

Mobile Network Providers – Canada – 2022

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This report looks at the following areas:

- Mobile network providers used by Canadians.
- Types of mobile network plans used by Canadians.
- Consumers' satisfaction with their current providers.
- Consumers' length of tenure, interest in switching providers and reasons for switching.
- Attitudes towards 5G compared to 4G/LTE.

As expected, the 'Big Three' mobile network provider brands are leaders in the Canadian market; a combined 45% of consumers use one of Bell, Rogers or Telus as their mobile network provider. However, much of that dominance is driven by momentum and legacy relationships with consumers. Among Canadians who have been with their provider for less than a year – meaning they were recently shopping for a provider – secondary flanker brands like Fido, Virgin and Koodo are neck and neck with their parent brands. So, while those parent brands have more customers overall, the competition for new customers is much tighter.

The market effects of the COVID pandemic and rapid inflation have been indirect for mobile network providers. Early in the pandemic, travel restrictions resulted in much lower demand for network roaming, which resulted in lower revenues. More recently, inflation is affecting other industries more acutely (eg gas, food), but is making consumers more price-sensitive overall as they attempt to keep their budgets under control. That increased scrutiny will make consumers more hesitant to upgrade plans (and maybe even look to switch to lower-cost providers) and also delay device upgrades.

A more direct challenge for the mobile network industry is maintaining excitement for 5G. After its initial entry into the market, consumers are beginning to question its value compared to current 4G/LTE networks. It is becoming more important to give consumers tangible examples of how 5G will



"Mobile networks are a vital part of Canadians' lives – illustrated by the disruption of a one-day outage. And while the market is competitive, it is very stable with little consumer interest in switching. Looking ahead, the next step is to tactically drive demand for 5G by illustrating its day-to-day utility to the average Canadian."

– **Scott Stewart, Associate Director, Lifestyles & Retail**

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improve their day-to-day lives; a focus on speed is struggling to resonate because consumers are generally satisfied with what 4G/LTE offers them.

In general, though, the mobile network provider industry is healthy and stable. Not only is demand high and increasing as Canadians become increasingly digital, but consumers are loyal overall; they are satisfied with their current provider, many are long-tenured and few have any interest in switching. For stakeholders, that means that there will be constant, predictable interest in their service and relatively low risk of consumers abandoning one provider for another.



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