

CANADIAN
MOBILE WIRELESS COMMUNICATIONS & 5G
SERVICES MARKET REPORT



2022 EDITION

NBI / MICHAEL SONE
ASSOCIATES INC.

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***CANADIAN MOBILE WIRELESS COMMUNICATIONS &
5G SERVICES MARKET REPORT, 2022 EDITION***

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About this Report

Marking the 28th year for the publication of this report, NBI/Michael Sone Associates' **Canadian Mobile Wireless Communications & 5G Services Market Report, 2022 Edition** remains the most comprehensive, independent study published on this industry. As the title suggests, within the report's front sections and service provider profiles, are discussions on spectrum allocation, deployment and the uptake of 5G and its eventual impact on all aspects of personal and business mobile wireless communications.

In remarking that 2022 will be remembered for some easing of the COVID-19 pandemic protocols and a return to some normalcy - despite war, global inflation and supply chain issues - the report focuses on the continued robust growth in subscribers and ongoing deployment of improved networks. The proposed acquisition of Shaw by Rogers against the backdrop of The Commissioner of Competition's resistance to the deal permeates throughout also.

Section 1, 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 final determination of a ban on Huawei and ZTE. Also prominent is a summary of developments in, and objections to, the Rogers-Shaw proposed merger and the implications for the future ownership of Freedom Mobile.

Sections 2 and 3 examine the policies, decisions and reviews of ISED & the CRTC that affect the mobile wireless industry and discuss the important spectral and technological developments occasioned by 5G.

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 illustrate service provider-specific data including projections to 2024 for total, flanker-brand and 5G subscribers, provincial segmentation of subscribers, segmentation of phone and non-phone devices, a breakdown between prepaid & postpaid accounts, and service revenues, including ARPU & ABPU measurement.