

CANADIAN
INTERNET SERVICE PROVIDERS
MARKET OVERVIEW REPORT



2024 EDITION

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**CANADIAN ISP MARKET OVERVIEW REPORT
2024 EDITION**

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About this Report

The **Canadian Internet Service Providers Market Overview Report, 2024 Edition** is NBI/Michael Sone Associates' updated analysis of the Canadian ISP market. Featuring information on broadband speed availability and consumer adoption, this edition continues our tradition of providing the most comprehensive and rigorously researched document available on the subject.

The report is divided into three sections. The first contains an Executive Summary and four summary figures. The second section presents a detailed overview that provides updates on major issues such as fibre-to-the-home/premises deployment and the provision of broadband to all corners of the country. We also explore market and technology developments pertinent to the industry, the growth of broadband penetration along with adoption of higher speeds to match greater Internet consumption and note the effect of the Rogers-Shaw merger. This section ends with an update on wholesale pricing regulation and the impact on independent ISP competitiveness along with some detail on government funded programs designed to bring broadband access to all Canadians.

The third section features four detailed exhibits and one figure that illustrate with forecasts through 2027, cableco and telco broadband subscribers & revenues, business versus consumer and wholesale data, bandwidth segmentation by major ISP, along with provincial subscriber distribution and changes in subscribed speed segmentation from 2022 through 2027. Each industry segment has been explored so that the report presents services offered and planned, marketing activities, regulatory matters, and technology trends.

Please note that the fixed and mobile wireless Internet markets are examined and discussed in depth in NBI/Michael Sone Associates' **Canadian Fixed Wireless Services Market Report, 2022 Edition** and **Canadian Mobile Wireless Communications Services Market Report, 2023 Edition** (and upcoming 2024 Edition).