

Smartphones: Plans and Hardware - Canada - 2023

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This report looks at the following areas:

- What mobile service providers are consumers using.
- What smartphone brands do consumers own. What brands have they bought in the past 12 years.
- What types of mobile service plans do consumers subscribe to.
- Reasons consumers changed their mobile service plans in the past 12 months
- What smartphone hardware or service-related actions consumers take to save money
- Factors consumers consider when purchasing a mobile phone.

Access to mobile networks is an essential service in 2023. The vast majority of Canadians (96%) are subscribed to a mobile service provider, with most subscribed to either the "Big 3" providers (Bell, Rogers or Telus) or a subsidiary flanker or budget brand owned by the "Big 3". While in some contexts, this may seem like there isn't that much choice for consumers, this simply isn't the case. Bell, Rogers and Telus typically provide consumers with more premium mobile service plan options with things like 5G unlimited data, while flanker brands offer cheaper alternatives and budget brands typically offer consumers pre-paid services.

As a result, different mobile service providers provide service to different demographic niches throughout the country. Higher income consumers are significantly more likely to choose unlimited data options from one of the "Big 3" providers, while lower income, younger consumers, newer Canadians and students are likely to choose cheaper, more affordable options.

Additionally, once consumers decide on a primary mobile service provider, they are unlikely to switch, with the vast majority of consumers being satisfied with their mobile service provider (78%). In fact, only 16% of consumers have switched providers over the past year, with chasing a lower bill or an interesting promotion being the top reasons for switching.



"Despite some monumental developments in the tech space over the past few years, like the widespread adoption of 5G and exciting developments in the AR/VR space, there really hasn't been much disruption in the smartphone space.

– Michael Lloyd, Senior Tech & Media Analyst

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Smartphones are some of the most ubiquitously owned tech devices in Canada and the majority of consumers upgrade their devices every one-to-three years, despite these devices costing upwards of \$1,000 for the latest models. As a result, mobile service providers typically partner with manufacturers to offer discounted devices or integrated payment plans that last over the course of anywhere from 12 to 36 months in order to make these devices attainable for consumers.

In tough economic times, however, if consumers are considering making cuts to their mobile service plans or habits, waiting longer to upgrade their smartphones is the top option. Unfortunately for lesser known smartphone brands, however, significantly more consumers would rather wait than compromise on brand choice by purchasing a lesser known brand, with only 9% of consumers reporting that they would purchase a lesser known smartphone brand to save money.

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