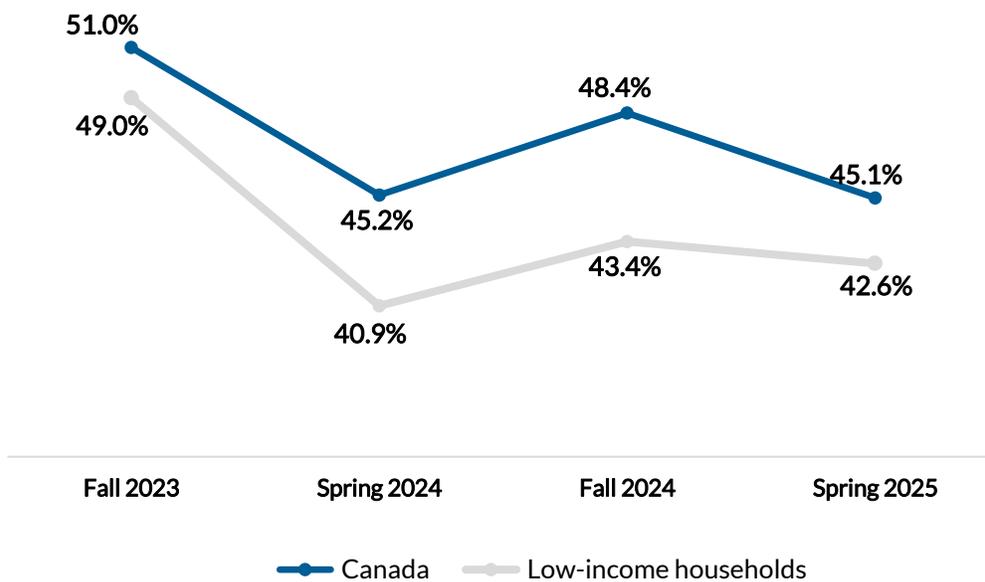


Source: CRTC data collection

## POR – Affordability

Since the launch of the POR tracker survey in 2023, fewer Canadians reported finding that Internet service is becoming less affordable.

**Figure 19:** “Internet services became less affordable over the year” (% of respondents), 2023 to 2025

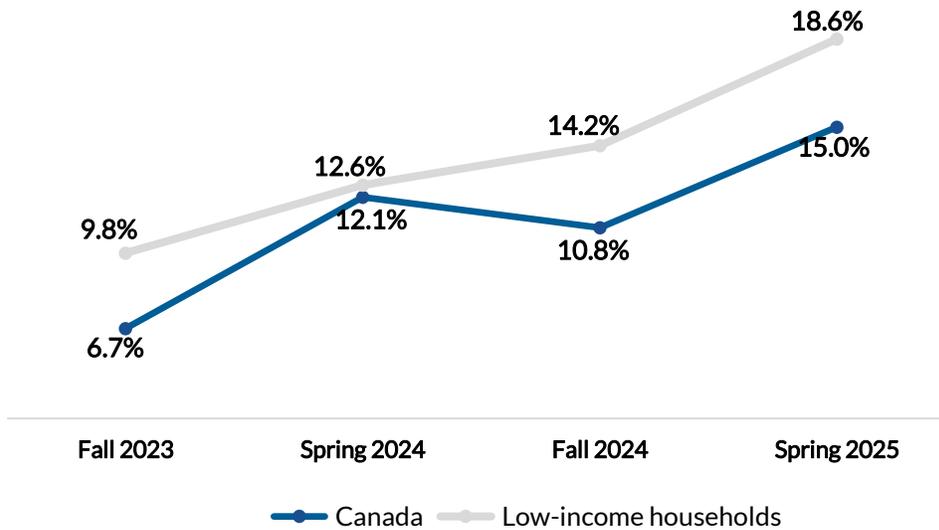


Source: Ipsos, Public Opinion Research Tracker: Baseline Survey, October 2023; Public Opinion Research Tracker: Wave 2, May 2024; Public Opinion Research Tracker: Wave 3, October 2024; and Public Opinion Research Tracker: Wave 4, October 2024, June 2025

## POR – Change to plans

From 2023 through 2025, Canadians have increasingly been making changes to plans to address affordability concerns, especially lower-income Canadians.

**Figure 20:** Made changes to home Internet plan due to affordability this month (% respondents), 2023 to 2025

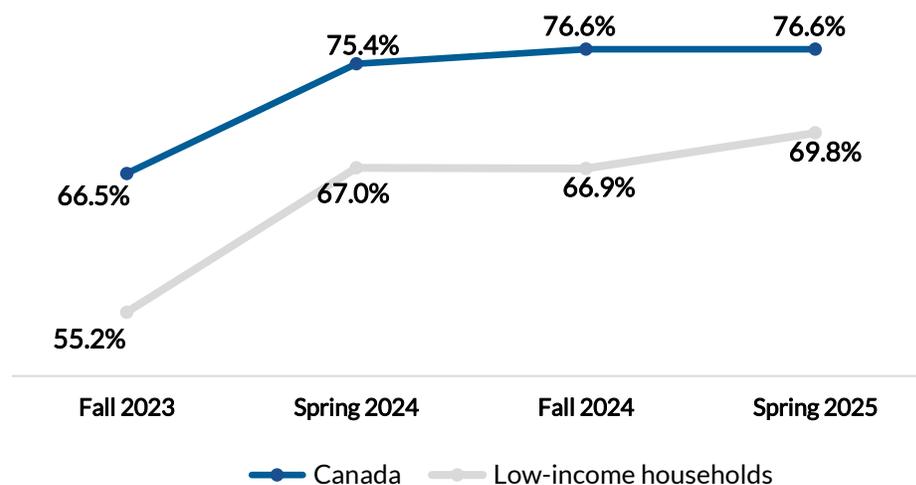


Source: Ipsos, Public Opinion Research Tracker: Baseline Survey, October 2023; Public Opinion Research Tracker: Wave 2, May 2024; Public Opinion Research Tracker: Wave 3, October 2024; and Public Opinion Research Tracker: Wave 4, June 2025

## POR – Confidence in ability to pay

According to the POR tracker survey, a majority of Canadians felt confident that they could pay their Internet bill in 2025. In the lowest income bracket, slightly fewer agreed, but the response was an improvement over past years.

**Figure 21:** Confidence in ability to pay for Internet service over next 3 months (% respondents), 2023 to 2025

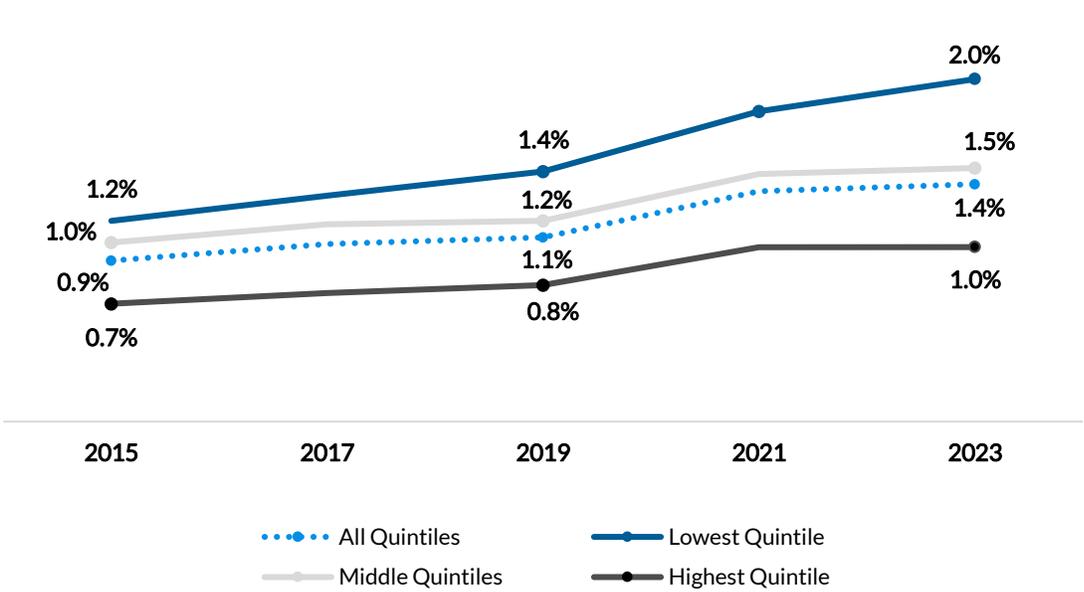


Source: Ipsos, Public Opinion Research Tracker: Baseline Survey, October 2023; Public Opinion Research Tracker: Wave 2, May 2024; Public Opinion Research Tracker: Wave 3, October 2024; and Public Opinion Research Tracker: Wave 4, June 2025

## Spotlight – Comparison of household spending on Internet services

Household spending on Internet services has grown steadily, but the share of spending varies by income level. Households in lower income brackets (or quintiles) spend slightly more of their resources on Internet services than those in the higher quintiles. Canadians are increasingly subscribing to faster (and more expensive) plans; thus, while prices have declined, Canadians have increased their share of spending on Internet services to benefit from faster-speed plans. And, as described earlier, Canadians continue to perceive these plans as affordable.

**Figure 22:** Share of household spending on Internet by income quintile (%), 2015 to 2023



Quintiles are based on level of disposable income.  
 Source: Statistics Canada, Table 11-10-0222-01, 2025

### 4.4 Network coverage

The CTMR reports on the following metrics relating to network coverage and evolution:

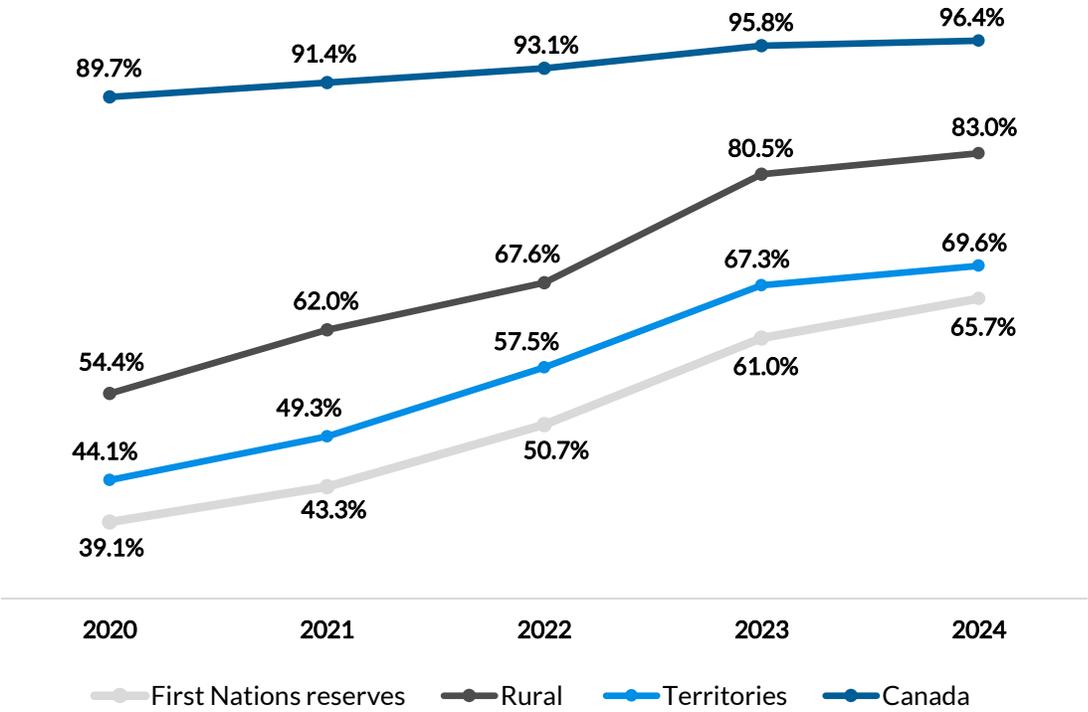
- 50/10 Mbps unlimited service – the proportion of Canadian households that have access to Internet service that meets or exceeds the USO
- Gigabit-speed service – the proportion of Canadian households that have access to Internet service at download speeds of at least one gigabit per second (Gbps)
-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

These metrics, detailed below, illustrate that, while there are still many underserved Canadians, USO-level Internet coverage 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 LEO satellite service and FWA proved to be viable options in sparsely populated areas. The development of an Indigenous stream under the CRTC Broadband Fund can also help fill gaps and empower underserved communities.

## 50/10 unlimited service

More than 96% of Canadians have access to USO-level Internet. Although 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 CRTC’s Broadband Fund and other federal, provincial, territorial, and local initiatives. Rural and First Nations reserve areas are lagging the Canadian average but have seen significant gains in recent years boosted by targeted public and private investments.

**Figure 23:** Households with access to 50/10 Mbps unlimited service (%), 2020 to 2024

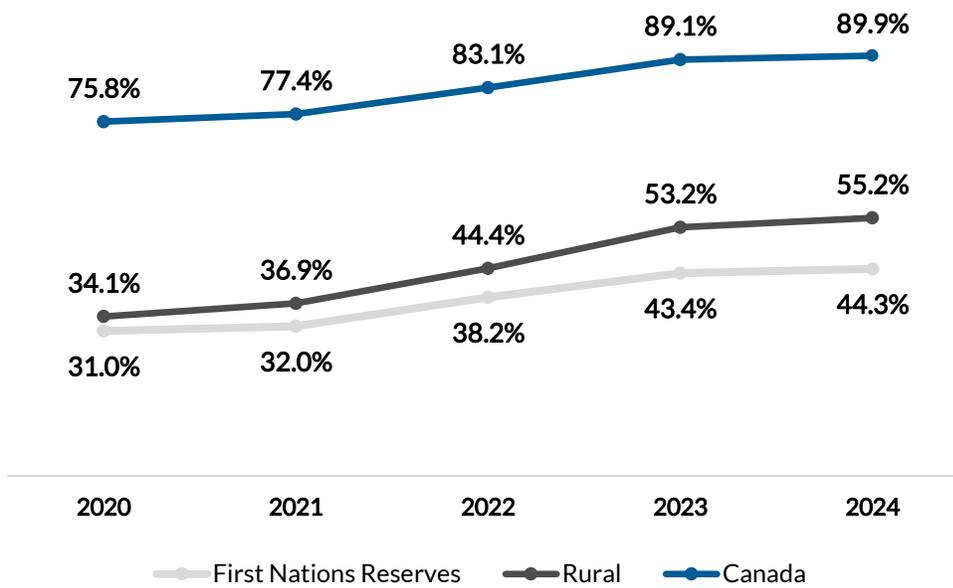


Source: CRTC data collection

## Gigabit-speed service

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

**Figure 24:** Households with access to gigabit-speed service (%), 2020 to 2024

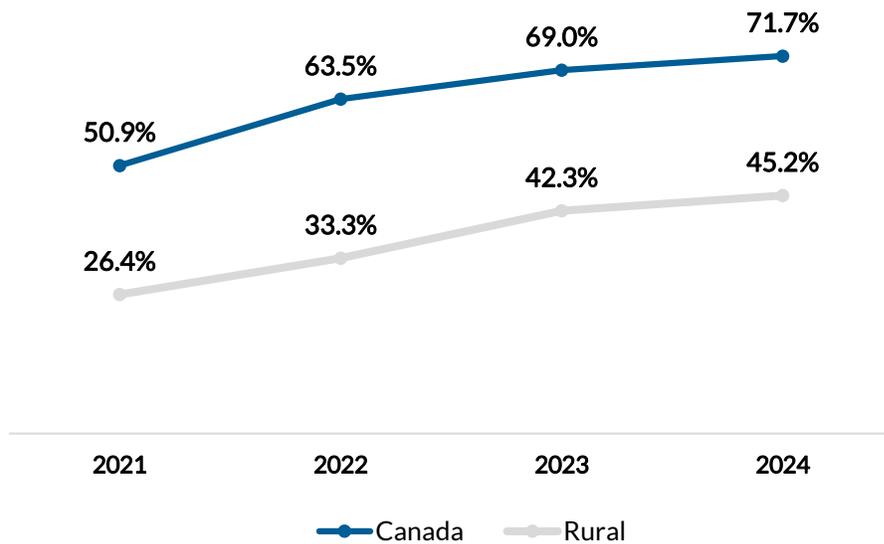


Source: CRTC data collection

### Spotlight – Fibre deployment

Approximately 72% of all households in Canada have access to fibre at home. Fibre coverage at this level is significant, given the geographic scope of the country and the scale of investment needed to cover it.

**Figure 25:** Percentage of total households covered by a fibre network (%), 2021 to 2025

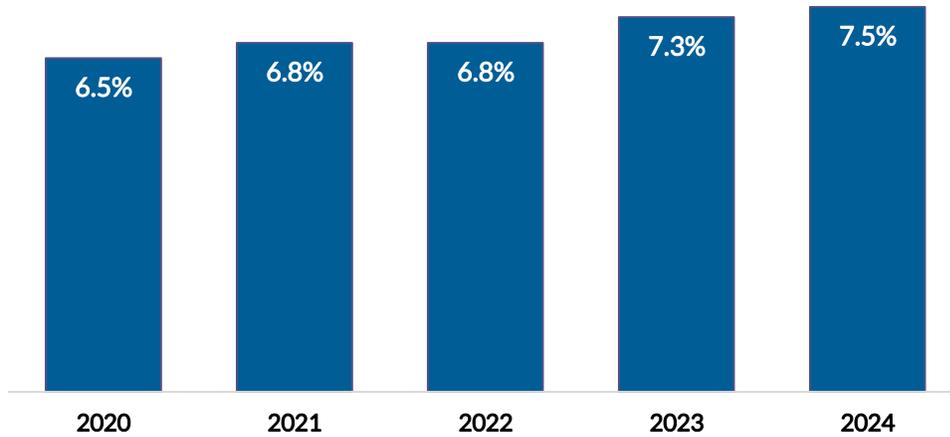


Source: CRTC data collection

### Subscribers to FWA and satellite Internet service

Residential subscriptions to this category continue to increase, with LEO satellite and 5G FWA offering better and faster options to Canadians in rural and remote areas.

**Figure 26:** Total residential Internet access service subscriptions – FWA and satellite (%), 2020 to 2024



Source: CRTC data collection

## 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, Canadians enjoy ever-increasing Internet speeds, and their usage continues to grow. Major outage incidents, and the potential for future weather-related events, underscore the critical importance of reliability. The CRTC's recent decision on notification and reporting of major outages will contribute to improve network reliability and resiliency for Canadians.<sup>2</sup>

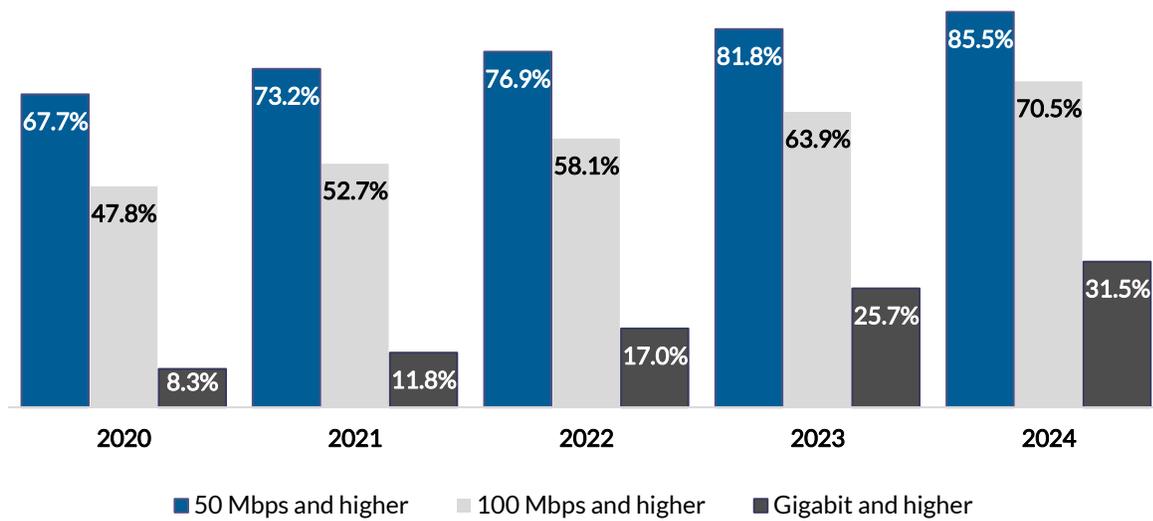
### Percentage of subscribers by plan speeds

Subscribers are increasingly choosing faster plans. Over 85% subscribe to speeds over 50 Mbps. Close to a third subscribed to speeds of one gigabit/s and over at the end of 2024, an increase of 23 percentage points since 2020.

---

<sup>2</sup> See Telecom Decision [CRTC 2025-225](#), *Mandatory notification and reporting about major telecommunications service outages*.

**Figure 27:** Subscribers by download speed (%), 2020 to 2024

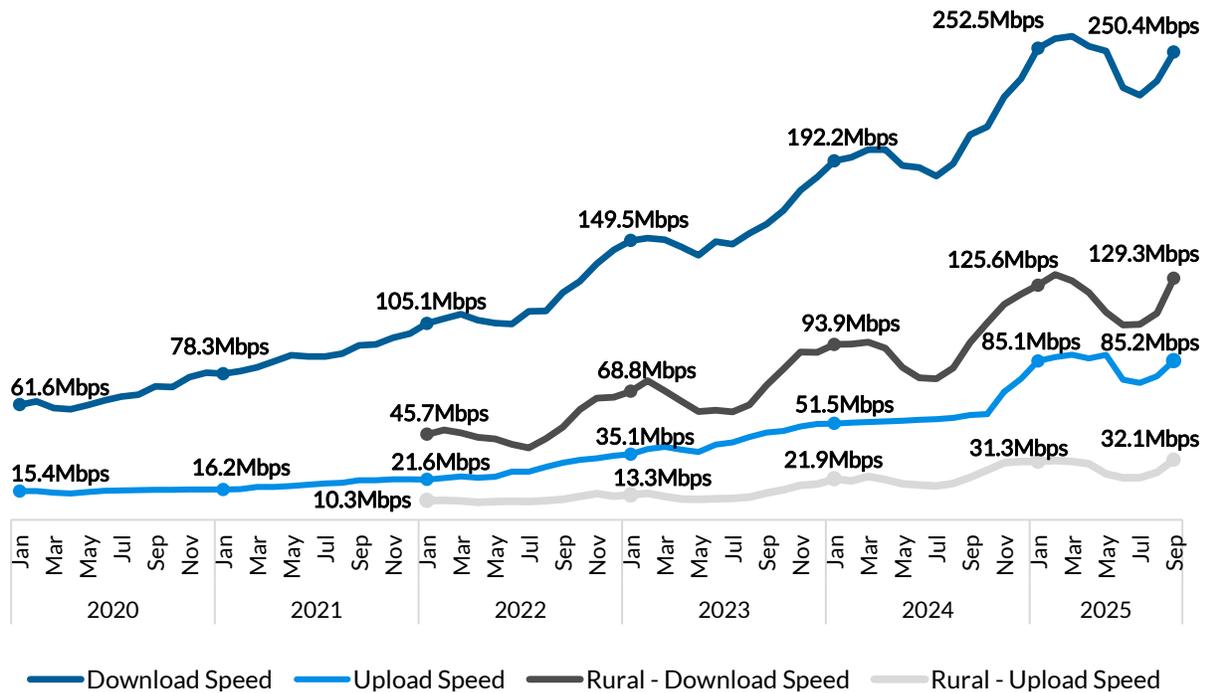


Source: CRTC data collection

### Median download and upload speeds

Average upload speeds have increased by around 30% annually since 2020. Upload speeds increased even more due to the deployment of fibre (which is typically offered with faster and more symmetrical upload and download speeds).

**Figure 28:** Median download and upload speeds in Canada and rural areas (in Mbps), 2020 to 2025

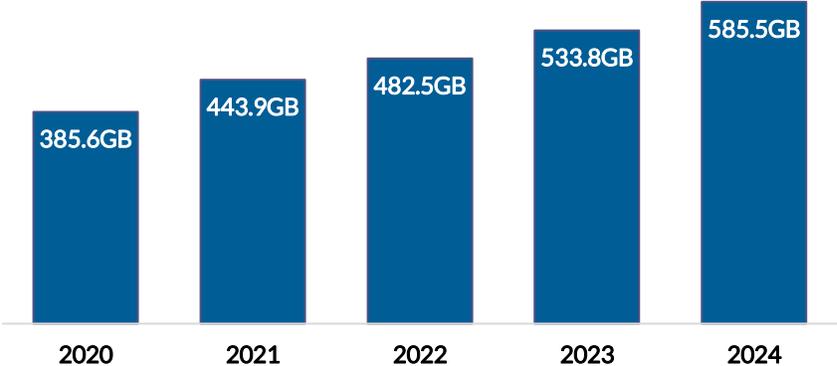


Source: Based on CRTC analysis of Ookla, Speedtest Intelligence®

# Monthly data consumption

Monthly data consumption has grown by more than 10% annually since 2020 (for both download and upload) as Canadians sign up for faster plans to accommodate more bandwidth-intensive uses like streaming high-definition video.

**Figure 29:** Average monthly data usage (download and upload) by residential Internet subscribers (in GB), 2020 to 2024

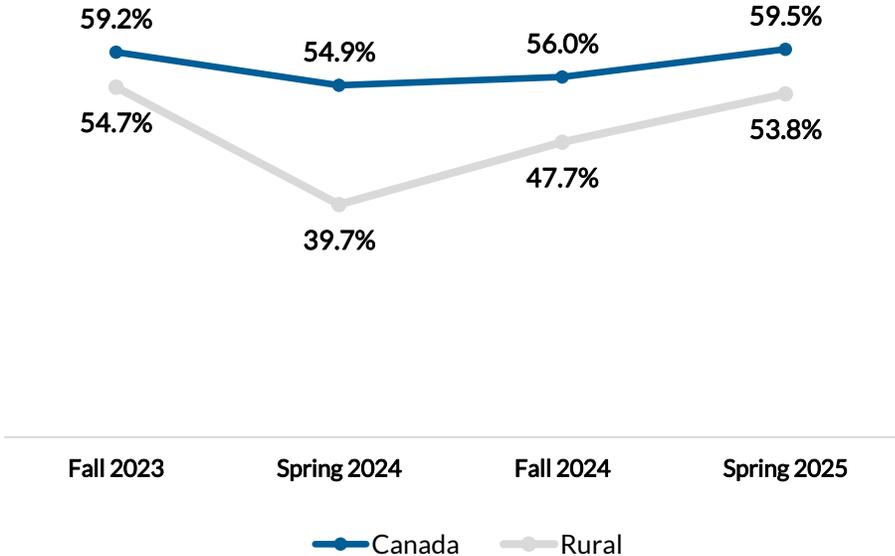


Source: CRTC data collection

# Canadians' perspectives on the reliability of home Internet service

A majority of respondents to the POR tracker survey consider that their broadband service is reliable. A smaller share of respondents in rural areas perceive that their broadband service is reliable, but the gap is narrowing.

**Figure 30:** "I can count on a reliable high-speed network where I live" (% of respondents), 2023 to 2025

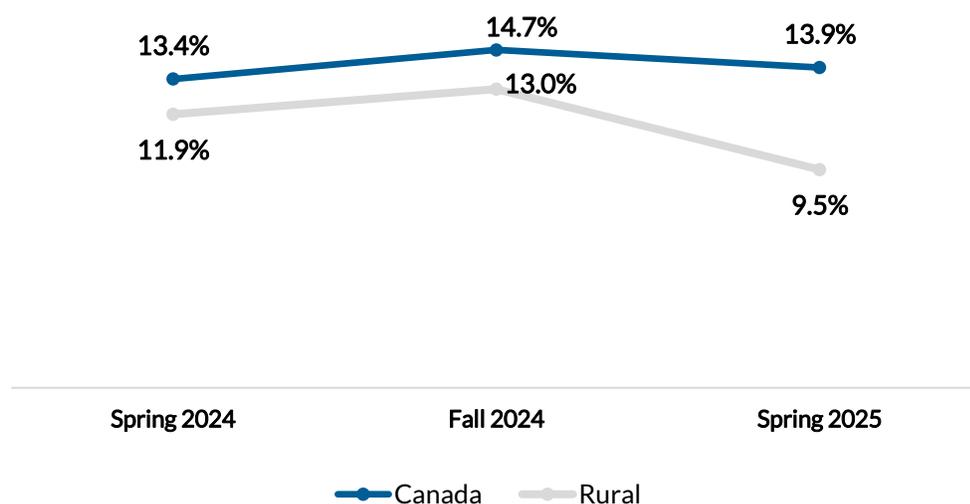


Source: Ipsos, Public Opinion Research Tracker: Baseline Survey, October 2023; Public Opinion Research Tracker: Wave 2, May 2024; Public Opinion Research Tracker: Wave 3, October 2024; and Public Opinion Research Tracker: Wave 4, June 2025

## Canadians' experience of home Internet service outages

In the POR, Canadians are asked whether they have experienced outages of 24 hours or more in their home Internet service. The research shows some regional variations in terms of outages experienced. The proportion of respondents in rural areas who report experiencing major service outages remains lower than the Canadian average. It is possible that rural Canadians experience more frequent, shorter service interruptions, slower home Internet speeds or other network quality concerns, rather than major outages of 24 hours or more. As service providers submit mandatory reports on major outages, as required under the CRTC's fall 2025 decision (Telecom Decision CRTC 2025-225), which will give the CRTC greater insight into Canadians' experience of major telecommunications service disruptions.

**Figure 31:** Consumers experiencing a home Internet service outage of 24 hours or longer (% of respondents), 2024 to 2025



Source: Ipsos, Public Opinion Research Tracker: Wave 2, May 2024; Public Opinion Research Tracker: Wave 3, October 2024; and Public Opinion Research Tracker: Wave 4, June 2025

## 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:

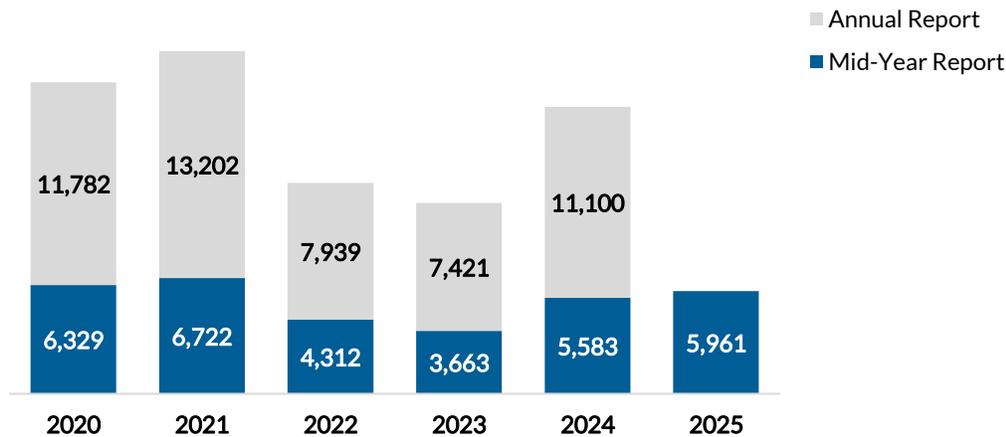
- CCTS Internet-related issues raised in complaints
- Canadians' likelihood of recommending their Internet provider, as expressed in the Net Promoter Score (NPS)
- Canadians' perceptions of choice of home Internet providers

Overall, perceptions of choice have slightly improved, but opinions about Internet providers have declined. Internet NPS has declined slightly since last year, showing that Canadians are more hesitant to recommend their ISP. The three largest operators have among the lowest NPS results, while certain regional providers consistently have the highest. Issues reported to the CCTS, particularly around billing and service quality, continue to rise. The ongoing CRTC proceeding to improve customer awareness of the CCTS could help Canadians feel more in control when resolving complaints. Other regulatory proceedings on updating consumer codes and improving information available to consumers for home Internet plans, could make it easier for Canadians to compare and switch providers.

## CCTS Internet-related issues

Internet issues reported to the CCTS rose in 2025. The most common issues raised by Canadians were incorrect charges and problems with intermittent service (such as slower-than-expected speeds).

**Figure 32:** CCTS Internet-related issues, 2020 to 2025

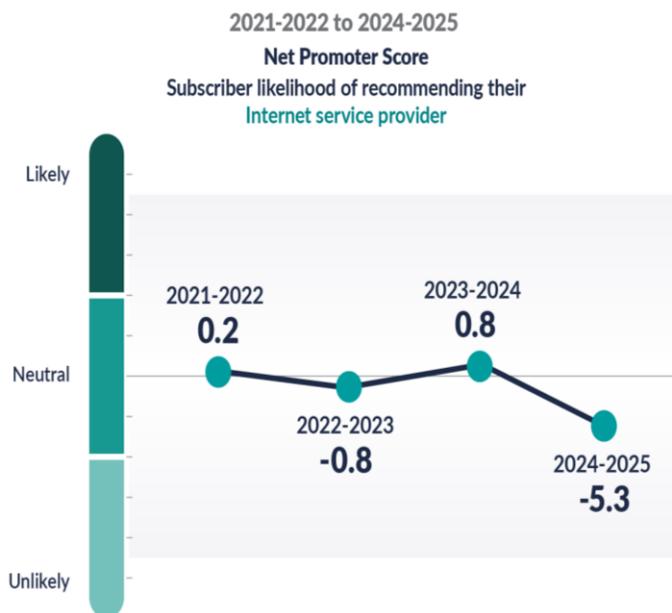


Source: CCTS Annual and Mid-Year Reports

## Net Promoter Score (NPS)

The NPS declined slightly since last year, suggesting that Canadians are hesitant to recommend their ISP. Customers of secondary brands that belong to major providers (known in the industry as “flanker brands”) continue to report significantly higher NPS than those of their main-brand counterparts, while Quebec remains the region with consistently high NPS compared with other parts of Canada.

**Infographic 4:** Subscriber likelihood of recommending their Internet service provider, 2021-22 to 2024-25

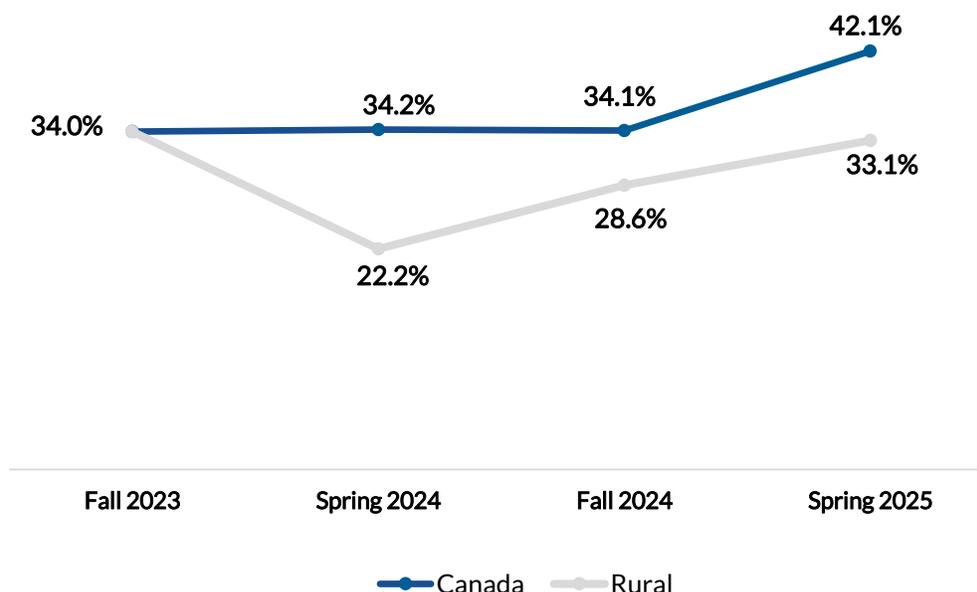


Source: MTM 18+ (combined fall and spring data)

## Canadians' perspectives on their choice of home Internet providers

More Canadians feel they have sufficient choice of Internet providers. This perception has grown among urban residents since fall 2023, while rural Canadians remain more neutral.

**Figure 33:** "I feel I have enough choice of Internet service providers where I live" (%), 2023 to 2025



Source: Ipsos, Public Opinion Research Tracker: Baseline Survey, October 2023; Public Opinion Research Tracker: Wave 2, May 2024; Public Opinion Research Tracker: Wave 3, October 2024; and Public Opinion Research Tracker: Wave 4, June 2025

## 5. Perspectives on mobile wireless services

In 2024, while mobile wireless revenues and subscribers were at their highest levels in five years, growth rates began to flatten. Together with the flattening of capital investment, and moving towards the later stages of 5G deployment, these developments suggest that Canada's increasingly mature wireless market could be entering a period of transition.

While Canada's three largest mobile operators continued to make up 90% of the national market, new competitors were responsible for over 55% of mobile subscribers added in 2024 – a trend that was evident in the Maritimes and western Canada, as well Quebec and Ontario.

After declining for several years, the price of mobile services remained essentially flat in 2024. Prices for higher-end mobile plans (100 GB) and lower-end plans (10 GB) decreased between 2% to 3%, while 50 GB plans increased 1.5% since 2023. Revenue per user also declined from 2023 to 2024, and the drop in mobile revenue was even clearer when the cost of phone purchases was excluded from ARPU.

Public perception of affordability in mobile services generally improved, with Canadians showing greater confidence in their ability to pay for such services, or else switch to more affordable (or otherwise preferable) options. This is significant, since Canadians have become more avid users of data, and the share of mobile subscribers with 50 GB or more of data has tripled since 2022.

Although mobile service has been described as nearly universal in Canada, more accurate measurement tools will help to identify remaining gaps in coverage. To address this need, in 2026 the CRTC is conducting a proceeding to establish a mobile coverage reporting standard.

Canadians said they found their mobile networks to be more reliable in 2025 than in previous years, and this was particularly evident in rural Canada. Consumer satisfaction continues to vary among different providers and different parts of the country, with the greatest share of issues being directed at the largest providers. Perceptions of choice have also improved, and consumers are able to switch mobile plans or providers more easily now, to find better options in the market.

### 5.1 Market size and investment

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

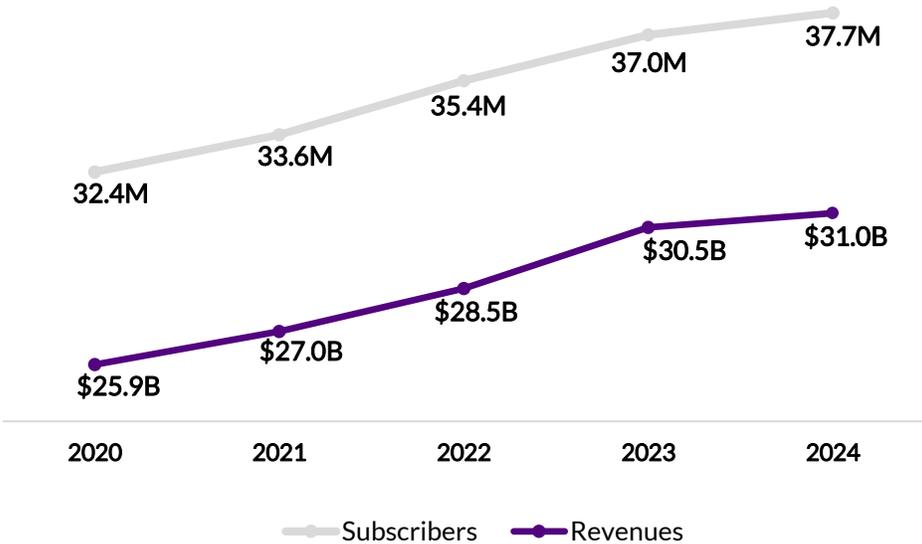
- Retail mobile phone subscribers and revenues
- Investments in wireless networks, measured in terms of wireless CAPEX and capital intensity
- Investments on a per-subscriber basis, measured in terms of average wireless CAPEX per user

Mobile wireless revenues and subscriber levels continued to increase in 2024. However, revenue growth is beginning to slow and CAPEX per user is declining, which suggests the market may be starting to shift. Several regional competitors have entered into wholesale MVNO access agreements with national operators, leading to subscriber gains for these competitors. In 2024, a little over half of new mobile wireless subscribers chose providers outside the three national operators.

#### Retail mobile phone subscribers and revenues

Retail mobile phone subscriptions grew in 2024, though revenue growth slowed. Two of the largest national carriers saw modest or no gains, while regional operators drove much of the subscriber growth.

**Figure 34:** Retail mobile phone subscribers (millions) and revenues (\$ billions), 2020 to 2024

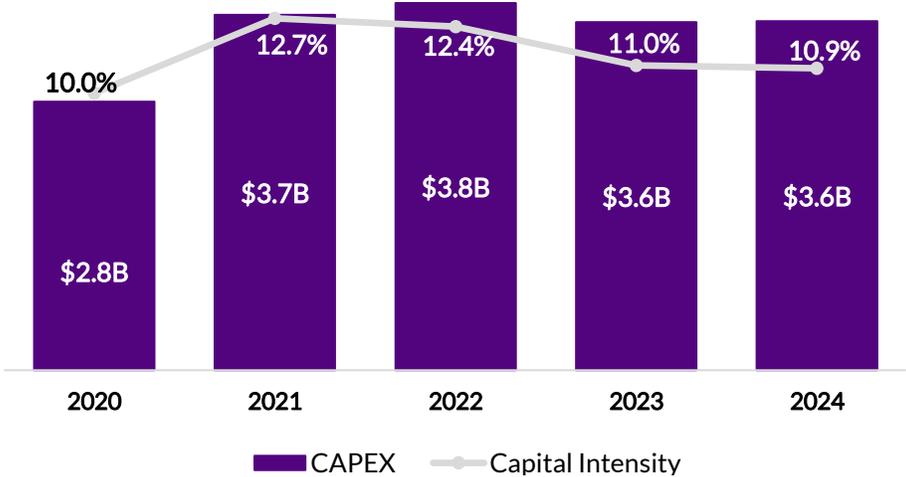


Source: CRTC data collection

## Investments in wireless networks

Wireless CAPEX has remained stable in the past two years and close to the 2022 peak. Wireless investments could be tapering as operators report nearly all of the population has 5G coverage. Meanwhile, capital intensity slightly declined in 2024, resulting from higher total wireless revenues.

**Figure 35:** Wireless CAPEX (\$ billions) and capital intensity (%), 2020 to 2024

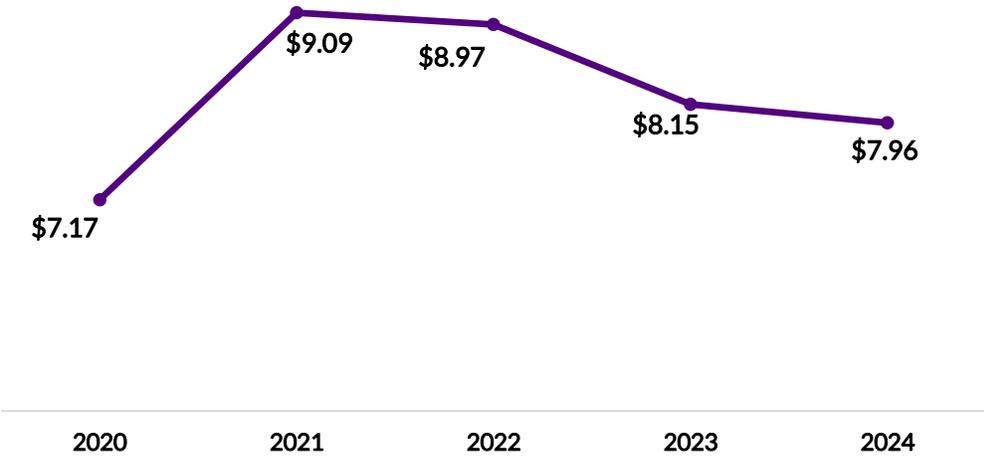


Source: CRTC data collection

## Average wireless network investment per user

Average monthly CAPEX per user peaked in 2021 and steadily declined through 2024, as subscriber levels continued to grow while overall CAPEX remains relatively stable.

**Figure 36:** Average wireless CAPEX per user (\$), 2020 to 2024



Source: CRTC data collection

## 5.2 Competitive intensity

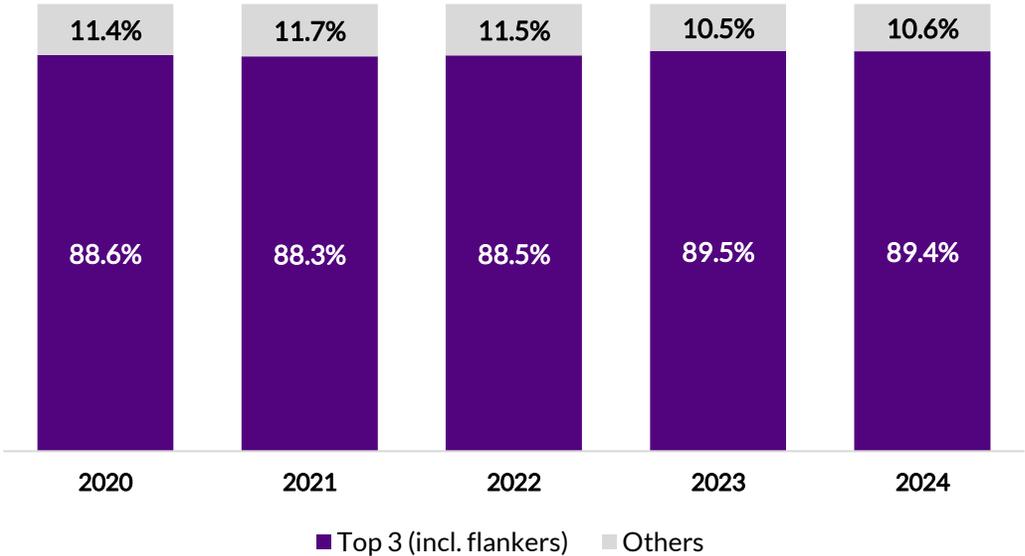
In mobile wireless service, as with Internet service, a focus on competitive intensity means Canadians can benefit from choice among operators that compete effectively and sustainably in the market. The CRTC uses metrics relating to revenue and subscriber share, profit margins, and subscriber turnover to assess competition in the mobile wireless service market.

Most Canadians are served by the three national mobile wireless service providers, and many Canadians can also choose from providers serving specific regions or markets. While 2024 saw the national operators continue to claim a dominant share of mobile wireless service revenue, their share of subscribers declined slightly. Regional competitors appear to be claiming more subscribers, using a strategy that includes differentiation through lower pricing. A slight increase in subscriber turnover in 2024 could be a further signal of Canadians switching to certain regional competitors. The CRTC will monitor the evolution of competition through the MVNO service.

### Revenue share

Revenues remain concentrated among the Top 3 operators. Revenue share is more concentrated than subscriber share, which suggests that these operators generate higher revenue per subscriber than their competitors.

**Figure 37:** Revenue share – Top 3 operators compared to other operators (%), 2020 to 2024

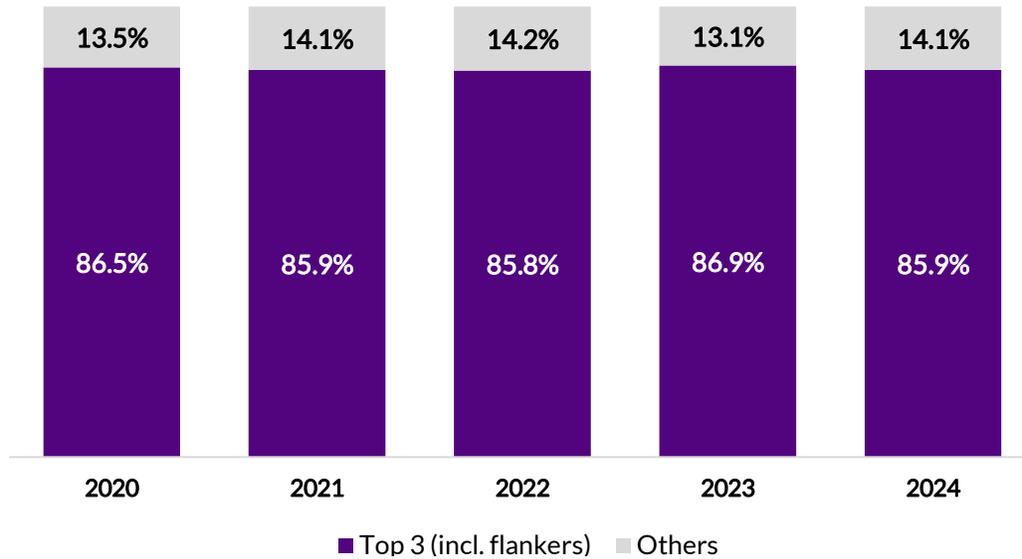


Source: CRTC data collection

### Subscriber share

The share of subscribers to the three largest operators has remained relatively unchanged over the past 5 years at the national level. Given take-up of the MVNO service in 2024 and MVNO operators gaining subscribers in large markets, national market concentration could decline in 2025.

**Figure 38:** Subscriber share – Top 3 operators compared to other operators (%), 2020 to 2024

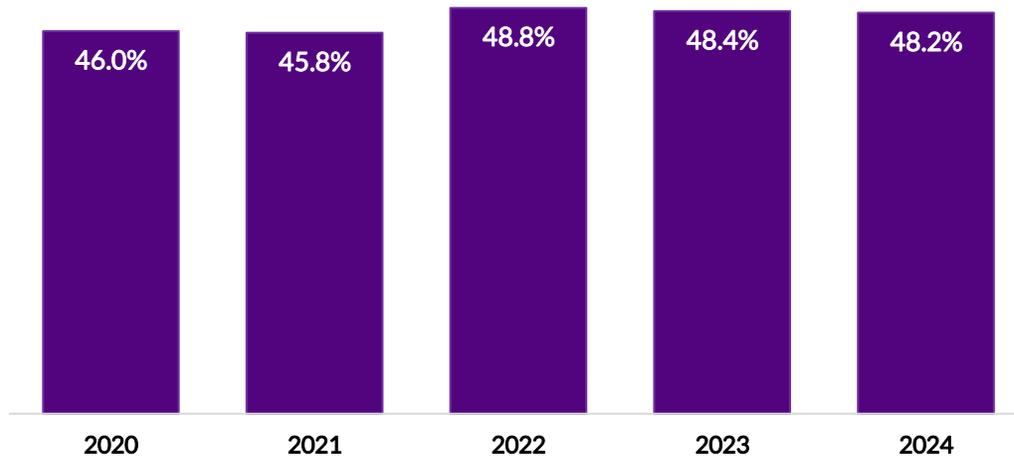


Source: CRTC data collection

## Earnings – wireless operators

Earnings of wireless operators have been flat since 2022. The three largest operators account for over 90% of wireless EBITDA.

**Figure 39:** Wireless EBITDA margins (%), 2020 to 2024

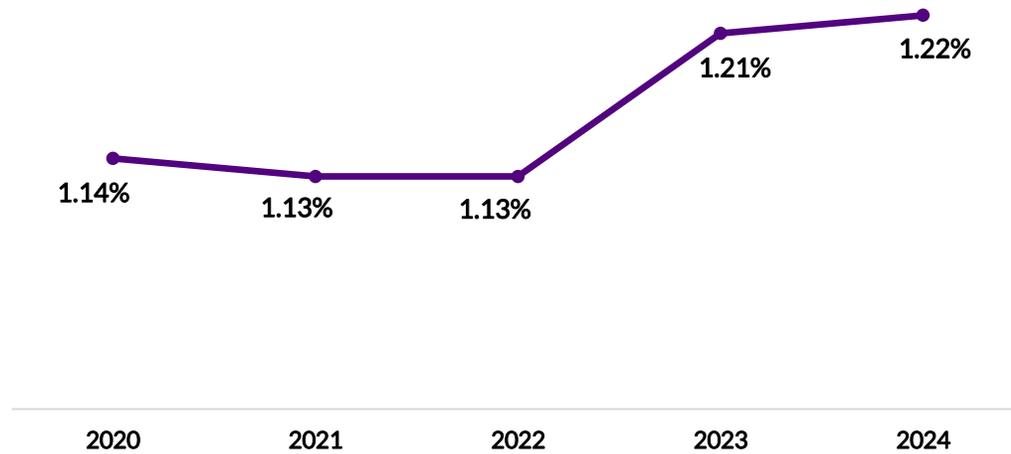


Source: CRTC data collection

## Subscriber turnover

Mobile phone service subscriber turnover, or churn, increased slightly in 2024. Certain national operators and their flanker brands account for most of this increase, while most regional operators have lower-than-average churn.

**Figure 40:** Retail mobile phone subscriber monthly churn (%), 2020 to 2024



Source: CRTC data collection

### 5.3 Prices and affordability

Prices for all services, should be reasonable for Canadians' needs, and Canadians at all income levels should have affordable service options. The CRTC looks at prices and affordability using the following indicators:

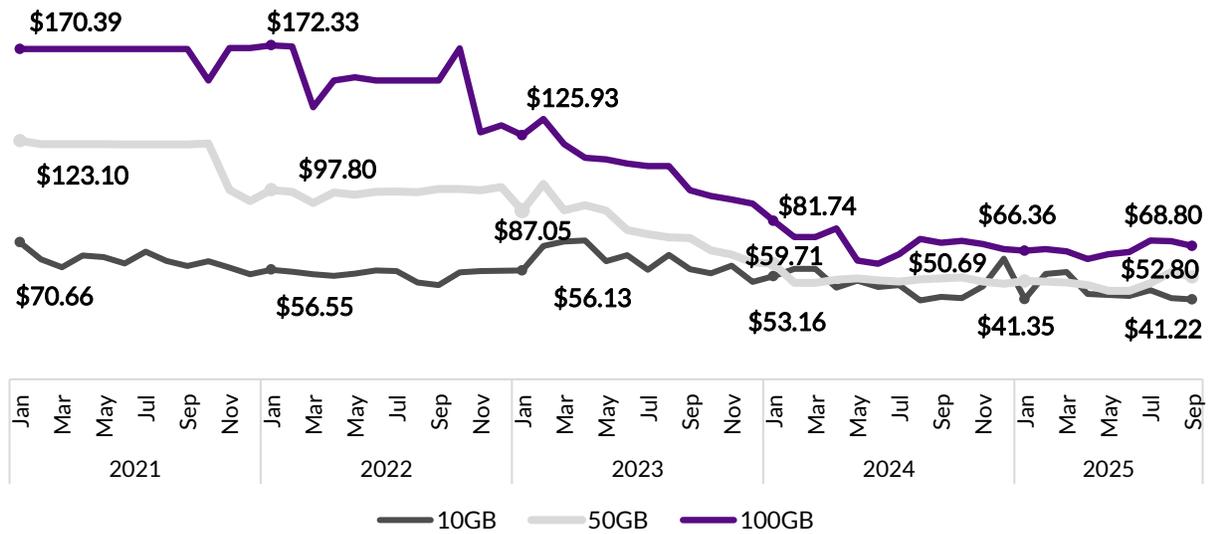
- Prices – for plans with 10 GB, 50 GB and 100 GB of data
- CPI – All-items and cellular services
- Revenue per subscriber, measured as average revenue per user (ARPU), with and without mobile wireless devices
- Mobile operators' revenue per GB of data consumed by subscribers
- POR on perceived affordability
- POR on consumers changing their cellular plans due to affordability concerns
- POR on Canadians' confidence in their ability to pay for cellular service

Cellphone plan prices either declined or remained flat over the past year and are still significantly lower than they were in early 2021, despite rising inflation. As ARPU and mobile plan prices decreased in 2024, however, device costs have increased. Canadians are also opting for plans with more data allowances. The result is that Canadians' spending on mobile services and devices is increasing, while the plans themselves have become less expensive. Against this backdrop, public perception of mobile prices continued to improve in 2024.

#### Prices for 10 GB, 50 GB and 100 GB plans

The price gap between 10 GB, 50 GB and 100 GB plans has narrowed since 2021, and plan prices have declined slightly since 2024. The larger data plans are increasingly popular with consumers.

**Figure 41:** Monthly prices for 10 GB, 50 GB and 100 GB plans (\$), 2021 to 2025

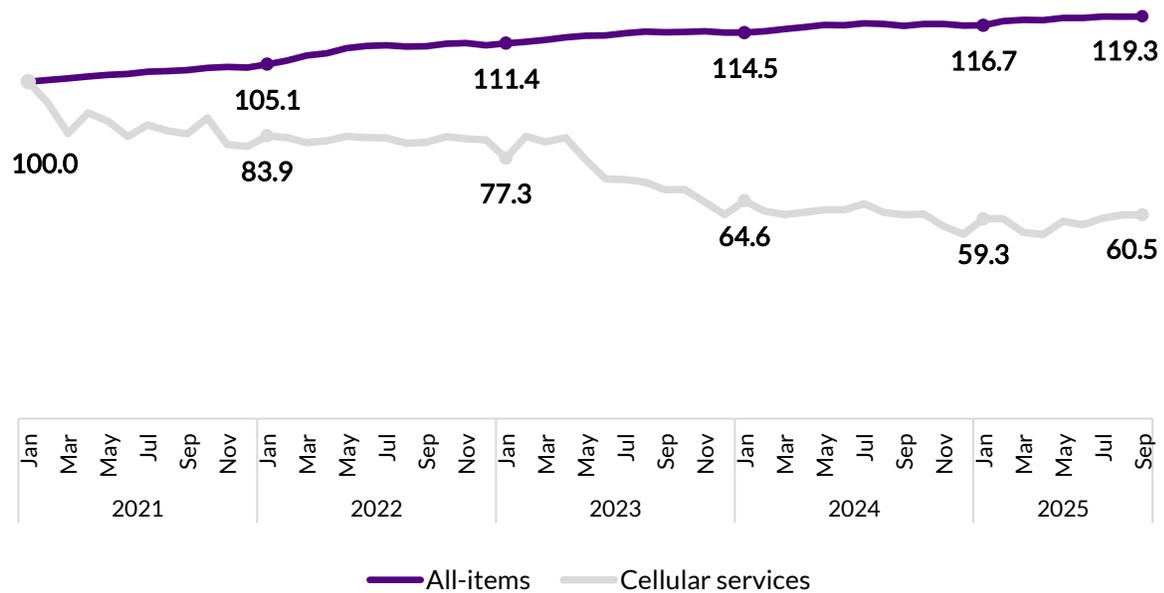


Data labels apply to January each year, with the addition of September 2025.  
Source: Statistics Canada

## Consumer Price Index (CPI)

The cellular services CPI declined from 2023 to 2024 and has remained relatively stable since then, despite inflation rising. The cellular services CPI trend is consistent with declining ARPU, described further below.

**Figure 42:** Consumer Price Index - All-items and cellular services, 2021 to 2025

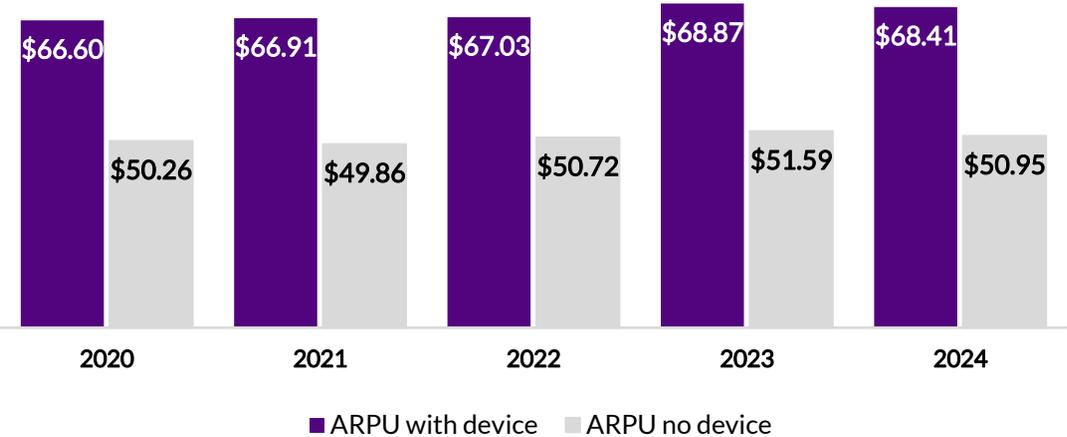


Data labels apply to January each year, with the addition of September 2025. The base period for this chart is January 2021, which may differ from other presentations of the CPI.  
Source: Statistics Canada

## Revenue per subscriber

Smartphone (device) costs have a significant impact on mobile ARPU. In 2024, ARPU including smartphones was \$68.41, while without devices it was approximately \$51. Thus, ARPU was over one-third higher when devices were included. ARPU with and without device costs decreased in 2024 compared to 2023.

**Figure 43:** Mobile phone ARPU, with and without device cost (\$), 2020 to 2024

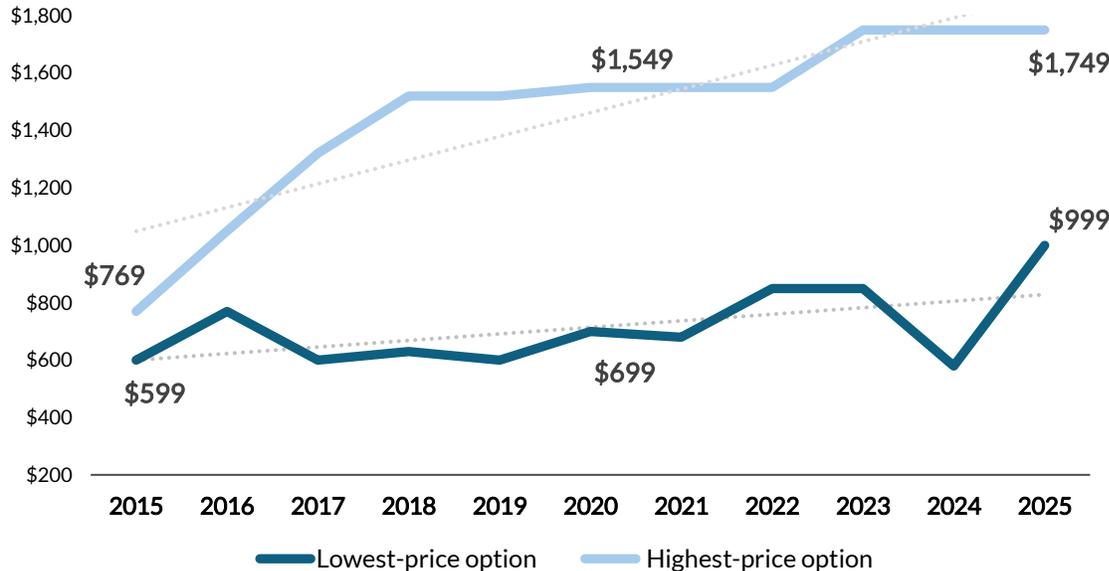


Source: CRTC data collection

## Spotlight – Prices of smartphones in Canada

While device prices are not regulated by the CRTC, the CRTC observes that mobile device prices have been increasing since 2015, especially for iPhones. The prices for the most expensive iPhones have stabilized in recent years while prices for the least expensive iPhones have increased. In 2025, some 58% of cellphone owners in Canada owned an iPhone, according to the MTM.

**Figure 44:** Prices of a new mobile phone in Canada (\$), 2015 to 2025



Sources: Apple website; MTM 18+

## Revenue per GB

Operators' average revenue per GB consumed by subscribers decreased more than 20% in 2024. The trend is consistent for all provider types; it reflects stable or declining plan prices combined with Canadians subscribing to plans with larger data allowances. For the largest three providers, average revenue per GB was \$4.50 in 2024.<sup>3</sup>

Figure 45: Revenue per GB of data, Top 3 and other providers (\$), 2020 to 2024



Revenue per GB for providers other than the Top 3 increased in 2023, as some of these other providers shifted their revenue from voice services to data services.

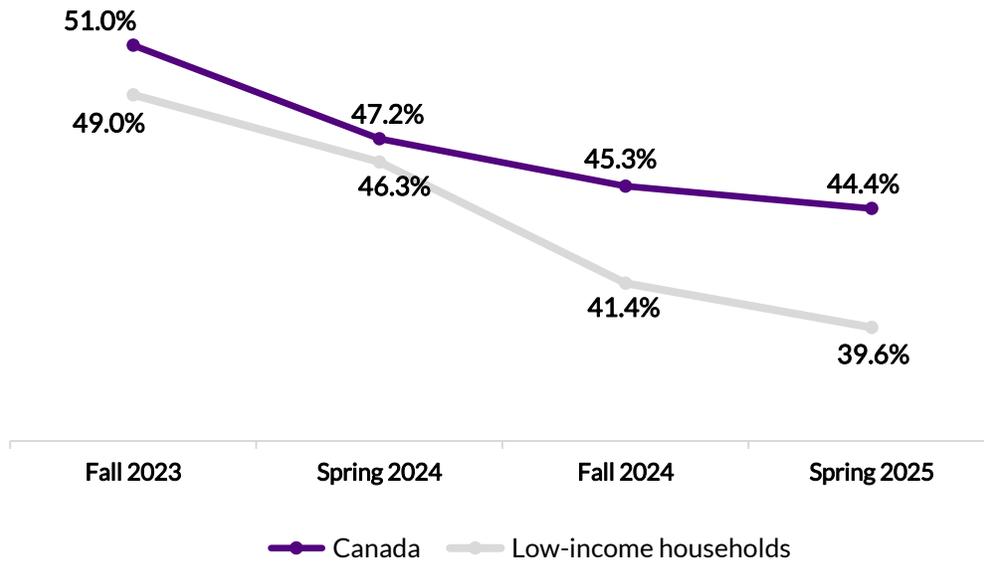
Source: CRTC data collection

## POR – Affordability

In 2025, the proportion of Canadians who said that cellular service is becoming less affordable fell to 44%. Only 40% of low-income Canadians agreed that services were becoming less affordable, over nine percentage points lower than in 2023.

<sup>3</sup> In Telecom Decision [CRTC 2024-233](#), revenue per GB was identified as a relevant benchmark to discussions about consumer costs, including roaming. See Section 6 for additional insights on Canadians' use of mobile roaming services.

**Figure 46:** “Cellular services became less affordable over the past year” (% of respondents), 2023 to 2025

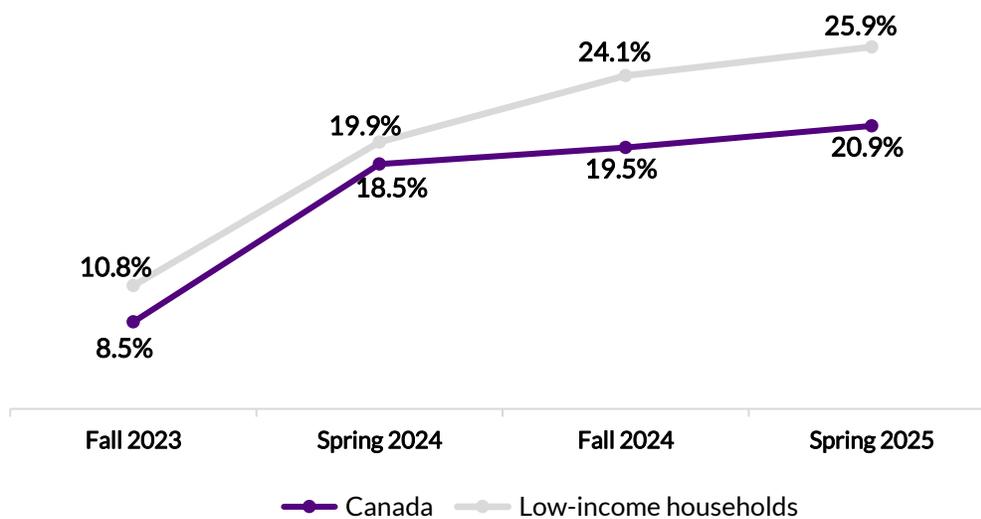


Source: Ipsos, Public Opinion Research Tracker: Baseline Survey, October 2023; Public Opinion Research Tracker: Wave 2, May 2024; Public Opinion Research Tracker: Wave 3, October 2024; and Public Opinion Research Tracker: Wave 4, June 2025

## POR – Change to plans

Since the launch of the POR tracker survey in fall 2023, Canadians have become more than twice as likely to change their cellphone plans due to affordability. At the same time, as shown earlier in this report, the churn rates reported by mobile wireless operators have also increased since 2020, showing Canadians’ increasing propensity to switch plans or providers.

**Figure 47:** Made changes to cellular services due to affordability this month (% respondents), 2023 to 2025

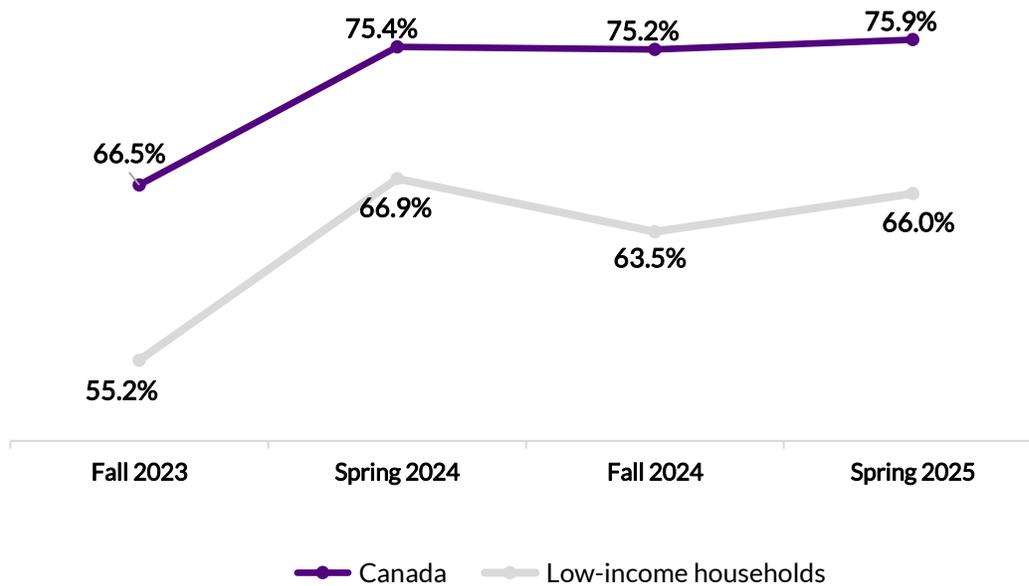


Source: Ipsos, Public Opinion Research Tracker: Baseline Survey, October 2023; Public Opinion Research Tracker: Wave 2, May 2024; Public Opinion Research Tracker: Wave 3, October 2024; and Public Opinion Research Tracker: Wave 4, June 2025

## POR – Confidence to pay

In spring 2025, nearly 76% of Canadians were confident they could pay their cellphone bill, while only 66% in the lowest income bracket agreed with this statement.

**Figure 48:** Confidence in ability to pay for cellular services over next 3 months (% respondents), 2023 to 2025



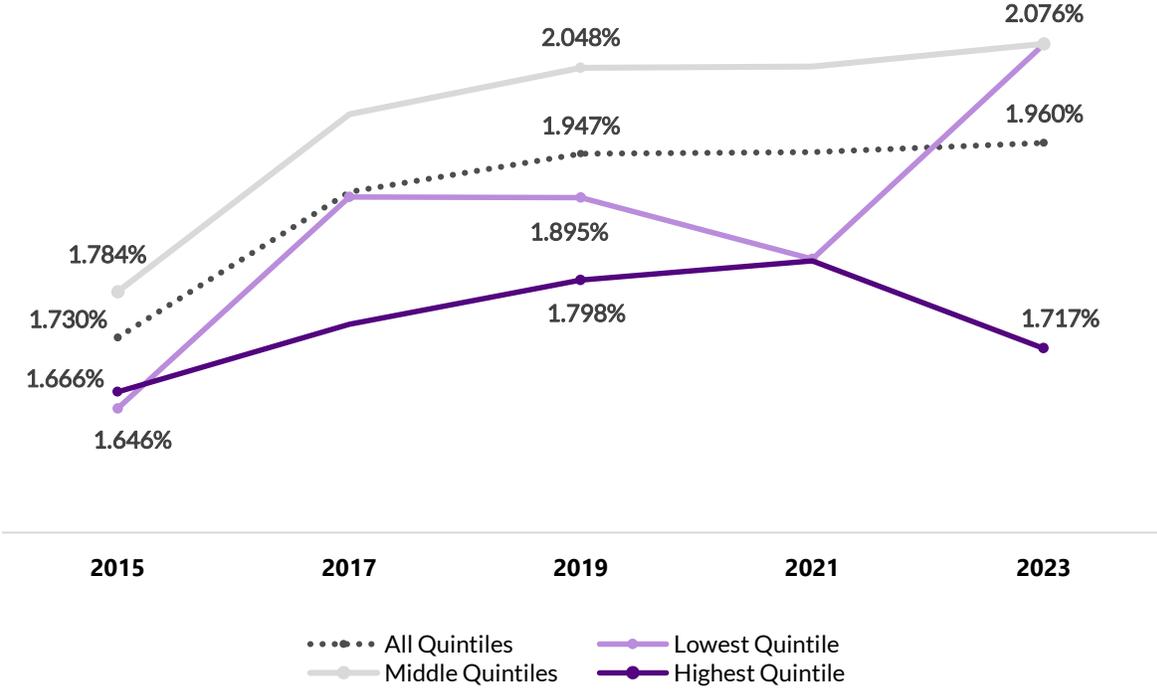
Source: Ipsos, Public Opinion Research Tracker: Baseline Survey, October 2023; Public Opinion Research Tracker: Wave 2, May 2024; Public Opinion Research Tracker: Wave 3, October 2024; and Public Opinion Research Tracker: Wave 4, June 2025

## Spotlight – Household spending on mobile services

While mobile prices went down in 2021 to 2023, the lowest-income households increased their share of spending on mobile services according to the Statistics Canada Survey of Household Spending. This increase may be the result of Canadians spending less on landline and replacing those expenditures with mobile services, and having more mobile phone subscriptions per household. Canadians are also migrating to more expensive plans with higher data allowances.

Higher-income households decreased their share of spending on mobile services since 2021, possibly because these households already subscribed to higher-data, higher-priced plans and those plan prices have decreased.

**Figure 49:** Share of household spending on mobile services by income quintile (%), 2015 to 2023



Source: Statistics Canada, Table 11-10-0223-01, 2025

### 5.4 Network coverage

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

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

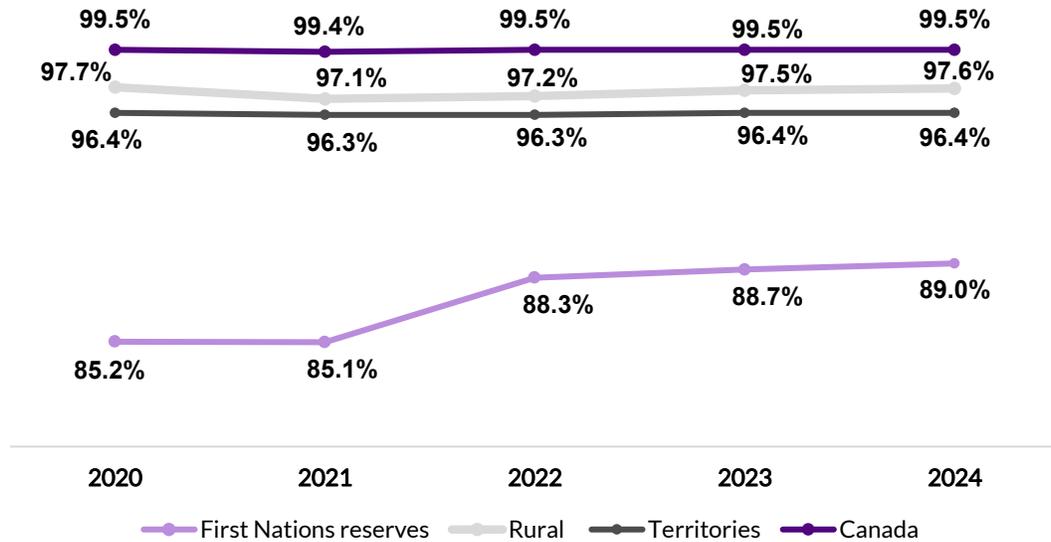
- Mobile coverage – the proportion of the Canadian homes, businesses, and major roads with access to the combined coverage of HSPA+, LTE and LTE-A networks
- Coverage (5G) – the proportion of the Canadian population with access to 5G networks
- Coverage (roads) – the proportion (share of total kilometres) 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, but rural and underserved areas have not yet reached the high coverage levels achieved in urban Canada. The CRTC recently launched a proceeding to determine how it can develop a new mobile reporting standard that will help governments, service providers, and the public more accurately identify coverage areas and address gaps in mobile coverage. 5G improvements can still come via densification, as more spectrum and more antennas can continue to be deployed especially in dense urban areas and to support innovative applications for consumers and businesses.

## Mobile coverage

Nearly all Canadians have access to mobile networks in Canada. Slight variations in annual results are due to improved data quality and not coverage declines.

**Figure 50:** Population with access to mobile networks (%), 2020 to 2024



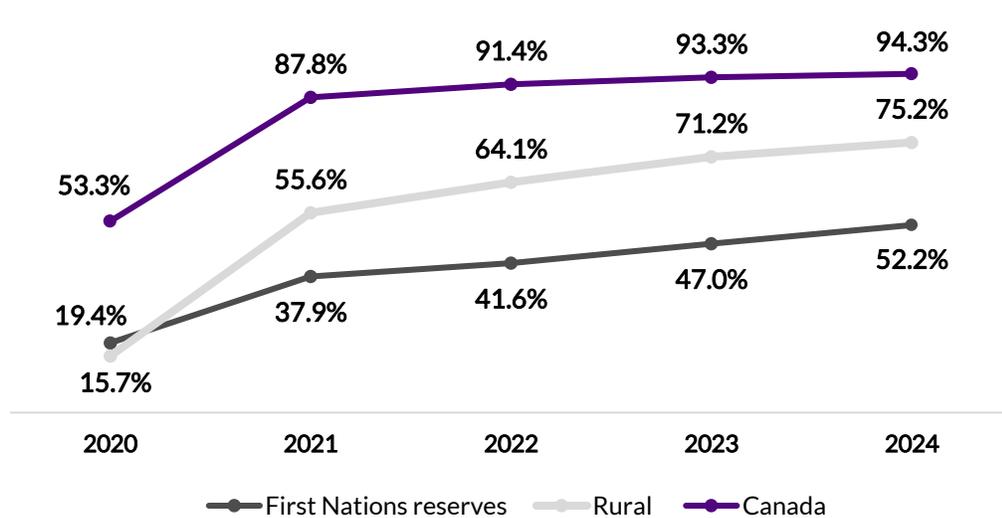
Combined coverage of LTE networks.

Source: CRTC data collection

## Coverage (5G)

5G networks launched in Canada in 2020 and are now available to 94% of the Canadian population. Rural and First Nations reserve coverage is expanding but lags well behind the Canadian average. There is still no reported 5G coverage in the Territories.

**Figure 51:** Population with access to 5G networks (%), 2020 to 2024

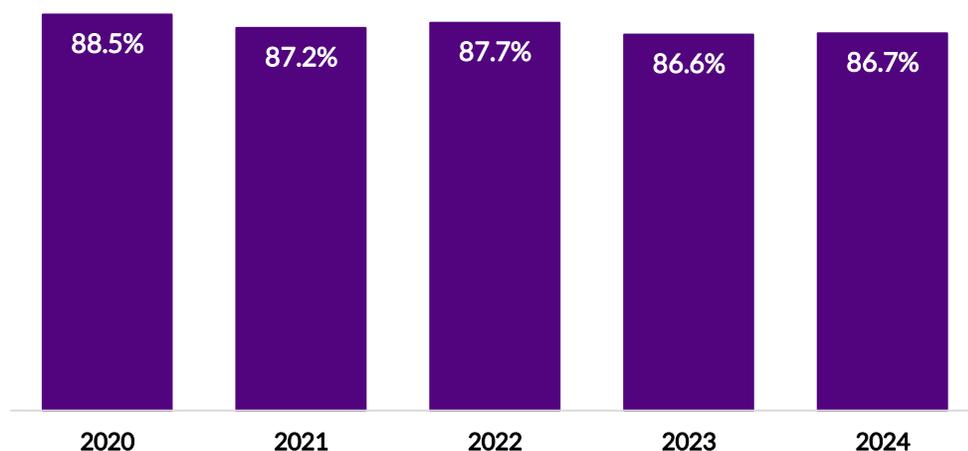


Source: CRTC data collection

## Coverage (roads)

Over 100,000 kilometres (87%) of major roads and highways are served by mobile networks. A decrease in coverage from 2022 to 2023 is due to improved data reporting and revised criteria for identifying major provincial highways.

**Figure 52:** Major roads and highways covered by mobile networks (%), 2020 to 2024



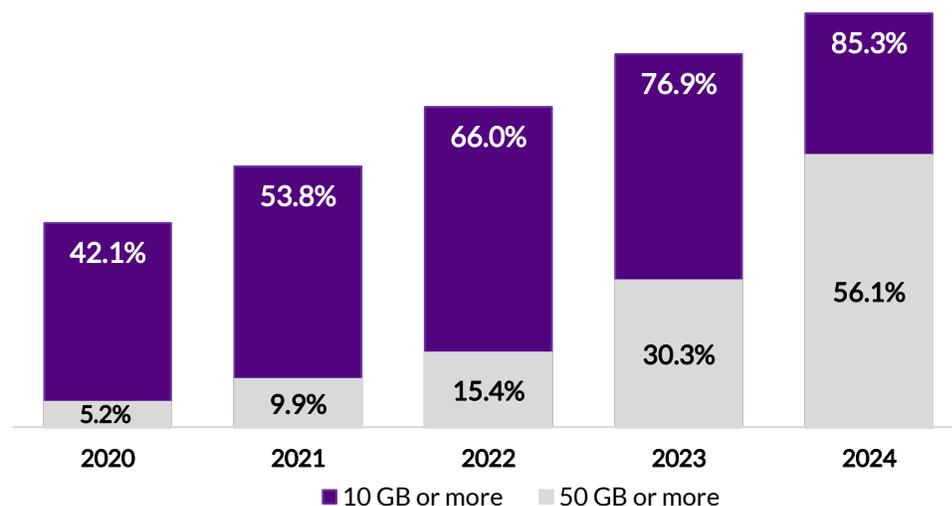
Combined coverage of LTE and LTE-A networks.

Source: Road Network File, 2023. Statistics Canada Catalogue no. 92-500-X

## Data plan subscribers

The proportion of mobile phone subscribers with ten or more gigabytes of data has more than doubled since 2020, while plans with 50 or more gigabytes of data more than tripled since 2022 (an increase of 40.5 percentage points).

**Figure 53:** Share of mobile phone subscribers by type of data plan (%), 2020 to 2024



Source: CRTC data collection

## 5.5 Network performance

As Canadians depend more on their mobile wireless devices, 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:

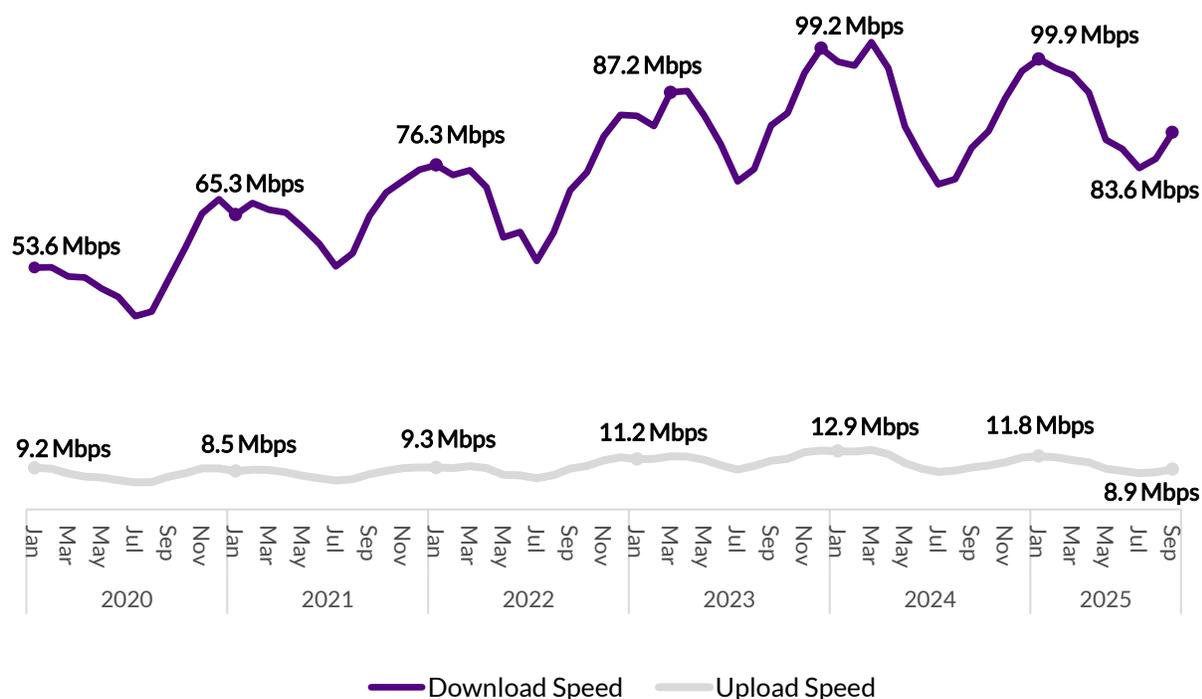
- Median mobile network download and upload speeds
- Latency of mobile networks
- Average monthly data usage for mobile data subscribers
- Canadians' perspectives on the reliability of their mobile service
- Canadians' perspectives on service outages experienced

These metrics show that Canadian networks support steady growth in usage and take-up of larger data plans, while average speeds and latency seem to have reached a plateau. Though they consider their mobile networks reliable, Canadians continue to experience and report outages. In this regard, in its decision on mandatory notification and reporting of major telecommunications service outages (Telecom Decision CRTC 2025-225) the CRTC recently set out more robust and specific outage-related requirements for telecommunications service providers.

### Mobile network speeds

In Canada, mobile network average download speeds see some seasonal fluctuations but no real growth since 2023, which coincides with the extensive rollout of 5G networks in the most populated markets in Canada.

**Figure 54:** Median mobile network download and upload speeds (in Mbps), 2020 to 2025

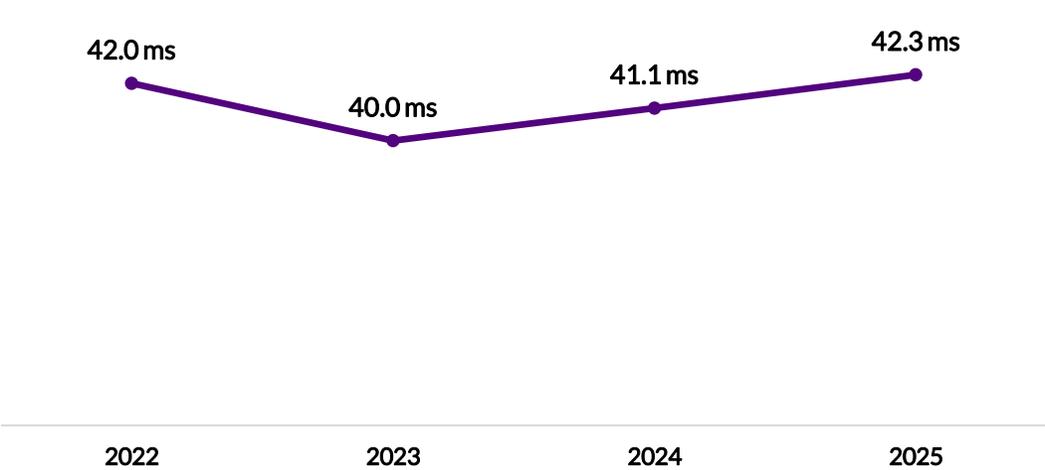


Source: Based on CRTC analysis of Ookla, Speedtest Intelligence®

## Minimum latency of mobile networks

Latency refers to the time required for data to travel from when a user takes an action on a network and when they get a response, and is a common network performance metric. Low latency means a network has relatively fast response times, which improves the user experience. Canada’s mobile network multi-server latency – the time required for data to travel between the user and multiple network servers - has remained stable since 2022, even with the rise in deployment and use of 5G technology. Latency is approximately on par with Canada’s peer countries (G7 plus Australia).

Figure 55: Multi-server mobile network latency (in ms), 2022 to 2025

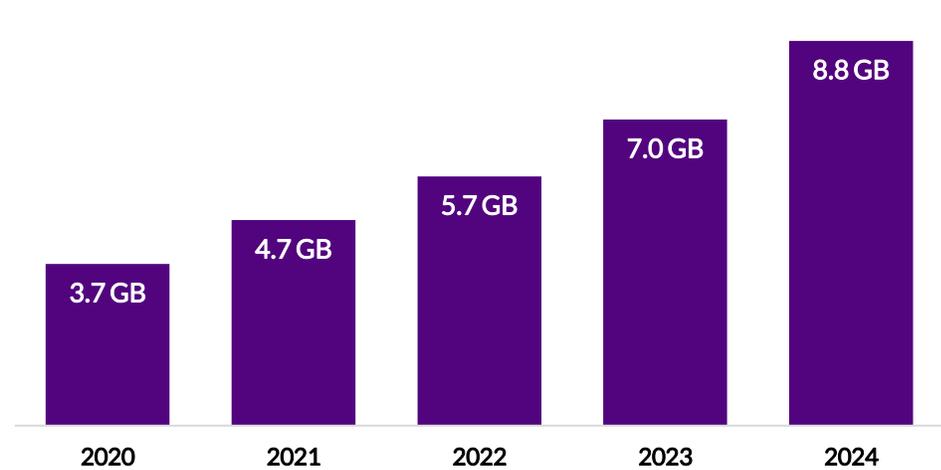


Source: Based on CRTC analysis of Ookla, Speedtest Intelligence®

## Average monthly data usage

Among subscribers with data plans, data consumption more than doubled between 2020 and 2024. This is a steady rise, with a CAGR of over 24% since 2020.

Figure 56: Average monthly usage for mobile data subscribers (in GB), 2020 to 2024

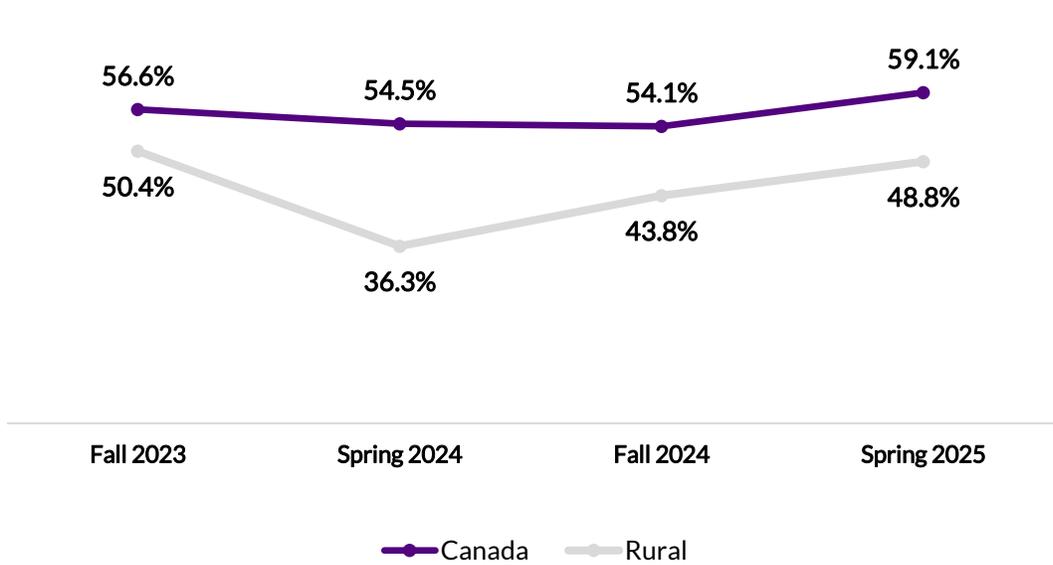


Source: CRTC data collection

## Canadians' perspectives on the reliability of mobile services

Most respondents consider that their mobile service is reliable, and this positive perception has increased since the POR started. Respondents in rural areas have a significantly lower perception that their mobile service is reliable, compared to the Canadian average. The difference could result from lower coverage levels in rural Canada (which in turn mean patchy mobile service in some areas), short service interruptions, or other speed and service quality factors that suggest rural Canadians might expect their service to be less reliable.

**Figure 57:** “I can count on a reliable mobile network where I live” (% of respondents), 2023 to 2025

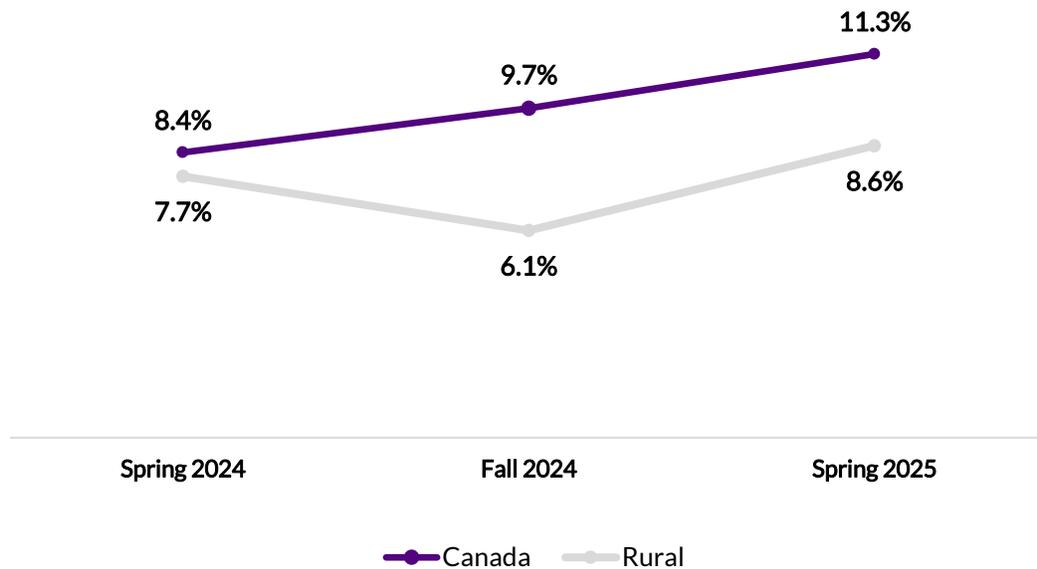


Source: Ipsos, Public Opinion Research Tracker: Baseline Survey, October 2023; Public Opinion Research Tracker: Wave 2, May 2024; Public Opinion Research Tracker: Wave 3, October 2024; and Public Opinion Research Tracker: Wave 4, June 2025

## Canadians' perspectives on service outages

The POR asks Canadians whether they have experienced any major service disruptions in their cellphone service lasting 24 hours or longer. More Canadians in 2025 reported experiencing an outage compared to 2024. This was particularly the case in certain regions (West and Ontario), while in other areas (Quebec and Atlantic), fewer Canadians reported experiencing outages. Rural Canadians were less likely to report experiencing a major disruption lasting more than 24 hours. It is possible that, while rural Canadians experience unreliable service such as minor service interruptions, they do not report having major outages. Following its fall 2025 decision on the mandatory reporting of major telecommunications outages (Telecom Decision CRTC 2025-225), the CRTC will publish reports on the incidence of major outages.

**Figure 58:** Consumers experiencing a mobile network service outage lasting 24 hours or longer (% of respondents), 2024 to 2025



Source: Ipsos, Public Opinion Research Tracker: Wave 2, May 2024; Public Opinion Research Tracker: Wave 3, October 2024; and Public Opinion Research Tracker: Wave 4, June 2025

## 5.6 Consumer empowerment

Indicators of consumer empowerment relate to whether Canadians are satisfied with their mobile wireless service, their service providers, and their choices. In this regard, the CRTC tracks the following:

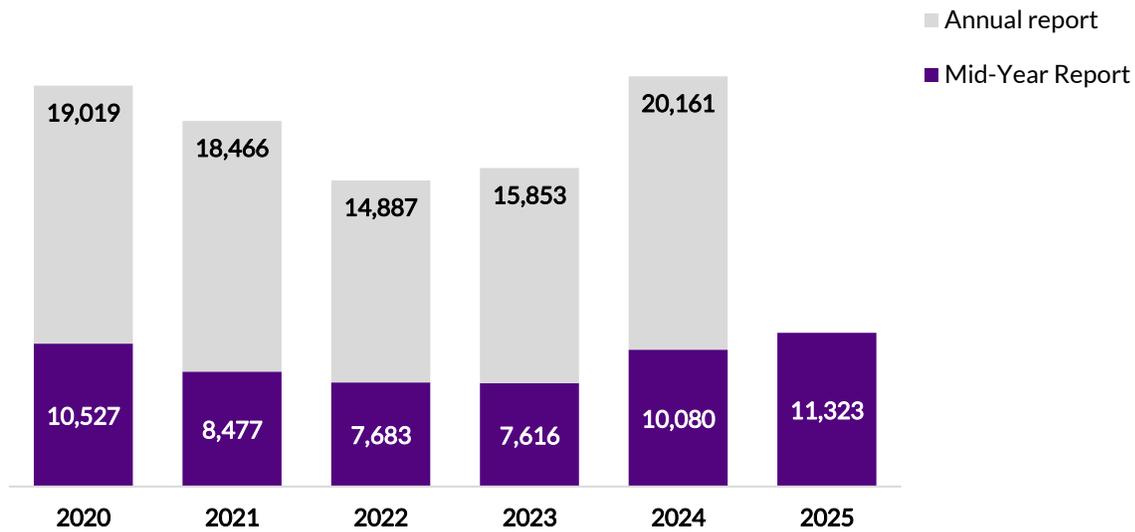
- CCTS wireless-related issues
- NPS, an indication of Canadians' likelihood of recommending their service provider
- Canadians' perceptions of choice of cellular service providers

While perceptions of choice have slightly improved, opinions about mobile providers have declined. The NPS declined slightly since last year but remains neutral overall, as Canadians are hesitant to recommend their provider. Billing and service quality continue to account for the largest number of wireless-related issues raised with the CCTS. Canadians are more likely to recommend smaller regional and other facilities-based carriers and less likely to recommend the three national operators (this excludes their flanker brands). Ongoing CRTC initiatives and updates to consumer codes could help Canadians feel more in control when addressing billing and service quality issues related to their mobile wireless services.

### CCTS wireless-related issues

Wireless issues reported to the CCTS rose in 2025. Billing issues now make up nearly half of all reported wireless issues, contract dispute issues continue to decline, and service delivery issues are gradually rising.

**Figure 59:** Wireless-related issues reported to the CCTS, 2020 to 2025

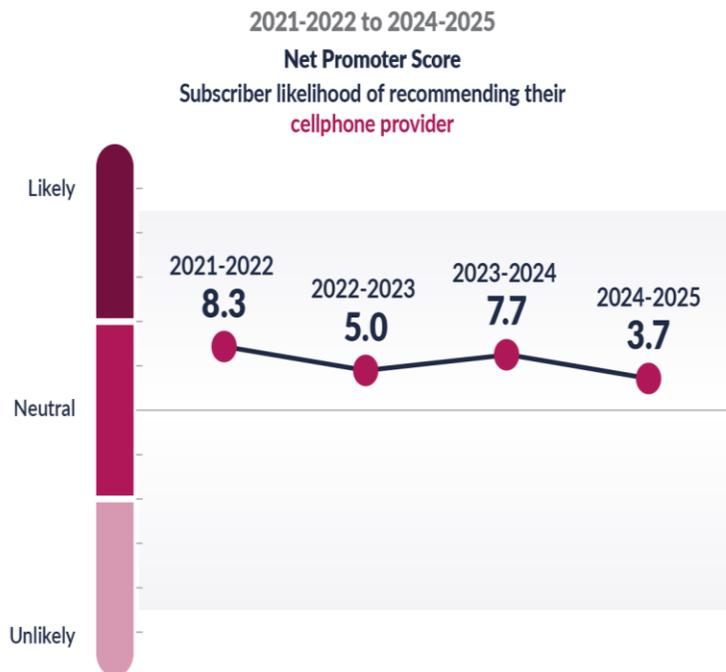


Source: CCTS Annual and Mid-Year Reports

## Net Promoter Score (NPS)

The NPS declined slightly since last year but remains neutral overall. One regional operator and its flanker brand are consistently the most recommended, while the largest national operators remain the least recommended. Flanker brands continue to score higher than their main brands.

**Infographic 5:** Subscriber likelihood of recommending their cellphone provider, 2021-22 to 2024-25

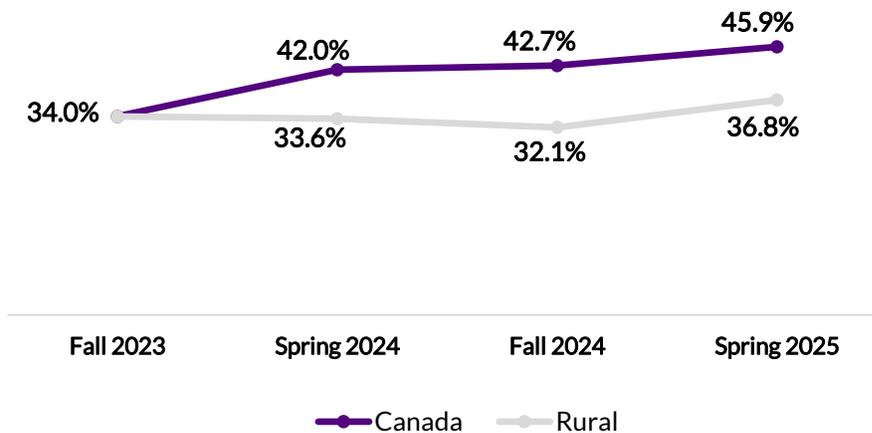


Source: MTM 18+ (Combined fall and spring data)

## Canadians' perspectives on their choice of cellular service providers

Nearly half of Canadians now agree that they have enough choice in cellphone service providers, a slight increase since Fall 2024. This perception has also improved in rural areas, though residents there remain mostly neutral. Agreement is highest among Francophones, seniors, Canadian newcomers, Quebec respondents, and urban residents.

**Figure 60:** "I feel that I have enough choice of cellphone providers" (% of respondents), 2023 to 2025

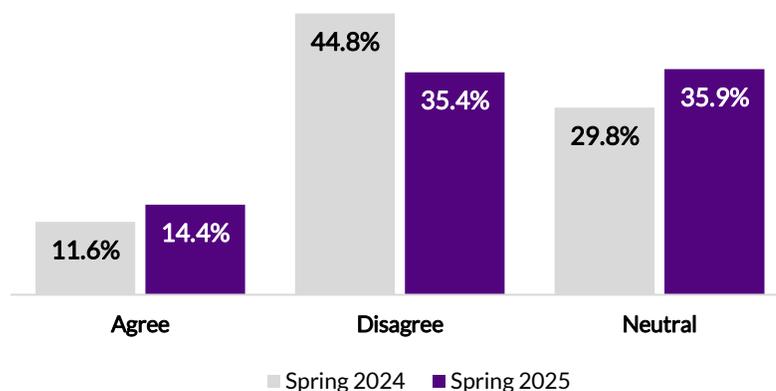


Source: Ipsos, Public Opinion Research Tracker: Baseline Survey, October 2023; Public Opinion Research Tracker: Wave 2, May 2024; Public Opinion Research Tracker: Wave 3, October 2024; and Public Opinion Research Tracker: Wave 4, June 2025

## Spotlight – Canadians and international roaming

The CRTC uses POR to track Canadians' perceptions of international roaming rates and options. This research shows that since 2024, more Canadians consider international roaming rates to be reasonable. Still, many Canadians are neutral about international roaming rates, which could reflect the fact that 29% of Canadians surveyed do not report travelling internationally at all.

**Figure 61:** "The cellphone rates Canadians pay while travelling outside of Canada are reasonable" (% of respondents), 2023 to 2025

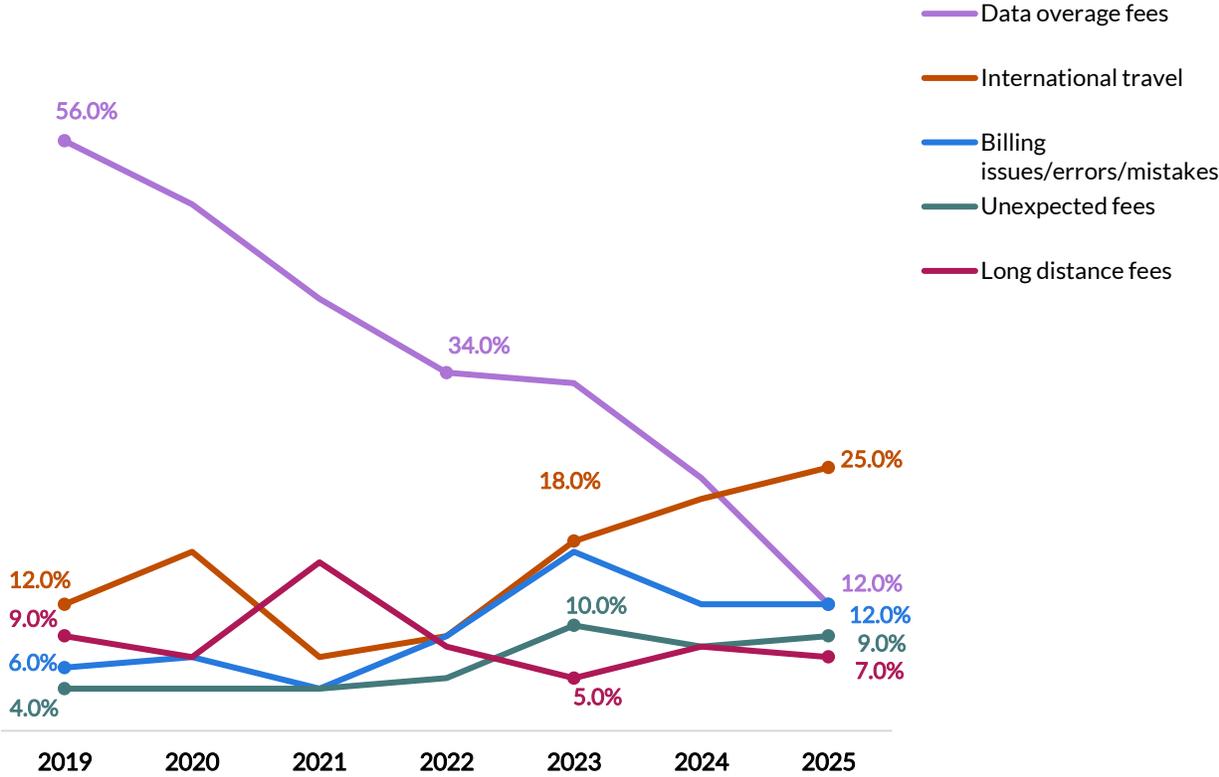


Excludes "Do not know" responses.

Source: Ipsos, Public Opinion Research Tracker: Wave 2, May 2024, and Public Opinion Research Tracker: Wave 4, June 2025

While Canadians in 2025 had slightly more positive perceptions of international roaming rates, international roaming charges are now the main reason for consumers' negative reactions to unexpected charges ("bill shock").

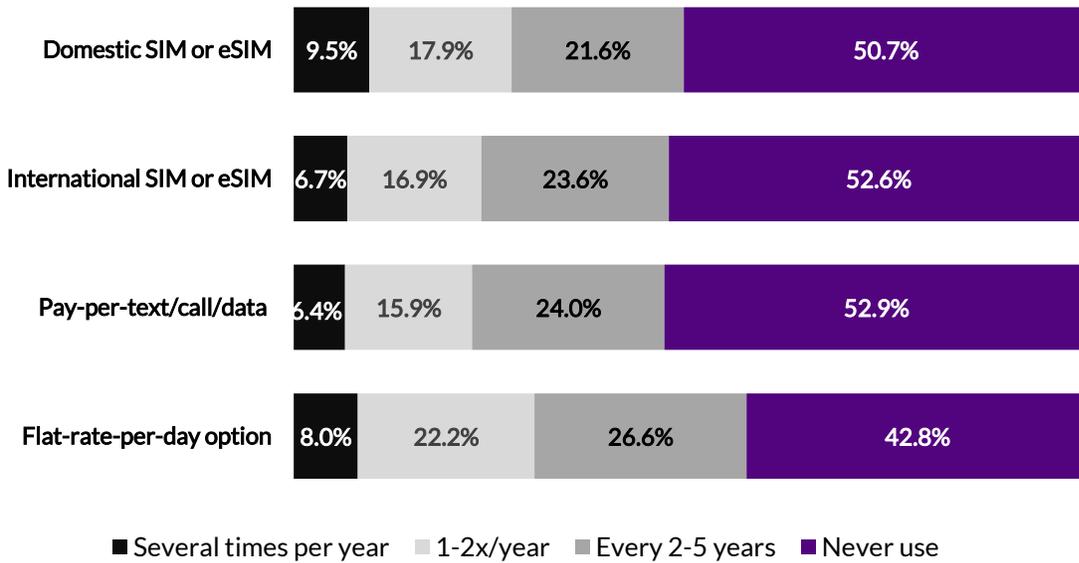
**Figure 62:** Reasons for "bill shock" reported by Canadian consumers (% of respondents), 2019 to 2025



Source: Phoenix SPI, Public Opinion Research on the CRTC's Consumer Protection Codes 2025, March 2025

Since late 2024, when the CRTC called on Canada's largest cellphone companies to take immediate action to reduce roaming fees, Canada's largest operators have introduced new international roaming plans ([Secretary General Letter - Telecom - Offering Canadians more competitive, flexible, and affordable international roaming options](#)). The survey explored the roaming options Canadians use when they travel with their cellphones outside Canada. Canadian travellers have a range of international roaming options, including paying a flat rate per day or a pay-per-use fee to their provider, or acquiring SIM or eSIM cards.

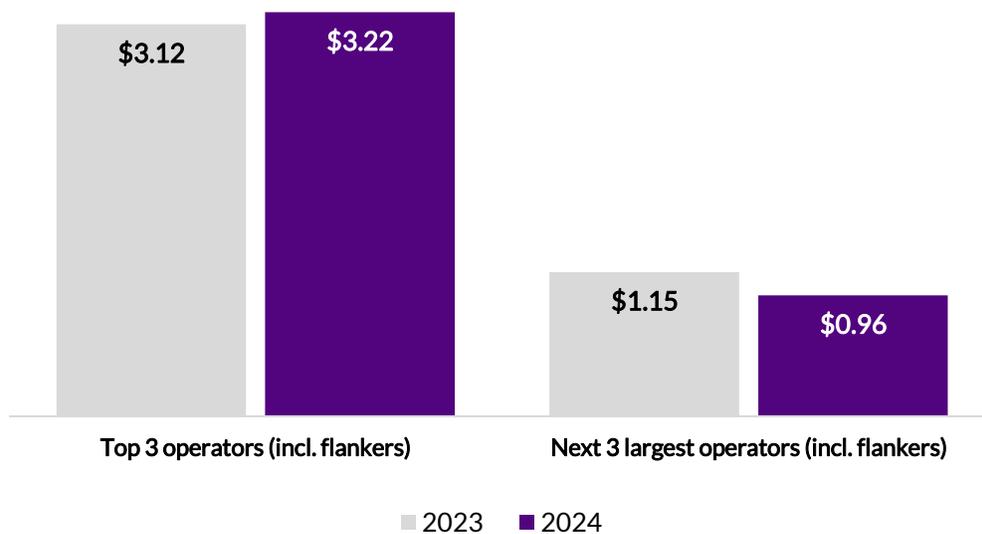
**Figure 63:** Use of roaming options while travelling outside Canada (% of respondents), 2025



Source: Ipsos, Public Opinion Research Tracker: Wave 4, June 2025

Given Canadians’ relatively infrequent use of international roaming plans, revenues generated from international roaming account for a small share of Canadian cellular service operators’ revenues. The three national operators generate, on average, revenue of approximately \$3 per month per subscriber from international roaming. This represents 6% of their monthly ARPU (excluding devices). The three largest regional operators, however, generated significantly lower revenue per subscriber from international roaming, and the approximately \$1 per subscriber per month they do generate represents less than 3% of their monthly ARPU (excluding devices).

**Figure 64:** International roaming – average monthly revenue per subscriber (\$), 2023 to 2024



Source: CRTC data collection

## 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. Unless otherwise noted, in this report 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** is administered by the CRTC to help provide all Canadians with access to broadband Internet and mobile wireless services at USO levels. The Broadband Fund is supported through contributions made by large Canadian TSPs or groups of 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 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** is a program 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.

The **Consumer Price Index (CPI)** is published by Statistics Canada to show changes in consumer prices, over time, by comparing a fixed basket of goods and services. The Internet access and cellular services CPI charts appearing in this report are indexed to a base period of January 2021, which may differ from other presentations of CPI.

**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 like 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 Internet** 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 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.

**Low-income household** refers to Canadian households with an annual pre-tax income of \$39,999 or less.

**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 as 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.

**Population centre** is defined by Statistics Canada as an area with a population of at least 1,000 and no fewer than 400 persons per square kilometre.

**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.

**Remote**, as explained in Telecom Regulatory Policy [CRTC 2024-328](#), *Broadband Fund policy review – New policy for funding capital projects*, describes an area or a community that is classified as such by Statistics Canada using an Index of Remoteness. The index for each populated community (or census subdivision) is determined by its distance to population centres (defined by Statistics Canada in a given travel radius), and its population size. The index is a continuous measure where zero is the minimum value of remoteness and one is the maximum value of remoteness. Statistics Canada’s recommendation is to classify a community that has an Index of Remoteness of 0.4 or above as remote.

**Rural** is defined in Statistics Canada’s *Dictionary, Census of Population, 2021* as including any area of Canada that is not within a population centre.

**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** 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 wholesale-based. Independent wholesale-based providers are those not owned or controlled by larger ILECs or cable-based carriers.