CRTC
Canada

Ipsos Public Affairs

Consultation on Canada's large telecommunications carriers' sales practices

POR Registration Number: 028-18
Contract Number: 3201706
Contract Award Date: August 8, 2018
Delivery Date: September 27, 2018

Prepared for the Canadian Radio-television and Telecommunications Commission (CRTC)

Ce rapport est aussi disponible en français.

Ipsos Public Affairs
1 Nicholas Street, Suite 1400
Ottawa, ON K1N 7B7

Ipsos

TABLE OF CONTENTS

LIST OF FIGURES

Political Neutrality Statement

I hereby certify as Senior Officer of Ipsos that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Communications Policy of the Government of Canada and Procedures for Planning and Contracting Public Opinion Research. Specifically, the deliverables do not include information on electoral voting intentions, political party preferences, standings with the electorate or ratings of the performance of a political party or its leaders.

Mike Colledge
President
Ipsos Public Affairs

KEY FINDINGS

Key Findings

The purpose of this POR was to examine claims of aggressive or misleading sales practices by telecommunications companies in Canada to provide evidence in support of a report requested by the Governor-in-Council.

The POR sought to better understand the prevalence of aggressive or misleading sales practices based on Canadians' own perception of these tactics, how they define such practices and incidence of a specific set of sales tactics commonly heard through complaints to CCTS. The POR also sought to gauge Canadians' level of concern with these sales practices in the contact of the broader telecommunications sector and their appetite for the government to take steps to address these concerns.

Overall, four in ten (40%) Canadians who responded to the online panel survey report having experienced sales practices by telecommunications companies in Canada that they consider to be aggressive or misleading, the majority of which report their most recent experience took place within the past year (60% of those who experienced these tactics or 24% of all Canadians).

- *When asked to explain their experiences, most comments could be attributed directly to either aggressive or misleading sales practice, while issues with door-to-door sales and poor customer service were also highlighted by some.*
- *In the qualitative research, many had experienced these practices and the sentiment was expressed that any sales and marketing practice where the customer feels they don't have a choice in engaging in the interaction are the most frustrating, and the ones where they are able to view the information on their own time and terms were viewed most favourably.*

Prevalence of aggressive or misleading sales practices is even higher when asked about a specific set of tactics with a majority of Canadians reporting salespeople pushing telecommunications products or services they are not interested in (55%), while four in ten have had technical support representatives attempt to sell them products or services during the support interaction (39%).

- *Fewer report having received a rebate or discount offers where the terms differ from the original information provided (32%), salespeople providing false details of telecommunications products or services (31%), or rebate or discount offer where terms are not disclosed before purchase (28%).*

Generally speaking, Canadians express concern with a number of aspects of the telecommunications sector in Canada and a strong majority are extremely or very concerned specifically about misleading sales practices (58%), while nearly half are as concerned about aggressive sales practices (48%).

- *Both quantitative and qualitative research highlighted that concerns with the telecommunications sector extend beyond aggressive or misleading sales practices, with concerns about the amount of competition in the sector, cost of services and quality of customer service among the most prevalent.*
- *The qualitative research also identified that a lack of knowledge and transparency about telecommunications companies pricing practices exacerbates negative impressions of the sector and of inappropriate sales tactics.*
- *A strong majority of Canadians feel that telecommunications companies place the pursuit of profit above consumer protection (76% agree) and the perception exists that they engage in*

aggressive or misleading sales practices to pressure more vulnerable people into accepting products or services they do not need (77%).

- *There is also strong agreement that the best way to address aggressive or misleading sales practices is for consumers to change to a provider who does not engage in such tactics (68% agree), however the research also identified that concern exists about the amount of competition in the sector (70% extremely/ very/ somewhat concerned) and qualitatively we learnt that Canadians feel they have limited choice of providers and that most major providers act in a similar fashion which compounds their ability to address these issues themselves.*

Among those impacted by aggressive or misleading sales practices, few have taken significant steps to address the issue beyond speaking to friends and family about their experience (48%) and while four in ten (39%) complained to their provider very few brought their concerns directly to the CCTS (8%).

- *The qualitative research highlighted a feeling of helpless among many, who believe there is limited accountability amongst telecommunications providers and that they as consumers have little recourse beyond speaking to friends or family about their experiences.*

There is strong sentiment among Canadians that they want action from government at all levels to tackle the issue (77% agree) and a strong majority look to the CRTC specifically to address their concerns (74% agree).

- *Support for the potential solutions presented is very strong with more than eight in ten either strongly or somewhat supportive of a mandatory code of conduct (83%), monetary penalties for companies engaging in such practices (83%) and a publicly released report on complaints received by government regarding sales practices (82%).*
- *Qualitative participants highlighted that these actions would be a means to empower consumers, enable more positive relationships with their telecommunications providers, and engage with the industry as informed consumers. They believe that a neutral third party would be best suited to oversee these actions.*
- *Awareness of the Commission for Complaints for Telecom-Television Services (CCTS) is universally low among Canadians (30%) and the qualitative research identified that greater knowledge of the organization and its mandate were of great interest as it provides a course of action in the event of a dispute.*

Canadians more vulnerable to aggressive or misleading sales practices

- **Canadians with a disability** are more likely to be aware of the issue of aggressive or misleading sales practices and to report having personally experienced it overall than those without a disability. Experiences with the specific aggressive or misleading sales practices presented however is consistent with the broader population as is support for the potential solutions.
- **Seniors (65+)** are less likely to have personally experienced aggressive or misleading sales practices and among those who have to report it took place more than a year ago. Seniors are however more likely to want to see action from government to address the issue and are more supportive of the proposed remedies than the broader Canadian population.
    - *Qualitatively, most seniors we spoke to do not see themselves as a vulnerable population (except for those on a fixed income to a limited degree) – but there is concern about their parents being taken advantage of (i.e. parents of seniors). That said, a few who feel less*

technically savvy mentioned having their adult children review things with them to ensure they understand what they are getting.

- **Third language communities** while more likely to have personally sales practices they consider aggressive or misleading sales practices and specifically salespeople providing details of telecommunications products or services which end up being false or rebate/discount offers where terms are not disclosed before purchase also express greater tolerance towards the practice. They are less likely to agree that all levels of government need to work together to address the issue, that telecommunications companies are too concerned with profit and not enough with consumer protection and that companies use these sales tactics to pressure more vulnerable people into accepting products or services they do not need. They are also more likely to agree that that it is a normal part of business and that concern about the sales tactics is exaggerated. Support for potential remedies is lower among those who speak a third language however a strong majority are still in favour of each solution presented.
- Among the audiences consulted qualitatively, many felt unaffected as part of a more vulnerable audience however some themes emerged regarding challenges they commonly deal with while engaging with telecommunications companies.
  - Language comprehension for Third Language and Minority Language communities where service is often offered in a language other than what they speak and among Seniors when dealing with a representative who speaks a language other than English or French, or has a heavy accent;
  - The ability to concentrate or engage among those with mental disabilities or issues with accessing in-person technical support for those with mobility challenges;
  - Canadians in rural or more remote communities mostly struggled with a lack of choice due to few telecommunications companies in the area.

Differences by Major Providers

- Customers of **Rogers** and **Bell/Aliant** are more likely to report having experienced aggressive or misleading sales practices either overall or in regards to the specifics types of practices presented. They are also more likely to indicate their experience took place within the past year.
- **Videotron** customers are more likely to report experiencing salespeople selling products or services they do not want and are among the most likely to report their experience was within the past year.
- Support for potential remedies is strong across customers of all major service providers.

Differences by Demographics

- **Region of residence:** Canadians who reside in Ontario are most likely to report experiencing aggressive or misleading sales practices and for the incident to have taken place within the past year. Incidence is also somewhat higher among those from Quebec or British Columbia, while those in Saskatchewan/ Manitoba are the least likely to have experienced a situation or for it to have been within the past year. Support for potential solutions while high across all regions of the country is highest in Saskatchewan/ Manitoba, followed by Quebec.
- **Urban/ Rural:** Canadians who reside in a rural area are less likely to indicate personally experiencing aggressive or misleading sales practices and to report specifically experiencing salespeople providing details of telecommunications products or services which end up being

false. They are also more likely to express concern with access to telecommunications services in rural areas. Support for all potential remedies while strong among both groups is higher for the creation of a mandatory code of conduct for telecommunications providers among those who live in a rural area.

- **Age cohort:** Prevalence of aggressive or misleading sales practices is higher among those under the age of 55 years old and in particular 18-34 years old. Support for potential solutions while high among all age cohorts is in fact strongest among older Canadians (over 55).
- **Indigenous status:** Awareness and incidence of aggressive or misleading sales practices is higher among Indigenous respondents, while support for potential remedies is lower than those who are not of Indigenous status however a strong majority respond positively.
- **Born in Canada*:*** Canadians not born in Canada express greater tolerance towards the issue of aggressive or misleading sales practices than those born in Canada. They are less likely to feel telecommunications providers place greater emphasis on profit than consumer protection and are more likely to feel aggressive or misleading sales practices are a normal part of business and that concern about the tactics is exaggerated. A strong majority are supportive of the potential solutions presented, but less so than those born in the country.

Differences by Official Language

- Those who speak French are less likely to indicate personally experiencing sales practices they consider aggressive or misleading, however when asked about a specific set of practices are more likely to report experiencing salespeople pushing telecommunications products or services you are not interested in and less likely to report salespeople providing details of telecommunications products or services which end up being false. Among those who experienced these sales practices, English-speaking respondents are more likely to have told friends and family or to have complained to their provider.
- Generally speaking, French-speaking respondents are more likely to express concern with the amount of competition in the telecommunications sector. Attitudinally, French-speaking respondents are also more likely to agree that all levels of government need to work together to address the issue and that concern over the tactics is exaggerated (however only a relatively small minority feel so). They are also much less likely to agree that they don't care who addresses concerns about aggressive or misleading sales practices as long as the practice is stopped.
- Support for potential remedies is consistent across both Official Languages.

Comparison to Voluntary survey results

- Experiences with and attitudes towards aggressive or misleading sales practices differ greatly among those who completed the voluntary public survey compared to the panel survey. Those who completed the voluntary survey are considerably more likely to be aware of the issue, to have experienced it personally and to express concern about the tactics.
- Support for the potential solutions presented is also considerably higher among those who completed the voluntary survey.

INTRODUCTION

INTRODUCTION

Ipsos was commissioned by the Canadian Radio-television and Telecommunications Commission (CRTC) to conduct public opinion research on Canada's large telecommunications carriers' sales practices.

BACKGROUND AND OBJECTIVES

On June 6, 2018, the CRTC was directed by the Governor-in-Council to make a report on the retail sales practices of Canada's large telecommunications carriers and specifically to examine claims of aggressive or misleading sales practices, the prevalence and impact on consumers and potential solutions. The final report is due to be submitted by February 28, 2019.

At the heart of the request by the Governor-in-Council is an increase in concern expressed by Canadians on the issue of aggressive or misleading sales practices in the telecommunications sector.

The CRTC understands the concerns of Canadians. The commission launched a public consultation on July 16, 2018. In addition, the CRTC also undertook Public Opinion Research (POR) on the topic to measure the extent to which those practices are taking place and are perceived to be misleading or aggressive. This report addresses the POR component of the CRTC consultation.

Including POR as a component to the report to the Governor-in-Council allows the CRTC to measure the prevalence of these issues, Canadians opinions on the matter and to encourage participation in the consultation process. It is essential to the CRTC that a wide-variety of perspectives are included in any such research and on the public record. In particular, the CRTC sought to ensure that individuals who may not be able to participate in public proceedings are included in the research as well as those groups who may be more vulnerable due to age, a disability or a language barrier including Canadians with disabilities, seniors, third language communities and those who reside in smaller/ remote communities. It is also essential that the opinions of both English and French language markets and those in Official Language Minority Communities are addressed in the POR.

The primary research objectives for this POR are as follows:

- Gauge consumers experiences with Canada's telecommunications carriers retail sales practices and the extent to which those practices are misleading, aggressive or harmful to consumers
- Measure awareness of the Commission for Complaints for Telecom-Television Services
- Measure reaction to potential solutions to addressing any misleading or aggressive retail sales practices
- Understand the perspectives from as broad a group of Canadians as possible from across the country including any trends by region of the country (among other factors)
- Understand how the issue is perceived among those more vulnerable to misleading or aggressive retail sales practices
- Understand any trends by large telecom providers and by types of telecommunications services

METHODOLOGY

The POR undertaken by the CRTC was conducted in two primary phases including both qualitative and quantitative research as outlined in the table below. Appended to the report is detailed methodological information, as well as a copy of the quantitative survey questionnaire and qualitative discussion guide.

Description	Details	Fieldwork Dates
QUALITATIVE		
Seniors	2 focus groups in urban centres (Calgary & Halifax) 2 focus groups in small / rural communities (Val-D'Or & Sault Ste Marie)	• Sault Ste. Marie, Thurs Sept 6 • Halifax, Mon Sept 10 • Calgary, Thurs Sept 13 • Val d'Or, Mon Sept 17
Individuals with disabilities	10 in-depth telephone / online-chat interviews	• Wed Sept 5 –Friday Sept 14
General public in rural communities	1 online focus group in Whitehorse, Yukon 1 online focus group in Prince George, BC	• Whitehorse, Wed Sept 12 • Prince George, Thurs Sept 13
Third language spoken at home	1 online focus group in Toronto, ON 1 online focus group in Vancouver, BC	• Toronto, Mon Sept 10 • Vancouver, Mon Sept 10
Official language minority community	1 online focus group in Saint Boniface, MB and Moncton, NB 1 online focus group in Montreal, QC	• Saint Boniface/ Moncton, Thurs Sept 20 • Montreal, Tues Sept 11
QUANTITATIVE		
Online panel survey	n=1603 completed surveys among a sample of Adult Canadians 18 year of age or older. The sample was stratified by age, gender and region to the representative proportions of adults Canadians Oversample of francophone market (n=206)	• Mon Aug 27- Sunday Sept 9
Public survey for voluntary participation	Hosted on CRTC website and promoted through CRTC social media channels. n=7075 completed surveys	
Paper-based survey	Available on request through the CRTC's toll-free line. N=1 completed paper surveys	

NOTES TO READERS

- The sample for the online panel survey was sourced through an online panel of Canadians who were pre-recruited to participate in survey research. Respondents were invited to participate based on their demographic characteristics. Quotas were applied and statistical weighting was utilized to ensure the final sample reflected the actual proportions of the Canadian population based on the 2016 Census (by age, gender and region) and forms the basis for the key findings in the research.
- The voluntary public survey provided an opportunity for participation among the broader public and is not considered to be representative of the Canadian population. Comparisons between results of the panel survey and voluntary public survey have been provided in a dedicated section of this report.
- The qualitative research was executed to hear directly from those groups described by the Governor in Council to be vulnerable to aggressive or misleading sales practices and are not intended on being representative of the broader population. Findings are meant to compliment the panel survey and provide greater depth of insight into specific experiences among these audiences.
- All results in the report are expressed as a percentage, unless otherwise noted.
- Throughout the report, percentages may not always add to 100 due to rounding.
- When reporting sub-group variations, only differences that are significant at the 95% confidence level, indicative of a pattern and pertaining to a sub-group sample size of more than n=30 are discussed.

DETAILED FINDINGS

1. ISSUE AWARENESS

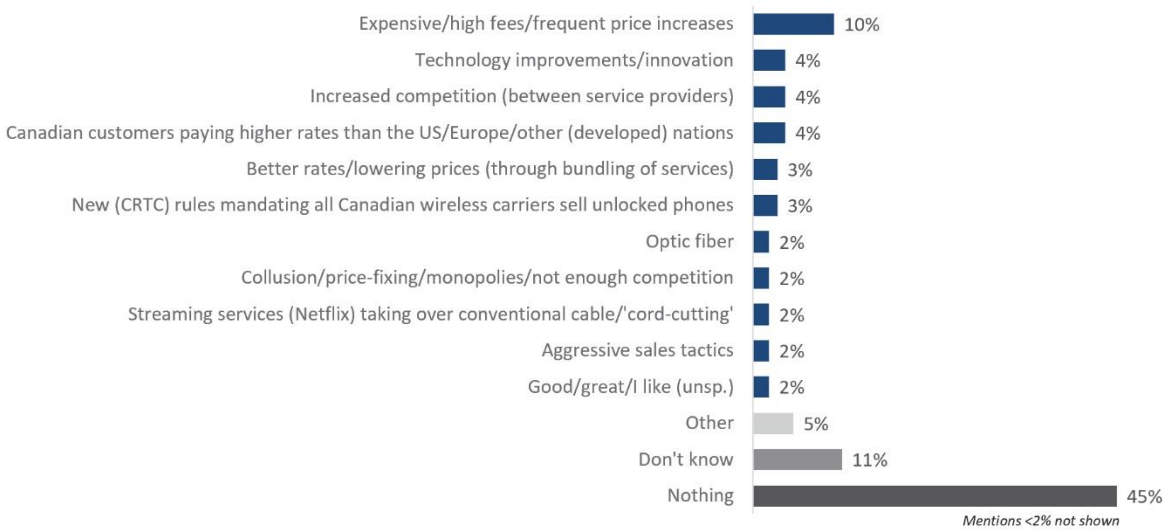
This section addresses awareness of prominent topics in the telecommunications sector as well as aided awareness of aggressive or misleading sales practices by telecommunications providers in Canada.

Unaided Awareness of Topics in Telecommunications Sector

When asked on an unaided basis what they have heard about the telecommunications sector in the past year, if anything, the most common responses are related to the perception of expensive or high fees and the increase in rates over time.

Other prominent topics mentioned by Canadians include technological improvement, increased competition and the perception that Canadian customers pay higher rates than other developed nation.

Figure 1: Unaided Awareness of Topics in the Telecommunications Sector



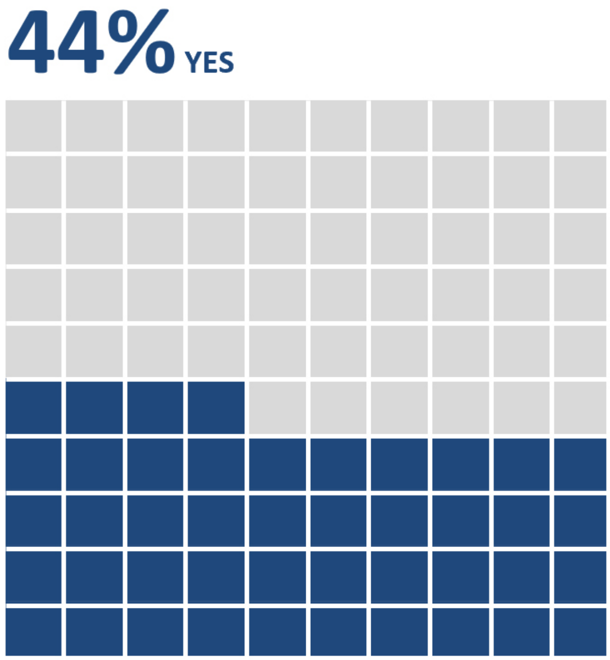
Base: All Respondents n=1809

Q13. What, if anything, have you heard about the telecommunications sector in the past year?

Aided Awareness of Aggressive or Misleading Sales Practices in the telecommunications sectors in Canada

At more than four in ten (44%), a strong minority of Canadians indicate they are aware of the issue of aggressive or misleading sales practices in the telecommunications sectors in Canada.

Figure 2: Aided Awareness of Aggressive or Misleading Sales Practices



Base: All Respondents n=1809
Q15. Before today, have you heard anything about aggressive or misleading sales practices in the telecommunications sector in Canada?

Qualitative Findings

Most participants are aware of aggressive and/or misleading sales practices by Canadian telecom companies and some techniques elicit stronger dislike than others, whether or not they have experienced them personally.

- Some believe that there are different levels of service associated with sales and marketing – that there are shorter wait times, and that their manner and tone is much friendlier, than customer service representatives.

"It has to do a lot with how the company does set up the structure for their marketing, versus service portion of that. The prime example is if you're trying to go and buy a plan, your wait time is going to be considerably shorter versus say if you want to get a billing portion fixed or something that had to do with service side. They make you wait a long time before you have an opportunity to speak to them. I think it does go with the culture of how they started up for it to be." – Third Language Vancouver

- Many do not make the distinction between sales and marketing representatives and general customer service representatives, or service generally vs sales – in other words, they consider their whole experience with their telecom as part of the sales and marketing process – even if they have a good experience on the phone, if the service does not live up to their expectations then this is a crucial component in their decision to continue with it. Furthermore, since many customer service representatives also sell services and products on the phone, this distinction is blurry for many.

“Marketing is a different department, sales is a different department, customer service is a different department, they do communicate with their departments through different communication channels, but to us, as a customer, we just take them as one whole company, right?” - Rural Community BC

“People showing up at night to sell me a new product, this is Telus. Somebody else showing up at my house telling me that they want to rewire my house for a new product, and I say: ‘Well, I don’t want the new product’. They say: ‘Well, if we don’t do this now and you change your mind, it’s going to cost you $1,000 a month’, right? So I said: ‘Fine, I don’t want it, I don’t care about the $1,000’. So twice they came to my place and we had the same discussion. And I’m mowing my lawn one day and holy cow there’s all these wires that are screwed into my wall, that I’d never seen before. Fiberoptic. They must’ve come in and did it anyway, and they would have had to climb the fence because it’s locked. I mean what are you going to do? I felt like actually cutting the wires off and tossing them in the garbage but, you know, they went onto my property without permission.” – Senior, Calgary

2. ISSUE PREVALENCE AND PERCEPTIONS

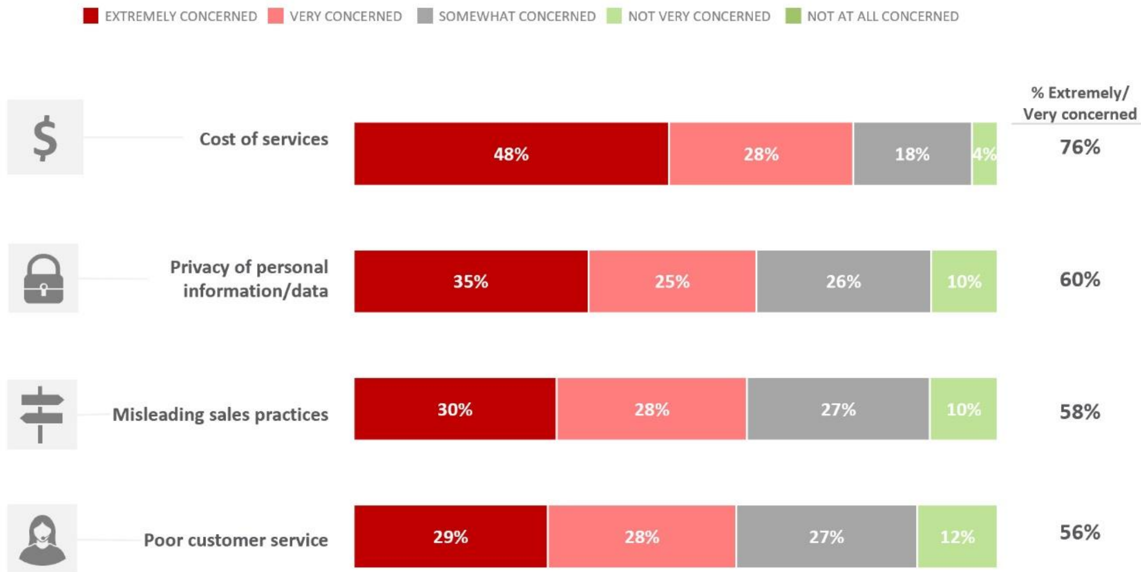
This section addresses the level of concern Canadians attribute to different aspects of the telecommunications sector in Canada, the proportion of Canadians who feel they have personally experienced aggressive or misleading sales practices and the timeframe in which those experiences took place.

Concerns with the Telecommunications Sector

A strong majority of Canadians express concern with a number of aspects of the telecommunications sector in Canada. Level of concern is highest for:

- Cost of services (76% extremely/very concerned);
- Privacy of personal information (60%);
- Misleading sales practices (58%);
- Poor customer service (56%)

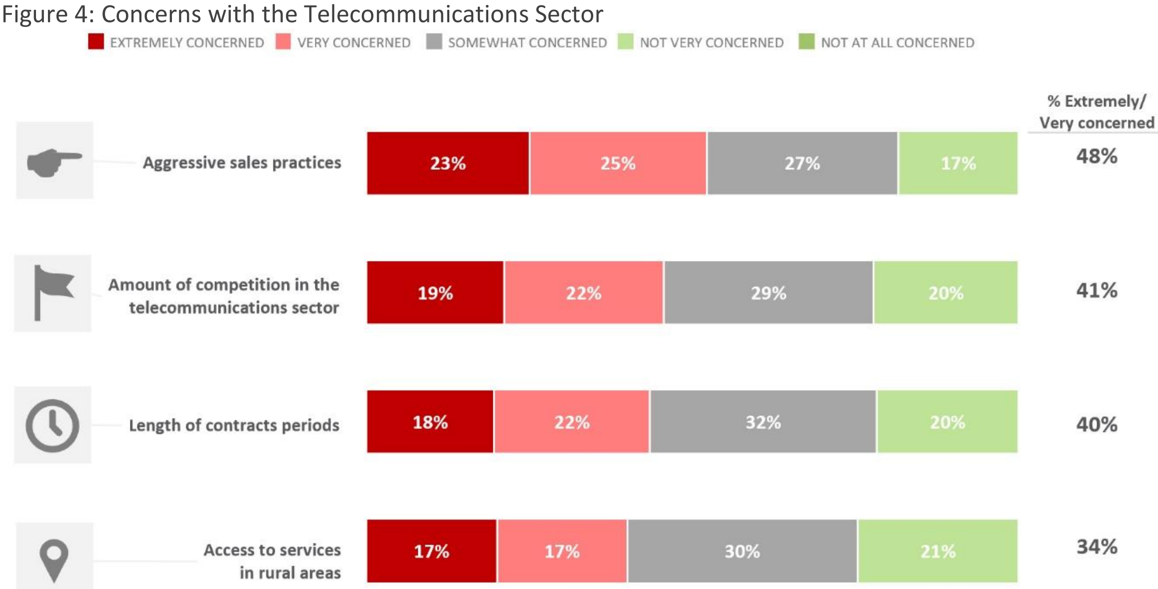
Figure 3: Concerns with the Telecommunications Sector



Base: All Respondents n=1809
Q14. How concerned are you about each of the following in the telecommunications sector in Canada?

Nearly half of Canadians also express concern with aggressive sales practices (48%), while closer to four in ten are concerned about the amount of competition in the telecommunications sector in Canada (41%), length of contract periods (40%) and to a lesser extent access to services in rural areas (34%).

Figure 4: Concerns with the Telecommunications Sector

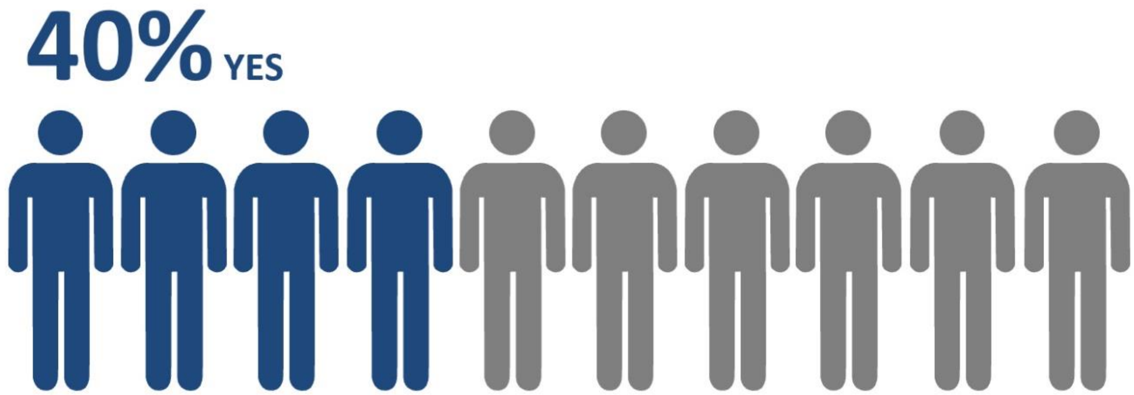


Base: All Respondents n=1809
Q14. How concerned are you about each of the following in the telecommunications sector in Canada?

Issue Prevalence

Four in ten (40%) Canadians indicate they have personally experienced sales practices they would consider aggressive or misleading from telecommunications providers in Canada.

Figure 5: Personally experienced aggressive or misleading sales practices

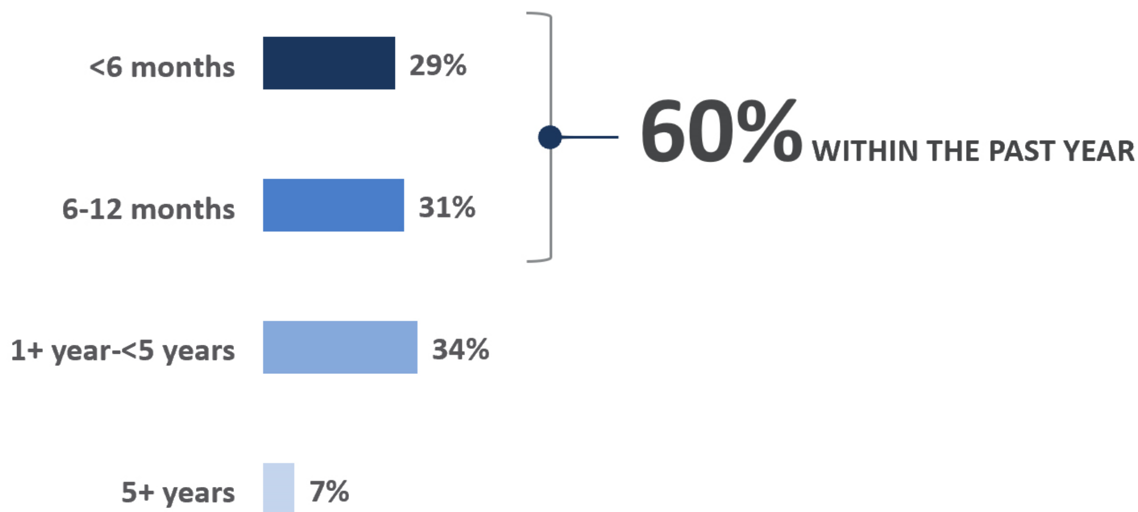


Base: All Respondents n=1809
Q16. Have you ever experienced any sales practices you would consider aggressive or misleading from telecommunications providers in Canada?

Timeframe of Experience

Of the four in ten who have personally experienced sales practices they consider aggressive or misleading, the vast majority indicate it was in the past year (60%), of which three in ten indicate it was either in the past 6 months (29%) or in the past 6 to 12 months (31%). One-third say their experience was more than a year ago but within the past five year (34%) and fewer than one in ten more than five years ago (7%)

Figure 6: Timeframe of experience



Base: Experienced aggressive or misleading sales practices (n=711)
Q17. When did you last experience this situation?

Qualitative Findings

Many participants believe that telecom companies engage in pricing practices that are unfair to them as consumers.

There were numerous pricing practices that we heard about in the qualitative research which were of concern to participants:

Participants would like a choice in how they interact with their telecom, rather than having it forced upon them.

- The sales and marketing practices that are of greatest concern and frustration are those that are not proactively sought out by the customer. Participants universally state that they are willing and capable of reaching out to their telecom as needed rather than having the telecom come to them. This is simply often a matter of not requiring any additional services, but also about the inconvenience of when the sales visits and calls happen. As such, door-to-door sales and repeated telephone calls were the most concerning, whereas more passive engagements were more positively perceived.

"I don't mind getting TV and digital ads or targeted flyers, just because it does let me know what is available to me should I be shopping around for a different service. I don't however appreciate mobile device ads or email ads, or phone calls, just because it's my choice to pick up that flyer, not being pushed into my face like a phone call or door to door salesperson would be." – Northwest Territories & Yukon

"I get fairly aggressive after a while and I just turn it on them, 'do you not understand the word no means no, you know, I have a life, get out!" – Senior, Calgary

- There are currently few mechanisms in place for customers to opt out of these types of practices and communications – for example, they might ask a provider to stop making sales calls and these requests are disregarded. Most participants do not wish to be rude, so they tolerate the interaction, with a few who assert themselves or resort to "hanging up" or "slamming the door".

"But it's the salesperson on the door, and I don't want to be rude so that's a tough spot for me sometimes. I end up listening to them even though I don't want to just because I feel like the person is doing his job so I don't want to be rude." – Rural Community BC

- Some had experiences of the price for service(s) on their bills increase incrementally each month, without any notice or apparent reason. Several mentions were made that upon expiry of a contract or deal with pricing favourable to the customer, they were not alerted or made aware of this by their telecom and the price would increase, often dramatically. The customer would then have to call their provider to find out why as they rarely remembered about the expiration, and negotiate a new deal or contract. In these situations, participants felt that the onus should be on the provider to proactively reach out and advise the customer about the expiration.

"I find that sometimes you know, the price will go up and things will change and you're not really notified of that. You're led to believe that you are going to have the same price where you know, they change it on you and you don't really know and the wait times are pretty long on the phone [for an explanation]. "– Person with Disability, BC

"So, every month I get on the phone and I say 'hey, my bill is $5 more a month, why? "– Senior, Calgary

"My bill, the one that I'm referring to was $180, it was $138 exactly a year ago. So, from $138 to $180 was 30%, that's in one year! My service hasn't been changed in any way. Nobody said they're doing this because it's good for me or I'm going to get all this extra service." – Senior, Calgary

"I called and was changing a few years ago my settings and different programs, and they said yes, you'll get this and this. Then I get the bill and it's totally different from what we discussed on the phone. And of course it was much higher than what we discussed on the phone. And so I called them, and it took about two hours to finally resolve. They would send me to another department, and another department, and it was quite annoying. And then they sent me the new bill, still there was something wrong. And so I don't know who the people in accounting, or whoever they were, but it took quite a while to resolve it." – Senior, Halifax

- Many loyal and long-term customers feel that new customers are given more favourable terms or pricing and that they are not rewarded for their history of good payment or loyalty. In order to obtain the same pricing, they resort to getting a competitive offer, or asking for the retention department and then threatening to leave.

"[…] these companies should give long-term clients loyalty discounts to show they are appreciated, instead of having to threaten to cancel the service because they're dissatisfied with the service." – Minority Language, Saint Boniface/Moncton

"These incentives all seem to be for new customers to that company, and I know some of you have talked about switching and so on. But my wife said there was one here, it said $500 pre-paid card if you bundle TV and internet. I don't know what company that was but that's only for new customers. We've been with Telus for over 50 years and we get zip, you know, we only get increases from month to month. Our TV went from $79 to $84 from May to August and our internet from $61 to $71 for exactly the same service, and they keep doing that." – Senior, Calgary

- In the event of pricing or other disputes with their telecom, a few had their accounts sent to collections by their telecom. They felt this was a drastic and unfair action to take given that felt the telecom was at fault, and their refusal to pay was driven by their desire to have the situation rectified by the provider, rather than having to pay something they did not feel was their responsibility. For example, one participant was promised a new phone by a telecom for free, but instead was sent a bill for it. He refused to pay, the bill was sent to collections, and the situation continues to be unresolved for 5 years.

"All they had to do was send me the free phone and everything would have been hunky dory but they refused to. They said that I wasn't owed one, and I said them well who goes on a 2-year contract without getting a free phone? […] I get a collection agency calling me and I keep telling them the same thing. Tell them to send me the free phone and I'll pay the outstanding balance […] Every time they keep telling me the same thing, I'm sorry sir, I'm just a collection agency to collect your funds. That's not part of my job […] In the beginning, I talked to six different people about the same thing and each time they said well I'm sorry, I can't do anything about it. So I frustrated to the point where now I just block their calls because I'm not getting anywhere, I'm not getting through to them that they still owe me a free phone." – Person with Disability, Alberta

"I had a contract with Bell and I wanted to drop them and go back to Shaw. They told me that it was going to cost me $600. I basically said, you folks can come and get it because I'm not paying it

and my argument is that your service is crappy and that's why I'm quitting. That was the last I ever heard from them." – Senior, Sault Ste Marie

- In general, pricing is thought to be wildly uneven and inconsistent across all the different telecommunications providers, and varies by customer and by which representative the customer happens to speak to. Some representatives are thought to be more helpful and knowledgeable than others, with greater latitude or motivation to find or give customers more favourable pricing. Similarities in pricing across telecommunications providers was thought to be as a result of competition, and not standardization by the industry or regulation by government.

"Yeah, well I really think it's unfair that somebody with the same Bell plan can pay more or less depending on just what they're willing to pay. You know, Rogers and Bell they go back and forth on their pricing and I feel like that's really unfair. Some people would just be happy with it, 'oh that's the price, okay I'll pay that', but really they don't know if they, you know, tried to get a discount that they might actually get a discount. So yeah, I just find it really unfair and I don't like that kind of pricing game. And they sort of have a monopoly on the market, people don't really know that there's other companies out there that are really competitive and offer good services."- Third Language, Toronto

"I'm with Shaw too and I don't agree with the billing way ahead. Like, I've got the October 15th bill and September 15th even isn't here yet. They do that all the time. I have my internet and cable with them. I am always having problems with cable." – Senior, Calgary

- The ability to grandfather favourable pricing was a positive; however, some felt pressured by their telecom providers to switch to other plans, or had their grandfathered plans changed or discontinued.

"I had this phone plan that I had since high school. It was a really good phone plan, it had a really incredible amount of data that was offered at the time when data was cheap to offer. And the thing was I had to buy my own device every time if I needed a new one, so I couldn't get it through the plan. And I guess they weren't too happy offering me this plan, so they kept offering me what they would call upgrades, but they would also include a more expensive plan just to try to get me on the new program. And I repeatedly told them no, I'm totally happy buying this device myself. I don't want to be paying $80 a month for my phone bill." – Third Language, Vancouver

- Telecommunications providers are considered by many to be monopolies of 1-2 large companies in any given service area, even in large urban centres such as Montreal and Toronto. They are perceived to own the telecommunications infrastructure, and any smaller companies within the area are thought to be subcontractors or intermediary companies that using the larger companies' infrastructures. As such, participants believe there is little incentive to keep prices low for consumers. Several mentions were made that telecom prices are among the highest in the world, and this was a point of frustration for those who mentioned it.

"I have to say a lot of us up in the North have been gouged for a long time. We haven't had lots of options, and with some of the other companies started to come in that's when the prices started to drop. The only other thing I wanted to add is, I know a whole bunch of people that have cancelled all of their telephone landlines because of cellphones, their TV internet services because they have Crave internet, Amazon TV, all of that stuff. So we have a lot of decisions to make when we're moving forward with how we want to spend our money." – Northwest Territories & Yukon

A few express dismay that telecom companies engage in what they perceive as an excessive amount of sales and marketing, in that they feel they are already spending a sizeable amount of money each month on their services, and the perception is that they are constantly being sold on more.

Experiences within each telecom can vary – not just across different telecommunications providers.

- The inconsistencies between individual representatives such as varying awareness of different plans, or a lack of record-keeping about calls between other representatives, often means that participants will employ various tactics and negotiation strategies in dealing with their telecommunications provider – these include asking to speak to a manager or retention department, adopting a more forceful tone, or obtaining an offer from a competitor – in order to get the best pricing and packages. While a few take pride in their ability to navigate the system, most express frustration and concern that they should have to resort to these actions.

"I just find that sometimes, you know, one rep will tell you one thing and then another rep, if you call back, will tell you another thing, so it's very frustrating. That to me is the most frustrating, is when they don't really know their packages themselves or, you know, they try and… you feel like you're being tricked. You don't know whether it's because they're not fully aware or if they're, you know, trying to trick you." – Third Language, Montreal

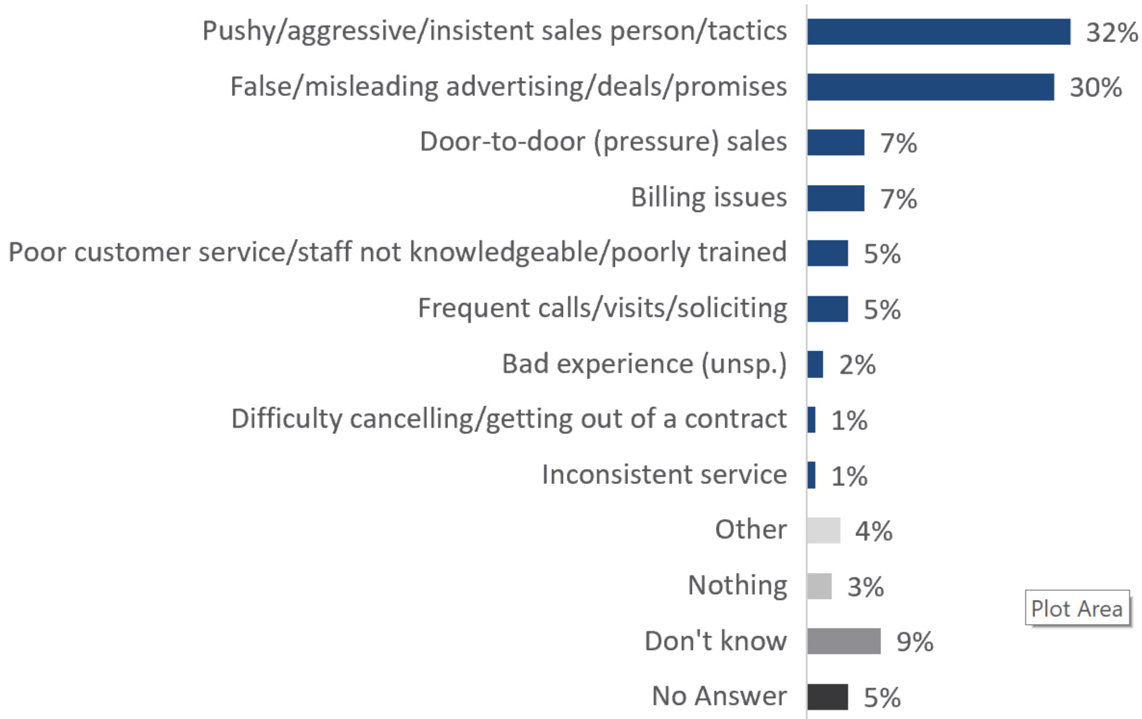
3. EXPERIENCES WITH AGGRESSIVE OR MISLEADING SALES PRACTICES

This section addresses how Canadians would describe their own experiences with aggressive or misleading sales practices, the proportion of Canadians who have experienced specific activities considered to be aggressive or misleading sales practices on the part of telecommunications providers and the actions they have taken following their experience.

Description of experiences with aggressive or misleading sales practices

Among the four in ten who have personally experienced sales practices they consider aggressive or misleading, nearly one-third described their experience as aggressive sales practices (32%) followed closely by those who described their experience as misleading sales practices (30%). Other common issues mentioned specifically include door-to-door pressure tactics (7%), billing issues (7%) or poor customer service (5%).

Figure 7: Description of experiences with aggressive or misleading sales practices



Base: Experienced aggressive or misleading sales practices (n=711)
Q18. What did you experience? Please be as specific as possible.

In their own words…

Below are verbatim comments from the most prominent categories of open-ended responses.

Pushy/ aggressive/ insistent sales person/ tactics	*'A door to door person trying to aggressively make me switch over. Wouldn't take no for an answer and would not leave.'* *'Aggressive selling by telemarketers or customer service people. Really, you don't understand what NO means?!'* *'A salesman arrived at my door with an offer that sounded too good to be true. I asked for his name and employee number to verify the offer, but he refused and became belligerent.'* *'Aggressive sales persons coming to my home trying to get me to switch providers, or purchase services I don't need or want.'* *'When I was enquiringly about the cost of bundling services and possibly switching over to Telus a few years ago I was harassed by a sales person and his supervisor from and out of country call centre. They called me back several times after I stated I was no longer interested in switching over. I ended up having to block the number in order to stop the calls.'* *'Aggressive sales pitch, refused to cease behaviour, forced to slam door in their face.'* *'We get NUMEROUS phone calls from both Rogers & Bell claiming they can offer us lower rates for better service. Rogers is terrible at insisting they can offer more options for less than we already pay and will call repeatedly. BELL -- who we are with constantly tries to get us to add services we don't need.'*

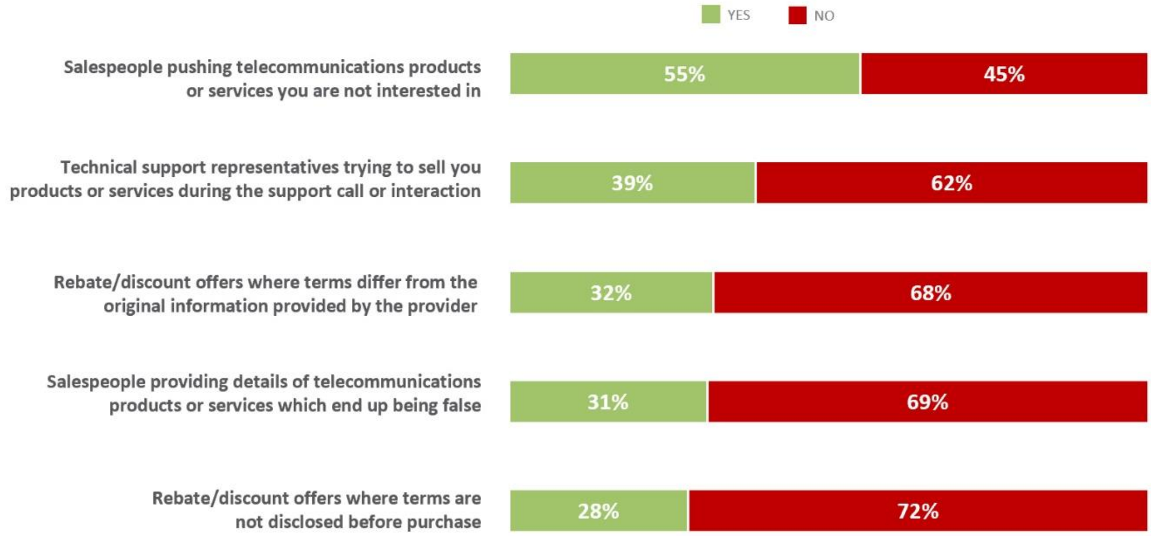
False/ misleading advertising/ deals/ promotions	*'A Bell sales rep told me that if it took a certain package it will last for 2 years, but once the first year ended the prices went up.'* *'A company told me about how awesome the service (coverage) they provided was in my area was. I know from several people there is almost zero or spotty coverage.'* *'A rep tried to sell me a bundle for a reasonable price but when it came to actually sign the papers, the price was twice as much.'* *'A sales rep telling us we won a free year of their product. Phone Sask Tel and told them about this and they said they had no one offering this free stuff.'* *'Aggressive sales people at malls, talking up one price, then when it's time to sign the paperwork they've inflated the price because they fail to mention all the add on costs.'* *'Being told if I sign with a phone and plan contract for 2 years, I would receive a $200 gift card. In the end, all I received was a credit against my phone bill for $200.'* *'Bell Canada promised me A certain price for my bundle very explicitly online during a chat. Once it was all installed, they reneged.my cost went up by 25 percent. They just said she shouldn't have quoted me that price online. Too bad for me.'* *'When I signed up for my internet they made the plan sound much better than it was. They didn't really mention that it would go up in price halfway through the contract.'* *'We switched from Rogers to Bell for TV and internet. We were offered huge discounts to switch and were told to call Bell when the promotion ended to renew discounts. Guess what? No such luck. My costs went up from 242 per month to 353 per month.'* *'We signed a contract with Telus after a home visit by a salesperson, then cancelled the contract two days later when we found out (after calling Telus directly) that we had been given some false information.'* *'Was told that the rate would be for the entire contract, but two months later the rate was increased'*

Personal experience with specific aggressive or misleading sales practices

When asked whether they have experienced specific sales practices, just over half of Canadians (55%) report having interacted with a salespeople pushing telecommunications products or services they are not interested in, while a sizeable minority (39%) indicate having technical support representatives trying to sell them products or services during the support call or interaction.

Approximately three in ten Canadians experienced rebate/discount offers where terms differ from the original information provided by the provider (32%), salespeople providing details of telecommunications products or services which end up being false (31%) or rebate/discount offers where terms are not disclosed before purchase (28%).

Figure 8: Experiences with specific aggressive or misleading sales practices



Base: All Respondents (n=1809)
Q21. Have you ever personally experienced any of these situations?

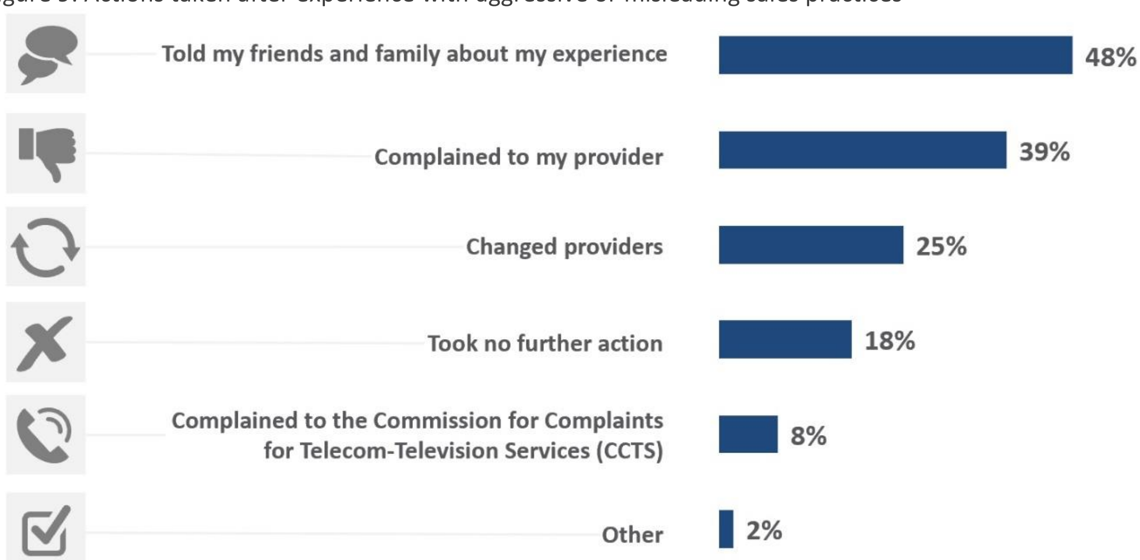
Actions taken after their experience

The most common steps taken after experiencing an interaction they would classify as aggressive or misleading sales practices are to:

- Talk to friends or family about the experience (48%);
- Complain to their provider (39%);
- Change providers (25%).

Nearly one in ten (8%) complained to CCTS directly while close to two in ten took no action (18%).

Figure 9: Actions taken after experience with aggressive or misleading sales practices



Base: Experienced aggressive or misleading sales practices (n=711)
Q19. What, if anything, did you do about it?

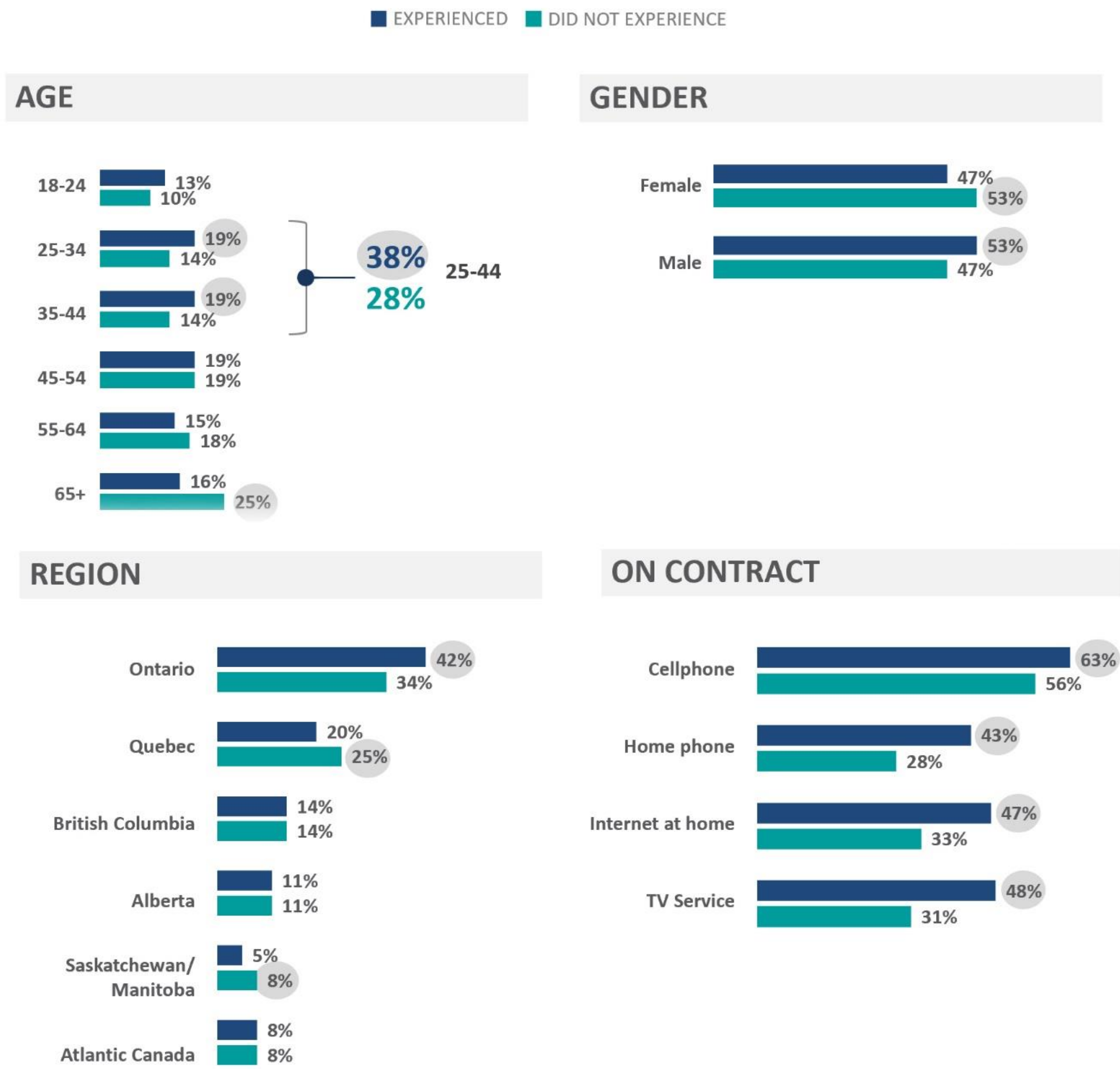
Profile of Canadians who have experienced aggressive or misleading sales practices

When profiled by demographic information a number of notable differences exist between those who have experienced aggressive or misleading sales practices versus those who have not.

Canadians who have experienced aggressive or misleading sales practices are statistically more likely than those who have not experienced these sales tactics to be:

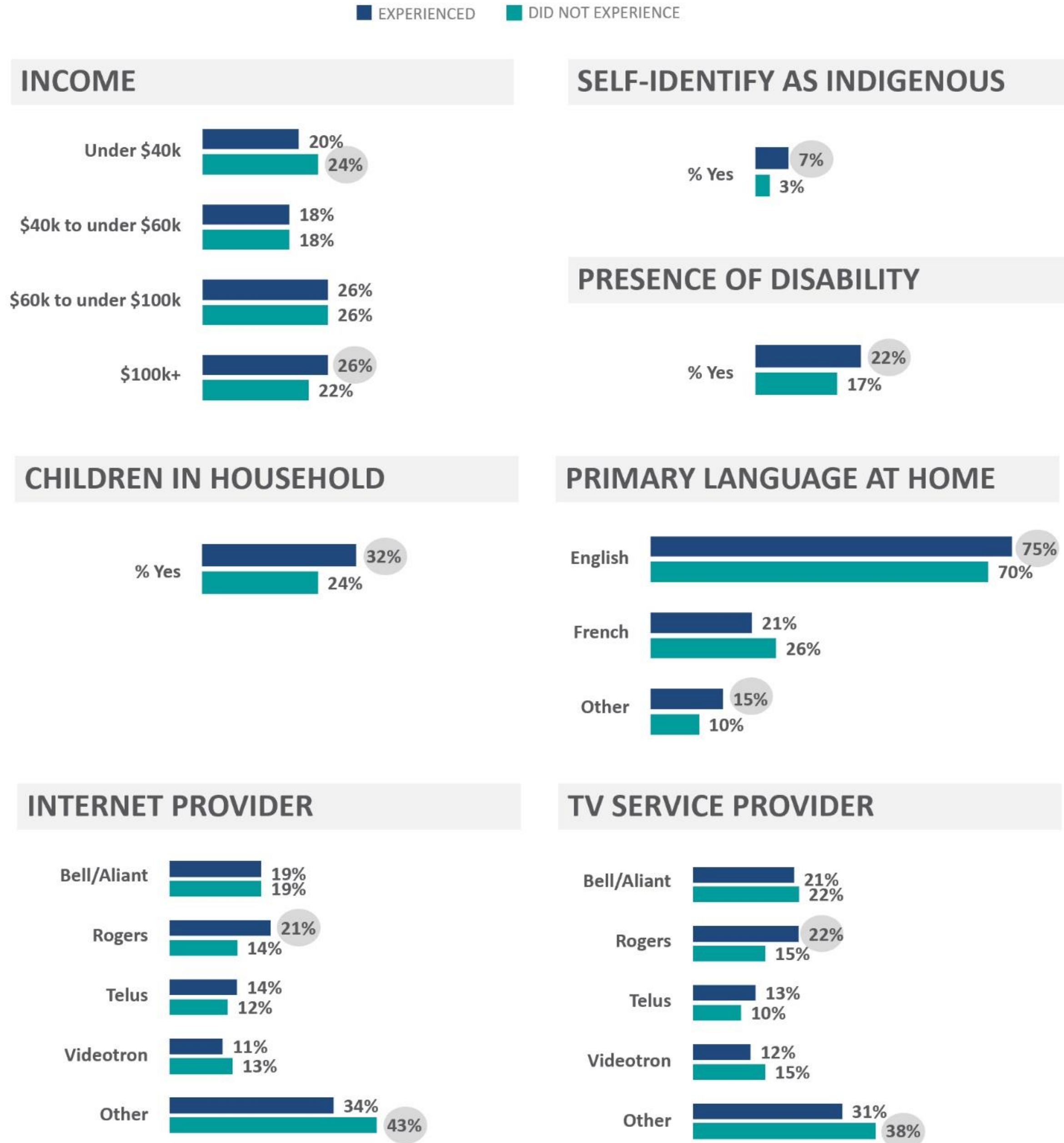
- Male (albeit to a limited degree)
- 25-54 years old (less likely to be 65+)
- Ontario resident (less likely to live in Quebec, Saskatchewan or Manitoba)
- English-speakers or speak a language other than English or French
- Have children in the household
- Have a household income in excess of $100,000 per year, less likely to make less than $40,000
- To self-identify as Indigenous
- To have a disability
- To be on contract for any of the services they currently use
- To have Rogers as their current service provider for internet at home or TV service

Figure 10: Profile by age, gender, region and on contract



Base: Experienced aggressive or misleading sales practices (n=711), Did not experience aggressive or misleading sales practices (n=1098)

Figure 11: Profile by income, indigenous status, presence of disability, children in household, primary language spoken at home, current internet at home and TV service provider



Base: Experienced aggressive or misleading sales practices (n=711), Did not experience aggressive or misleading sales practices (n=1098)

Qualitative Findings

Many participants had experiences with aggressive or misleading sales and marketing practices and these were very poorly perceived. Other practices received more of a mixed reaction. Broadly, any sales and marketing practice where the customer feels they don't have a choice in engaging in the interaction is the most frustrating, and the ones where they are able to view the information on their own time and terms were the most favourably viewed.

- **Door-to-door salespersons** for whom some participants simply refuse to answer the door – they either dislike these unsolicited visits because of safety reasons (for females, for those with children), or the visits occur at inconvenient times. For some who do answer the door, they are often put in a position of listening politely to sales pitch which they are not interested in, or forced to be “rude” in order to cut the visit short.

“Well, the digital ads and television ads, they are there. yes, they made me advertising that they will appeal to you as a customer, but it's our decision whether we like it or we don't. We also have the power to change the channel that we don't watch to watch it, right? But it's the salesperson on the door, and I don't want to be rude so that's a tough spot for me sometimes. I end up listening to them even though I don't want to just because I feel like the person is doing his job so I don't want to be rude.” – Rural Community BC

“Two young Asian girls, very attractive, maybe late teens, maybe 20, at like about 9 o’clock in the morning. Like this just shocked me, okay. I don’t know, it was about a week or so ago and she wanted me to take Telus, and I said I’ve already got Shaw’. And she said ‘oh but we’ll give you a very good deal’ and I said ‘well I’ve just signed a 2-year contract’ and I said I got a great price, and she said ‘what’s your great price?’. I said ‘$101, internet, phone and television, cable’. And she said ‘oh we can beat that, we can give you that for $81, we can even get you out of your contract’. Can you imagine?, ‘we can get you out of that contract, it won’t cost you anything, you can sign with us for $81’. I said ‘well I couldn’t handle another hassle like this’, you know.” – Senior, Calgary

- **Unsolicited telephone sales calls** are another area of frustration and concern for some participants, who employ various techniques to mitigate these: Some don’t answer the phone, some answer and as with door-to-door, either listen politely to an irrelevant pitch or are forced to be “rude”; others are assertive in their responses and firmly ask to be disconnected, or hang up. Participants ask to be removed from call lists to no avail – they still receive sales calls even after this request, sometimes from different phone numbers.

“I just talked to my friends and they said that it was annoying and that I wasn’t the only one that was getting harassed by a company, and yeah, they are good with that […]I think the difference is they insist a lot even though you are saying that you are not interested. They will keep speaking and speaking and leaving you voicemails and that’s almost harassment. It’s just too much. You feel like they are too close to you and it’s not fun […]Yeah, you tell them okay, I’m sorry I’m not interested, but oh yeah, this will just take a minute and there’s this super deal and they keep speaking and you almost have to hang up on them so they can shut up […] It’s really frustrating. It’s not fun. You have a life to live and when they are always calling you, it’s not fun.” -Person with Disability, Quebec

“Most of the time they try to pressure you. You only have until tomorrow morning to decide that if you want to do this and you know, price is going to go up. Well, we had the last call from Shaw [at midnight]. My husband was talking to them and they said this is going to only be available until tomorrow morning, so you have to tell me tonight. It sounded like a really good idea, but they said we need to know now and I said to my husband, it's too good to be true. My husband said we need time to think about it. Well, you know, they can't do better so...” – Senior, Sault Ste. Maire

- For a few of the door-to-door or telephone experiences, the participant expressed potential interest and received what they characterized as an excessive amount of follow up, which was often also aggressive – for one participant, the salesperson waited outside her home over the course of several days to the point where she felt she couldn’t leave.

"[…] then there was this Bell guy who came up and he just like wanted to talk and tell us about the services. So I was just being nice and opened the door and was trying to listen to what he had, so he took like I would say more than an hour to explain his services. But yeah, okay I was being nice to him but then what happened the next day, he came again. I told him if I'm going to get the service, I'm going to call you and I'm going to let you know. But this guy, he kept coming for more than a week, he used to wait in his car for like long hours right in front of our home. And that I think is annoying and concerning for me, because I wasn't feeling comfortable going out of my house, right. So I think that was pretty annoying to me." – Third Language, Toronto

- While some received door-to-door salespersons and phone calls from their current telecom, others received them from competitors attempting to gain their business. Another common time to receive phone calls was when they switched providers and their previous provider would attempt to offer them a more attractive deal to switch back. In these instances, participants expressed resentment that the telecom did not simply offer this to begin with, especially if they had been a long term loyal customer.

"[…]they should offer you the best service across the boards either Bell or Rogers should be all the same thing, it shouldn't be all this price gouging or make me special deals when you complain. You shouldn't have to go that far." – Person with Disability, Ontario

- **Text messages** received a mixed response, with some who were in favour of receiving these as they felt they had a choice to open the text, and a few valued the information they received. Others did not want to be reached by text and felt that they were an annoyance – the ability to opt out of receiving such texts was mixed. Emails also received a mixed response, with some in favour of them as a good way to allow the customer to decide on whether or not they choose to open the email.

"Yes, we've had messages from our provider. We're just learning how to get into them and we've had help from family and friends so we are getting better at it. It is a good way to see their specials and things, yes." – Person with Disability, ON

"I don't mind getting text messages from people that I know but I hate getting these text messages, I just find them so annoying. They are usually being intrusive when I'm in the middle of something and interrupting my train of thought because of this stupid text message." – Rural Community BC

- **Targeted flyers** which offer a competitive and appealing price for a service in large font and bold graphics, but the actual details – most notably, the details such as the duration of the contract or what is included in the price advertised – are in very small print. Upon further investigation, participants found that the special pricing typically lasted only 3-6 months before the price would be raised. For advertised prices on products or services, there were other hidden fees or charges that would add up and significantly raise the cost of the product or service.

"Especially targeted flyers, there are some I feel they're very misleading certain times where I don't know if that's a past practice or not, but I had an experience where the flyer comes out, you look and it's a great deal, you go there, and oh boy there's tiny print where you have to sign this many years, buy this particular phone at this particular price. Starting at $29.95 you can get this, but no, if you want the better phone you have to be on the $100 plan. You can't get it for $29 anymore. So that's what I've seen before." – Third Language, BC

- **Television and Digital Ads** received a mostly neutral reaction, with participants being neither in favour or against them. A few found them valuable sources of information, with a few others who thought they were misleading by offering packages or prices that as with targeted flyers, came with caveats about length of contract – or, the ad was not relevant to them in their region.

“Whether it's on the TV or the computer, it's not unpleasant. And you can still skip them if you want.” – Minority Language Saint Boniface/Moncton

“For me I find all your TV ads are geared to down south, in our case Vancouver or Edmonton area, and they don’t apply up here. Of course they’re selling high speed unlimited internet, well we don’t have those options. And even most of the cell providers that are advertising all these wonderful plans, we can’t get them anyway, we don’t have those providers. So really, in my experience the TV ads are just if you want to watch it for interest, go ahead. If you want to drool a little bit over what they’re offering, okay. But they’re meaningless anyway.” – Northwest Territories/Yukon

- Many participants stated that in the event they are in need of additional products or services, or to change their products and services, they would reach out proactively to their telecom. As such, they found these techniques wasteful in terms of their time, and in the case of targeted flyers, wasteful for the environment. In a few cases, the sales practices employed had the opposite desired effect on the participant, in that a poor experience made them less likely to sign up for products or services with the telecom in question.

“I've had many negative experiences with Shaw, even though I have never had their services. They phone me quite often, offering services - even though I have told them many times that they do not offer services in my area. I would think they would know that before they call!” – Third Language Vancouver

4. ATTITUDES AND OPINIONS TOWARDS AGGRESSIVE OR MISLEADING SALES PRACTICES

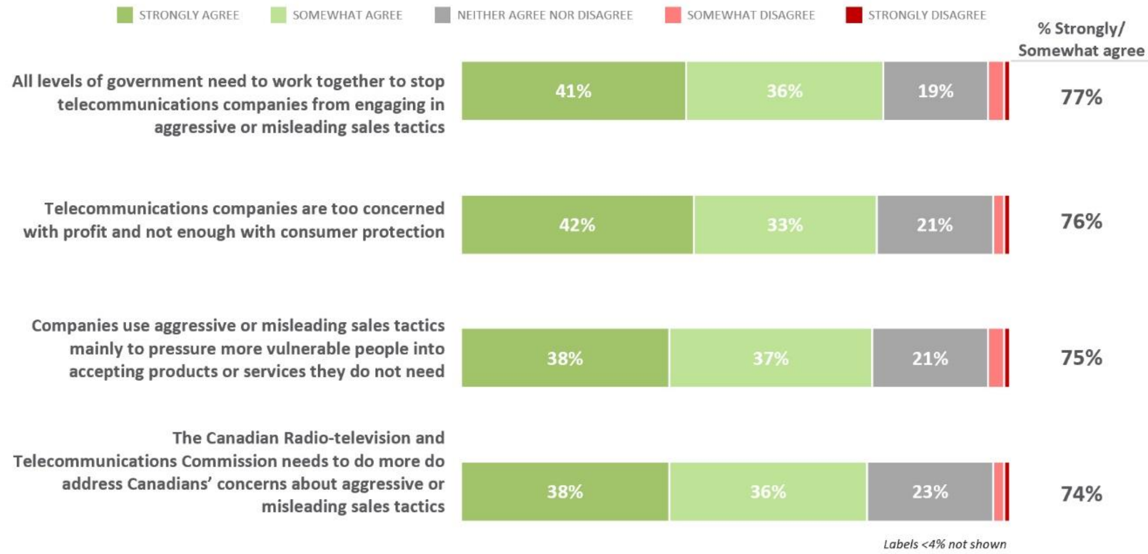
This section address Canadians’ broader attitudes and opinions towards aggressive or misleading sales practices.

Attitudes and Opinions

At approximately three quarters, the vast majority of Canadians agree that:

- All levels of government need to work together to stop telecommunications companies from engaging in aggressive or misleading sales tactics (77% strongly/somewhat agree);
- Telecommunications companies are too concerned with profit and not enough with consumer protection (76%);
- Companies use aggressive or misleading sales tactics mainly to pressure more vulnerable people into accepting products or services they do not need (75%);
- The CRTC needs to do more do address Canadians' concerns about aggressive or misleading sales tactics (74%).

Figure 12: Attitudes and Opinions towards aggressive or misleading sales practices



Base: All Respondents (n=1809)

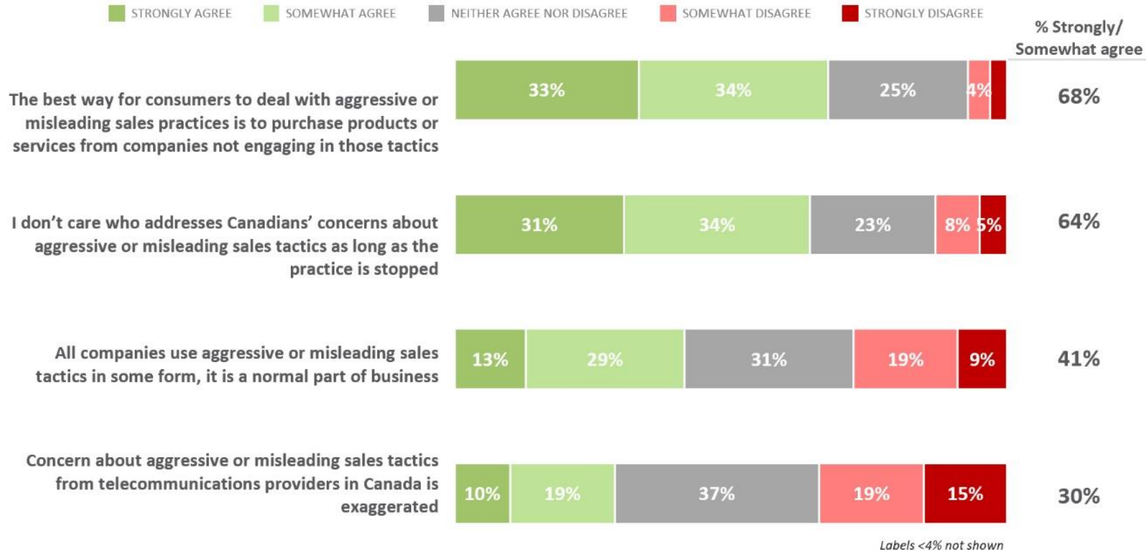
Q22. Please indicate how much you agree or disagree with the following statements.

A strong majority of Canadians also agree that:

- The best way for consumers to deal with aggressive or misleading sales practices is to purchase products or services from companies not engaging in those tactics (68%);
- They don't care who addresses Canadians' concerns about aggressive or misleading sales tactics as long as the practice is stopped (64%).

Comparatively, four in ten agree that all companies use aggressive or misleading sales tactics in some form and that it is a normal part of business (41%), while fewer feel that concern about aggressive or misleading sales tactics from telecommunications providers in Canada is exaggerated (30%).

Figure 13: Attitudes and Opinions towards aggressive or misleading sales practices



Base: All Respondents (n=1809)
Q22. Please indicate how much you agree or disagree with the following statements.

5. REACTION TO POTENTIAL SOLUTIONS

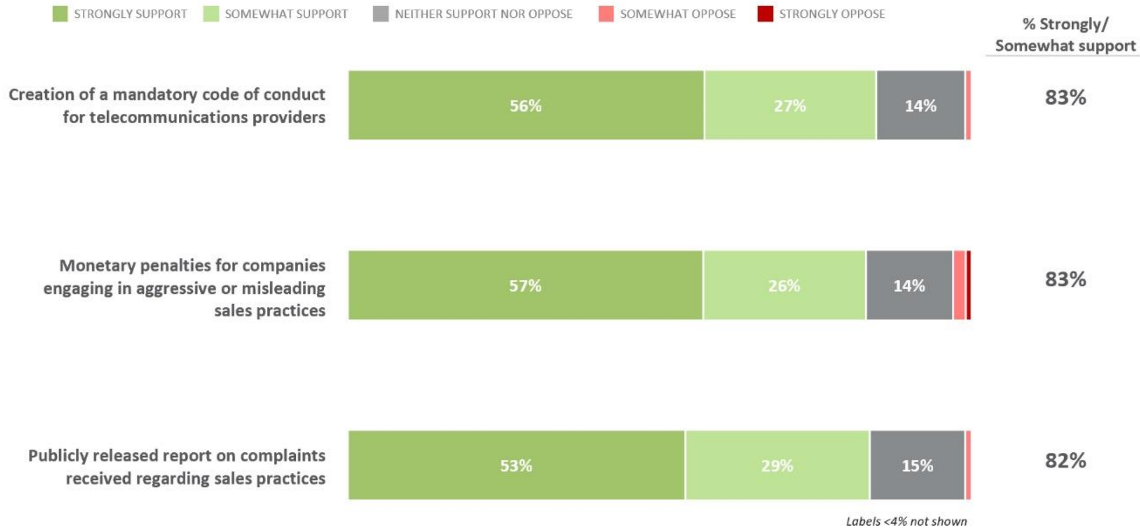
This section addresses Canadians support or opposition to a series of potential solutions to complaints about aggressive or misleading sales practices on the part of telecommunications companies in Canada as well as awareness of the Commission for Complaints for Telecom-Television Services (CCTS).

Support or Opposition to Potential Solutions

At more than eight in ten, support is very strong among Canadians for each of proposed remedies.

- Monetary penalties for companies engaging in aggressive or misleading sales practices (83% strongly/somewhat support);
- Creation of a mandatory code of conduct for telecommunications providers (83%);
- Publicly released report on complaints received regarding sales practices (82%).

Figure 14: Support/ Opposition to Potential Solutions



Base: All Respondents (n=1809)

Q23. How much do you support or oppose the following actions being taken to try and address the increase in complaints?

Qualitative Findings

Participants feel much helplessness in dealing with telecom companies. They do not believe they have any course of action to protect themselves, and so hearing about potential solutions during the course of the discussions was of tremendous interest.

- A **mandatory code of conduct** is positively viewed as increasing accountability by the telecommunications providers, and giving customers a basis and something to refer to if needed in their dealings with them. The code would ideally be the same across the industry and apply to all telecommunications providers. While some believe it was appropriate to include expectations around tone and manner, others think this would be out of scope for a code.

"I feel like there should be one code for everyone, because otherwise you don't know what people are doing and they should just be straightforward or as straightforward as possible. So if there's one set of rules for everyone, I think that's the better way to go." – Third Language Montreal

"They just need to be held accountable for it. It's one thing to have a code of ethics or a code of conduct, but what are the ramifications if they break it? You know, 'gosh, you've been bad', you know, so there has to be some sort of accountability and penalty applied or attached to it, and then I think that's a great idea." – Senior, Calgary

"I guess my concern is that they may explain it in such a manner that it is perfectly clear to person A but person B, because they are less educated or a little older, whatever, they don't understand it so when you say that it has to be made understandable, there's not one size fits all explanation here so how does anybody ascertain whether the person doing the calling has done whatever he or she had to do to make sure that the person being called understands it?" – Senior, Sault Ste. Marie

- A **written summary** is very appealing to many, as some currently struggle with documentation of their conversations with telecommunications providers, where there is often no record of phone conversations they have had with individual representatives. Participants felt strongly that this should be a short, succinct document written in plain language that is easy-to-understand and free from technical jargon. A few felt that this should be optional and not applied universally to all sales agreements.

"I think it would be really great. I think most of the contracts that you get are in writing. My thing though is it would work so long as what was written up was written at a Grade 6 level, otherwise many people might not fully understand the contract anyway." – Northwest Territories & Yukon

"I think something in writing, in pen and paper right in front of you is real compared to an idea which is not real, it's abstract." – Senior, SSM

- A **trial period** was considered a great idea to many, who like the idea that they are able to see for themselves if the service they receive aligns with what they were sold by representatives of the telecom. It would also give them some time to determine if they really use/need the service without worrying about cancellation fees or contracts. Participants feel that the onus should be on the telecom to remind the customer that the trial period is ending so that they can make a decision on whether or not to stay with the product or service. However, a few had concerns about the practicality and rollout of trial periods, as they felt it might be onerous for telecommunications providers to execute.

"My preference would be that the telecom provider would have to contact us. He can cancel at any time obviously but I just want. It's like when you join one of those things, here you get a free delivery for a month but if you don't cancel that program within the month then you're going to be charged $70. They are really relying on people remembering that the month has gone by and canceling it." – Rural BC

- **Monetary penalties** are seen as the most effective and concrete means to truly hold telecommunications providers accountable. However, there are concerns that eventually the cost of these penalties would be passed onto customers in the form of higher prices. Some think this could be mitigated by having the penalties go back to the telecom's customers, instead of being held in a fund. Others are concerned about the administrative costs of overseeing this action, and how the penalties would be arbitrated and amounts determined.

"If it touches providers' pockets, I think it will change something, I think it's a good idea." – Minority Language, Saint Boniface & Moncton

"But when they've collected a lot of fines, won't the cost of our packages go up? So it's us who will pay for the fines." – Val D'Or

- **Publicly released reports** received a less enthusiast reaction than the other items. Some think these could be valuable for customers to make comparisons between telecommunications providers in choosing a provider, similar to rating websites for various products and services. Some positively interpreted the reports as high level, aggregated data. However, others were concerned that these would become a forum for individual complaints without providing a balanced viewpoint.

"Because if it's public, the people will know. You can go check before you go see that company if they have a lot of problems with people." – Minority Language Toronto

"[…] a complaint report of complaints received just make it subject to targeted complaints or targeted complaining so there is reason to doubt you know […]" – Rural Community BC

Although there is some awareness that the industry is regulated, most do not believe there are any regulations in place as it relates to pricing, and sales or marketing tactics. One participant was told that the reason for higher telecom prices in Canada is because of the regulatory demands placed on the provider by the CRTC.

“Some regulatory body, and it’s probably the CRTC, came out like a month ago and identified the big companies that we’re talking about as being aggressive and not providing fair service. Well, it didn’t change anything.” – Senior, Calgary

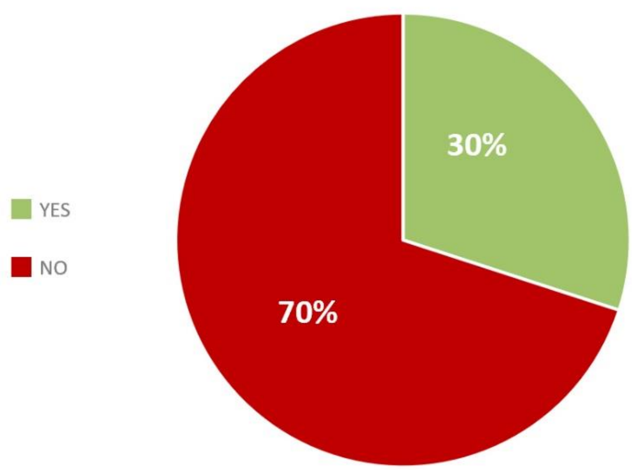
Most believe that the actions should be overseen by a neutral third party; this could be a government regulator or an independent body. Participants were leery of having industry itself or individual telecom providers oversee such an initiative. They believed that the telecommunications providers would look out for their own best interests over those of consumers.

“No, that’s like the fox in charge of the henhouse”. – Senior, Halifax

Awareness of the Commission for Complaints for Telecom-Television Services (CCTS)

At three in ten (30%), a minority of Canadians have ever heard of the Commission for Complaints for Telecom-Television Services (CCTS) before taking the survey.

Figure 15: Awareness of CCTS



Base: All Respondents (n=1809)

Q20. Have you ever heard of the Commission for Complaints for Telecom-Television Services (CCTS) before taking this survey?

Qualitative Findings

- **Awareness of the CCTS is universally low and hearing of the organization’s existence and mandate was of great interest.** Knowing that they have a course of action in the event of a dispute was appealing and relevant to hear for many. For a few, they saw filing a complaint with CCTS as being mostly for very serious disputes, and not smaller complaints.

“The consumer can only complain if they know where to go”. – Senior, Calgary

“[I feel] a little better [knowing about CCTS], at least you can go there and find out where you can complain to, if nobody listened to you.” – Senior, Halifax

"I think that's brilliant to have a commission for telecom services in this day in age, in Canada." – Rural Community, BC

"This is new to me and it's good to know there's such a thing we can go and complain. Thank you." – Third Language, Vancouver

6. CANADIANS MORE VULNERABLE TO AGGRESSIVE OR MISLEADING SALES PRACTICES

An essential part of the POR commissioned by the CRTC was to ensure those groups more vulnerable to aggressive or misleading retail sales practices were included in the consultation to determine whether their experiences differed from those of other Canadians.

The audiences considered more vulnerable to aggressive or misleading retail sales practices include:

- Canadians with disabilities;
- Seniors (65+);
- Third language communities;
- Those who reside in smaller/ remote communities;
- Official Language Minority Communities

The quantitative panel survey provides sufficient sample sizes for analysis among Canadians with disabilities (n=338), Seniors (n=388) and Third language communities (n=195). The remaining, harder to reach, audiences were consulted through qualitative research which included sessions among all groups considered more vulnerable to aggressive or misleading sales practices.

Presence of disability

Those who self-identify as having a disability (n=338) are more likely to report experiencing sales practices they consider aggressive or misleading than those who do not. They are also more likely to express concern with the cost of services charged by telecommunications providers.

Figure 16: Differences in experience and level of concern among those with a disability

Base: All Respondents (n=1809), Presence of disability (n=338), No disability (n=1416)

Prevalence of specific aggressive or misleading sales practices however is no higher among those with a disability and support for the potential solutions presented is also consistent with the broader Canadian population.

Figure 17: Differences in experience and support for action among those with a disability

PERSONALLY EXPERIENCED ANY OF THESE SITUATIONS

% YES

	TOTAL	DISABILTY	NO DISABILTY
● Salespeople pushing telecommunications products or services you are not interested in	**55%**	60%	54%
● Technical support representatives trying to sell you products or services during the support call or interaction	**39%**	38%	39%
Rebate/discount offers where terms differ from the original information provided by the provider	**32%**	35%	31%
● Salespeople providing details of telecommunications products or services which end up being false	**31%**	35%	30%
● Rebate/discount offers where terms are not disclosed before purchase	**28%**	32%	27%

SUPPORT FOR THE FOLLOWING ACTIONS BEING TAKEN

% STRONGLY/SOMEWHAT SUPPORT

	TOTAL	DISABILTY	NO DISABILTY
● Creation of a mandatory code of conduct for telecommunications providers	**83%**	82%	83%
Monetary penalties for companies engaging in aggressive or misleading sales practices	**83%**	83%	83%
● Publicly released report on complaints received regarding sales practices	**82%**	82%	82%

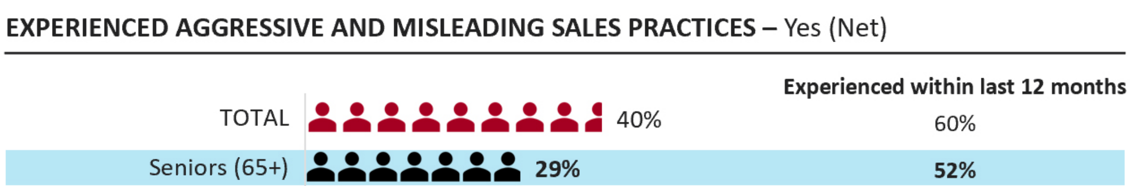
Base: All Respondents (n=1809), Presence of disability (n=338), No disability (n=1416)

Seniors (65 years of age or older)

Canadians over the age of 65 years old (n=388) are less likely to indicate having personally experienced aggressive or misleading sales practices both at the overall level and in regards to the specific types of sales practices asked about. Among those Seniors who have experienced aggressive or misleading sales practices, they are more likely to report it took place more than a year ago compared to the general population.

Despite the issue being somewhat less prevalence among this audience, Seniors are among the most likely to want to see all levels of government work together to address the issue and specifically to see action from the CRTC. Seniors are also more likely than the broader Canadian population to support the potential solutions presented.

Figure 18: Differences in experience among Seniors



Base: All Respondents (n=1809), Seniors (n=388)

Figure 19: Differences in experience, attitudes and support for action among Seniors

PERSONALLY EXPERIENCED ANY OF THESE SITUATIONS

% YES

	TOTAL	Seniors (65+)
● Salespeople pushing telecommunications products or services you are not interested in	55%	50%
Technical support representatives trying to sell you products or services during the support call or interaction	39%	27%
● Rebate/discount offers where terms differ from the original information provided by the provider	32%	22%
● Salespeople providing details of telecommunication products or services which end up being false	31%	20%
● Rebate/discount offers where terms are not disclosed before purchase	28%	16%

ATTITUDES AND OPINIONS TOWARDS AGGRESSIVE OR MISLEADING SALES PRACTICES

% STRONGLY/SOMEWHAT AGREE

	TOTAL	Seniors (65+)
● All levels of government need to work together to stop telecommunications companies from engaging in aggressive or misleading sales tactics	77%	84%
● The Canadian Radio-television and Telecommunications Commission (CRTC) needs to do more to address Canadians' concerns about aggressive or misleading sales tactics	74%	79%

SUPPORT FOR THE FOLLOWING ACTIONS BEING TAKEN

% STRONGLY/SOMEWHAT SUPPORT

	TOTAL	Seniors (65+)
● Creation of a mandatory code of conduct for telecommunications providers	83%	90%
● Monetary penalties for companies engaging in aggressive or misleading sales practices	83%	89%
● Publicly released report on complaints received regarding sales practices	82%	89%

Base: All Respondents (n=1809), Seniors (n=388)

Third language communities

Third language communities are defined as those who speak a language other than English or French most-often in the household (n=195). Respondents from a third language community are more likely to indicate personally experiencing aggressive or misleading sales practices overall (50% vs. 40% overall), while prevalence of specific aggressive or misleading sales practices is also higher for some activities including:

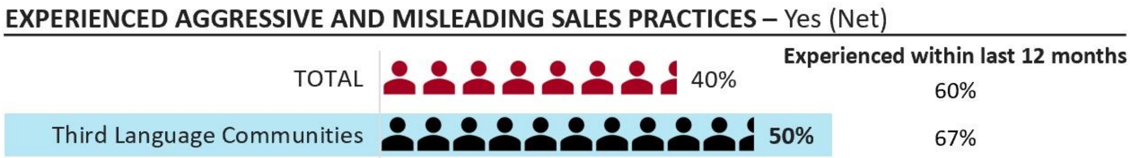
- Salespeople providing details of telecommunications products or services which end up being false (Total: 31%, Third-language: 39%);
- Rebate/discount offers where terms are not disclosed before purchase (Total: 28%, Third-language: 35%)

Respondents from a third language community also hold somewhat different attitudes towards aggressive or misleading sales practices than the broader population. They are less likely to agree that all levels of government need to work together to address the issue (Total: 77%, Third-language: 69%), that telecommunications companies are too concerned with profit and not enough with consumer protection (Total: 76%, Third-language: 69%) and that companies use these sales tactics to pressure more vulnerable people into accepting products or services they do not need (Total: 75%, Third-language: 66%). They are also more likely to agree that all companies use aggressive or misleading sales tactics and that it is a normal part of business (Total: 41%, Third-language: 51%) and that concern about the sales practices in Canada is exaggerated (Total: 30%, Third-language: 40%).

Support for potential remedies is lower among those who speak a third language however a strong majority are still in favour of each solution presented.

- Creation of a mandatory code of conduct for telecommunications providers (Total: 83%, Third-language: 75%)
- Monetary penalties for companies engaging in aggressive or misleading sales practices (Total: 83%, Third-language: 77%)
- Publicly released report on complaints received regarding sales practices (Total: 82%, Other-language: 75%)

Figure 20: Differences in experience, attitudes and support for action by Third Language Communities



PERSONALLY EXPERIENCED ANY OF THESE SITUATIONS

% YES	TOTAL	Third Language
Salespeople pushing telecommunications products or services you are not interested in	55%	51%
Technical support representatives trying to sell you products or services during the support call or interaction	39%	40%
Rebate/discount offers where terms differ from the original information provided by the provider	32%	38%
Salespeople providing details of telecommunications products or services which end up being false	31%	**39%**
Rebate/discount offers where terms are not disclosed before purchase	28%	**35%**

ATTITUDES AND OPINIONS TOWARDS AGGRESSIVE OR MISLEADING SALES PRACTICES

% STRONGLY/SOMEWHAT AGREE	TOTAL	Third Language
All levels of government need to work together to stop telecommunications companies from engaging in aggressive or misleading sales tactics	**77%**	69%
Telecommunications companies are too concerned with profit and not enough with consumer protection	**76%**	69%
Companies use aggressive or misleading sales tactics mainly to pressure more vulnerable people into accepting products or services they do not need	**75%**	66%
All companies use aggressive or misleading sales tactics in some form, it is a normal part of business	41%	**51%**
Concern about aggressive or misleading sales tactics from telecommunications providers in Canada is exaggerated	30%	**40%**

SUPPORT FOR THE FOLLOWING ACTIONS BEING TAKEN

% STRONGLY/SOMEWHAT SUPPORT	TOTAL	Third Language
● Creation of a mandatory code of conduct for telecommunications providers	83%	75%
● Monetary penalties for companies engaging in aggressive or misleading sales practices	83%	77%
● Publicly released report on complaints received regarding sales practices	82%	75%

Base: All Respondents (n=1809), Third language communities (n=195)

Qualitative Findings

While many were unaffected as part of a vulnerable population in their dealings with telecommunications providers, some themes emerged by group:

- **Seniors** struggle with language and prefer dealing with sales and marketing, and customer service, representatives who are fluent in English or French (depending on the language they speak). Furthermore, they would like employees who work within Canada as there are cultural considerations and references that those in foreign phone rooms do not understand or provide help with. A few felt that they are being taken advantage of because they have poor/less technical knowledge, or that they are treated worse than others because of their age.
- Some seniors also had complaints about the offers they received from telecommunications providers – they felt that they were getting "deals", i.e., grandfathered pricing, and offered special promotions. They only question it when they find out that new customers are paying less; they see price creep on their monthly bills; they are charged for a specialty channel they didn't ask for; or when after 6-12 months they are paying more than they had initially signed up for. They are not informed by the provider about the price increase – they have to ask.
- Most seniors we spoke to do not see themselves as a vulnerable population (except for those on a fixed income to a limited degree) – but there is concern about their parents being taken advantage of (i.e. parents of seniors). That said, a few who feel less technically savvy mentioned having their adult children review things with them to ensure they understand what they are getting.

"I have sort of a funny story with respect to, you had mentioned, you know, people not understanding you. And I don't know about Shaw, but I know Telus uses offshore a lot. My husband passed away and I phoned to cancel his cell phone. And it's really, totally… it's terrible. So, I got somebody on the line and I explained that, you know, my husband's passed away and I need to cancel his phone. And he asked me a few questions and then he said: 'Of course we can't do this without your husband's permission'. And I said: 'he's passed away' and he said: 'oh no, I'm terribly sorry' and then he asked me some more questions and told me what I had to do, and then he said: 'Is there any way you can get in touch with him?' …And I wanted to say 'the séance is Friday, but you know…' And then he asked, you know, more things about where I need to take the phone … And then: 'when do you expect him back?' And I said: 'the man is dead, dead, dead as a doornail, DEAD!', and I go: 'Oh my God', and I was put on hold right away. And the next thing was a north American voice: 'Mrs. F, I'm so sorry for your loss'." – Senior, Calgary

"With anybody you deal with, you know, so if they're going to have call centers and have them here or whatever, you know, I think that as Canadians we have the option of speaking French I guess. And I don't speak French, but the two languages in Canada are English and French, and that's my feeling on that." – Senior, BC

"I called [Bell] one day in January and I think it was probably Mumbai or somewhere and they said that the leaves were blocking my satellite dish and I said, I don't know where you are but it's January." – Senior, Sault Ste. Marie

"When I bought my cell phone – I don't know anything about this stuff – I go to Bell, I get a cell phone. The most basic package is for just making phone calls. But they give me the most complicated one, I don't understand any of it. On top of that, you try and do something with the phone and you don't manage (or at least I don't). When I went back to ask for their help, she said 'yes but madame, you should have told us, you've paid $400 for the contract, I could have offered you this (something simpler)'. And I said that was what I asked you for last time. Oh (big sigh). They sold me the big package, I took it, and now I'm stuck with it for 2 years." – Senior, Val D'Or

- **Persons with disabilities** might struggle with concentration, focus or become overwhelmed by long wait times, and interactions that are difficult or confusing. As such, these participants tend to withdraw, rather than attempting to deal with the situation. Those with mobility issues don't struggle with sales and marketing, but would prefer technical support come to their home, rather than trying to troubleshoot over the phone.

"I'm openly autistic and I also have attention deficit disorder and so, with the fact that I am autistic, there are certain things where I have some sensory processing issues so you know, dealing with people on the phone sometimes, I get very frustrated and you know, it's just a sensory input thing so I do my best to get through them and get things resolved but sometimes it's just a bit too overwhelming for me. So, that's why I don't always follow- I don't always fight it, like I was saying earlier." – Person with Disability, BC

"[…]there are some days where like my body just doesn't work and so it can be really hard to then have to deal with services not working. And having to call and speak with multiple people and try to like, they're telling you to do like all these troubleshooting options and so that can be hard if my mobility is not great that day. And a lot of time I'll have to be on oxygen, so that can make it really hard too, to have to be going up and down stairs and just doing all of these things that they'd like me to try to do. So yes, in that way it is frustrating for sure, it does add an extra layer of frustration." – Person with Disability, NB

- **Third language** participants did not have concerns for themselves as it relates to sales and marketing, but some facilitate or support their parents in dealing with telecom providers, and these participants expressed concern that their parents might not understand what they are signing up for because of language barriers / difficulties.

"My parents, you know, they're not as fluent in English and I just find that a lot of the customer service representatives speak very fast. You know, I myself am in sales and I find that when you're talking to different people you just have to listen to how they speak, and try and follow so that they can actually follow. So if they speak slowly, then you speak slowly so that they can understand. A lot of times I find the customer service reps are speaking so fast that even I have trouble […] So it's just, you know, proper training where they can slow down to where the customer is." – Third Language Toronto

- **Minority language** participants were mostly comfortable communicating in the primary language in their region; however a few had experiences with customer service representatives or salespersons who did not speak their language.

"For me, that's very important, customer service agents that speak English because a lot of times you can be redirected to the French-speaking ones, which is fine. I am bilingual, but if I'm going to

get my point across and maybe I'm not happy with something, I need to speak in English." – Minority Language Montreal

- **Rural and remote communities** and those in the **Yukon and NWT** mostly struggled with what they believed to be lack of choice in terms of competitors and pricing. However, some acknowledged that there are more choices now available to them than in the past.

"[…]when cellphones first came out here in the Northwest Territories, there was only one provider. So they could charge whatever they wanted, and anybody that wanted a cellphone had to pay for it. It wasn't until other cellphone providers started to creep into the NWT and start giving them a little bit of competition that the prices started to drop. When it first came out it was ten cents a text message. Now we have unlimited text messaging. But it wasn't until other providers started to come in because of competition. So there's not a lot of options here in the Northwest Territories, Yukon, and Nunavut." – Northwest Territories & Yukon

"I find it's very expensive. If you compare with elsewhere, like Mont Laurier, just 3.5h from here. They pay half what we pay! It doesn't make sense.: -Val D'Or

7. DIFFERENCES BY MAJOR PROVIDERS

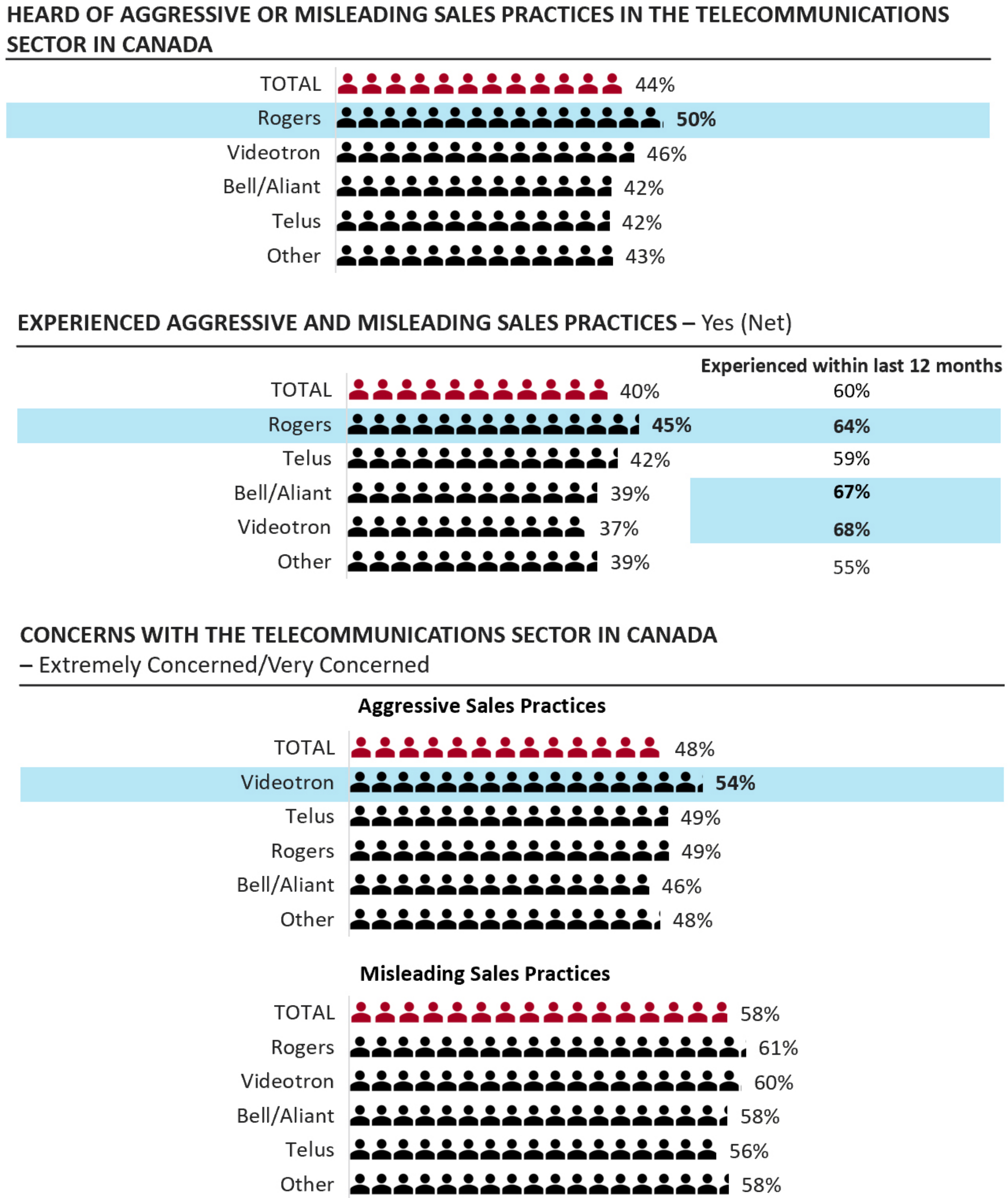
This section addresses differences in responses by major telecommunications providers. Respondents were asked at the beginning of the survey to identify their provider for each of the primary telecommunications services they currently use (i.e. internet at home, cellphone, TV service and home phone). Those who indicated currently having at least one service with each of the major providers were then grouped and analyzed.

Sufficient sample sizes exist to analyze the panel survey data by the four largest providers: Rogers (n=509), Bell/Aliant (n=545), Videotron (n=332) and Telus (n=443), while all other providers have been grouped as other (n=1036).

The primary differences when analyzing responses by major provider are as follows:

- **Rogers** customers are more likely to be aware of aggressive or misleading sales practices in the telecommunications sector in Canada (50% vs. 44% overall) and to report having experienced such tactics overall (45% vs. 40% overall);
- Among those who have experienced aggressive or misleading sales practices, customers of **Videotron, Bell/Aliant** and to a lesser extent **Rogers** are more likely to indicate their experience took place within the past 12 months (68%, 67% and 64% respectively);
- **Videotron** customers are more likely to express concern (extremely/ very concerned) with the issue of aggressive sales practices (54% vs. 48%);
- **Rogers** and **Bell/Aliant** customers are more likely to have experienced the specific aggressive or misleading sales practices presented of which the largest gaps are for:
    - Rebate/discount offers where terms are not disclosed before purchase (35% for Rogers customers vs. 28% overall);
    - Salespeople providing details of telecommunications products or services which end up being false (37% for Rogers customers vs. 31% overall);
    - Salespeople pushing telecommunications products or services you are not interested in (59% for each of Rogers, Bell/Aliant and Videotron customers vs. 55% overall);
- Notably, there are limited differences in opinions regarding the potential solutions presented with the vast majority of respondents from all major providers expressing support.

Figure 21: Differences in awareness, experience and level of concern by major provider



Base: All Respondents (n=1809), Rogers customers (n=509), Bell/Aliant customers (n=545), Videotron customers (n=332), Telus customers (n=443), Customers of other providers (n=1036)

Figure 22: Differences in experience and support for action by major provider

PERSONALLY EXPERIENCED ANY OF THESE SITUATIONS

% YES	TOTAL	Bell/ Aliant	Telus	Rogers	Video-tron	Other
● Salespeople pushing telecommunications products or services you are not interested in	**55%**	**59%**	54%	**59%**	**59%**	53%
● Technical support representatives trying to sell you products or services during the support call or interaction	**39%**	**42%**	39%	**42%**	38%	35%
● Rebate/discount offers where terms differ from the original information provided by the provider	**32%**	**34%**	32%	**35%**	32%	30%
● Salespeople providing details of telecommunications products or services which end up being false	**31%**	**33%**	32%	**37%**	28%	29%
● Rebate/discount offers where terms are not disclosed before purchase	**28%**	**31%**	28%	**35%**	22%	26%

SUPPORT FOR THE FOLLOWING ACTIONS BEING TAKEN

% STRONGLY/SOMEWHAT SUPPORT	TOTAL	Bell/ Aliant	Telus	Rogers	Video-tron	Other
● Creation of a mandatory code of conduct for telecommunications providers	**83%**	84%	86%	82%	86%	84%
● Monetary penalties for companies engaging in aggressive or misleading sales practices	**83%**	84%	84%	84%	88%	85%
● Publicly released report on complaints received regarding sales practices	**82%**	84%	83%	83%	85%	83%

Base: All Respondents (n=1809), Rogers customers (n=509), Bell/Aliant customers (n=545), Videotron customers (n=332), Telus customers (n=443), Customers of other providers (n=1036)

8. DIFFERENCES BY DEMOGRAPICS

This section addresses differences by demographic information. The demographic factors which were analyzed include age, gender, region of residence, Indigenous status and whether the respondent was born in Canada.

Region of residence

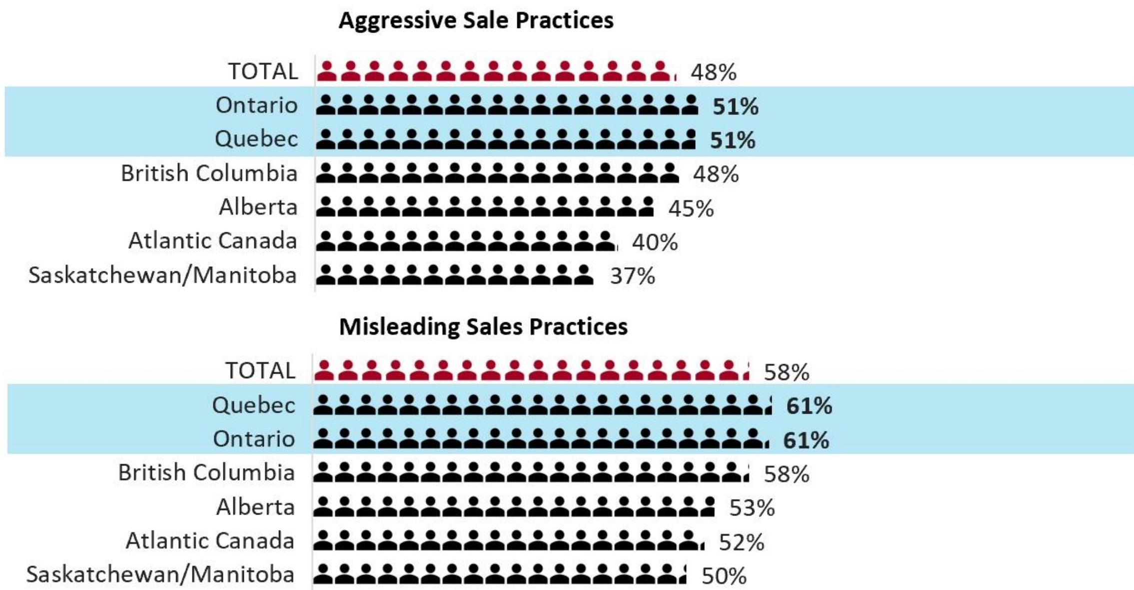
Experiences and attitudes towards aggressive or misleading sales practices in the telecommunications sector in Canada vary based on where in the country the individual resides. The primary differences by region of residence are as follows:

- Awareness of aggressive or misleading sales practices in the telecommunications sector in Canada is consistent among most regions with the exception of Atlantic Canada where it is lower (36% vs. 44% overall).
- Residents of Ontario are more likely to indicate personally experiencing aggressive or misleading sales practices at an overall level (45% vs. 40% overall) while prevalence is lower in Saskatchewan/ Manitoba (30%) and Quebec (35%).
- Among those who have experienced aggressive or misleading sales practices, the timeframe with which the incident took place is generally consistent by region except for in Saskatchewan/ Manitoba where residents are less likely to indicate it took place in the past 12 months (42% vs. 60% overall). Residents of Ontario (62%) and Quebec (62%) are most likely to indicate it taking place within the past year.

- Concern with aggressive sales practices and misleading sales practices is highest in Ontario (51% and 61% respectively) and Quebec (51% and 61%), while residents of Saskatchewan/ Manitoba (37% and 50%) and Atlantic Canada (40% and 52%) are less likely to express concern with either.
- Residents of Ontario and to a lesser extent Quebec and British Columbia are more likely to have experienced the specific aggressive or misleading sales practices presented. Residents of Saskatchewan/ Manitoba report the lowest prevalence of any of these specific activities.
    - Salespeople pushing telecommunications products or services you are not interested in (Highest in QC at 60%, followed by ON 57% and BC 56%);
    - Technical support representatives trying to sell you products or services during the support call or interaction (Highest in ON 41%, lowest in SK/MB 30%);
    - Rebate/discount offers where terms differ from the original information provided by the provider (Highest in ON 35% and QC 33%);
    - Salespeople providing details of telecommunications products or services which end up being false (Highest in ON 37%, Atlantic Canada 35% and BC 32%);
    - Rebate/discount offers where terms are not disclosed before purchase (Highest in ON 33% and BC 28%)
- Support for potential remedies while strong in all regions is highest in Saskatchewan/ Manitoba and to a lesser extent Quebec.
    - Creation of a mandatory code of conduct for telecommunications providers (SK/MB 89%, QC 87%)
    - Publicly released report on complaints received regarding sales practices (SK/MB 88%, QC 84%)
    - Monetary penalties for companies engaging in aggressive or misleading sales practices (SK/MB 87%, QC 87%)

Figure 23: Differences in awareness, experience and level of concern by region of residence

CONCERNS WITH THE TELECOMMUNICATIONS SECTOR IN CANADA
– Extremely Concerned/Very Concerned



Base: All Respondents (n=1809), Ontario (n=611), Quebec (n=572), British Columbia (n=223), Alberta (n=175), Saskatchewan/ Manitoba (n=110), Atlantic Canada (n=118)

Figure 24: Differences in experience and support for action by region of residence

PERSONALLY EXPERIENCED ANY OF THESE SITUATIONS

% YES	TOTAL	BC	AB	SK/MB	ON	QC	ATL
● Salespeople pushing telecommunications products or services you are not interested in	55%	56%	49%	44%	57%	60%	53%
● Technical support representatives trying to sell you products or services during the support call or interaction	39%	39%	38%	30%	41%	37%	37%
● Rebate/discount offers where terms differ from the original information provided by the provider	32%	28%	31%	23%	35%	33%	33%
● Salespeople providing details of telecommunications products or services which end up being false	31%	32%	26%	21%	37%	26%	35%
● Rebate/discount offers where terms are not disclosed before purchase	28%	28%	26%	17%	33%	24%	27%

SUPPORT FOR THE FOLLOWING ACTIONS BEING TAKEN

% STRONGLY/SOMEWHAT SUPPORT	TOTAL	BC	AB	SK/MB	ON	QC	ATL
● Creation of a mandatory code of conduct for telecommunications providers	83%	81%	81%	89%	82%	87%	76%
● Monetary penalties for companies engaging in aggressive or misleading sales practices	83%	83%	82%	87%	81%	87%	74%
● Publicly released report on complaints received regarding sales practices	82%	80%	82%	88%	81%	84%	76%

Base: All Respondents (n=1809), Ontario (n=611), Quebec (n=572), British Columbia (n=223), Alberta (n=175), Saskatchewan/Manitoba (n=110), Atlantic Canada (n=118)

Urban/Rural

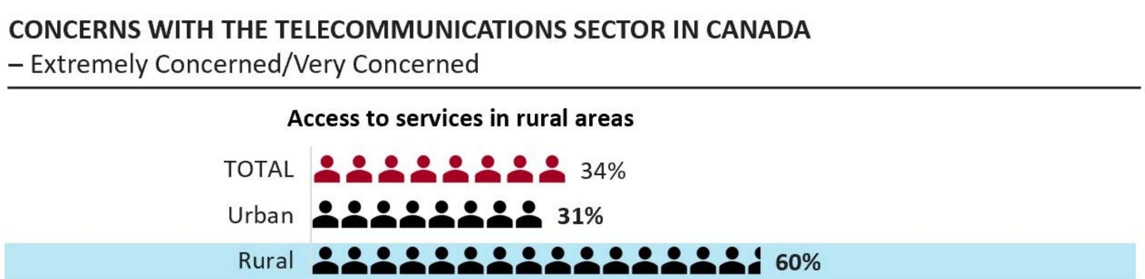
Experiences and attitudes towards aggressive or misleading sales practices differ somewhat depending on if the individual resides in an urban (n=1647) or rural area (n=162). Urban and rural have been defined by the postal code provided by each respondent for their residence and match Canada Post's definition for a rural route delivery area. Rural route delivery areas are classified by those postal codes which have a "0" in second position. The primary differences between Canadians who live in urban or rural areas are as follows:

- Canadians who reside in a rural area are less likely to indicate personally experiencing aggressive or misleading sales practices at an overall level (Rural: 28%, Urban: 41%, Total: 40%);
- Those who live in a rural area are also less likely to report specifically experiencing salespeople providing details of telecommunications products or services which end up being false (Rural: 22%, Urban: 32%, Total: 31%) while prevalence of all other specific types of sales practices presented were consistent among both groups;
- Canadians who live in a rural area are more likely to express concern (% extremely/very concerned) with access to telecommunications services in rural areas (Rural: 60%, Urban: 31%, Total: 34%);
- Support for all potential remedies while strong among both groups is higher for the creation of a mandatory code of conduct for telecommunications providers (Rural: 90%, Urban: 82%, Total: 83%) among those who live in a rural area.

Figure 25: Differences in experience, level of concern and support for action by Urban/Rural

PERSONALLY EXPERIENCED ANY OF THESE SITUATIONS

% YES	TOTAL	Urban	Rural
Salespeople pushing telecommunications products or services you are not interested in	**55%**	56%	53%
Technical support representatives trying to sell you products or services during the support call or interaction	**39%**	39%	34%
Rebate/discount offers where terms differ from the original information provided by the provider	**32%**	33%	26%
Salespeople providing details of telecommunications products or services which end up being false	**31%**	32%	**22%**
Rebate/discount offers where terms are not disclosed before purchase	**28%**	28%	22%



SUPPORT FOR THE FOLLOWING ACTIONS BEING TAKEN

% STRONGLY/SOMEWHAT SUPPORT	TOTAL	Urban	Rural
● Creation of a mandatory code of conduct for telecommunications providers	83%	82%	90%
● Monetary penalties for companies engaging in aggressive or misleading sales practices	83%	82%	87%
● Publicly released report on complaints received regarding sales practices	82%	81%	87%

Base: All Respondents (n=1809), Urban (n=1647), Rural (n=162)

Age cohort

We observed several differences in experience and attitude when analyzing the data by age cohort. The primary differences by age of respondents are as follows:

- Canadians between the age of 18-34 and 35-54 are more likely to indicate personally experiencing aggressive or misleading sales practices at an overall level (46% and 44% respectively) while those over 55 years old are less likely (32%);
- Among those who have experienced aggressive or misleading sales practices, those between the age of 18-34 are more likely to indicate it took place in the past 12 months (70%), while those over 55 years old are less likely (51%);
- Prevalence of the specific aggressive or misleading sales practices presented tends to be highest among those 18-34 followed by those 35-54, while Canadians over the age of 55 are less likely to experience each situation:
    - Salespeople pushing telecommunications products or services you are not interested in (18-34: 57%, 35-54: 59%, 55+: 50%);
    - Technical support representatives trying to sell you products or services during the support call or interaction (18-34: 45%, 35-54: 43%, 55+: 30%);
    - Rebate/discount offers where terms differ from the original information provided by the provider (18-34: 38%, 35-54: 34%, 55+: 26%);
    - Salespeople providing details of telecommunications products or services which end up being false (18-34: 39%, 35-54: 33%, 55+: 25%);
    - Rebate/discount offers where terms are not disclosed before purchase (18-34: 34%, 35-54: 32%, 55+: 19%)
- Support for potential remedies while strong across all age groups is higher among those over the age of 35 and in particular over the age of 55 years old.
    - Creation of a mandatory code of conduct for telecommunications providers (18-34: 73%, 35-54: 82%, 55+: 90%)
    - Publicly released report on complaints received regarding sales practices (18-34: 71%, 35-54: 82%, 55+: 89%)
    - Monetary penalties for companies engaging in aggressive or misleading sales practices (18-34: 73%, 35-54: 84%, 55+: 89%)

Figure 26: Differences in experience by age cohort

EXPERIENCED AGGRESSIVE AND MISLEADING SALES PRACTICES – Yes (Net)

		Experienced within last 12 months
TOTAL	40%	60%
18-34	**46%**	**70%**
35-54	**44%**	58%
55+	32%	51%

PERSONALLY EXPERIENCED ANY OF THESE SITUATIONS

% YES	TOTAL	18-34	35-54	55+
Salespeople pushing telecommunications products or services you are not interested in	**55%**	**57%**	**59%**	50%
Technical support representatives trying to sell you products or services during the support call or interaction	**39%**	**45%**	**43%**	30%
Rebate/discount offers where terms differ from the original information provided by the provider	**32%**	**38%**	**34%**	26%
Salespeople providing details of telecommunications products or services which end up being false	**31%**	**39%**	**33%**	25%
Rebate/discount offers where terms are not disclosed before purchase	**28%**	**34%**	**32%**	19%

Base: All Respondents (n=1809), 18-34 (n=469), 35-54 (n=621), 55+ (n=719)

Figure 27: Differences in support for action by age cohort

SUPPORT FOR THE FOLLOWING ACTIONS BEING TAKEN

% STRONGLY/SOMEWHAT SUPPORT	TOTAL	18-34	35-54	55+
Creation of a mandatory code of conduct for telecommunications providers	**83%**	73%	82%	**90%**
Monetary penalties for companies engaging in aggressive or misleading sales practices	**82%**	71%	82%	**89%**
Publicly released report on complaints received regarding sales practices	**83%**	73%	84%	**89%**

Base: All Respondents (n=1809), 18-34 (n=469), 35-54 (n=621), 55+ (n=719)

Indigenous status

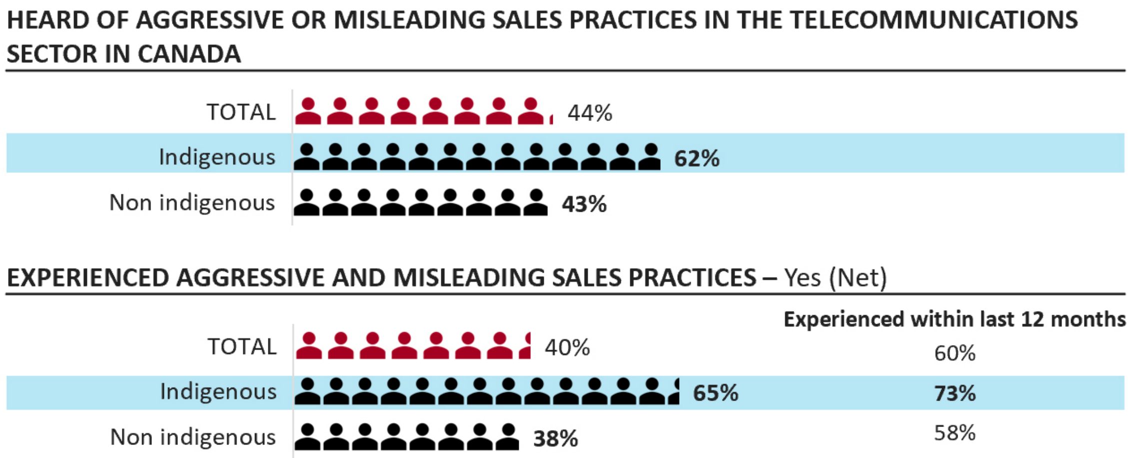
While the sample size of those who self-identify as indigenous is relatively small (n=58) some trends are evident across key measures when analyzing results by this audience.

Awareness of the issue of aggressive or misleading sales practices is higher among Indigenous respondents and they are more likely to indicate having experienced such sales practices both overall and among the specific types asked about.

Indigenous respondents are also more likely to express concern with access to services in rural areas and less likely to feel concerned regarding the cost of services in the telecommunications sector in Canada.

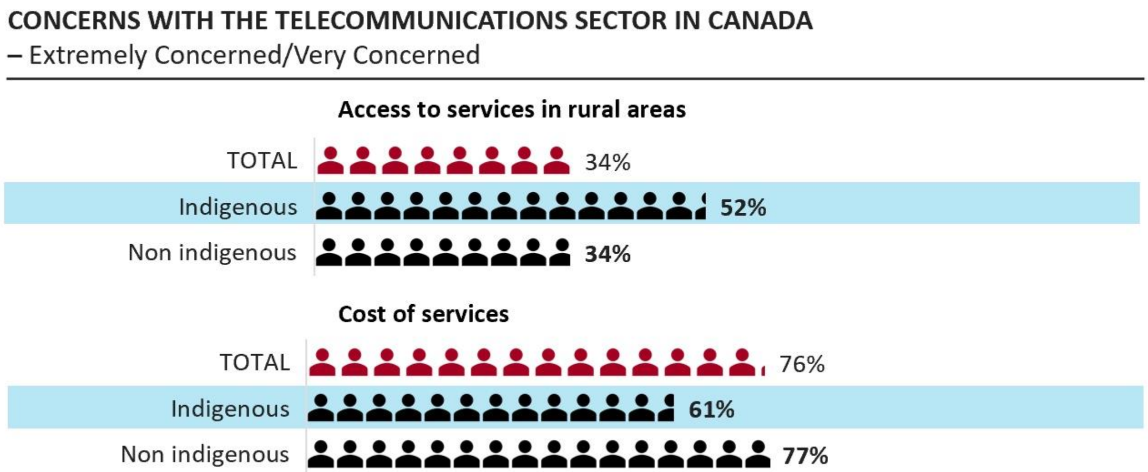
Despite being more likely to have experienced aggressive or misleading sales practices, support for the potential remedies is lower than the general population but remains high with a strong majority in support of each solution presented.

Figure 28: Differences in awareness and experience by Indigenous status



Base: Respondents Born in Canada (n=1478), Indigenous (n=58), Non Indigenous (n=1420)

Figure 29: Differences in experience, level of concern and support for action by Indigenous status



PERSONALLY EXPERIENCED ANY OF THESE SITUATIONS

% YES

	TOTAL	Indigenous	Non indigenous
● Salespeople pushing telecommunications products or services you are not interested in	**55%**	**60%**	56%
● Technical support representatives trying to sell you products or services during the support call or interaction	**39%**	**60%**	38%
● Rebate/discount offers where terms differ from the original information provided by the provider	**32%**	**55%**	31%
● Salespeople providing details of telecommunications products or services which end up being false	**31%**	**43%**	30%
● Rebate/discount offers where terms are not disclosed before purchase	**28%**	**41%**	26%

SUPPORT FOR THE FOLLOWING ACTIONS BEING TAKEN

% STRONGLY/SOMEWHAT SUPPORT	TOTAL	Indigenous	Non indigenous
● Creation of a mandatory code of conduct for telecommunications providers	**83%**	68%	**85%**
● Monetary penalties for companies engaging in aggressive or misleading sales practices	**83%**	75%	84%
● Publicly released report on complaints received regarding sales practices	**82%**	66%	**85%**

Base: Respondents Born in Canada (n=1478), Indigenous (n=58), Non Indigenous (n=1420)

Born in Canada

Those not born in Canada (n=331) are no more or less likely to have experienced aggressive or misleading sale practices than those born in the country but have some differences of opinions expressing greater tolerance towards the tactics than those born in the country.

Respondents not born in Canada are less likely to agree that telecommunications companies are too focused on profit and not enough on consumer protection and more likely to agree that all companies use such sales practices and they are a normal part of business and that concern about the tactics is exaggerated compared to those born in Canada. They are also less likely to be supportive of the potential solutions than those born in Canada however a strong majority support each of the remedies presented.

Figure 30: Differences in attitudes and support by Born in Canada

ATTITUDES AND OPINIONS TOWARDS AGGRESSIVE OR MISLEADING SALES PRACTICES

% STRONGLY/SOMEWHAT AGREE	TOTAL	Born in Canada	Not Born in Canada
● Telecommunications companies are too concerned with profit and not enough with consumer protection	**76%**	77%	**71%**
● All companies use aggressive or misleading sales tactics in some form, it is a normal part of business	**41%**	40%	**46%**
● Concern about aggressive or misleading sales tactics from telecommunications providers in Canada is exaggerated	**30%**	28%	**37%**

SUPPORT FOR THE FOLLOWING ACTIONS BEING TAKEN

% STRONGLY/SOMEWHAT SUPPORT	TOTAL	Born in Canada	Not Born in Canada
● Creation of a mandatory code of conduct for telecommunications providers	**83%**	84%	**76%**
● Monetary penalties for companies engaging in aggressive or misleading sales practices	**83%**	84%	**79%**
● Publicly released report on complaints received regarding sales practices	**82%**	83%	**77%**

Base: All Respondents (n=1809), Born in Canada (n=1478), Not Born in Canada (n=331)

9. DIFFERENCES BY OFFICIAL LANGUAGE

This section addressed differences by Official Language and data has been analyzed by those who speak (n=1180) or French (n=570).

The primary differences by Official Language are as follows:

- Canadians who speak French are less likely to indicate personally experiencing sales practices they consider aggressive or misleading (French: 35%, English: 42%, Total: 40%);
- Prevalence of specific aggressive or misleading sales practices presented differs for some activities by Official Language including:
    - Salespeople pushing telecommunications products or services you are not interested in (French: 61%, English: 55%, Total: 55%);
    - Salespeople providing details of telecommunications products or services which end up being false (French: 27%, English: 33%, Total: 31%);
- Among those who experienced aggressive or misleading sales practices, English-speaking respondents are more likely to have told friends and family (French: 34%, English: 51%, Total: 48%) or to have complained to their provider (French: 30%, English: 41%, Total: 39%);
- French-speaking respondents are more likely to express concern (% extremely/ very concerned) with the amount of competition in the telecommunications sector (French: 45%, English: 39%, Total: 41%);
- Attitudinally, French-speaking respondents are also more likely to agree that all levels of government need to work together to address aggressive or misleading sales practices on the part of telecommunications companies (French: 81%, English: 76%, Total: 77%) and that concern over the tactics is exaggerated (French: 34%, English: 26%, Total: 30%). They are also much less likely to agree that they don't care who addresses concerns about aggressive or misleading sales practices as long as the practice is stopped (French: 48%, English: 71%, Total: 64%);
- Support for potential remedies is consistent across both Official Languages.

Figure 31: Differences in experience by Official Language

PERSONALLY EXPERIENCED ANY OF THESE SITUATIONS

% YES	TOTAL	English	French
● Salespeople pushing telecommunications products or services you are not interested in	**55%**	55%	**61%**
● Technical support representatives trying to sell you products or services during the support call or interaction	**39%**	40%	37%
● Rebate/discount offers where terms differ from the original information provided by the provider	**32%**	31%	35%
● Salespeople providing details of telecommunications products or services which end up being false	**31%**	**33%**	27%
● Rebate/discount offers where terms are not disclosed before purchase	**28%**	28%	26%

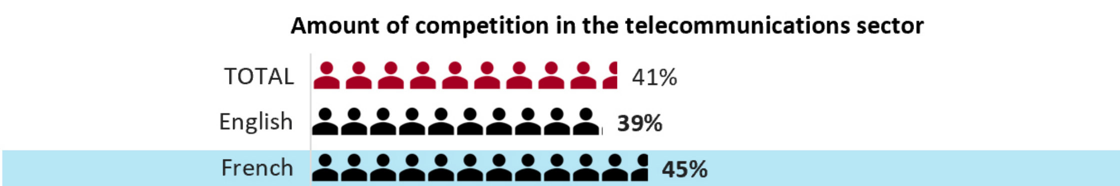
ACTIONS TAKEN

% YES	TOTAL	English	French
● Told my friends and family about my experience	48%	**51%**	34%
● Complained to my provider	39%	**41%**	30%
● Changed providers	25%	24%	28%
● Complained to the CCTS	8%	7%	9%
● Other	2%	2%	2%
● Took no further action	18%	16%	20%

Base: All Respondents (n=1809), English (n=1180), French (n=570); Experienced aggressive or misleading sales practices (n=711), English (n=493), French (n=197)

Figure 32: Differences in attitudes and support for action by Official Language

CONCERNS WITH THE TELECOMMUNICATIONS SECTOR IN CANADA – Extremely Concerned/Very Concerned



ATTITUDES AND OPINIONS TOWARDS AGGRESSIVE OR MISLEADING SALES PRACTICES

% STRONGLY/SOMEWHAT AGREE	TOTAL	English	French
● All levels of government need to work together to stop telecommunications companies from engaging in aggressive or misleading sales tactics	**77%**	76%	**81%**
● I don't care who addresses Canadians' concerns about aggressive or misleading sales tactics as long as the practice is stopped	**64%**	71%	**48%**
● Concern about aggressive or misleading sales tactics from telecommunications providers in Canada is exaggerated	**30%**	26%	**34%**

SUPPORT FOR THE FOLLOWING ACTIONS BEING TAKEN

% STRONGLY/SOMEWHAT SUPPORT	TOTAL	English	French
● Creation of a mandatory code of conduct for telecommunications providers	**83%**	83%	86%
● Monetary penalties for companies engaging in aggressive or misleading sales practices	**83%**	82%	86%
● Publicly released report on complaints received regarding sales practices	**82%**	82%	84%

Base: All Respondents (n=1809), English (n=1180), French (n=570)

10. COMPARISON TO VOLUNTARY SURVEY RESULTS

This section addresses differences in responses between the panel and voluntary public survey.

In order to allow the Canadian public to participate in the consultation process a separate voluntary version of the survey was executed and made available through the CRTC's website and social media channels. In total, n=7075 responses were received to the voluntary public survey.

Those who responded to the voluntary survey are more likely to be male (66%), 25-44 years old (43%) and from Alberta (20%) or Quebec (32%) compared to the actual proportions of the Canadian population. A full detailed profile of respondents to the voluntary survey can be found in the appendix of this report.

The primary differences in responses are that those who completed the voluntary survey are much more likely to have heard of aggressive or misleading sales practices in the telecommunications sector in Canada (87% voluntary survey vs. 44% panel survey) and to report having it personally both at the overall level (80% vs. 40%) and in regards to specific situations presented including:

- Salespeople pushing telecommunications products or services they are not interested in (85% vs. 55%);
- Salespeople providing details of telecommunications products or services which end up being false (62% vs. 31%);
- Technical support representatives trying to sell you products or services during the support call or interaction (62% vs. 39%);
- Rebate/discount offers where terms are not disclosed before purchase (57% vs. 28%);
- Rebate/discount offers where terms differ from the original information provided by the provider (64% vs. 32%).

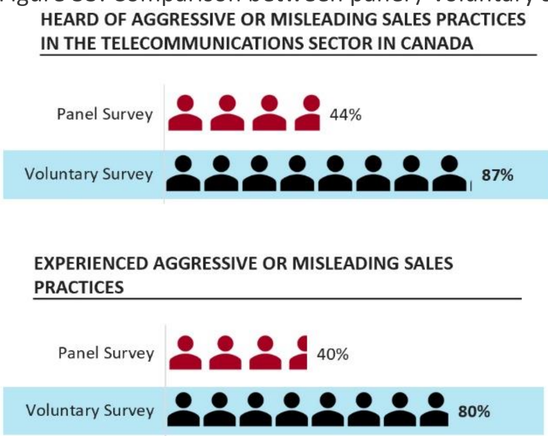
Those who completed the voluntary survey are also more likely to express a high-level of concern (% extremely concerned) with the telecommunications sector across all areas presented of which the gap in attitudes is largest for concern with the amount of competition in the sector (59% vs. 19%), cost of services (83% vs. 48%) and misleading sales practices (59% vs. 30%).

Among those who experienced aggressive or misleading sales practices, respondents to the voluntary survey are more likely to have told friends and family (62% vs. 48%) and to have changed providers (31% vs. 25%), while those who responded to the panel survey are more likely to have complained to their provider (39% vs. 31%) or complained to the CCTS (8% vs. 4%).

Respondents to the voluntary survey are also much more likely to support action to be taken to address the issue of misleading or aggressive sales practices and in particular to 'strongly support' each potential solution presented by nearly a 20-point margin.

- Creation of a mandatory code of conduct for telecommunications providers (81% vs. 56%);
- Publicly released report on complaints received regarding sales practices (77% vs. 53%);
- Monetary penalties for companies engaging in aggressive or misleading sales practices (81% vs 57%).

Figure 33: Comparison between panel / voluntary survey by awareness and experience



PERSONALLY EXPERIENCED ANY OF THESE SITUATIONS

% YES	Panel	Voluntary
Salespeople pushing telecommunications products or services you are not interested in	55%	85%
Technical support representatives trying to sell you products or services during the support call or interaction	39%	62%
Rebate/discount offers where terms differ from the original information provided by the provider	32%	64%
Salespeople providing details of telecommunications products or services which end up being false	31%	62%
Rebate/discount offers where terms are not disclosed before purchase	28%	57%

Base: Panel survey (n=1809), Voluntary survey (n=7075)

Figure 34: Comparison between panel/voluntary survey by level of concern and support for action

CONCERNS WITH THE TELECOMMUNICATIONS SECTOR IN CANADA

% Extremely Concerned	Panel	Voluntary
Aggressive sales practices	23%	42%
Misleading sales practices	30%	59%
Cost of services	48%	83%
Access to services in rural areas	17%	28%
Amount of competition in the telecommunications sector	19%	59%
Length of contract periods	18%	31%
Privacy of personal information/data	35%	47%
Poor customer service	29%	47%

ACTIONS TAKEN: AGGRESSIVE OR MISLEADING SALES PRACTICES IN THE TELECOMMUNICATIONS SECTOR IN CANADA

% YES	Panel	Voluntary
Told my friends and family about my experience	48%	62%
Complained to my provider	39%	31%
Changed providers	25%	31%
Complained to the CCTS	8%	4%
Other	2%	13%
Took no further action	18%	15%

SUPPORT OR OPPOSED THE FOLLOWING ACTIONS TAKEN TO TRY & ADDRESS THE INCREASE IN COMPLAINTS

% STRONGLY SUPPORT	Panel	Voluntary
Creation of a mandatory code of conduct for telecommunications providers	56%	81%
Publicly released report on complaints received regarding sales practices	53%	77%
Monetary penalties for companies engaging in aggressive or misleading sales practices	57%	81%

Base: Panel survey (n=1809), Voluntary survey (n=7075); Experienced aggressive or misleading sales practices Panel survey (n=711), Voluntary survey (n=5677)

PROFILE OF RESPONDENTS

The demographic characteristics of the surveyed populations from the panel and voluntary surveys are presented below. **Data presented in the tables below for the panel survey are weighted proportions.**

Figure 35: Profile of Respondents

Age	Panel survey	Voluntary survey
18-24	11%	4%
25-34	16%	22%
35-44	16%	21%
45-54	19%	16%
55-64	17%	19%
65+	21%	18%
Gender		
Male	49%	66%
Female	51%	34%
Region		
British Columbia	14%	10%
Alberta	11%	20%
Saskatchewan	3%	2%
Manitoba	4%	2%
Ontario	37%	28%
Quebec	23%	32%
New Brunswick	2%	2%
Nova Scotia	3%	2%
Prince Edward Island	1%	-
Newfoundland and Labrador	2%	2%
Income		
<$40,000	22%	17%
$40,000-<$60,000	18%	15%
$60,000-<$100,000	26%	24%
$100,000+	23%	25%
Prefer not to say	11%	19%
Born in Canada		
Yes	81%	86%
No	19%	14%
Indigenous Status		
Indigenous	4%	3%
Non Indigenous	96%	97%
Presence of Children Under 18 in Household		
Yes	28%	26%
No	72%	74%

APPENDIX

DETAILED METHODOLOGICAL NOTE

Quantitative Panel Survey

1. Survey Methods

Ipsos conducted a 10-minute online survey among a sample of n=1809 Canadians aged 18 years and older (n=1603 general population with an oversample of n=206 French-speaking respondents) stratified to the actual proportion of the Canadian population based on the 2016 Census by age, gender and region. Fieldwork was conducted between Monday, August 27th and Sunday, September 9th, 2018.

The survey was administered among a general public audience using panel-based resources for data collection and included sample from Research Now panel. Respondents for this survey were selected from among those who have volunteered to participate in online surveys. The panel provides a number of innovative incentive programs to participants tailored to the specific requirements of each survey, depending on the length of the survey, the subject matter of the study, and the time required to complete a minimum number of interviews. A point-based system is used where participants can redeem points for various items.

Weighting has been applied to ensure that the sample proportions match the characteristics of the population according to the 2016 Census, by age, gender, and region. Ipsos does not calculate a margin of error for online surveys because online surveys are considered non-probabilistic. A credibility interval is used instead. The credibility interval for a sample of this size of ± 2.8% in 19 cases out of 20.

The table below compares the unweighted sample to the 2016 Census results by region, age, and gender, as well as the weighted geographical and demographic distribution of the sample.

Figure 36: Sample frame

	Definition	Unweighted Sample size	Sample proportions	Census 2016 Proportions
Age	18-24	197	11%	11%
	25-34	280	16%	16%
	35-44	294	16%	16%
	45-54	324	19%	18%
	55-64	329	17%	17%
	65+	386	21%	21%
Gender	Male	877	49%	49%
	Female	932	51%	51%
Region				
	Prince Edward Island	9	1%	>1%
	Nova Scotia	47	3%	3%
	New Brunswick	31	2%	2%

	Quebec	574	23%	23%
	Ontario	608	37%	38%
	Manitoba	63	4%	4%
	Saskatchewan	47	3%	3%
	Alberta	176	11%	11%
	British Columbia	223	14%	14%
	Newfoundland and Labrador	31	2%	2%

2. Response Rate

The following table provides the response dispositions and response rate calculation, as per the MRIA's empirical method of calculating response rates for telephone surveys, with definitions extended to the online survey.

Figure 37: Response Rate Calculation

Calculation for Panel Survey	#
Total Email Invitations Issued	**14572**
Unresolved (U) (no response)	12001
In-scope - non-responding (IS)	**203**
Qualified respondent break-off (incomplete)	203
In-scope - Responding units (R)	**2368**
Over quota	100
Other disqualified	459
Completed Interviews	1809
Response Rate = R/(U+IS+R)	**16%**

3. Non-Response Analysis

There exists within the current sample the possibility of non-response bias. In particular, this survey would not include members of the population who do not have access to the Internet (either via a personal computer or mobile device) or who are not capable of responding to a survey in either English or French. In addition, some groups within the population are systemically less likely to answer surveys. Variations in proportions have been corrected in the weighting to reflect 2016 Canadian Census values.

Quantitative Voluntary Public Survey

Ipsos conducted a 10-minute online survey among a sample of n=7075 respondents. Fieldwork was conducted between Monday, August 27th and Sunday, September 9th 2018. The survey was voluntary and made public through the CRTC's website and social media channels. The survey was executed through Ipsos' online survey platform and the only restriction placed on participating was an IP restriction meaning that only one completed survey could be received per IP address. The voluntary public survey is not intended to be representative of the broader Canadian population. A response rate and analysis of non-response bias cannot be completed due to the voluntary nature of the survey.

Qualitative Research

Ipsos conducted a series of 10 focus groups (4 in-person and 6 online) as well as 10 in-depth interviews among a variety of audiences considered more vulnerable to aggressive or misleading sales practices.

Details of each qualitative session including fieldwork dates, number of participants and incentives provided are detailed in the table below.

Figure 38: Qualitative Fieldwork details

Description	Details	# of participants	Fieldwork Dates	Incentive
Seniors	2 focus groups in urban centres (Calgary & Halifax) 2 focus groups in small / rural communities (Val-D'Or & Sault Ste Marie)	32 in total (8 per session)	• Sault Ste. Marie, Thurs Sept 6 • Halifax, Mon Sept 10 • Calgary, Thurs Sept 13 • Val d'Or, Mon Sept 17	$100 per participant
Individuals with disabilities	10 in-depth telephone / online-chat interviews	10 in total	• Wed Sept 5 – Friday Sept 14	$175 per participant
General public in rural communities	1 online focus group in Whitehorse, Yukon 1 online focus group in Prince George, BC	17 in total (7 in Yukon, 10 in BC)	• Whitehorse, Wed Sept 12 • Prince George, Thurs Sept 13	$100 per participant
Third language spoken at home	1 online focus group in Toronto, ON 1 online focus group in Vancouver, BC	19 in total (10 in Toronto, 9 in Vancouver)	• Toronto, Mon Sept 10 • Vancouver, Mon Sept 10	$100 per participant
Official language minority community	1 online focus group in Saint Boniface, MB and Moncton, NB 1 online focus group in Montreal, QC	17 in total (8 in MB, 9 in Montreal)	• Saint Boniface/ Moncton, Thurs Sept 20 • Montreal, Tues Sept 11	$125 per participant

It should be noted that the qualitative findings are not generalizable to a larger population, and that they should be considered directional only.

QUESTIONNAIRE

Quantitative Survey (Panel/Open-link)

SCREENING QUESTIONS

1. What is your date of birth?

YEAR
_1915
...
_2018

MONTH
January
February
March
April
May
June
July
August
September
October
November
December
[TERMINATE IF UNDER 18 YEARS OLD]

2. What is your gender?

Male
Female
I self-identify using another term

3. What is your postal code? (example: A8A 8A8)
[Record X#X]
Prefer not to answer

[ASK Q4 FOR PANEL SURVEY ONLY]

4. In which industries or professions do you, or any member of your immediate household, work? Please select all that apply.

_1 Advertising/Public Relations
_2 Automotive
_3 Beauty/Cosmetics

_4 Education
_5 Electronics/Computer/Software
_6 Fashion/Clothing
_7 Financial Services
_8 Food/Beverages
_9 Government/Politics
_10 Grocery/Convenience/Department Stores
_11 Healthcare/Pharmaceuticals
_12 Internet/E-Commerce
_13 Insurance
_14 Management Consulting
_15 Marketing/Market Research
_16 Movie Studio
_17 Movie Theater or Theater Chain
_18 Music
_19 Paper Products
_20 Personal Care/Toiletries
_21 Pets (Grooming, Veterinary, Retail, Training)
_22 Publishing (Newspaper, Magazines, Books)
_23 Radio
_24 Real Estate/Construction
_25 Restaurants
_26 Sales/Sales Promotion
_27 Sports
_28 Telecommunications (phone, cell phone, cable)
_29 Television (Studio/Network/Cable/Satellite)
_30 Toys
_31 Transportation/Shipping
_32 Travel/Tourism
_33 Video Games
_34 Other Entertainment
_35 None of the above [Exclusive]

[IF 1, 9, 15 TERMINATE, OTHERWISE CONTINUE]

[ASK Q5 FOR BOTH OPEN-LINK AND PANEL SURVEY. FOR PANEL SURVEY, IF YES TO CODE 9 AT Q4 ASK Q5]

5. Do you, or any member of your immediate household, work for any of the following organizations? Please select all that apply.

Competition Bureau
Innovation, Science and Economic Development Canada (ISED)
Canadian Radio-television and Telecommunications Commission (CRTC)
None of the above

[IF NONE OF THE ABOVE CONTINUE, OTHERWISE TERMINATE]

MAIN QUESTIONNAIRE

SERVICE TYPE AND PROVIDER

6. Which of the following telecommunications and television services do you currently have for your personal use? Please select all that apply.

- Cellphone
- Home phone
- Internet at home
- TV Service (e.g. Cable TV, satellite TV excluding online only TV services like Netflix, Crave TV and Club Illico)
- None of the above [MUTUALLY EXCLUSIVE]

[IF NONE OF THE ABOVE SKIP TO Q13]
[ASK Q7 IF CELLPHONE SELECTED AT Q6]

7. Which of the following is your current cellphone provider? Please select only one.

   [RANDOMIZE LIST]

- Bell/Aliant
- MTS
- Chatr
- Telus
- Rogers
- Virgin
- Fido
- Koodo
- Videotron
- Sasktel
- Freedom (formerly Wind Mobile)
- Northwestel
- TbayTel
- Other [ANCHOR]
- Don't Know [ANCHOR]

[ASK Q8 IF INTERNET SELECTED AT Q6]

8. Which of the following is your current internet provider? Please select only one.

   [RANDOMIZE LIST]

- Bell/Aliant

- SaskTel
- Cogeco
- Rogers
- Shaw
- Telus
- Videotron
- Eastlink
- MTS
- TbayTel
- TekSavvy
- Xplornet
- Other [ANCHOR]
- Don't Know [ANCHOR]

[ASK Q9 IF TV SERVICE SELECTED AT Q6]

9. Which of the following is your television provider? Please select only one.

   [RANDOMIZE LIST]

- Bell/Aliant
- SaskTel
- Cogeco
- Rogers
- Shaw
- Telus
- Videotron
- Eastlink
- MTS
- Other [ANCHOR]
- Don't Know [ANCHOR]

[ASK Q10 IF HOME PHONE SELECTED AT Q6]

10. Which of the following is your home phone provider? Please select only one.
    [RANDOMIZE LIST]

- Bell/Aliant
- SaskTel
- Cogeco
- Rogers
- Shaw
- Telus
- Videotron
- Eastlink

- MTS
- TbayTel
- TekSavvy
- Xplornet
- Other [ANCHOR]
- Don't Know [ANCHOR]

11. Are you currently on contract with your service provider for any of these services? (i.e. multi-year commitment)

[INSERT RESPONSE SELECTED AT Q6]

- Yes
- No
- Don’t know

[IF MORE THAN ONE SELECTED AT Q6 ASK Q12]

12. Do you bundle any of these services with one service provider (i.e. purchase more than one product or service with one provider sold as a single combined product/plan)?

- Yes
- No

[ASK Q13 FOR PANEL SURVEY ONLY]

13. What, if anything, have you heard about the telecommunications sector in the past year?

    [INSERT TEXT]

14. How concerned are you about each of the following in the telecommunications sector in Canada? Please provide one response per item.

[ROWS][RANDOMIZE]

- Aggressive sales practices
- Misleading sales practices
- Cost of services
- Access to services in rural areas
- Amount of competition in the telecommunications sector
- Length of contract periods
- Privacy of personal information/data
- Poor customer service

[COLUMNS]

- Extremely concerned
- Very concerned
- Somewhat concerned
- Not very concerned
- Not at all concerned

15. Before today, have you heard anything about aggressive or misleading sales practices in the telecommunications sector in Canada?

- Yes
- No

16. Have you ever experienced any sales practices you would consider aggressive or misleading from telecommunications providers in Canada?

- Yes, once before
- Yes, on more than one occasion
- No

[IF YES, ONCE BEFORE OR YES, ON MORE THAN ONE OCCASION AT Q16, ASK Q17, Q18 AND Q19, OTHERWISE SKIP]

17. When did you last experience this situation?

- Within the past six months
- Within the last 6-12 months
- More than a year ago but within the past five years
- More than five years ago

[ASK Q18 FOR PANEL SURVEY ONLY]

18. What did you experience? Please be as specific as possible

[TEXT BOX]

19. What, if anything, did you do about it? Please select all that apply.

[RANOMIZE]

- Complained to my provider
- Changed providers
- Complained to the Commission for Complaints for Telecom-Television Services (CCTS)
- Told friends and family about my experience
- **[OPEN-LINK SURVEY]** Took some other action/ **[PANEL SURVEY]** Other- Please specify [TEXT BOX] [ANCHOR]
- Took no further action [MUTUALLY EXCLUSIVE] [ANCHOR]

20. Have you ever heard of the Commission for Complaints for Telecom-Television Services (CCTS) before taking this survey?

- Yes
- No

[SHOW ON SEPARATE SCREEN AFTER Q17] The Commission for Complaints for Telecom-Television Services (CCTS) is an independent industry-funded agency dedicated to resolving customer complaints about Canadian telecommunications and television service providers.

21. Have you ever personally experienced any of these situations? Please select all that apply.

- Salespeople pushing telecommunications products or services you are not interested in
- Salespeople providing details of telecommunications products or services which end up being false
- Technical support representatives trying to sell you products or services during the support call or interaction
- Rebate/discount offers where terms are not disclosed before purchase
- Rebate/discount offers where terms differ from the original information provided by the provider

- Yes
- No

22. Please indicate how much you agree or disagree with the following statements. Please provide one response per item.

[RANDOMIZE]

- All companies use aggressive or misleading sales tactics in some form, it is a normal part of business
- The best way for consumers to deal with aggressive or misleading sales practices is to purchase products or services from companies not engaging in those tactics
- Companies use aggressive or misleading sales tactics mainly to pressure more vulnerable people into accepting products or services they do not need
- Telecommunications companies are too concerned with profit and not enough with consumer protection
- All levels of government need to work together to stop telecommunications companies from engaging in aggressive or misleading sales tactics

- Concern about aggressive or misleading sales tactics from telecommunications providers in Canada is exaggerated
- The Canadian Radio-television and Telecommunications Commission (CRTC) needs to do more to address Canadians' concerns about aggressive or misleading sales tactics
- I don't care who addresses Canadians' concerns about aggressive or misleading sales tactics as long as the practice is stopped

- Strongly agree
- Somewhat agree
- Neither agree nor disagree
- Somewhat disagree
- Strongly disagree

23. How much do you support or oppose the following actions being taken to try and address the increase in complaints? Please provide one response per item.

- Creation of a mandatory code of conduct for telecommunications providers
- Publicly released report on complaints received regarding sales practices
- Monetary penalties for companies engaging in aggressive or misleading sales practices

- Strongly support
- Somewhat support
- Neither support nor oppose
- Somewhat oppose
- Strongly oppose
- Nothing. In my view, sales practices are fine as they are.

[ASK Q24 FOR PANEL SURVEY ONLY]

24. Are there any other comments you would like to share?

[TEXT BOX]

DEMOGRAPHIC QUESTIONS

We have a couple final questions for statistical classification purposes. Please indicate the answer that best describes you. Be assured that your responses will be held in strict confidence.

25. Have you ever been an employee of a telecommunications company in Canada?

- Yes, currently

- Yes, in the past
- No, I have never been
- Prefer not to answer

26. What was your total household income, before taxes, in 2017?

- Under $20,000
- $20,000 to under $30,000
- $30,000 to under $40,000
- $40,000 to under $50,000
- $50,000 to under $60,000
- $60,000 to under $80,000
- $80,000 to under $100,000
- $100,000 to under $120,000
- $120,000 or more
- Prefer not to say

27. Are there any children 18 years or younger living in your household?

- Yes
- No

28. Were you born in Canada?

- Yes
- No

[IF YES AT Q28 ASK Q29]

29. Do you self-identify as an Indigenous person?

Yes
No

30. What is the language you use **most often** at home? *If you* use *more than one language at home, please select the **two** most used languages.*

[INSERT LIST AND ALLOW TWO RESPONSES ONLY]

- French
- English
- American Sign Language (ASL)
- Arabic

- Bengali
- Chinese - Cantonese
- Chinese - Mandarin
- Chinese - other
- Cree
- Farsi
- German
- Gujurati
- Hindi
- Inuktitut
- Italian
- Japanese
- Korean
- Ojibwe
- Punjabi
- Quebec Sign Language (LSQ)
- Spanish
- Tagalog
- Tamil
- Urdu
- Other

31. Does any of the following currently apply to you? Please select all that apply.

- Deaf, deafened, or hard of hearing
- Deaf and blind
- Blind or partially sighted
- Physically disabled
- Mental impairment/developmentally disabled
- Learning disability
- Diagnosed Mental health condition
- Chronic illness/injury
- None of the above [ANCHOR]
- Prefer not to answer [ANCHOR]

Thank you. Those are all the questions we have for your today. We greatly appreciate your participation in this research.

DISCUSSION GUIDE

FOCUS GROUPS AND IN-DEPTH INTERVIEWS

SESSION BREAKDOWN

Welcome and Introduction	5 Minutes
Section 1: Context	15 Minutes
Section 2: Sales and Marketing Tactics	45 Minutes
Section 3: Reactions to Potential Solutions	20 Minutes
Wrap-up and Final Questions	5 Minutes
SESSION TOTAL	90 Minutes*

**Timing will be adjusted for 60-minute in-depth interviews*

DETAILED SESSION AGENDA

MODERATOR WELCOME (5 MINUTES)	• Welcome & thanks for attending • Overview of the session purpose • Neutrality of Ipsos and importance of honest feedback • Rules of engagement - informed and respectful dialogue • Anonymity of your participation - remarks are not attributed and your privacy will be protected • Audio recording for notetaking purposes; observers in the backroom/on the phone • Technical considerations in using online Ideation Exchange platform (for online groups) • Quick round of intros - your first name, where you are located and what you do for fun

Unless otherwise noted, all questions are open-ended.

SECTION 1: CONTEXT (15 MINUTES)

We are here today to have a discussion on telecom companies in Canada.

Q1. I would like to start by understanding who your current telecom provider is, and your relationship with them. How did you end up with your current provider and package?

PROBES:

- Bundling / packages
- More than one provider for various services
- Length of relationship
- On contract vs. other arrangement

Q2. What information did you seek out or refer to when you chose a provider? Who was involved in decision-making?

PROBES:

- **For seniors groups**: Was another family member or friend involved in the decision?
- I'd like to understand the degree to which you understand what you're signing up for – do you go with their recommendation, conduct any research, or ask someone else?

Q3. How satisfied / dissatisfied are you with your providers and packages? What do you like, what do you not like?

PROBES:

- Interactions with various departments and any variation
- Wait times, difficulty in reaching someone
- In-person experiences (tech support or in-store)
- Cost/price of services
- Availability of information from other sources to conduct own research/ confirm deals offered by customer service representatives (online, in flyers)

SECTION 2: SALES AND MARKETING TACTICS (45 MINUTES)

For the bulk of our discussion today, we'd like to hear about your experiences with sales and marketing with your current telecom provider.

Q4. Could you tell me about any positive experiences you've had with sales and marketing at your telecom? What made the experience valuable? Please tell me about it from start to finish.

Q5. Could you tell me about any negative experiences you've had with sales and marketing at your telecom? What made the experience poor? Please tell me about it from start to finish.

PROBES / MODERATOR TO NOTE:
DRAW OUT DETAILS OF EXPERIENCE AS MUCH AS POSSIBLE – STORYTELLING FROM PARTICIPANT ABOUT WHAT HAPPENED, HOW THEY WOULD CHARACTERIZE THE INTERACTION, HOW THEY FELT AS A RESULT OF IT.

Q6. For these more negative experiences, did you do anything about them or follow up in any way after?

PROBE:

- Complained to my provider
- Changed providers

- Complained to the Commission for Complaints for Telecom-Television Services (CCTS). **Clarify if needed:** The CCTS is an independent industry-funded agency dedicated to resolving customer complaints about Canadian telecommunications and television service providers.
- Told friends and family about my experience
- Took some additional action- what was it?
- Took no further action

Q7. I'm going to list some more specific tactics, please let me know if you've had any experiences with these and if so, what the interaction was like. If you haven't had any specific experiences, I'd still like to hear what's appealing or concerning about them.

- TV / digital ads
- Targeted flyers
- In-person door-to-door sales
- Contact through mobile device, email, phone call, etc.

Q8. Have you ever experienced any situations in which you were not interested in, or did not proactively seek out information but were being sold products or services by your telecom? Please tell me about this experience. How did it make you feel?

PROBE:

- Salespeople pushing products or services, or providing false details
- Technical support representatives trying to sell products or services
- Rebate/discount offers where terms are not disclosed before purchase
- Rebate/discount offers where terms differ from the original information provided
- Rebate/discount offers where term/price change over the course of the contract

SECTION 3: REACTIONS TO POTENTIAL SOLUTIONS (20 MINUTES)

Q9. I'm going to read you some different actions that might be taken to try and address complaints – I'd like to hear your thoughts on each – what would be positive about them, and any drawbacks.

- Creation of a mandatory code of conduct for telecommunications providers Clarify if needed: a set of rules that service providers have to follow to make contracts understandable by you, prevent bill shock, and switch service providers
- Requiring provider to provide you a written summary version of their offer before you agree to them. **Clarify if needed:** this would ensure that even after you verbally agreed to an offer, by phone or in person, your provider would have to provide a written summary version of what you agreed before signing your contract.
- Requiring provider to provide a trial period to ensure that their services meet your needs and cancel those services if they do not. **Clarify if needed:** this would allow you to terminate a service that does not meet your need and only paying for that period as opposed to the whole month.

- Publicly released report on complaints received regarding sales practices
- Monetary penalties for companies engaging in aggressive or misleading sales practices

Q10. Are there any other actions you can think of that you think might help consumers like yourselves in these situations and interactions?

FINAL QUESTIONS AND ADVICE (5 MINUTES)

Q11. What are your final thoughts and advice to my client? Was there anything missing from our discussion of this topic today?

THANKS & WRAP