

North America telecoms market: trends and forecasts 2019–2024



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About this report

This report provides:

- a 5-year forecast of more than 180 mobile and fixed KPIs for North America, as a whole and for two key countries
- an in-depth analysis of the trends, drivers and forecast assumptions for each type of mobile and fixed service, and for key countries
- an overview of operator strategies and country-specific topics, in order to highlight similarities and differences by means of a cross-country comparison
- a summary of results, key implications and recommendations for mobile and fixed operators.

Our forecasts are informed by on-the-ground regional market experts from our topic-led research programmes and our consulting division, as well as external interviews. In addition to our robust set of historical data, our forecasts draw on a unique and in-house modelling tool, which applies a rigorous methodology (reconciliation of different sources, standard definitions, top-down and bottom-up modelling).



Our forecasts are refined throughout the year. This report presents the results at the time of publication and will continue to give useful background information about key drivers. However, we recommend that you always use the Analysys Mason [DataHub](#) to view the latest data associated with this report.

REPORT COVERAGE		
Geographical	Key performance indicators	
Regions modelled <ul style="list-style-type: none">North America (NA) Countries modelled individually <ul style="list-style-type: none">CanadaUSA	Connections	Revenue
	Mobile <ul style="list-style-type: none">Handset, mobile broadband,¹ IoT²Prepaid, contract2G, 3G, 4G, 5GSmartphone, non-smartphone	Mobile <ul style="list-style-type: none">Service,³ retailPrepaid, contractHandset, mobile broadband,¹ IoT²Handset voice, messaging, data
	Fixed <ul style="list-style-type: none">Voice, broadband, IPTV, dial-upNarrowband voice, VoBBDSL, FTTP/B, cable, BFWA, 5G, other	Fixed <ul style="list-style-type: none">Service,³ retailVoice, broadband, IPTV, dial-up, specialist business servicesDSL, FTTP/B, cable, BFWA, other
		ARPU
	Voice traffic	Mobile <ul style="list-style-type: none">SIMs, handsetPrepaid, contractHandset voice, data
	Fixed and mobile <ul style="list-style-type: none">Outgoing minutes, MoU	

¹ Includes USB modem, and mid- and large-screen, but not handset-based data.
² IoT connections and revenue figures include mobile services only.
³ Service revenue is the sum of retail and wholesale revenue.

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- 19. Mobile: the lack of competition in the mobile segment will lead to slow but stable growth in mobile revenue during the forecast period
- 20. Fixed: the cable share of broadband connections will fall as the fibre and 5G FWA shares increase, but cable will remain the most-popular fixed broadband technology
- 21. Fixed: fixed broadband penetration will grow during the forecast period, mainly due to improved fixed coverage

- 22. Fixed: the total fixed revenue will grow thanks to increases in both fixed broadband penetration and fixed broadband ASPU
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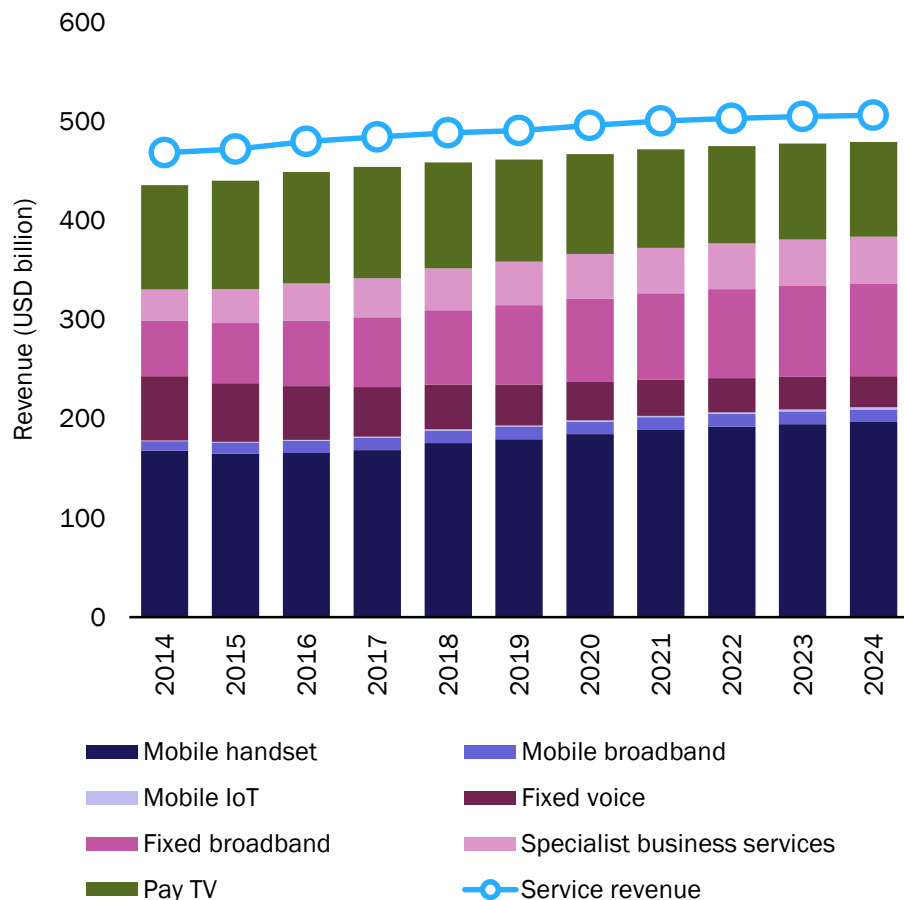
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Revenue from data in both the mobile and the fixed segments will be the main driver of telecoms revenue growth

Figure 1: Telecoms and pay-TV retail revenue by type and total service revenue, North America, 2014–2024



Source: Analysys Mason

Telecoms and pay-TV retail revenue will grow slowly in North America (NA) during the forecast period.

The total telecoms revenue is expected to grow by just 3.3% (CAGR of 0.7%) between 2019 and 2024. The main reason for this is the strong revenue decline in the fixed voice and pay-TV segments. Fixed voice revenue will continue to fall due to substitution by mobile and over-the-top (OTT) voice services. Pay-TV revenue will fall as a result of subscribers moving to OTT video services (a process known as ‘cord-cutting’).

The total telecoms revenue is still expected to grow despite these declines due to increased revenue from data services in both the fixed and the mobile segments. Fixed broadband revenue is expected to grow at a CAGR of 3.2% between 2019 and 2024. Fixed broadband coverage is slowly improving across NA, which will lead to some growth in penetration. Additionally, operators will be able to monetise part of their investments to switch consumers to faster, more-expensive services. Consumers are also increasingly using mobile data services now that improved coverage and capacity supports heavier data usage.

Revenue from other areas (such as IoT services or specialist business services) will also grow during the forecast period. However, the net impact on the total revenue will be smaller. For example, revenue from IoT connectivity will grow at a CAGR of 12% between 2019 and 2024, but it will still only account for less than 0.5% of the total revenue.

Geographical coverage: 4G and 5G will be the only mobile technologies in use in 2024 because operators will shut down their 2G and 3G networks

Figure 3: 4G/5G share of mobile connections and NGA share of fixed broadband connections by country, North America, 2018 and 2024¹



¹ For a full list of countries modelled as part of the North America region, please see the accompanying data annex. Mobile connections exclude IoT connections. NGA share of fixed broadband connections is calculated as cable, VDSL and FTTP/B connections (that provide access speeds of 30Mbit/s or more) divided by the total number of fixed broadband connections.



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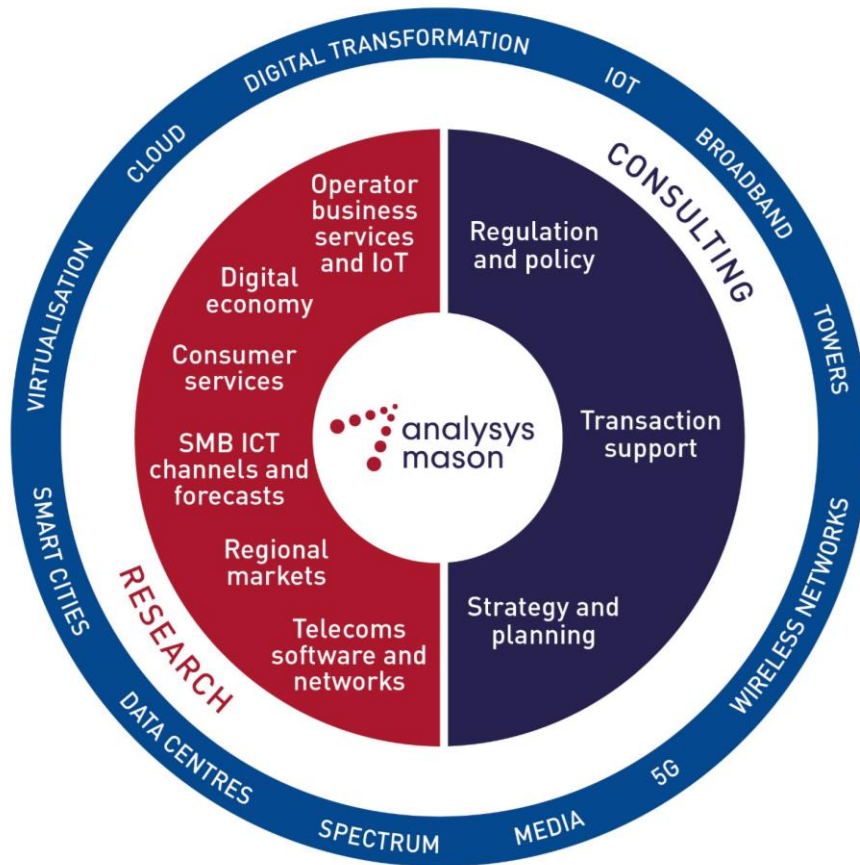
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