

Accessing the Internet - Canada - 2023

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This report looks at the following areas:

- What internet-connected devices are people utilizing?
- How extensive is 5G adoption?
- What mobile network providers and ISPs are people utilizing and what might motivate them to switch?
- What activities are consumers doing online and how do these inform what types of internet service and access levels that they need?
- How are consumers engaging with mobile hotspots and Wi-Fi while out in public?

It is a common statement that access to the internet is a human right. After the pandemic had transitioned many Canadians to cloistered solitude with internet access being the only way to communicate with the outside world, keep entertained and remain working, a large majority of Canadians seem inclined to agree. In fact, Canadians of all ages, genders, races and income levels certainly feel that unlimited internet access is integral to maintaining their lifestyles, with unlimited home internet being notably more crucial. Still, even within their homes, Canadians value mobility. When it comes to internet-connected devices utilized in the past 12 months, significantly more Canadians had used smartphones and laptops than more fixed internet devices like desktops or Smart TVs.

"I do feel the internet is a human right, at this point it is a necessity in all aspects of life from accessing healthcare to education and social connection."

– 25-34 year old, Ontario male

So who are Canadians choosing to access the internet with? Well, Bell Canada has the widest coverage with a quarter of Canadians reporting utilizing its home internet service, significantly surpassing both Rogers and TELUS, though activity is largely driven regionally, with brands like TELUS and Shaw popular in the west, Bell popular in the east, and Ontario existing as a battleground



"On the mobile front, Canadians are adopting 5G at a rapid pace. Faster and stronger mobile networks open up stronger capabilities for consumers to do things like game, download large files, or stream on mobile devices, as well as set-up and utilize stronger hotspots."

– **Michael Lloyd, Senior Tech & Media Analyst**

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between Bell and Rogers. Mobile network subscriptions are a bit more varied and competition is tighter among the big three, but larger slivers of business are also claimed by flanker brands, which are smaller mobile networks owned by the big three that offer more affordable services.

When it comes to online activities, around 80% cite that they use it to check emails, work or search for information. Still, nearly two-thirds use it to access social media and streaming, which is a high bandwidth activity, and a large minority of consumers utilize it for things like gaming and downloading large files, which more data and higher speeds are needed for. While many consumers do these things at home, many also do them while on-the-go. Enter mobile hotspots.

When no other ways to access mobile data on a device like laptops exist, mobile hotspots allow consumers to set up private Wi-Fi networks from their phones and, even when public Wi-Fi does exist, hotspots are significantly more secure because they are encrypted and password-protected. A growing number of consumers is becoming aware of this, with around two-thirds of consumers having reported utilizing a hotspot over public Wi-Fi in the past and 40% doing so due to security reasons. With the onset of 5G unlimited data plans, hotspots will only become more and more efficient, leading to even more widespread usage of this means of accessing the internet.

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