

# Caribbean Telecommunications Report Q3 2012

<https://marketpublishers.com/r/C591A313969EN.html>

Date: August 2012

Pages: 109

Price: US\$ 1,295.00 (Single User License)

ID: C591A313969EN

## Abstracts

Includes 3 FREE quarterly updates

Canada's mobile sector expanded by only 8,000 subscribers in Q112 to reach 25.895mn, based on data from operators such as Rogers, Bell, Telus and MTS. BMI continues to hold on to our view that operators are focusing on the higher value areas such as LTE, which has led to a dip in demand for prepaid services. We believe that the number of prepaid subscribers in Canada fell to about 4.9mn in March 2012, down from 5.1mn in December 2011.

The weaker-than-expected mobile subscriber growth has resulted in a revision in our forecasts. We now expect 27.071mn mobile subscribers in Canada at the end of 2012, and we predict this number will increase to 30.138mn in 2016, representing a penetration rate of 83.9%. The slow growth momentum is expected to continue due to operators' heavy emphasis on higher income, postpaid clients over prepaid. Meanwhile, we have largely retained our forecasts for the Canadian fixed-line and internet sectors.

In May 2012, Astral Media's shareholders approved the proposed takeover by Bell. However, the deal, which could be completed in H212, is still subject to the approval of the telecoms and competition authorities. We remain bullish on the pending acquisition by Bell as it would leave the company well positioned to cater to growing demand for mobile content. Astral is the eighth largest media outlet in Canada, operating 22 TV channels and 84 radio stations, as well as 100 websites and other digital media content. However, regulatory approval could prove a challenge. If allowed to pass, Bell would be violating ownership rules surrounding how many radio stations a company can own in particular regions. However, we expect Bell would make moves to sell these, as they are less important to the company's strategy - for Bell, the crucial content obtained through the deal would be television access.

Economic growth will slow in Canada in 2012, with overstretched households retrenching their spending, and weakening global conditions. We continue to forecast Canadian real GDP growth forecast of 2.0% in 2012, followed by 2.3% in 2013 (down slightly from 2.4% in our previous set of forecasts). Real GDP growth came in at 1.8% q-o-q annualised in Q411, much weaker than the 4.2% posted in the previous quarter, leaving the 2011 growth rate as a whole at 2.5%. However, the underlying components of growth in Q411 suggested a more robust economy than the headline number may suggest. Real private consumption expanded by 2.9% (versus 1.8% in Q311), while non-residential fixed investment soared by 8.1% (vs 2.1% in Q311). The major drags came from weaker residential investment, a greater subtraction from government spending, and higher imports (which were partly a function of stronger domestic consumption). We expect these themes to continue into 2012.

The federal government is in tightening mode, with the 2012-2013 budget including measures such as raising the retirement age and eliminating public-sector jobs. With another three years to go before the next scheduled election, the ruling Conservative Party will have relatively free rein to shape policy, but much will depend on the ability of the opposition parties to regroup after a lengthy spell without permanent leaders.

## Contents

Executive Summary

SWOT Analysis

Mobile SWOT Analysis

Fixed-Line SWOT Analysis

Political SWOT Analysis

Economic SWOT Analysis

Industry Business Environment Overview

Business Environment Analysis

Table: Risk/Reward Ratings Q3 2012

Canada

Industry Forecast

Mobile

Table: Telecoms Sector - Mobile - Historical Data & Forecasts

Fixed Line

Table: Telecoms Sector - Fixed Line - Historical Data & Forecasts

Internet

Table: Telecoms Sector - Internet - Historical Data & Forecasts

Market Data Analysis

Mobile

Table: Canada Mobile Market, Q112

Table: Canada Mobile Market Net Additions, Q311-Q112

Table: Blended ARPU Comparison (CAD), 2010-2012

Table: Mobile Contract Wins

Table: Canada Mobile Market

Table: Rogers Wireless

Table: Bell Wireless Alliance

Table: Telus Wireless

Table: SaskTel Mobility

Table: MTS Mobility

Mobile Country Content

Table: VAS Timeline

Fixed-Line

Table: Local & Long-Distance Revenue By Category

Table: Canada Local Voice Market - No. of Subscribers ('000)

Table: CRTC Pay-TV Market

Table: Canada Pay-TV Market - No. of Subscribers ('000)

Table: CRTC Pay-TV ARPU (CAD/month)

## Broadband

Table: Canada Broadband Market - No. of Subscribers ('000)

Table: Wireline Developments

## Regulatory Development

Table: Division Of Regulatory Responsibilities In Canada

## Regulatory Developments

## Industry Developments

## Competitive Landscape

Table: Key Players - Canada Telecoms Sector

Table: Selected Operators Financial Indicators (US\$m)

## Operator Profiles

Bell Canada Enterprises Inc (BCE)

Rogers Communications

Telus

## Market Overview

## Mobile

Table: Regional Mobile Penetration Overview

## Fixed Line

Table: Regional Fixed-Line Penetration Overview

## Broadband

Table: Regional Broadband Penetration Overview

## Demographic Data

### Section 1: Population

Table: Demographic Indicators, 2005-2030

Table: Rural/Urban Breakdown, 2005-2030

### Section 2: Education And Healthcare

Table: Education, 2000-2003

Table: Vital Statistics, 2005-2030

### Section 3: Labour Market And Spending Power

Table: Employment Indicators, 2001-2006

Table: Consumer Expenditure, 2000-2012 (US\$)

Table: Average Annual Manufacturing Wages, 2000-2012

## Methodology

Table: Key Indicators For Telecommunications Industry Forecasts

## Telecoms Business Environment Ratings

Table: Ratings Indicators

Table: Weighting Of Indicators

## Glossary

Table: Glossary Of Terms

## I would like to order

Product name: Caribbean Telecommunications Report Q3 2012

Product link: <https://marketpublishers.com/r/C591A313969EN.html>

Price: US\$ 1,295.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/C591A313969EN.html>