

*CANADIAN*  
*MOBILE WIRELESS COMMUNICATIONS*  
*SERVICES MARKET REPORT*



*2023 EDITION*

NBI / MICHAEL SONE  
ASSOCIATES INC.

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SERVICES MARKET REPORT, 2023 EDITION***

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**About this Report**

Marking the 29<sup>th</sup> year of the publication of this report, NBI/Michael Sone Associates' **Canadian Mobile Wireless Communications Services Market Report, 2023 Edition** remains the most comprehensive, independent study published on this industry.

In remarking that 2023 will be remembered for return to some post-pandemic normalcy - despite war, global inflation and supply chain issues in the wake of the pandemic - the report focuses on the continued healthy growth in subscribers and ongoing deployment of improved networks. The report discusses the implications of the finalized Rogers-Shaw merger along with the prospective effects on the market as a whole of Freedom Mobile's acquisition by Videotron.

Section 1, the Market Overview, examines in detail the Canadian mobile wireless market by focusing on the service providers, their networks, market position and performance. Of particular note is the widening availability of 5G service, its effects on service providers' growth, and the growth of so-called non-phone devices such as tablets and wearables.

Sections 2 and 3 examine the policies, decisions and reviews of the CRTC and ISED that affect the mobile wireless industry and discuss the important spectral and technological developments occasioned by 5G, past, present and future. Also discussed is the politically charged issue of universal wireless access on the Toronto Transit Commission (TTC) subway system.

Section 4 contains detailed profiles of nine wireless service providers including revenue & subscriber analysis, a look at the marketing & sales activities, competitive tactics as well as predictions for future performance.

The final section presents eight comprehensive Exhibits that quantify service provider-specific data for 2021 to 2025 for total subscribers, flanker-brand and 5G subscribers, provincial segmentation by provider, segmentation of phone and non-phone devices, a breakdown between prepaid & postpaid accounts, and service revenues, including ARPU measurement.