



Public Opinion Research on the CRTC's Consumer Protection Codes 2023

Executive Summary

Prepared for the Canadian Radio-television and Telecommunications Commission

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Public Opinion Research on the CRTC’s Consumer Protection Codes 2023 Final Report

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This public opinion research report presents the results of a 15-minute random digit dialing (RDD) telephone survey of 1,671 Canadians aged 18 years of age and older. The fieldwork was conducted from December 1 to December 22, 2022.

Cette publication est aussi disponible en français sous le titre: *Recherche sur l’opinion publique concernant les Codes de protection des consommateurs du CRTC 2023*

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Canadian Radio-television and Telecommunications Commission (CRTC)

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Executive Summary

The Canadian Radio-television and Telecommunications Commission (CRTC) commissioned Phoenix Strategic Perspectives (Phoenix SPI) to conduct quantitative public opinion research (POR) with Canadians on the consumer protection codes.

1. Research Purpose and Objectives

The purpose of this research was to track Canadians’ awareness of and satisfaction with the Wireless Codes, TVSP Code, and Internet Code. The specific objectives of this POR were to: better understand issues that affect Canadians the most as they relate to their wireless, TV and Internet services; obtain data to assess whether the Wireless Code, TVSP Code, and Internet Code are continuing to meet their objectives; obtain data regarding awareness of the three Consumer Protection Codes; and measure Canadians’ perceptions of the CRTC.

2. Methodology

A 15-minute random digit dialling (RDD) telephone survey was administered to 1,671 Canadians¹, 18 years of age or older, between December 1 and 22, 2022. The sample frame was geographically disproportionate to improve the accuracy of specific regional results. Based on a sample of this size, the overall results can be considered accurate within $\pm 2.7\%$, 19 times out of 20 (adjusted to reflect the geographically disproportionate sampling). The margins of error are greater for results pertaining to subgroups of the total sample.

3. Key Findings and Implications

Consumer Protection Codes

Recall of the Wireless, Internet and TV Service Provider Codes, collectively referred to as consumer protection codes, largely remains unchanged from last year. Overall, 17% of Canadians either clearly or vaguely recalled hearing or seeing something about these Codes as compared to 20% in 2022.

Wireless Plans

Two-thirds (66%) of Canadians use an individual wireless plan and one-third (32%) use a family or shared plan. Eighty-nine percent of Canadians have chosen a postpaid wireless service plan (down slightly from 2022 when 92% reported having such a plan). The incidence of prepaid service plans holds steady (8% compared to 7% in 2022 and 9% in 2021).

Wireless Data Usage

After a small increase between 2021 and 2022, the number of wireless plans with data has not changed year over year: almost nine in 10 (88%) Canadians have a service plan that includes data.

¹ Citizenship was not an eligibility requirement, which means that survey respondents may include Canadians citizens, landed immigrants or permanent residents as well as non-permanent residents. In the report, survey respondents are referred to as ‘Canadians’ and ‘respondents’ interchangeably for clarity and readability.

Limited data plans continue to be the most common type of plan reported by Canadians, with 63% (unchanged from 2022) saying there is a monthly data limit attached to their plan.

More than three-quarters (77%) of Canadians who have a wireless plan with data said they use Wi-Fi when available to manage or limit their data use. Following this, three in 10 (30%) reduce their data use after getting a notification that they are nearing their limit, while significantly fewer (15%) use tools to track their data use. This year marks a large decline in the proportion of Canadians taking these actions to manage or limit data.

Managing Wireless Data

Most Canadians (83%) continue to find it easy to manage their data. Underscoring this, very few (9%) Canadians have paid data overage fees in the past 12 months and just two in 10 (17%) have experienced an unexpectedly high bill (‘bill shock’) during the last year. Exactly one-third of those who experienced bill shock said this was due to data overage fees (down from 56% in 2019). Consistent with previous years, the majority of those who experienced bill shock were charged less than \$50 (27%) or between \$50 and \$100 (35%).

Wireless Complaints

The incidence of filing a complaint about wireless services has been consistent over the past few years, ranging from 15% this year to 17% in 2020, and is significantly lower than in 2014 when 26% reported making a complaint. For those who filed a complaint, the single largest proportion (43%) pointed to inadequate service, followed by incorrect charges on their bill (36%), and data changes (14%).

Ninety-two percent of those who filed a complaint did so directly with their service provider. Very few (6%) made the complaint to both their provider and the Commission for Complaints for Telecom-television Services (CCTS).

Wireless Contracts

Over time, the proportion of Canadians who understand their contract is increasing, from a low of 57% in 2020 to this year’s high of 64%. Consistent with 2022, fewer Canadians (46%) have a clear understanding of their trial period.

Just over one in 10 (13%) Canadians have had their service provider make changes to their plan without expressly making them aware of new the terms and conditions. Although this represents a small decline since 2022 (down 4%), over time, the proportion of Canadians reporting changes of this nature has remained relatively consistent, from a low of 12% in 2018 to a high of 17% in 2022.

Television Service Provider Code

Nearly two-thirds (64%) of Canadians subscribed to a TV provider find their contract clear and easy to understand. Over the last five years, the proportion of Canadians who found their contract clear and easy to understand has gradually increased, from 54% in 2019 to 59% in 2021 to 64% in 2023. Consistent with 2022, three in 10 (30%) Canadians subscribed to a TV service said they were informed about their provider’s basic service package (down from a high of 55% recorded in 2021).

Two in 10 (21%) Canadians subscribed to a TV service filed a complaint about their TV services in the last 12 months. This represents a slight decrease since last year when 25% reported having file a complaint over the past year. For those who filed a complaint against their TV provider, exactly half complained of inadequate quality of service. Beyond this, others complained of incorrect charges on their bill (30%), and changes to pricing or channel package without notice from their provider (12%).

Internet Code

Two-thirds (65%) of Canadians subscribed to a home Internet service reported that their contract is clear and easy to understand. This is unchanged from 2022. Two in 10 (21%; down from 27% last year) Canadians filed a complaint about their Internet services in the last 12 months. Among those who filed a complaint about their internet services, nearly half (45%) questioned the legitimacy or amount they were charged for early cancellation of their contract. Other reasons included inadequate quality of service (28%), followed by incorrect charges on their bill (18%), and service calls (12%).

CRTC

Approximately one-third of Canadians feel well (24%) or very well (7%) informed about the mandate and role of the CRTC. This represents a decline since 2022 when 38% of considered themselves informed about the CRTC. After remaining stable since 2019, Canadians’ impressions of the CRTC have declined this year, with one-quarter (26%) holding a somewhat or very favourable view of the CRTC (compared to 33% in 2022).

Concluding Observations

- Recall of the consumer protection codes has not changed in the last year. Though awareness is unchanged, it is quite low. There is an important opportunity for the CRTC to position itself as a source of education for Canadians, better equipping them with the knowledge needed to make informed decisions when selecting providers.
- A large number of Canadians are also uninformed about the CRTC. Although awareness of the CRTC’s mandate and role has fluctuated over time, this year recorded the most significant drop since 2018. Moreover, just a quarter of Canadians report a positive impression of the CRTC, with most who do not report a positive impression being neutral towards the CRTC. Limited understanding of the role and mandate of the CRTC and generally neutral to moderately favourable impressions of the agency present an opportunity for the CRTC to raise awareness of its role as an advocate for Canadians.
- Understanding of contracts across wireless, TV, and Internet providers is relatively high among Canadians and has continued to remain stable in recent years. However, there is an opportunity to better educate Canadians on their rights. Specifically, the number of Canadians aware of their TV service providers’ entry-level offering has declined over 2022, suggesting that service providers need to improve information sharing when it comes to ensuring customers are aware of the availability, price, and content of their entry-level service offering (i.e., basic service package). Moreover, when it comes to wireless service providers, a significant minority of Canadians found the explanation of the trial period and cancellation fees to be unclear. More work is needed on the part of providers to help Canadians better understand this aspect of

their contracts. Additionally, this may be an area for which the Wireless Code can better support consumers.

- Canadians tend to stay with their wireless service providers for two or more years. For the few customers who decided to change providers, most found the process easy. Additionally, the number of Canadians purchasing a new phone from their wireless service provider has continued to decline over time, with many bringing their own devices rather than opting for a new phone. Moreover, even among customers who have opted to purchase a new device from their provider, the proportion of those who enter a tab balance contract with their wireless service provider has decreased significantly in recent years, since the introduction of device rental or return plans.
- Most Canadians continue to subscribe to a wireless plan with limited data, find it easy to manage their data use, and have not paid data overage fees in the last year. Though the incidence of bill shock is relatively low, data overage fees remain the biggest reason for an unexpectedly high bill. Additionally, there has been an increase in Canadians experiencing bill shock due to international travel fees. The increase, both in data overage fees and international travel fees, may be attributed to a return to prior patterns of behaviour as COVID-19 restrictions were eased with more Canadians opting to travel again and/or spending less time at home. Ideally, this will need to be monitored over time for implications for the Wireless Code.

4. Intended Use of the Results

The results will be used to: 1) inform the actions the CRTC should take to ensure that Canadians have the tools they need to understand their wireless service contracts and related rights; 2) identify potential gaps in the Wireless Code; and 3) serve as a measure of Canadians’ awareness and satisfaction with the Wireless Code, TVSP Code, and Internet Code over time.

5. Contract Value

The contract value was \$113,466.13 (including applicable taxes).

6. Statement of Political Neutrality

I hereby certify as a Senior Officer of Phoenix Strategic Perspectives 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 contain any reference to electoral voting intentions, political party preferences, standings with the electorate, or ratings of the performance of a political party or its leader.



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