Canadian Radio-television and Telecommunications Commission
Conseil de la radiodiffusion et des télécommunications canadiennes

Public Opinion Research on the CRTC's Consumer Protection Codes 2024

Final Report

Prepared for the Canadian Radio-television and Telecommunications Commission

Supplier Name: Phoenix SPI
Contract Number: CW2337602
Award Date: 2023-11-15
Contract Value: $114,485.95 (including applicable taxes)
Delivery Date: 2024-03-14

Registration Number: POR #084-23

For more information on this report, please contact the CRTC at ROP-POR@crtc.gc.ca.

Ce rapport est aussi disponible en français.

Canada

Public Opinion Research on the CRTC's Consumer Protection Codes 2024
Final Report

Prepared for Canadian Radio-television and Telecommunications Commission
Supplier name: Phoenix SPI
Registration Number: POR #084-23

This public opinion research report presents the results of a 15-minute random digit dialing (RDD) telephone survey of 1,500 Canadians aged 18 years of age and older. The fieldwork was conducted from November 28 to December 21, 2023.

Cette publication est aussi disponible en français sous le titre: *Recherche sur l'opinion publique concernant les Codes de protection des consommateurs du CRTC 2024*

Permission to Reproduce

Canadian Radio-television and Telecommunications Commission (CRTC)
1 Promenade du Portage
Gatineau, Quebec J8X 4B1

Catalogue Number:
BC92-117/2024E-PDF

International Standard Book Number (ISBN):
978-0-660-70814-0

Related publication (Registration Number: POR #084-23):
Catalogue Number: BC92-117/2024F-PDF
ISBN: 978-0-660-70815-7

Table of Contents

List of Figures

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 Code, Television Service Provider (TVSP) Code, and Internet Code. The specific objectives of this POR were to obtain data regarding awareness of the three consumer protection codes; to better understand issues that affect Canadians the most as they relate to their wireless, TV and Internet services; to obtain data to assess whether the Wireless Code, TVSP Code, and Internet Code are continuing to meet their objectives; and to measure Canadians' perceptions of the CRTC and how it is changing over time.

2. Methodology

A 15-minute random digit dialling (RDD) telephone survey was administered to 1,500 Canadians[1], 18 years of age or older, between November 28 and December 21, 2023. 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 ±2.8%, 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

Consumer Protection Codes

Recall of the Wireless, Internet and TVSP Codes --- collectively referred to as consumer protection codes --- is unchanged year over year. In total, 18% of Canadians either clearly or vaguely recalled hearing or seeing something about these Codes compared to 17% in 2023 and 20% in 2022.

Wireless Code

Types of plans

Unchanged from 2023, 88% of Canadians reported owning a cell phone, smartphone, or another wireless device. Two-thirds (63%) of wireless users opt for an individual wireless plan, while one-third (35%) opt for a family or shared plan. The incidence of individual versus family or shared plans has been relatively stable since 2018. The choice of postpaid wireless service plans is unchanged year over year, with 89% of Canadians opting for this type of service plan. Relatively few (9%) wireless users choose a prepaid service plans.

---

[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 this report, survey respondents are referred to as 'Canadians' and 'respondents' interchangeably for clarity and readability.

Wireless data

The proportion of wireless plans that include data has increased slightly from 88% in 2022 and 2023 to 91% in 2024. Among those with data, limited data plans are still the main choice, with 6 in 10 (61%) reporting monthly data limits in their plans. While the incidence of "unlimited" data plans steadily increased between 2019 and 2022 (from 9% to 21%), there has been no significant year-over-year change in 2024, with 2 in 10 (20%) saying their wireless plan has unlimited data (compared to 18% in 2023).

Managing data

Among Canadians with a wireless plan including data, approximately three-quarters (74%) use Wi-Fi when available to manage or limit their data usage. One-quarter (24%) reduce their data usage upon receiving a notification about nearing their limit, while 12% use tools to track their wireless data usage. Perhaps not surprisingly given the continued decline in the use of data management practices, almost 9 in 10 (87%) find it easy to manage their data and eight in 10 have *not* paid any data overage fees in the last 12 months (80%) nor experienced any unexpectedly high bills (commonly known as 'bill shock') (81%) during this period.

Complaints

Most wireless service subscribers (84%) have not made a complaint about their wireless services in the past 12 months. The incidence of filing a complaint about wireless services has been relatively consistent over the past few years, ranging from 15% this year to 17% in 2020. The single largest proportion of respondents who filed a complaint about their wireless services over the last year pointed to incorrect charges on their bill (37%) as the reason for the complaint. Most (88%) of those who filed a complaint did so directly with their provider.

Contracts

The proportion of Canadians finding their wireless contract clear and easy to understand has been increasing over time, from a low of 57% in 2020 to the current high of 66%. Half (52%) of wireless subscribers found the explanation of the trial period to be clear and only 15% have had their provider change their plan without expressly making them aware of how the terms and conditions had changed.

Television Service Provider Code

Exactly 6 in 10 (60%) Canadians reported that their household subscribes to a cable, satellite, or IPTV TV service. Since 2019, the proportion of Canadians who subscribe to a TV service who found their contract to be clear and understandable has gradually increased, from 54% to 66% in 2024. More than one-third (37%) said they were informed about their provider's basic service package (up from 30% in 2021). Among Canadians who subscribe to a TV service, 20% reported filing a complaint about their TV services in the past 12 months (unchanged from 2023). The top reason for the complaint was inadequate service quality (58%).

Internet Code

The vast majority (93%) of households in Canada subscribe to a home Internet service. Consistent with 2023, 68% of Canadians with a home Internet service find their contract clear and easy to understand. A little over 2 in 10 (21%) filed a complaint about their services in the last year. Among these complaints, 39% reported early cancellation charges, 31% inadequate service quality, 17% incorrect billing charges, and 14% issues with service calls.

View of the CRTC

Consistent with 2023, approximately one-third of Canadians feel well (27%) or very well (7%) informed about the mandate and role of the CRTC. Conversely, almost two-thirds (64%) do not feel well informed. Canadians' impressions of the CRTC are unchanged this year, with exactly one-quarter (25%) holding a somewhat or very favourable impression of the CRTC. As was the case in 2023, favourability continues to sit at a record low, with the previous low of 29% recorded in Fall 2016.

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 $114,485.95 (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.

AWoods

Alethea Woods
President
Phoenix Strategic Perspectives Inc.

Introduction

Background

In June 2013, the CRTC established the Wireless Code, a mandatory code of conduct for providers of retail mobile wireless voice and data services. The purpose of the Wireless Code is to make it easier for Canadians to understand their mobile contracts, to switch service providers, and to prevent bill shock.

The CRTC indicated in the Wireless Code Decision that it would evaluate the effectiveness of the Code over time and that the results of this evaluation would form part of a formal review of the Wireless Code. According to the Wireless Code Decision, the formal review would be initiated within three years of the implementation of the Code. In June 2017, the CRTC completed a formal review and announced multiple changes to the Wireless Code.

To track the effectiveness of the Wireless Code and Canadians' opinions over time, the CRTC regularly conducts public opinion research (POR). In 2014, the CRTC conducted baseline POR on the Wireless Code; the preliminary data collected was used to establish benchmarks for future evaluations. This POR has been repeated every year since 2014 to gather data on how Canadians' understanding of wireless service contracts and related rights has changed between the implementation of the Wireless Code and the review.

Since the baseline POR in 2014, additional questions concerning Canadians' perceptions of the CRTC have been added to the survey, as well as questions to explore relevant topics, such as the CRTC's Television Service Provider (TVSP) Code (Broadcasting Regulatory Policy 2016-1), which came into effect on September 1, 2017 (added in the spring 2018 POR); and the Internet Code (Telecom Regulatory Policy 2019-269), which came into effect on January 31, 2020 (added to the POR in 2021). In addition, questions related to the TVSP Code and Internet Code have been modified to address changing information needs and questions related to the Wireless Code have been added as needed to, for example, measure the adoption of "device rental plans" by Canadians (also added to the 2021 POR). There were no additional areas of investigation added to this year's POR (the 2024 POR); the questionnaire administered was the same questionnaire as the previous year (the 2023 POR).

Research objectives

The purpose of this research was to collect data that will help the CRTC to understand Canadians' awareness of and satisfaction with the Wireless Code, TVSP Code, and Internet Code. The specific objectives of this year's POR were to obtain data regarding awareness of the three consumer protection codes; to better understand issues that affect Canadians the most as they relate to their wireless, TV and Internet services; to obtain data to assess whether the Wireless Code, TVSP Code, and Internet Code are continuing to meet their objectives, which include ensuring that consumers are empowered to make informed decisions; and to measure Canadians' perceptions of the CRTC and how it is changing over time.

To meet these objectives, this POR targeted the following population subgroups: Canadians with wireless plans; Canadians without wireless plans; Canadians under contract with a TV service provider; and Canadians under contract with an Internet service provider (ISP). 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.

Methodology

A random digit dialling (RDD) telephone survey was administered to 1,500 Canadians, 18 years of age or older, between November 28 and December 21, 2023. The survey averaged 15 minutes to complete. An overlapping dual-frame (landline and cell phone) sample was used to minimize coverage error.[2] The sample frame was geographically disproportionate to improve the accuracy of regional results. Based on a sample of this size, the overall results can be considered accurate within ±2.8%, 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. For a more complete description of the methodology, refer to the Appendix: Technical Specifications.

Notes to reader

- In the report, survey respondents are referred to as 'Canadians' and 'respondents' interchangeably for clarity and readability. Citizenship, however, 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.
- All results are expressed as percentages, unless otherwise noted. Throughout the report, percentages may not always add to 100 due to rounding and/or multiple responses being offered by respondents.
- At times, the number of respondents changes in the report because questions were asked of sub-samples of the survey population. Accordingly, readers should be aware of this and exercise caution when interpreting results based on smaller numbers of respondents.
- Where base sizes are reported in graphs, they reflect the actual number of respondents who were asked the question.
- When reporting subgroup variations:
    - The only differences discussed in the report are those that are significant at the 95% confidence level, that exceed the margin of sampling error for the overall sample, and that pertain to a subgroup sample size of at least n=30. The only exception regarding the sample size criterion for subgroup variations is significant differences that are part of a pattern or trend. These *may* be reported even when a subgroup sample size falls below the reporting threshold of n=30.
    - If one or more categories in a subgroup are not mentioned in a discussion of differences (for example, if 2 out of 4 regions are compared), it can be assumed that significant differences were found only among the categories reported.

[2] Coverage error occurs when not all segments of the target population are included in the sample frame. If only landlines were included in the sample frame for this survey, Canadians who only have a cell phone would not have an opportunity to participate in the survey. The survey results, therefore, would only reflect the views of Canadians who have a landline in their household.

- Tracking data is included in the analysis. As noted, this POR has been conducted annually since 2014. When reporting differences over time, only differences that exceed the margin of sampling error for the survey are reported. Data on impressions of the CRTC is available from 2008 to present.
- The survey questionnaire is appended: Survey Questionnaire.

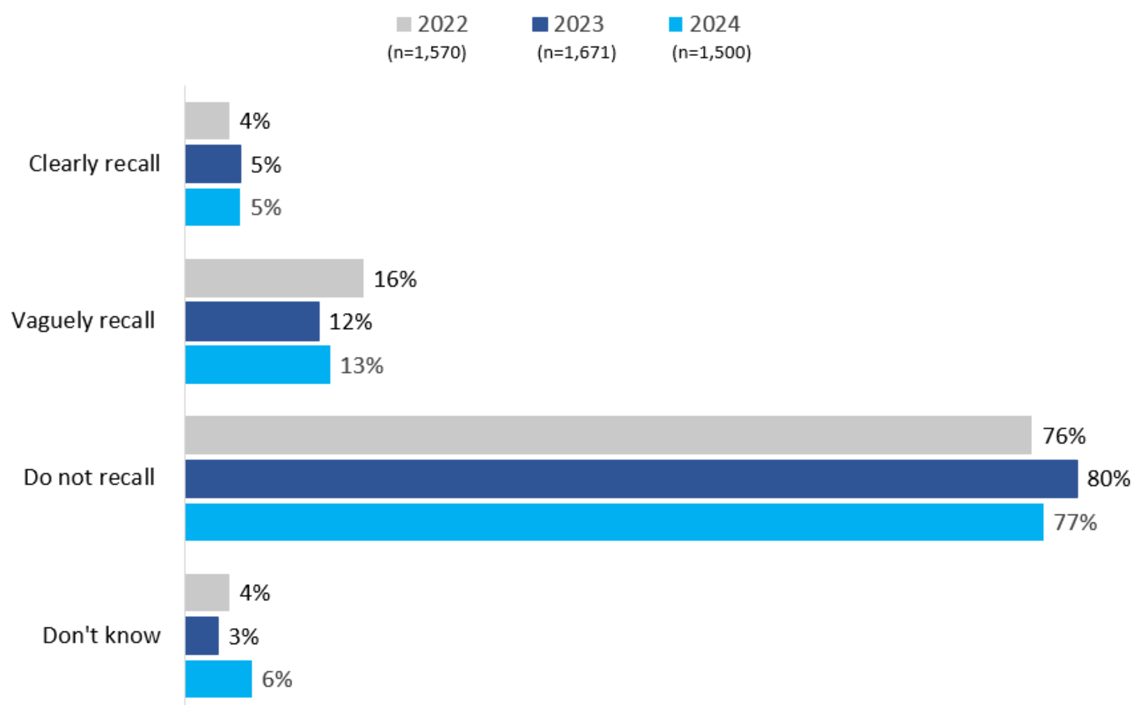
Detailed Findings

1. Awareness of the consumer protection codes

Limited awareness of the consumer protection codes.

Recall of the Wireless, Internet and TV Service Provider (TVSP) Codes --- collectively referred to as consumer protection codes --- is unchanged year over year. This year, 18% of respondents either clearly or vaguely recalled hearing or seeing something about these Codes compared to 17% in 2023 and 20% in 2022. Before being asked if they recalled hearing or seeing anything about these Codes, respondents were told that the Wireless Code, Internet Code, and TVSP Code were created to make contracts easier for customers to understand and to contribute to a more dynamic marketplace.

Figure 1: Recall of consumer protection codes



WC1. The Wireless Code, Internet Code, and TV Service Provider Code were created to make contracts easier to understand and to contribute to a more dynamic marketplace. To what extent, if any, would you say you recall hearing or seeing anything about these Codes? Would you say you clearly recall, vaguely recall or do not recall? Base: all respondents.

The likelihood of recalling these consumer protection codes was higher among those who described themselves as informed about the CRTC (24%) compared to those who said they are not informed about the mandate and role of the CRTC (14%).

2. Wireless Code

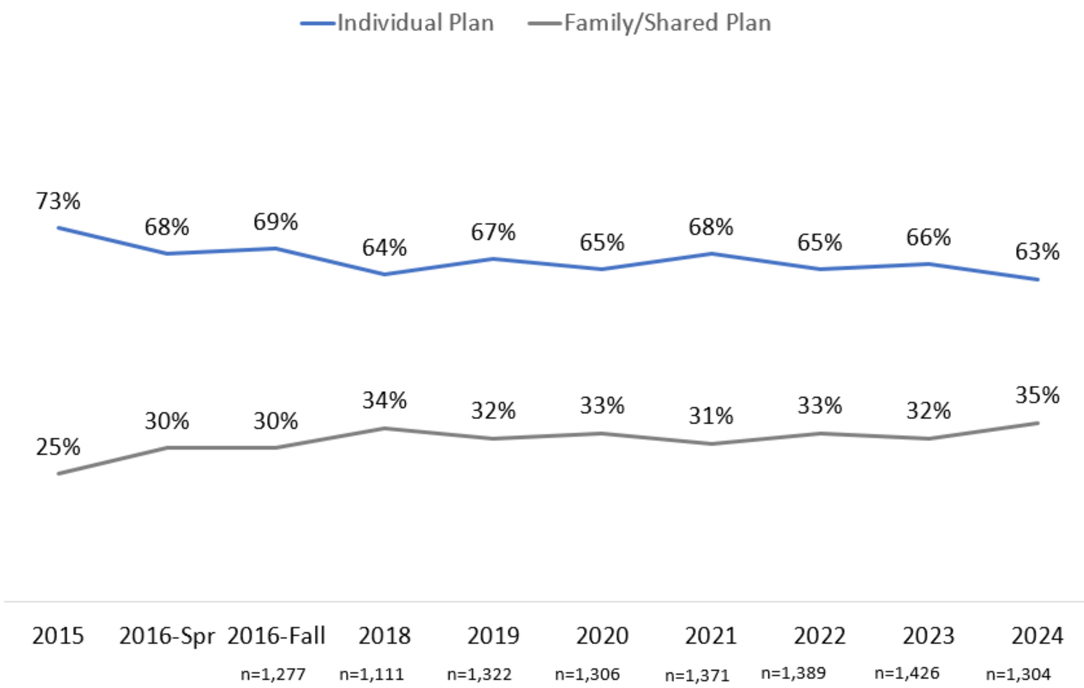
Almost 9 out of 10 (88%) Canadians stated that they own a cell phone, smartphone, or another wireless device. Ownership rates were highest among individuals aged 18-34 (94%) and lower among residents of Quebec (82% versus 93% of those in Atlantic Canada and 90% each of those living in Ontario and the Prairies).

2.1 Type of Wireless Plan

The majority of Canadians still opt for individual wireless plans.

Nearly two-thirds (63%) of Canadians use an individual wireless plan and approximately one-third (35%) use a family or shared plan. The incidence of individual versus family or shared plans has been relatively stable since 2018, with the percentage of Canadians using each type of plan varying by 3% or less year over year.

Figure 2: Type of wireless plan: individual vs. family/shared



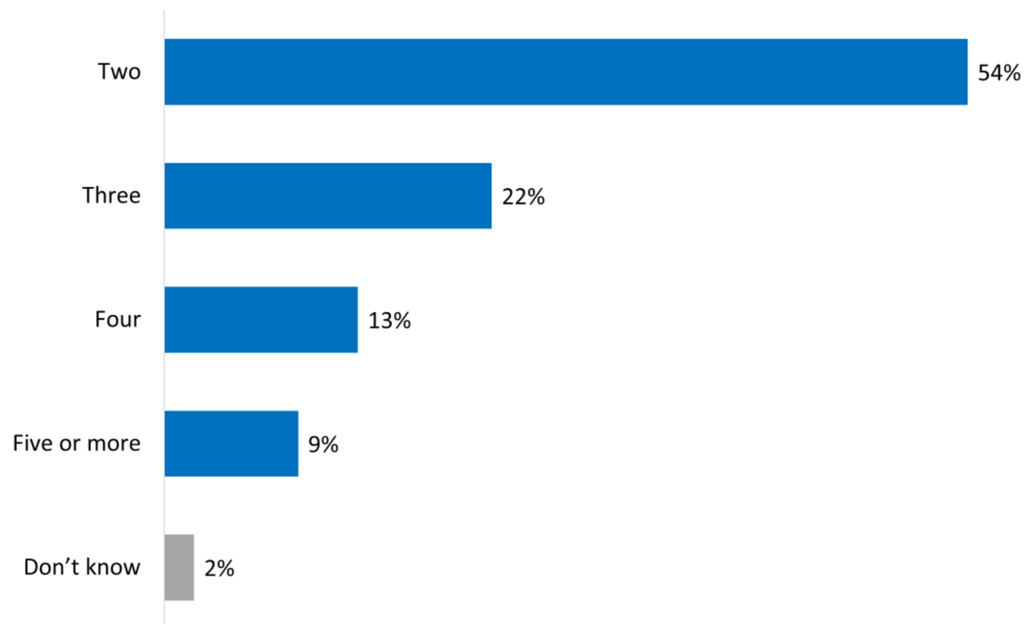
WC2. Is it an individual plan or a family or shared plan? Base: n=1,304; respondents with cell or wireless phone service contract or plan. 2024: 1% did not know.

As household income increases, the incidence of individual plans declines, from 79% for those from households with an annual income under $40,000 to 46% for those from households with an annual income of $150,000+. This pattern is consistent with 2023, where lower-income households were more likely to have individual plans. In addition, the use of individual plans was higher among residents of Quebec (66% compared to those living the Prairies at 58%) and individuals aged 65 and older (67% compared to 56% of those aged 55 to 64).

Half of Canadians on family plans share between two members.

Among Canadians on a family or shared wireless plan, just over half (54%) said that their plan includes two members. Over 1 in 5 (22%) mentioned having three members on their shared plan, while smaller percentages reported having four (13%) or five or more (9%) members.

Figure 3: Number of members on the shared plan

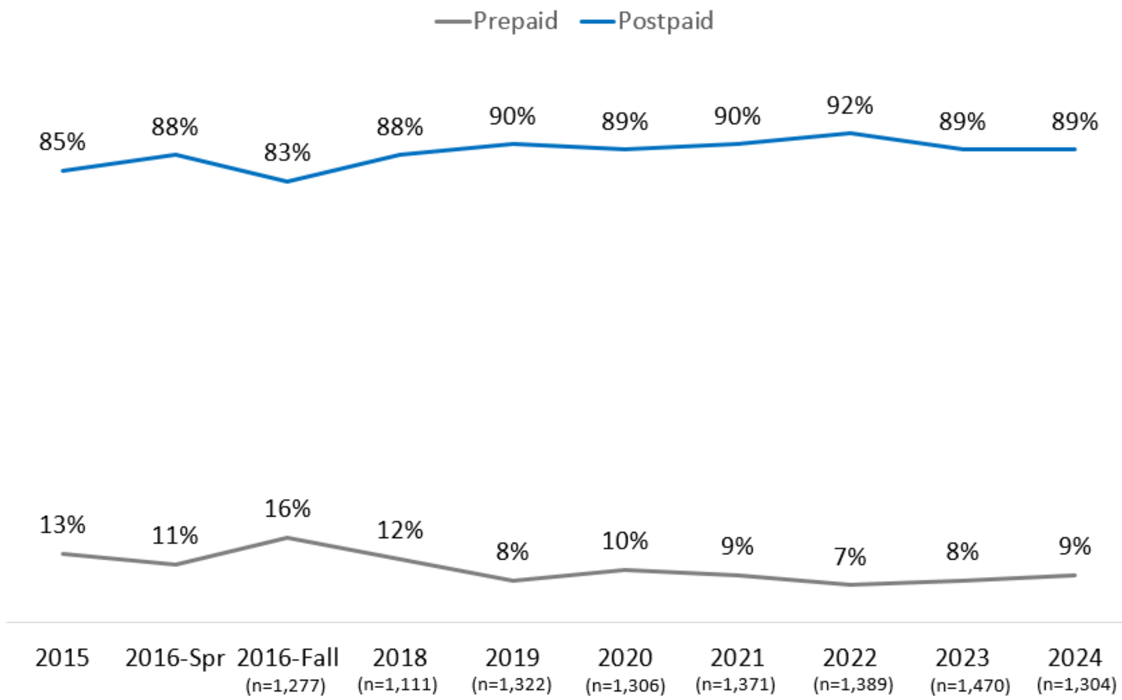


WC3. How many members are on your shared plan? Base: n=460; respondents with a shared plan.

Nearly 9 in 10 Canadians use a postpaid wireless service plan.

The choice of postpaid wireless service plans is unchanged year over year, with 89% of Canadians opting for this type of service plan. Prepaid, or pay-as-you-go plans, also show relative stability year over year, accounting for 9% of wireless service plans.

Figure 4: Type of wireless plan: prepaid vs. postpaid



WC4. And, is it a monthly plan, or a prepaid or pay-as-you-go plan? Base: respondents who are subscribed to a wireless service plan. 2024: 2% did not know.

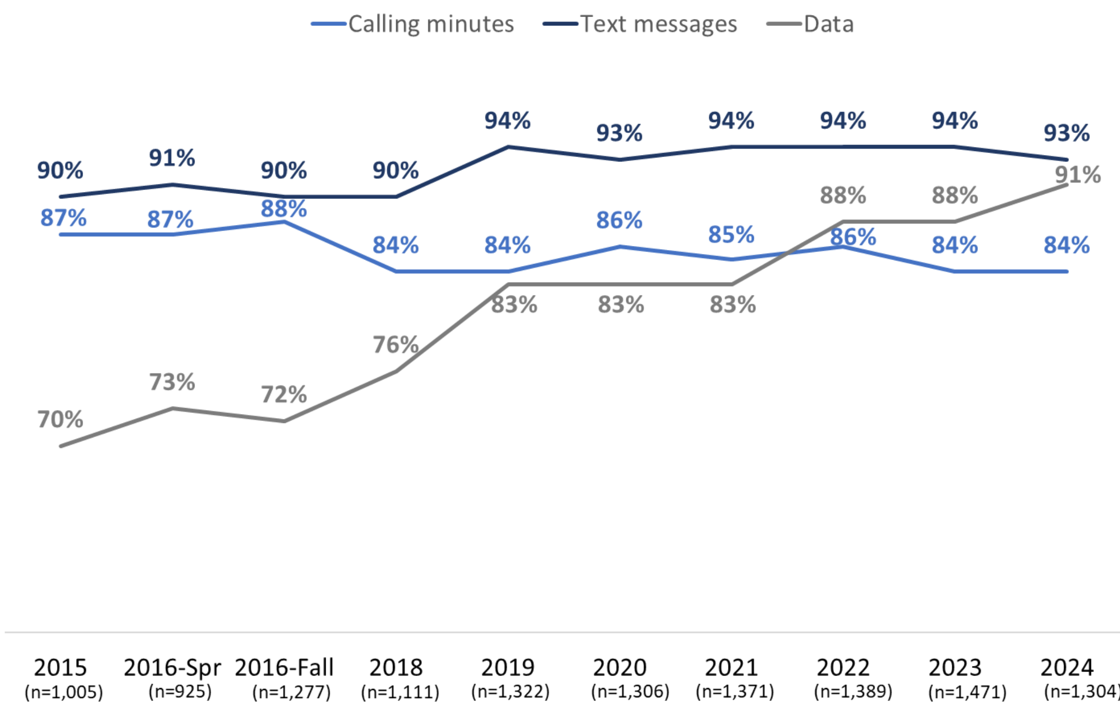
The likelihood of using a post-paid monthly plan generally increased with household income (from 83% of households earning under $40,000 per year to 93% of households earning $150,000+ per year).

2.2 Services included in Canadians' Wireless Plans

Canadian wireless plans typically include calling minutes, text messaging, and data.

Most wireless plans still incorporate calling minutes (84%), data (91%), and text messaging (93%). Approximately two-thirds (68%) of respondents have calling minutes, text messaging, *and* data included in their wireless plan. The inclusion of text messaging has remained consistent since 2019, while the proportion of plans offering data has increased slightly from 88% in 2022 and 2023 to 91% in 2024.

Figure 5: Wireless plan features



WC5. Which of the following are included in your wireless plan? [Multiple responses accepted] Base: respondents who are subscribed to a wireless service plan. 2024: 1% to 4% did not know.

Certain demographic differences stand out in wireless plan features:

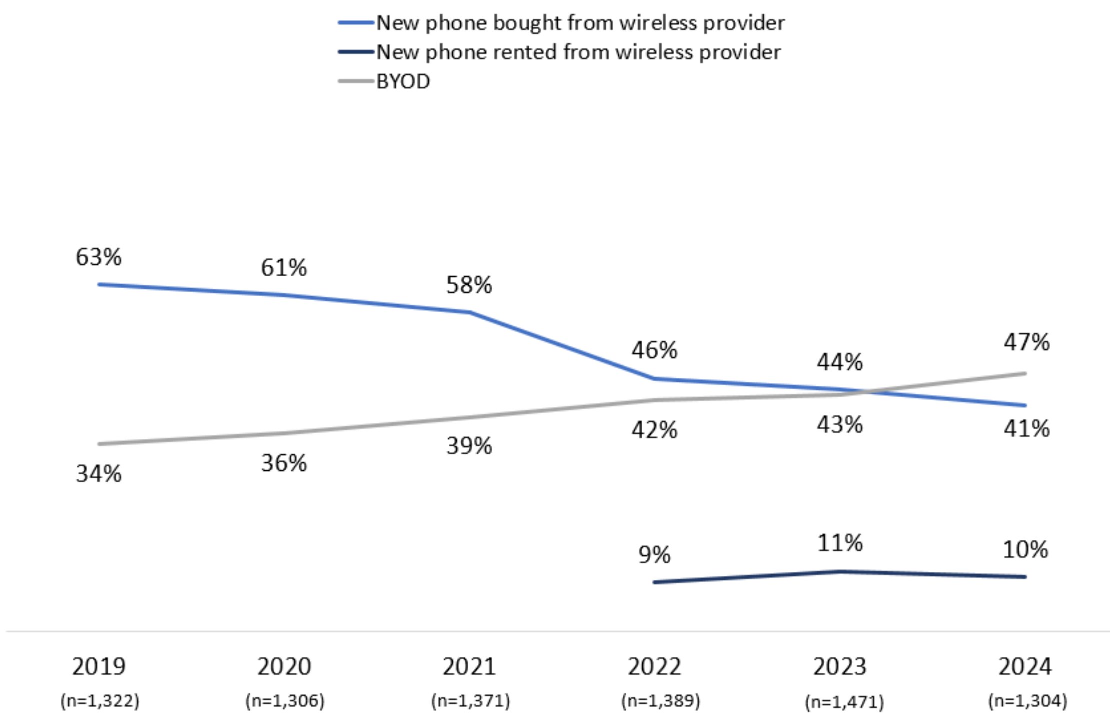
- Residents of British Columbia were more inclined to have calling minutes in their plans compared to those living in the Prairies (90% versus 82%).
- The likelihood of having any of these features in their wireless plan was lower among those aged 65+. Specifically, 80% reported calling minutes compared to 87% of 55- to 64-year-olds, 88% reported text messages compared to 95% of younger Canadians, and 78% reported data compared 96% of younger Canadians, including 98% of 18- to 34-year-olds.
- The likelihood of having any of these features generally increased with annual household income and was higher among those with a post-secondary education. Moreover, those with an income exceeding $100,000 were more inclined to have calling minutes included in their plan compared to those earning under $40,000 (88% versus 77%).
- Those from racialized communities (94%) were more likely than other subscribers (90%) to say that their wireless plan includes data.

2.3 Devices

Most Canadians either purchase a new phone or bring their own device when signing up for a wireless plan.

When signing up for their latest wireless plan, more Canadians said they are bringing their own device, BYOD, (47% compared to 43% in 2023) than purchasing a new phone from their wireless provider (41% compared to 44% in 2023). Consistent with previous years, relatively few wireless subscribers are renting or leasing their phone from their provider (10% compared 9% in 2022 and 11% in 2023).

Figure 6: Type of device



WC6. When you signed up for your latest wireless plan, did you bring your own device, or did you buy, rent or lease a new phone from your wireless provider? Base: respondents subscribed to a wireless service plan. 2024: 2% did not know.

The following groups were more likely to report bringing their own device when they signed up for their latest plan:

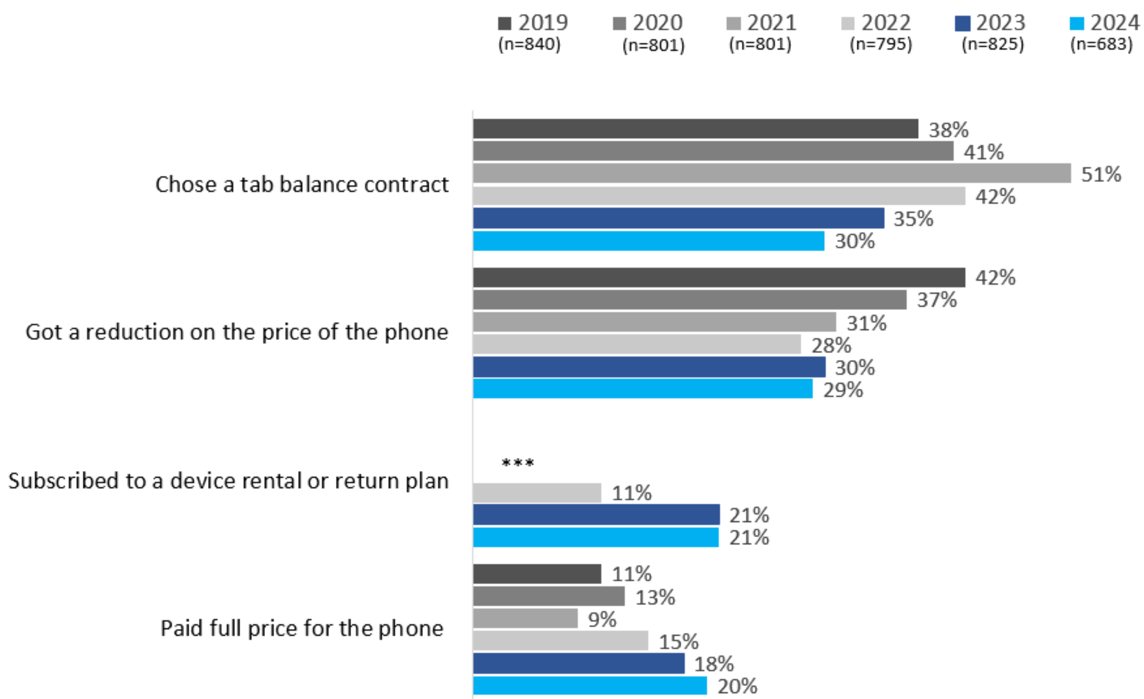
- Those in Ontario (50%) and British Columbia (55%) compared to those in Quebec (40%).
- 18- to 34-year-olds (55%) compared to 35- to 54-year-olds (42%) and 55- to 64-year-olds (41%).
- Racialized wireless plan subscribers (54%) compared to other subscribers (43%).

The type of new phone purchases varies among Canadians.

Among those acquiring a new phone, 2 in 10 paid the full price (20%) or have subscribed to a device rental or return plan (21%). Nearly 3 in 10 received a price reduction (29%) or opted for a tab balance contract (30%).

The trend of Canadians opting for tab balance contracts to purchase new phones continues to decline, dropping from the high of 51% in 2021 to 30% this year. In contrast, this year marks the third consecutive increase in the proportion of wireless subscribers saying they paid the full price for their phone (from 9% in 2021 to 15% in 2022 to 18% in 2023 to 20% in 2024).

Figure 7: Type of new phone acquisition



***Not a response option in 2019, 2020, 2021

WC7. Which of the following did you do: …? [Multiple responses accepted] Base: respondents who bought or rented a new phone from their wireless provider. 2024: 9% did not know.

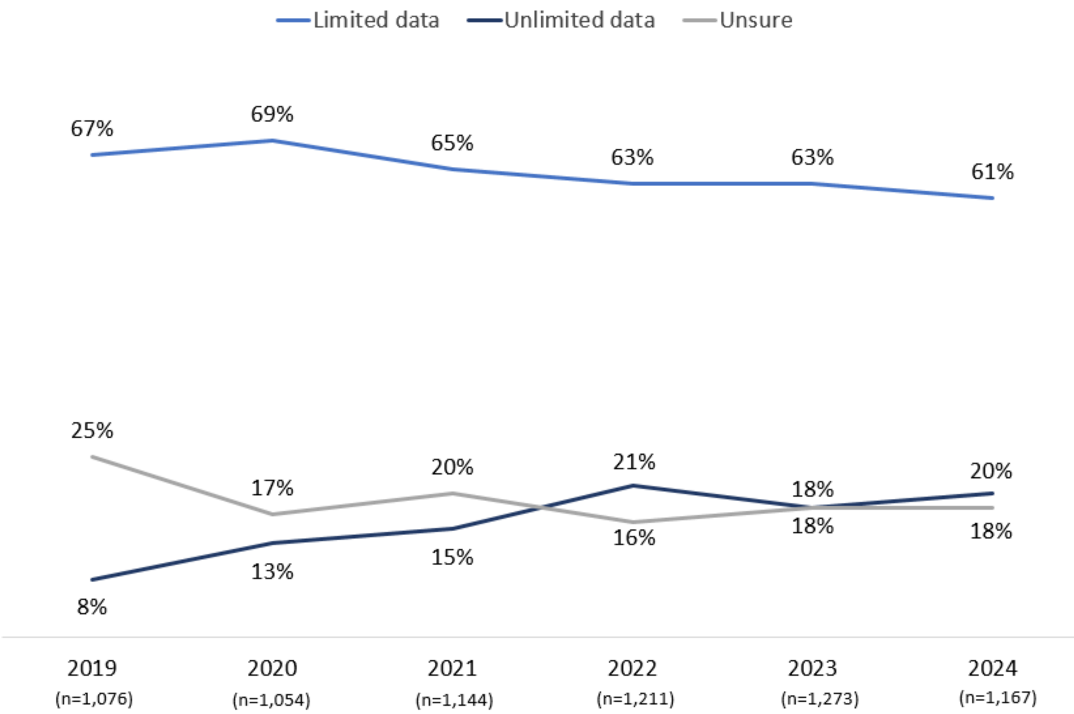
Respondents with a high school education or less (31%) were more likely than those with a college- (17%) or university-level (16%) education to report paying in full for their new phone when they signed up for their latest wireless plan. In contrast, the likelihood of opting for a tab balance contract was higher among those with a post-secondary education (34%) compared to those with high school or less (18%).

2.4 Wireless Data

Limited data remains the most prevalent type of data included in wireless plans.

As reported earlier, 91% of Canadians have a wireless service plan with data. Among those with data, limited data plans are still the main choice, with 6 in 10 (61%) reporting monthly data limits in their plans (virtually unchanged from 2023). While the incidence of "unlimited" data plans steadily increased between 2019 and 2022 (from 9% to 21%), there has been no significant year-over-year change in 2024, with 2 in 10 (20%) saying their wireless plan has unlimited data (compared to 18% in 2023). The likelihood of having an "unlimited" data plan was higher among those aged 65 and older (25%) compared to 18- to 34-year-olds (17%).

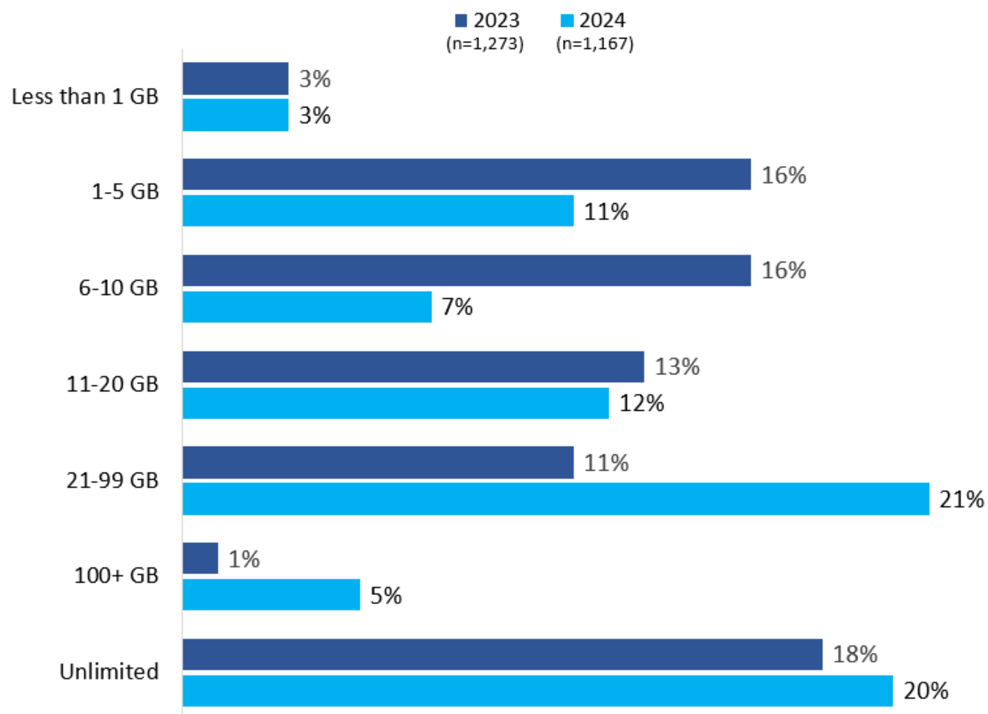
Figure 8: Type of data included in wireless plan



WC8. Some wireless plans have unlimited data and some have limited data. When a plan includes a monthly data limit, you may have to pay data overage fees if you use more data in a month than is included in your plan. How much data is currently included in your plan each month? Base: respondents subscribed to a wireless service plan that includes data.

One-quarter (26%) of those subscribed to a wireless service plan that includes data have at least 25 GB of data included in their monthly plan: 21% have 21-99 GB and 5% have 100+ GB. This is a notable year-over-year increase, with only 12% of respondents reportedly having a plan that includes this amount of data in 2023.

Figure 9: Amount of data included in monthly plan

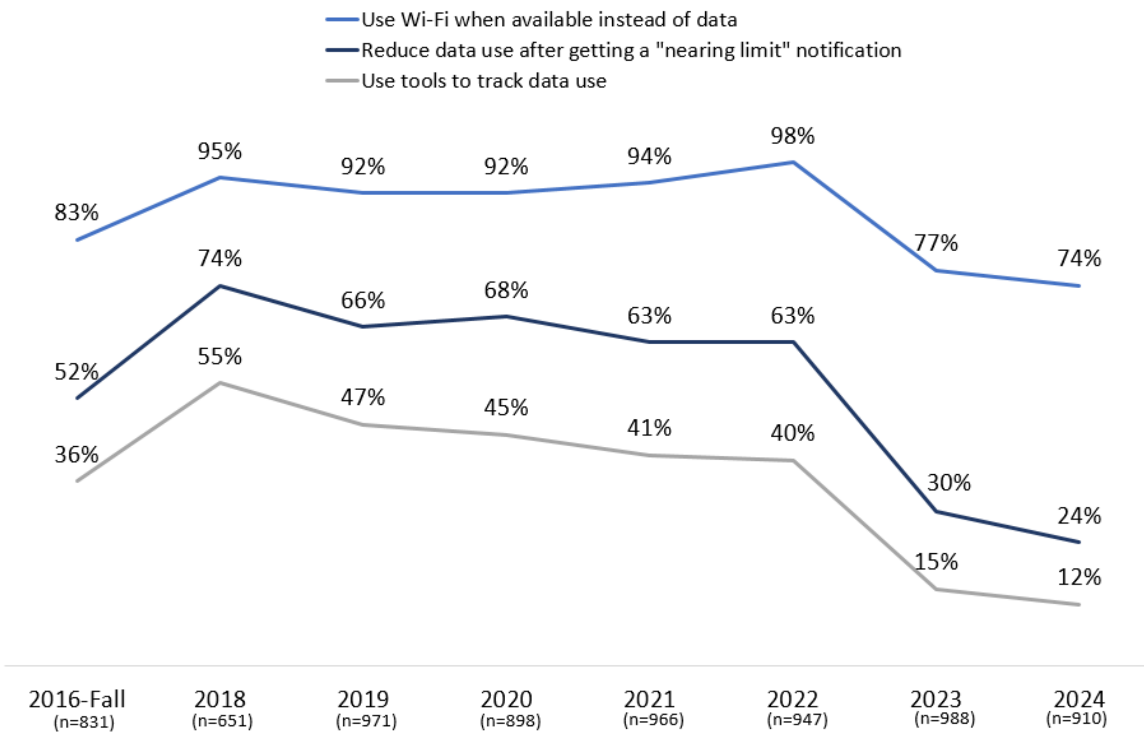


WC8. Some wireless plans have unlimited data and some have limited data. When a plan includes a monthly data limit, you may have to pay data overage fees if you use more data in a month than is included in your plan. How much data is currently included in your plan each month? Base: respondents subscribed to a wireless service plan that includes data.

The number of wireless plan subscribers taking actions to manage or limit data use has been consistently decreasing.

Three-quarters (74%) of Canadians with data in their wireless plan use Wi-Fi when available to manage or limit their data use. Following this, one-quarter (24%) reduce their data use after getting a notification that they are nearing their limit and 12% use tools to track their data use. This year continues the decline in the proportion of Canadians taking these actions to manage or limit data that started in 2023.

Figure 10: Activities to manage or limit data use



WC9. Which of the following activities, if any, do you use to manage or limit your data use? [Multiple responses accepted] Base: respondents subscribed to a wireless service plan and whose plan includes data. 2024: 9% did not know.

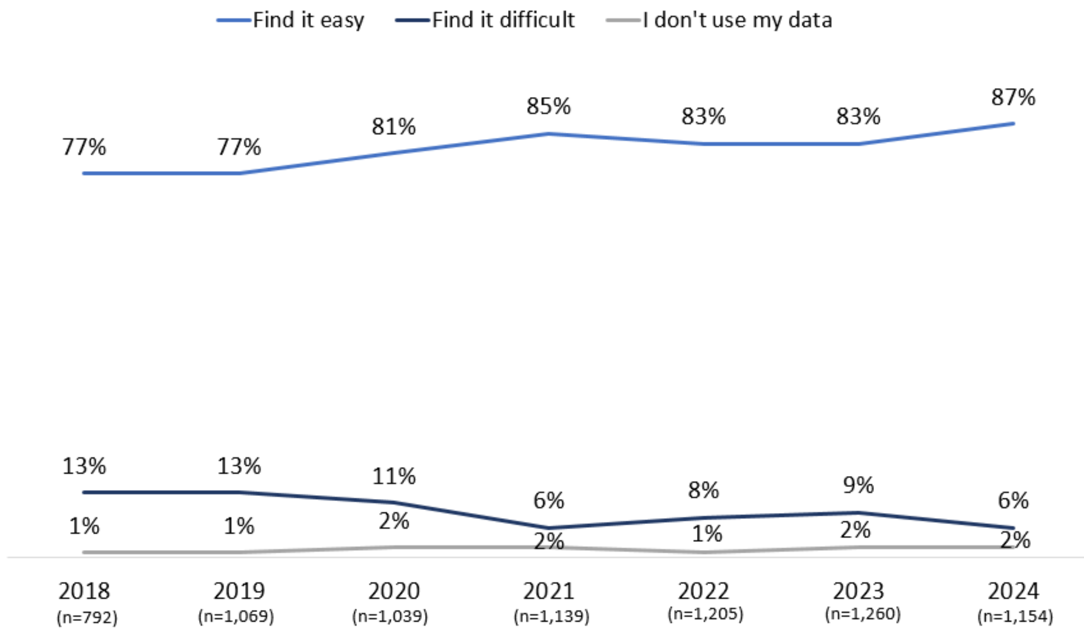
Wireless subscribers in Ontario were more likely than their counterparts in Quebec to use Wi-Fi (78% versus 68%) and to reduce data use after receiving a notification (29% versus 19%) to manage or limit data use. Those aged 65 and older were less likely to use Wi-Fi (66% versus 77% of 35- to 54-year-olds), reduce their data use after receiving a notification (15% versus 30% of 18- to 34-year-olds and 26% of 55- to 64-year-olds), and use tools to track data use (7% versus 13% of 35- to 54-year-olds). Racialized respondents were more likely than others to use Wi-Fi to manage data use (79% versus 71% of other respondents).

The majority of Canadians find it easy to manage their data use.

Canadians continue to find it easy to manage their data each month. Nearly 9 in 10 (87%) rated it as easy on a 7-point scale (scores of 5, 6 or 7), including approximately 6 in 10 (62%) who said it is *extremely* easy.

Wireless subscribers in Atlantic Canada (72%) and Quebec (66%) were more likely than those in Ontario (57%) to find it *extremely* easy to manage their data. Conversely, men (58% versus 67% of women), racialized respondents (55% versus 66% of other respondents), and 18- to 34-year-olds (57% versus 68% of 55- to 64-year-olds) were less likely to say that managing their data is *extremely* easy.

Figure 11: Ease of managing data use



WC10. How easy do you find it to manage the data used by yourself and/or your family each month? Please use a 7-point scale where 1 means extremely difficult and 7 means extremely easy. Base: respondents subscribed to a wireless service plan and whose plan includes data. 2024: 9% did not know.

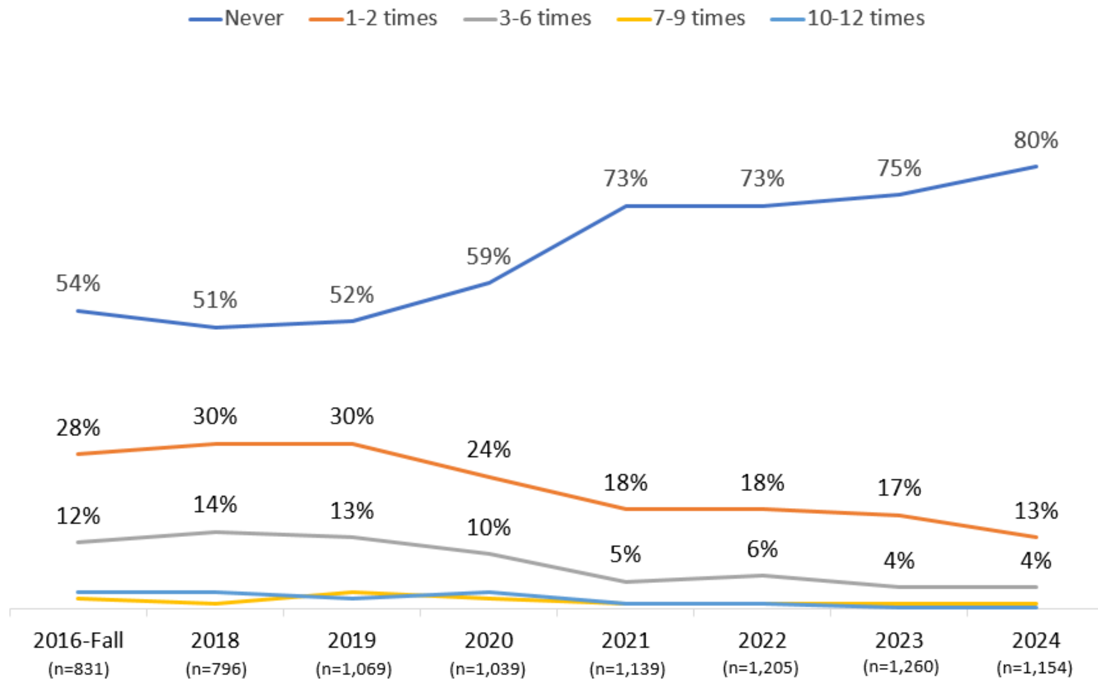
Most Canadians have not paid data overage fees in the past 12 months.

Most (80%) Canadians with a wireless service plan that includes data have not paid any data overage fees in the last 12 months, continuing a trend that started in 2021 when more than 7 in 10 Canadians reported not paying overage fees in the 12 months preceding the survey. Fewer than 2 in 10 (18%) paid overage fees in the past 12 months, and most of those who did, paid them one to two times (13%).

The following groups of respondents were more likely to say they have *never* paid data overage fees: those aged 65+ (84% versus 73% of those under the age of 35); those from households with an annual income of $100,000 to just under $150,000 (89% versus 72% to 78% of those from lower income households); and those with a bachelor's degree or higher (82% versus 74% of those with a high school diploma or less).

Compared to their counterparts, fewer of the following plan holders reported *never* having paid data overage fees: racialized respondents (75%); those who experienced 'bill shock' (54%); those who have filed a complaint about their wireless (68%) or Internet (74%) services; and those who described themselves as not informed about the CRTC (77%). Conversely, these plan holders were more likely to have paid data overage fees in the last 12 months.

Figure 12: Number of times data overage fees paid in the past 12 months



WC11. In the past 12 months, how often have you paid data overage fees? Base: respondents subscribed to a wireless service plan and whose plan includes data. 2024: 2% did not know.

2.5 Bill Shock

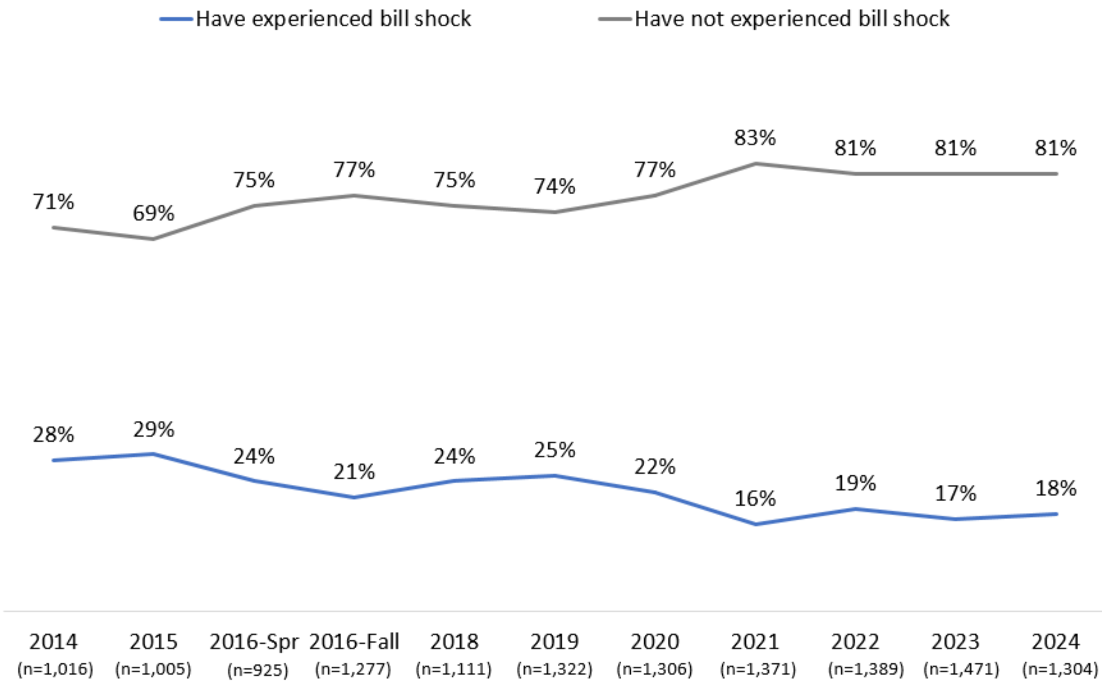
Most Canadians have not experienced "bill shock."

A little over 8 in 10 Canadians (81%) with a wireless service plan reported not experiencing a surprisingly high bill ('bill shock') in the past year. The proportion of Canadians experiencing bill shock (18%) has been consistent for the last four years, varying by no more than 3% year over year since 2021 when it dropped to 16% from 22% in 2020.

Consistent with previous years, younger and middle-aged individuals were more likely to report encountering bill shock, with 22% each of 18- to 34-year-olds and 55- to 64-year-olds experiencing it, compared to 13% of those aged 65 and older. The likelihood of experiencing bill shock also was higher among allophones (24% versus 16% to 17% of those who first learned English or French at home as a child and still understand the language) and those living in the Territories (38% versus 16% of those in Quebec and 18% of those in Ontario).

Additionally, those who find it difficult to manage their data (48%), those who have switched wireless providers (24%), those who have filed a complaint about their wireless (40%) or Internet (25%) services, and those with an unfavourable impression of the CRTC (24%) were all more likely to have experience bill shock at some point during the last year.

Figure 13: Experience with 'bill shock'

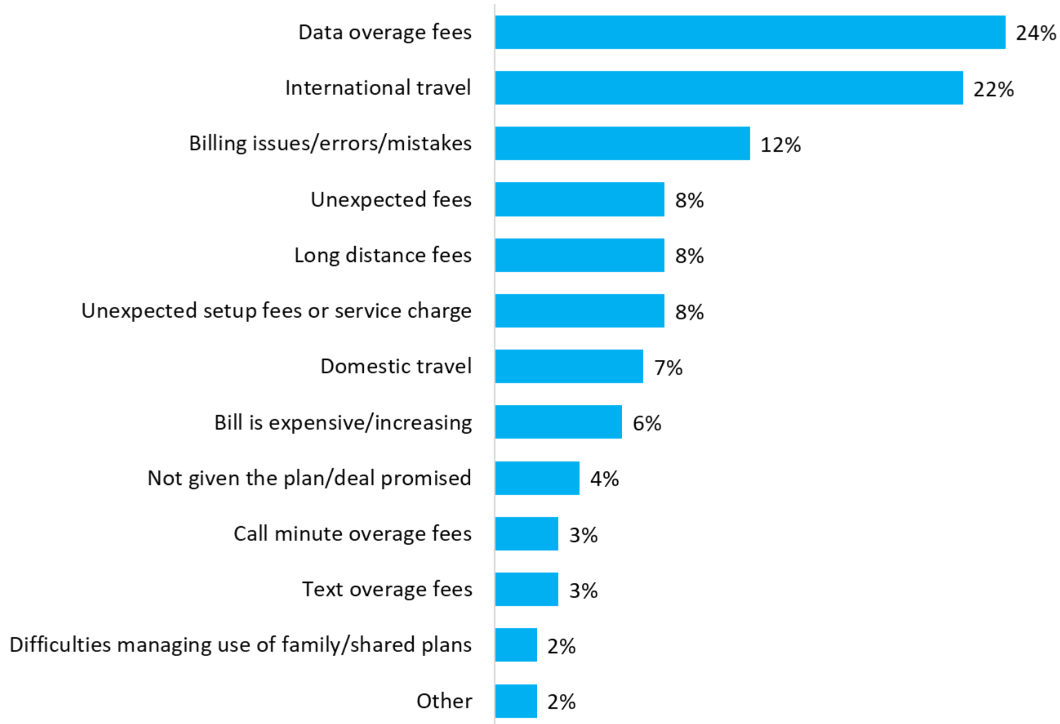


WC12. During the last year, have you experienced 'bill shock, meaning a surprisingly high bill? Base: respondents subscribed to a wireless service provider. 2024: 1% did not know.

Top reasons for 'bill shock' are data overage fees and international travel.

Among those who have experienced bill shock in the last 12 months (n=235), the main two reasons were data overage fees (24%) and international travel (22%). Other reasons leading to bill shock were billing issues (12%), unexpected fees, such as network access or 911 fees, or setup charges (8% each), long distance fees (8%), and domestic travel, specifically, roaming fees (7%). In addition, 6% of respondents said simply that their bill is expensive or that it is increasing in general. All other reasons for experiencing bill shock were mentioned by fewer than 5% of respondents and can be found in Figure 14 below.

Figure 14: Top reasons for 'bill shock'



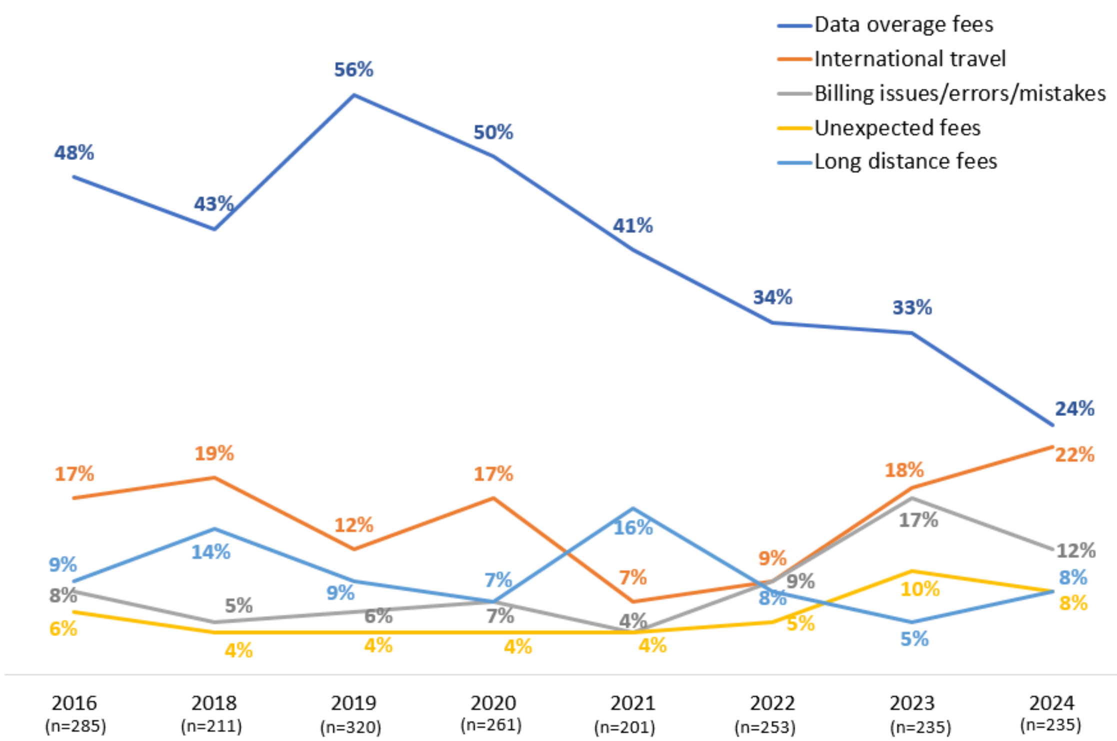
WC13. What was the main reason for the 'bill shock' you experienced? [Multiple responses accepted] Base: n=235; respondents subscribed to a wireless service provider and who experienced 'bill shock' in the last 12 months. Don't know: 8%.

Figure 15 presents the top reasons for bill shock over time, from 2016 to present. The number of Canadians reporting data overage fees peaked in 2019 and then began a downward trend the following year (-6% in 2020; -9% in 2021; -7% in 2022). After levelling off in 2023, the downward trend continues this year, with a year-over-year decline of 9%, from 33% in 2023 to 24%.

Compared to 2021, the proportion of Canadians attributing their bill shock to international travel continues to increase, from the low of 7% reported during the height of the COVID-19 global pandemic, to a high of 22% this year, which is generally in line with pre-pandemic levels.

After a notable increase in 2023 to 17% (up from 9% in 2022), billing issues have declined to 12%, while unexpected fees remain consistent year over year and the trend of declining mentions of long-distance fees as a reason for bill shock has stopped this year.

Figure 15: Top reasons for 'bill shock' (over time)



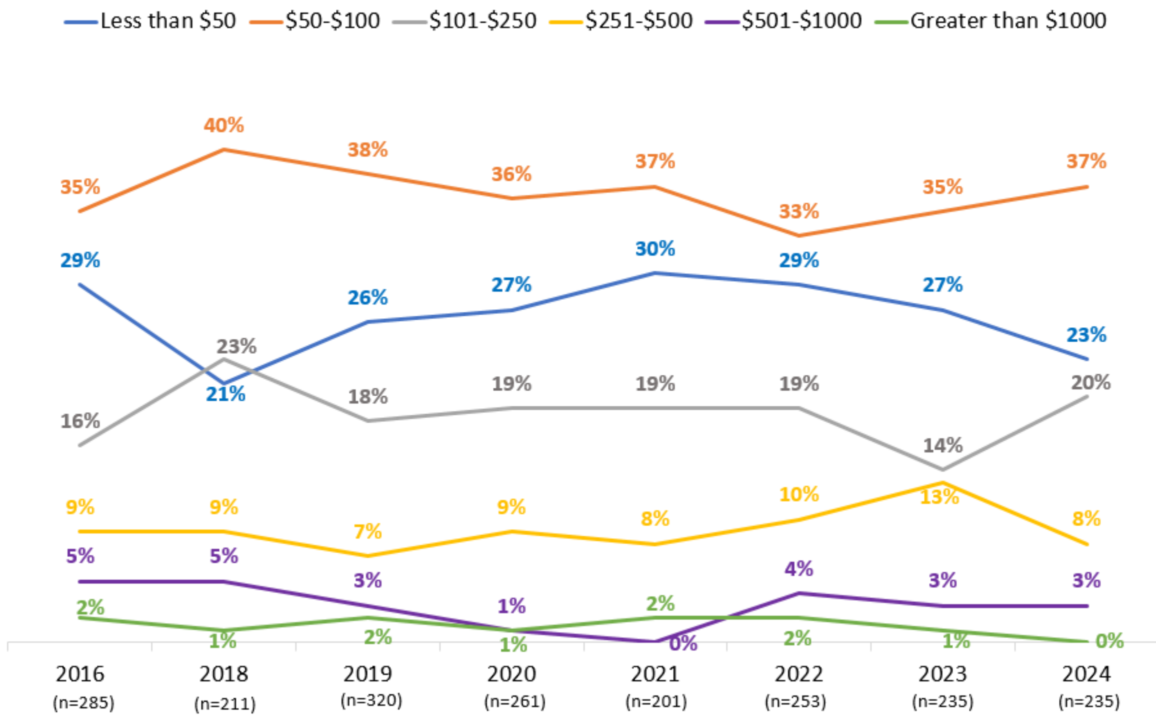
WC13. What was the main reason for the 'bill shock' you experienced? [Multiple responses accepted] Base: respondents subscribed to a wireless service provider and who experienced 'bill shock' in the last 12 months. 2024: 8% did not know.

The majority of unexpected bill charges are typically below $100.

Among those who experienced bill shock, 6 in 10 were charged less than $50 (23%) or between $50 and $100 (37%), which is consistent with previous years. That said, as seen in Figure 16, the proportion of Canadians reporting charges of $50 to $100 is higher in 2024 than it was in 2022, when 33% reported paying charges in this range, and the proportion of Canadians reporting charges of $101 to $250 has increased this year after reaching a low of 14% in 2023.[3]

[3] Inflation is likely a factor with annual average prices of goods and services rising across Canada in 2023.

Figure 16: Amount of unexpected charges on bill



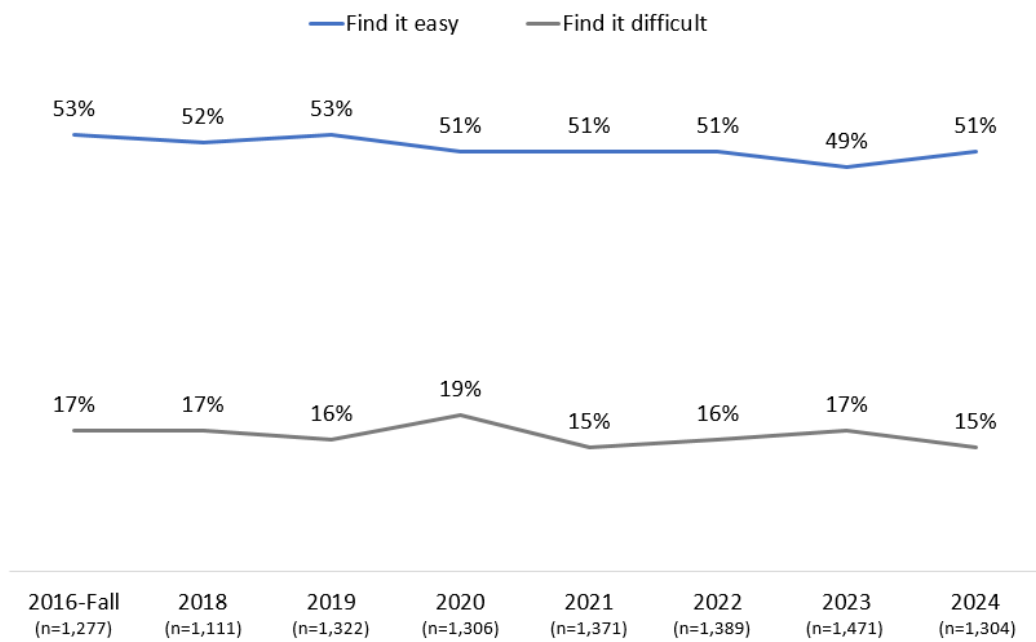
WC14. What was the amount of the unexpected charges on your bill? Base: respondents subscribed to a wireless service provider and who experienced bill shock in the last 12 months. 2024: 9% did not know.

2.6 Roaming Fees

Half find it easy to handle roaming charges when they are travelling.

Approximately half (51%) of those subscribed to a wireless service provider found it easy (scores of 5, 6, or 7 on a 7-point scale) to handle roaming charges while travelling, including one-third (33%) who said it is *extremely* easy to do this. The proportion of subscribers who find it easy to manage their roaming charges has been consistent since fall 2016, varying by no more than 2% year over year. Relatively few (15%) subscribers find it difficult (scores of 1, 2, or 3 on a 7-point scale) to manage roaming charges.

Figure 17: Level of difficulty managing charges when travelling



WC15. If you use your plan while travelling, you may be charged roaming fees. How easy do you find it to manage your roaming charges when you are travelling? Please use a 7-point scale where 1 means extremely difficult and 7 means extremely easy. Base: respondents subscribed to a wireless service provider. 2024: 4% did not know.

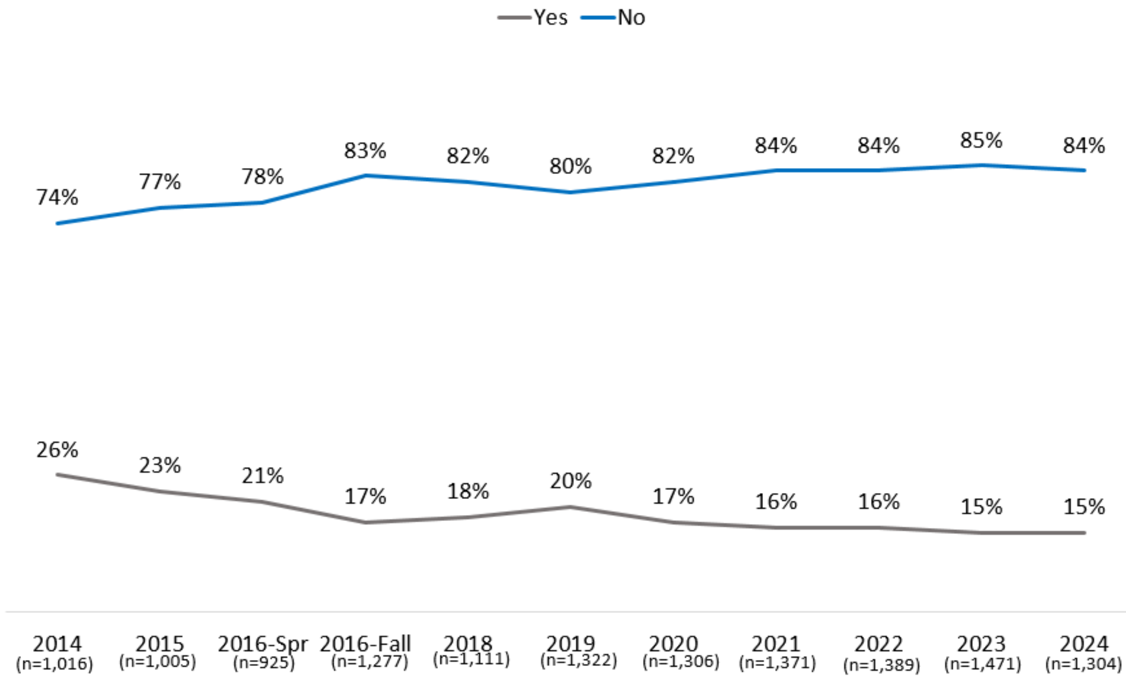
Compared to those living in British Columbia (22%), subscribers in Atlantic Canada (41%), Quebec (37%) and the Prairies (37%) were more likely find it *extremely* easy to manage roaming charges when travelling. Subscribers aged 65+ (27%) were less likely than 55- to 64-year-olds (36%) and 35- to 54-year-olds (42%) to say that managing roaming charges is *extremely* easy. So too were subscribers with annual household incomes of under $40,000 (24%) compared to 38% of those from households with annual incomes of $100,000 to just under $150,000 and 43% of those earning $150,000 or more by year.

2.7 Complaints

Most have not submitted a complaint about their wireless services in the last 12 months.

Most wireless service subscribers (84%) have not made a complaint about their wireless services in the past 12 months. In contrast, 15% reported making such a complaint. The incidence of filing a complaint about wireless services has been relatively consistent over the past few years, ranging from 15% this year to 17% in 2020. Moreover, significantly fewer Canadians have made a complaint in recent years than a decade ago, when 26% had done so.

Figure 18: Wireless service complaints made in the past 12 months



WC16. Have you made a complaint about your wireless services in the past 12 months? Base: respondents subscribed to a wireless service provider. 2024: 1% did not know.

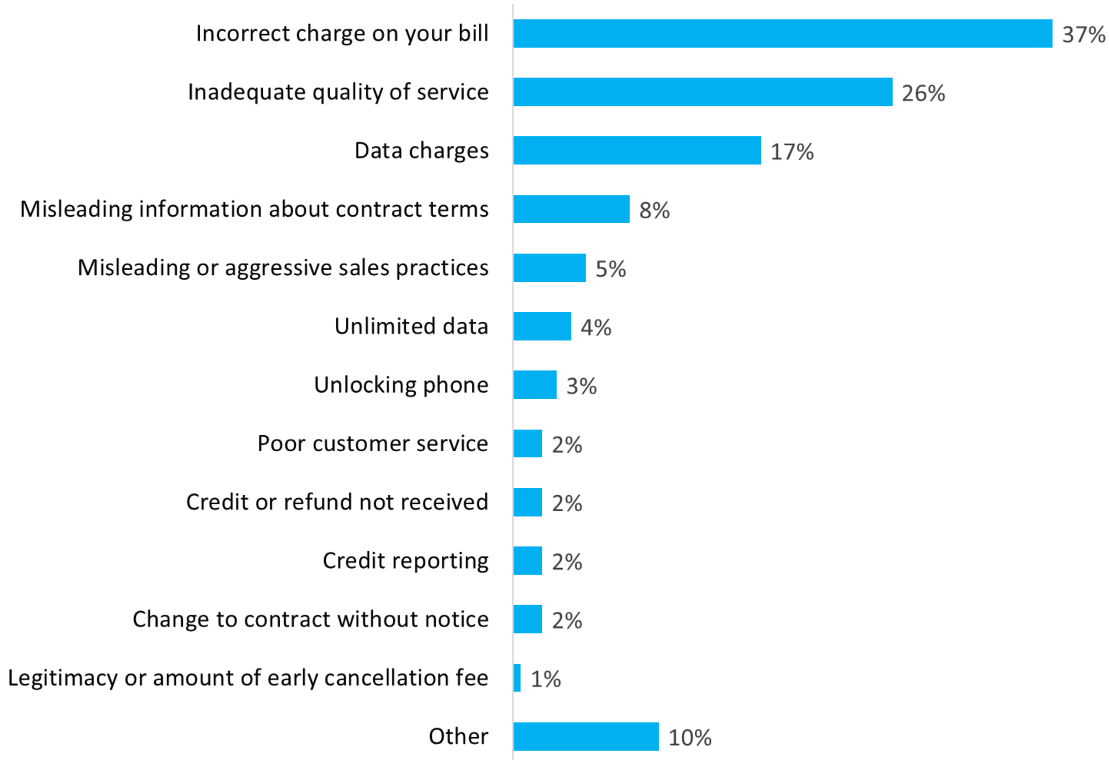
Wireless subscribers in Quebec (9%) were the least likely to report a complaint about their wireless services in the past 12 months (versus 16% of the living in Ontario and the Prairies, 18% in British Columbia, 24% in Atlantic Canada, and 30% in the Territories).

Not surprisingly, those who experienced bill shock (34%), as well as those who filed a complaint about their TV (23%) or Internet (31%) services were more likely to have made a complaint about their wireless services in the last year. In addition, the likelihood of making a complaint was higher among those not informed about the CRTC (18%) and those who have an unfavourable impression of the CRTC (18%).

Many complaints are due to incorrect charges on bills or inadequate quality of service.

The single largest proportion of respondents who filed a complaint about their wireless services over the last year pointed to incorrect charges on their bill (37%) as the reason for the complaint. Following this, approximately one-quarter (26%) filed a complaint due to inadequate quality of service and 17% due to data charges. Other reasons were mentioned by small numbers and can be found in Figure 19. The majority (83%) made their complaint for one reason; just 16% reported more than one reason for their complaint.

Figure 19: Reasons for complaints



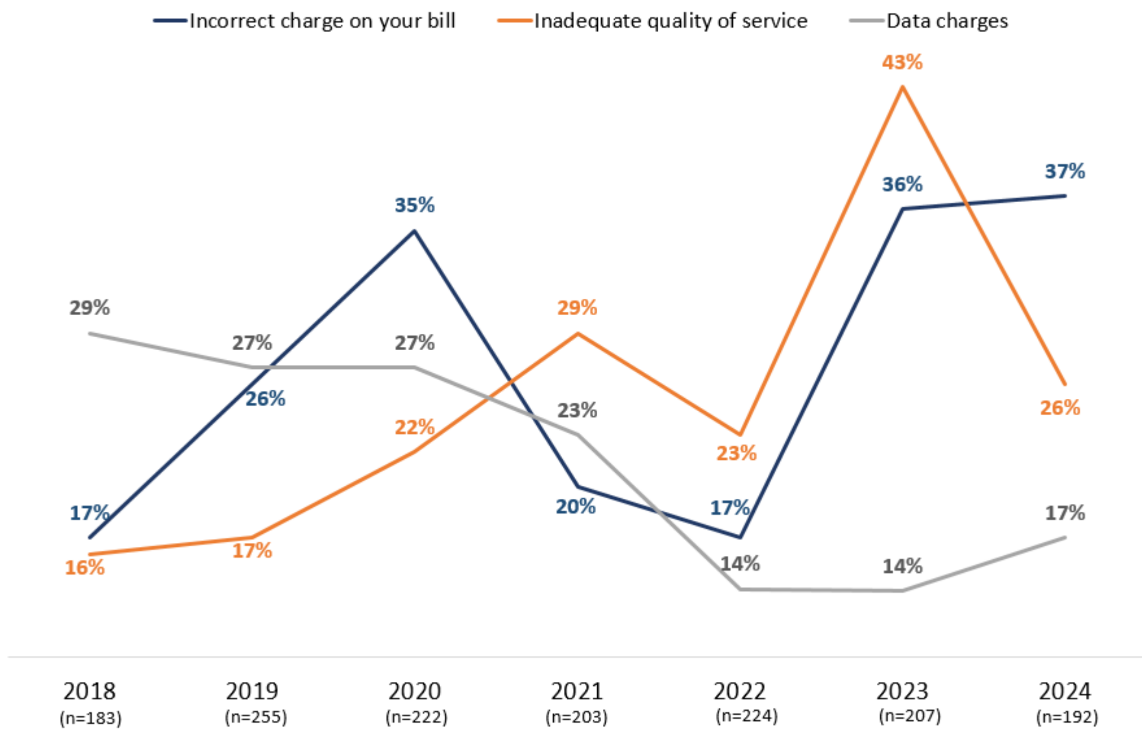
WC17. What was your complaint about? [Multiple responses accepted] Base: n=192; respondents subscribed to a wireless service provider who filed a complaint. Don't know: <1%.

Figure 20 presents the top reasons for wireless complaints over time. The number of respondents reporting incorrect charges on bills has not changed this year and is in line with pre-pandemic levels, after experiencing a sharp decline during the pandemic years (from 35%[4] in 2020 to 20% in 2021 and 17% in 2022). Those reporting inadequate quality of service declined significantly this year, from 43% in 2023 to 26% in 2024, which is more in line with 2022 (at 23%) and 2021 (at 29%).

The proportion of wireless subscribers attributing their complaint to data charges has increased slightly this year after a steady rate of decline from 2018 to 2022.

[4] Recall that respondents were asked about complaints made in the 12 months proceeding the survey. For the 2020 wave of this survey, the reference year was 2019.

Figure 20: Top reasons for complaints (over time)

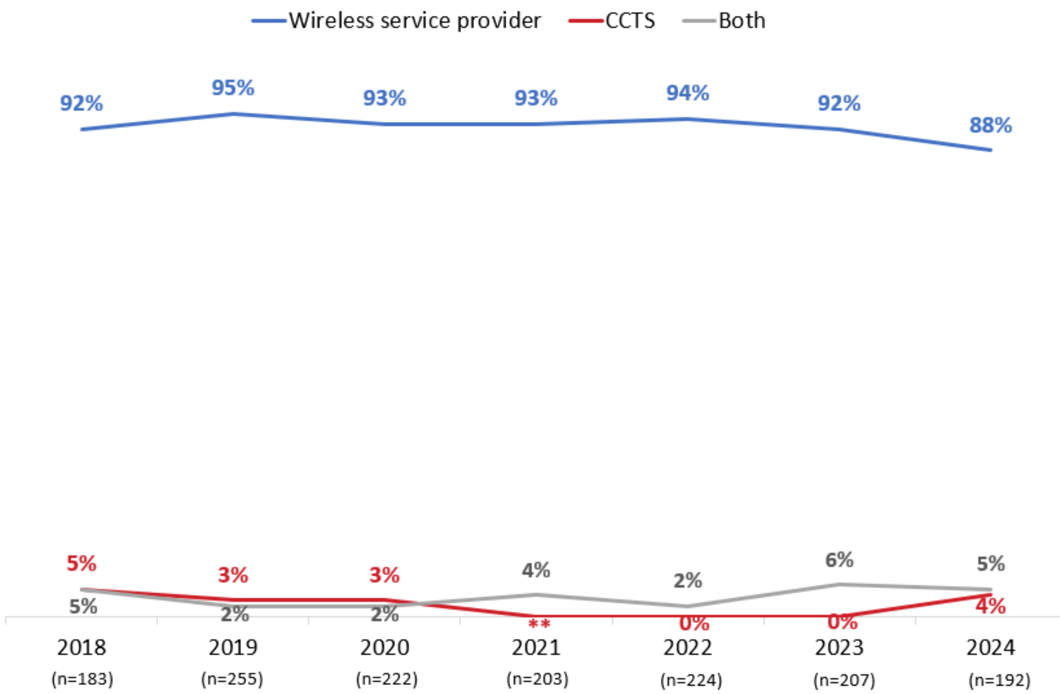


WC17. What was your complaint about? Base: respondents subscribed to a wireless service provider who filed a complaint. 2024: <1% did not know.

Nearly 9 in 10 who filed a complaint chose to do so directly with their wireless service provider.

Most (88% compared to 92% in 2023) of those who filed a complaint about their wireless services in the past 12 months did so directly with their provider. The rest complained to the Commission for Complaints for Telecom-television Services (CCTS) (4%, up from no-one in 2022 and 2023) or to both their service provider and the CCTS (5%). In this regard, it is important to mention that the CCTS's role is to review complaints from individuals dissatisfied with their service provider's response.

Figure 21: Complaints to wireless service provider



WC18. Who did you complain to? Was it your service provider, the Commission for Complaints for Telecom-television Services, also known as the CCTS, or both? Base: respondents subscribed to a wireless service provider who filed a complaint. **Low base; data suppressed. 2024: 41% did not know.

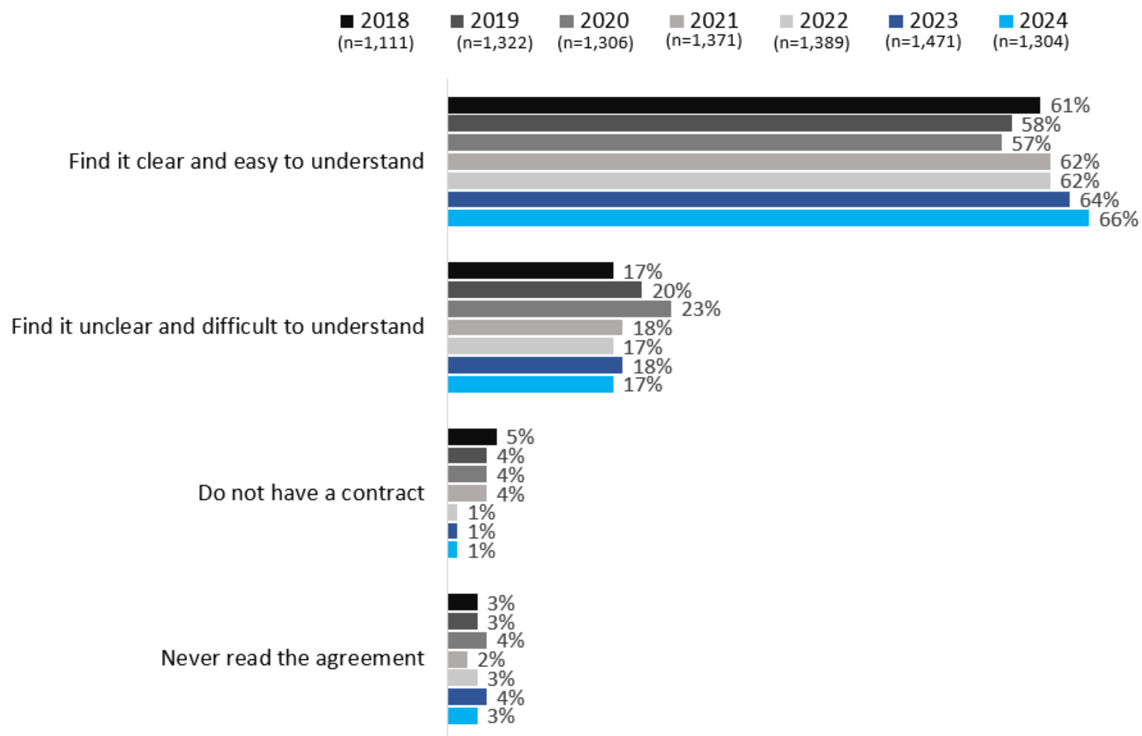
2.8 Contract Clarity

Two-thirds find their wireless contract clear and easy to understand.

Two-thirds of Canadians (66%) reported that they find their wireless contract clear and easy to understand (scores of 5, 6, or 7 on a 7-point scale). The proportion of Canadians finding their contract clear and easy to understand has been increasing over time, from a low of 57% in 2020 to the current high of 66%.

In contrast, approximately 2 in 10 (17%) reported that they find their contract to be unclear and difficult to understand. A small percentage (3%) admitted to never reading the agreement, and an even smaller group (1%) reported not having a contract.

Figure 22: Ease of understanding wireless contract



WC19. Do you find your contract clear and easy to understand? Please use a 7-point scale where 1 means extremely unclear and difficult to understand and 7 means extremely clear and easy to understand. Base: respondents subscribed to a wireless service provider. 2024: 1% did not know.

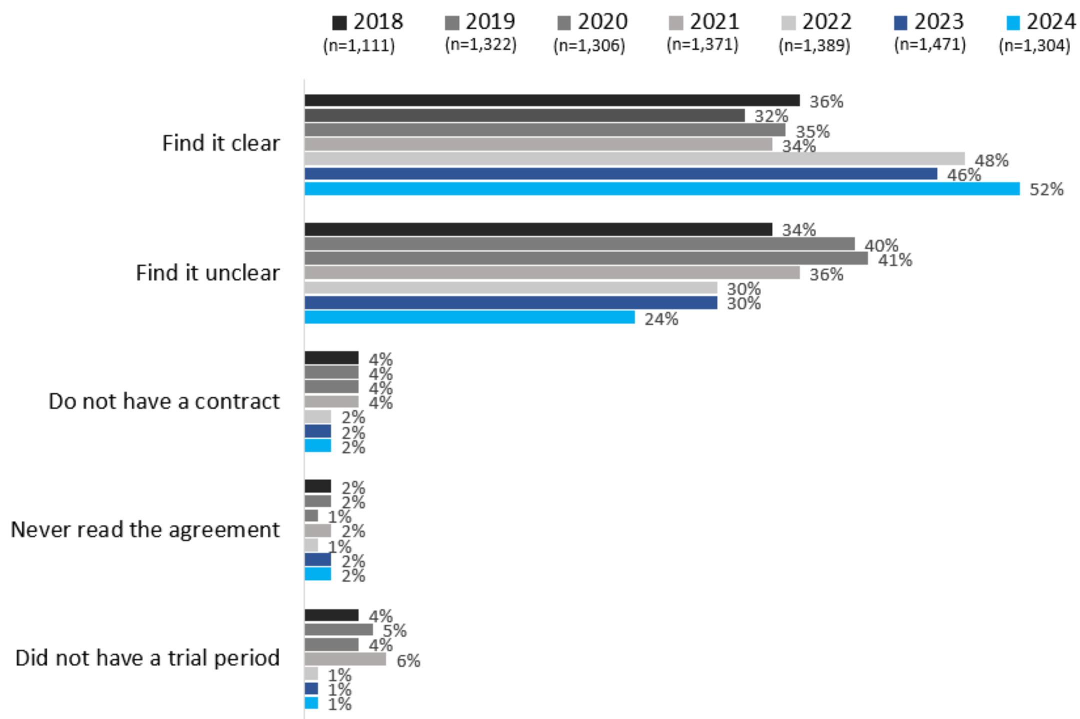
Those living in British Columbia (19%) were the least likely to find their contract *extremely* clear and easy to understand. The likelihood of saying their contract is *extremely* clear and easy to understand increased as education levels declined, from 24% of those with at least a bachelor's degree to 43% of those with high school or less.

Those with a shared or family plan (25%), those who find it difficult to manage their data (18%), those who experienced bill shock (18%), and those who lodged a complaint about their wireless services (23%) were less likely to say their contract is *extremely* clear and easy to understand.

Half had a clear understanding of their trial period.

Just over half of Canadians (52%; up from 46% in 2023) consider the explanation of their trial period to be clear (scores of 5, 6 or 7 on a 7-point scale). On the other hand, approximately a quarter (24%; down from 30% in 2023) found the explanation of the trial period to be unclear. Others mentioned not having a contract (2%), never reading the agreement (2%), and not having a trial period (1%).

Figure 23: Ease of understanding explanation of the trial period



WC20. The Wireless Code requires service providers to include a trial period for new contracts that include a device and to clearly explain any fees that would apply if you cancel your contract or agreement early. How clearly did your service provider explain these measures to you? Please use a 7-point scale where 1 means extremely unclear and 7 means extremely clear. Base: respondents subscribed to a wireless service provider. 2024: 2% did not know.

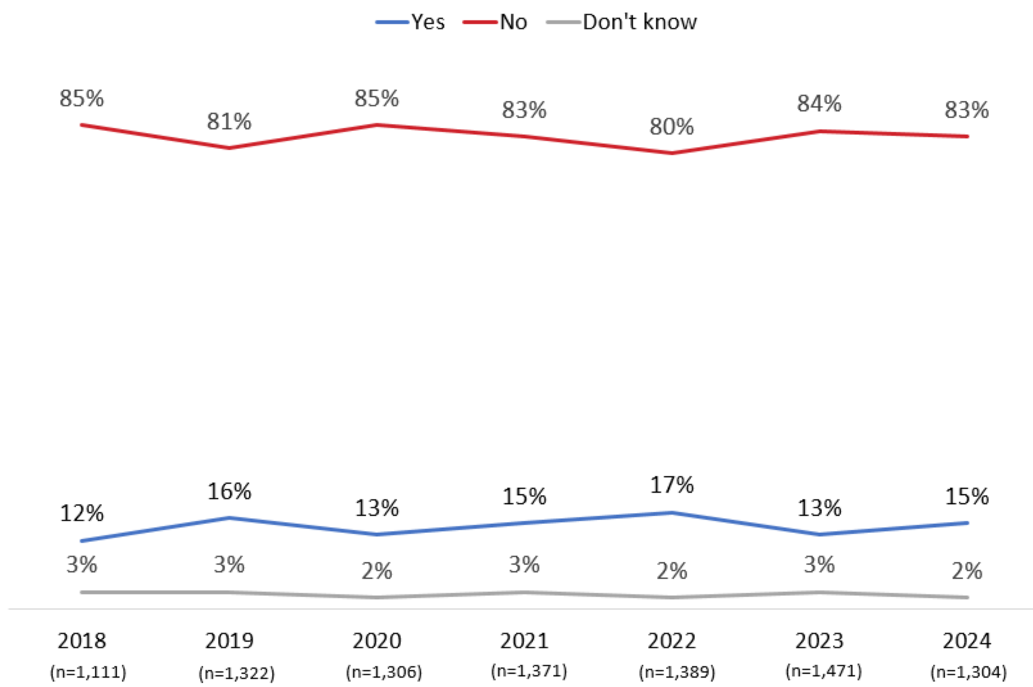
Those living in British Columbia (15%) were the least likely to say these measures were *extremely* clear. The likelihood of saying the trial period was explained to them *extremely* clearly increased as education levels declined, from 22% of those with at least a bachelor's degree, to 38% of those with high school or less.

As with other related knowledge measures, the following groups were less likely to find their service provider's explanation of the trial period to be *extremely* clear: those who find managing their data challenging (16% versus 30% of those who find it easy), those who experienced bill shock (19% versus 30%), and those who had a complaint about their wireless (20% versus 29%) or Internet (21% versus 29%) services in the last 12 months.

Few have had changes to their wireless contract without the mandated disclosure.

Fifteen percent of respondents subscribed to a wireless service provider have had their provider change their plan without expressly making them aware of how the terms and conditions had changed. Over time, the proportion of Canadians reporting changes without the mandated disclosure has remained relatively consistent, varying by no more than 4% year over year.

Figure 24: Changes to contract without disclosure



WC21. Have you ever become aware that your service provider changed your plan without expressly making you aware of how the terms and conditions had changed? Base: respondents subscribed to a wireless service provider.

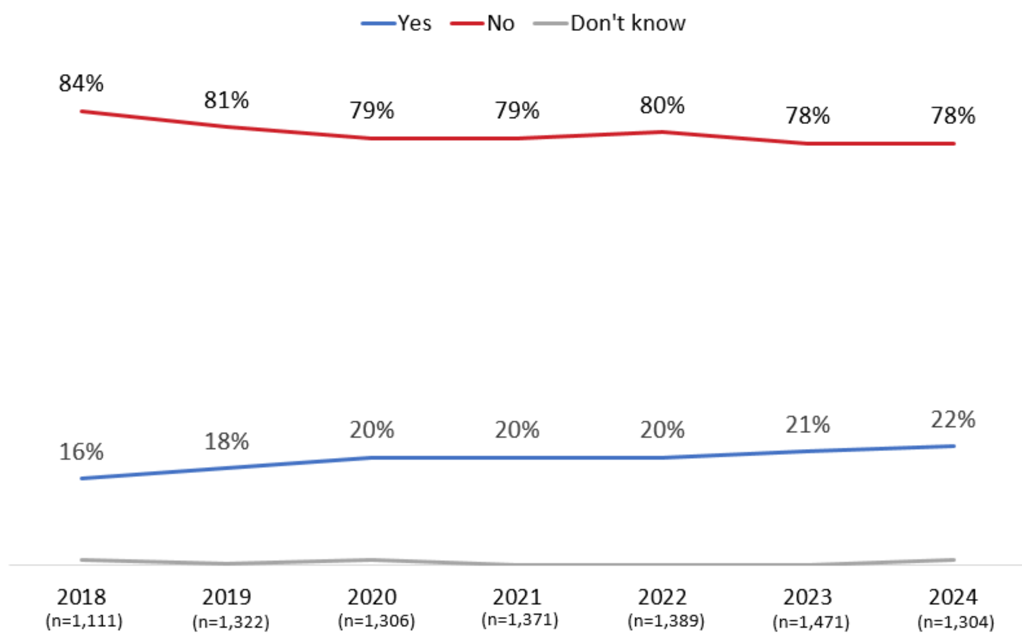
Those who experienced bill shock (24%) and those who lodged a complaint about their wireless service (34%) in the past 12 months were more likely to report having experienced undisclosed changes to the terms and conditions of their plan.

2.9 Changing Service Providers

Many have been with their wireless service provider for two or more years, and those who have changed providers did so for a better deal.

Almost 8 in 10 (78%) Canadians subscribed to a wireless plan have not changed service providers in the last two years. Consistent with previous years, approximately 1 in 5 (22%) have changed their wireless service provider in the last two years.

Figure 25: Changed wireless service providers in the last 2 years



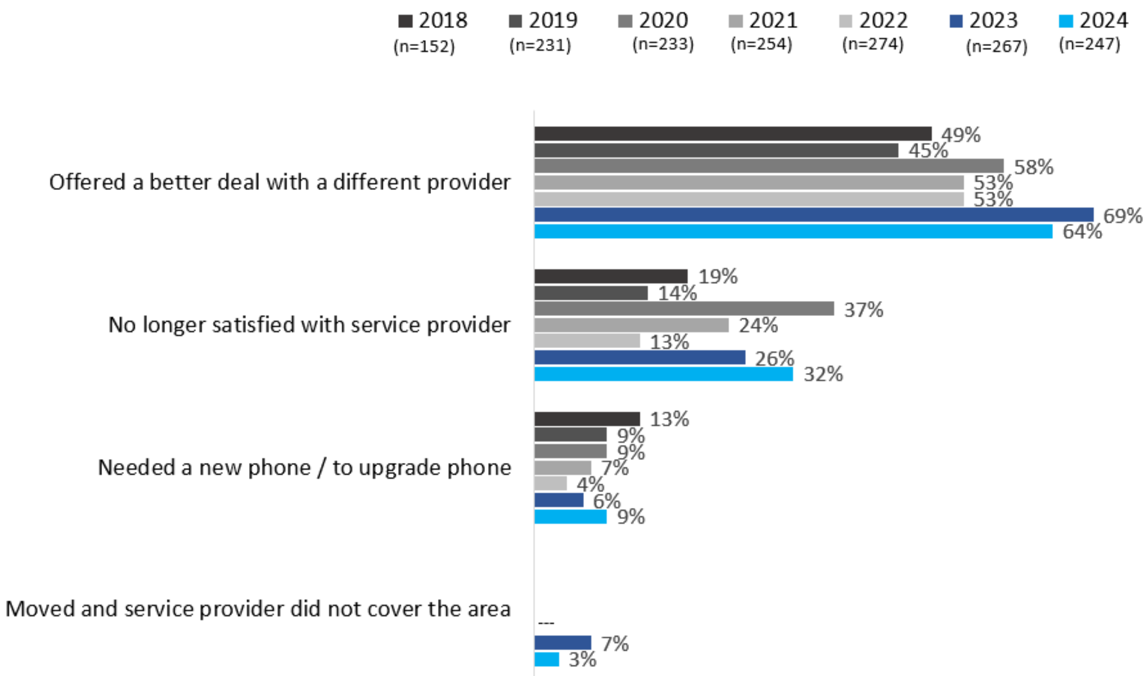
WC22. Have you changed wireless service providers in the last two years? Base: respondents subscribed to a wireless service provider.

Individuals who experienced bill shock (29%) and those who had a complaint about their wireless (32%) or Internet (29%) services were more likely to say they switched wireless providers in the last two years.

The likelihood of changing wireless service providers in the last two years increased as age decreased, from 13% of those aged 65+ to 29% of 18- to 34-year-olds. Additionally, men (25%) and racialized respondents (29%) were *more* likely to have changed providers, while Indigenous respondents (11%) and those with a high school education or less (15%) were *less* likely to have switched providers.

Of those who switched wireless providers in the last two years (n=247), nearly two-thirds (64%; down from 69% in 2023) did so because they were offered a better deal by another service provider. Approximately one-third (32%; up from 26% in 2023) made the switch because they were no longer satisfied with their current service provider. Relatively few changed service providers for other reasons: 9% mentioned the need for a new or upgraded phone, and 3% reported that they moved to an area not covered by their current service provider.

Figure 26: Reasons for changing wireless service provider

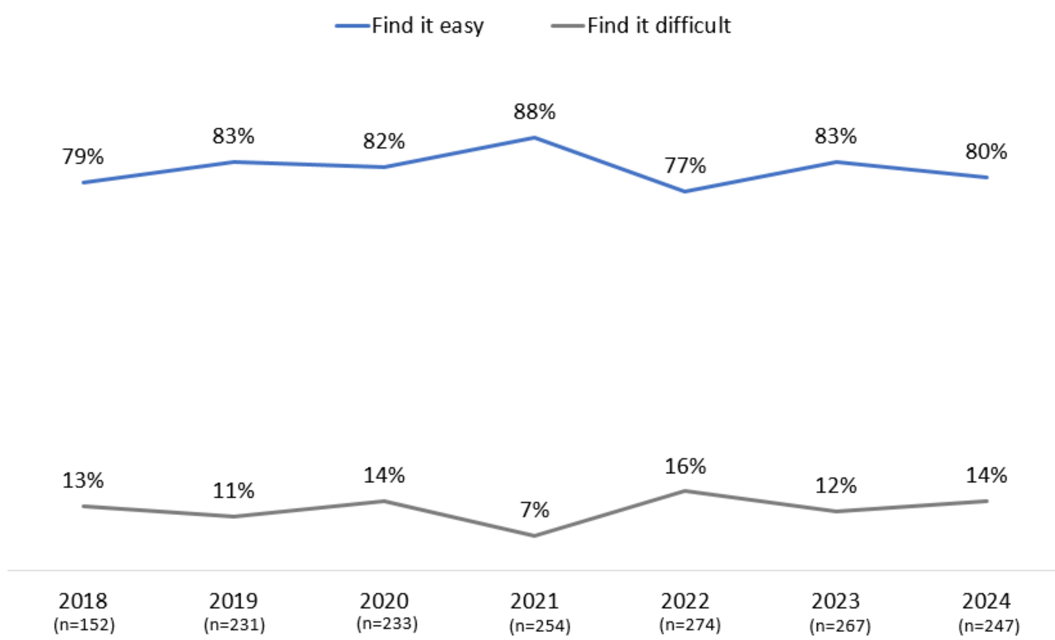


WC23. Why did you change service provider? [Multiple responses accepted] Base: respondents who switched service providers. 2024: 1% did not know.

Most people found switching wireless providers to be easy.

Exactly 8 in 10 (80%) Canadians considered the process of switching service providers to be easy (scores of 5, 6, or 7 on a 7-point scale), including just over half (56%) who said the process was *extremely* easy. Year-over-year, there has been no significant change in the proportion of wireless subscribers who found it easy to switch service providers. Fourteen percent found the process difficult (scores of 1, 2 or 3 on a 7-point scale).

Figure 27: Ease of switching wireless service providers

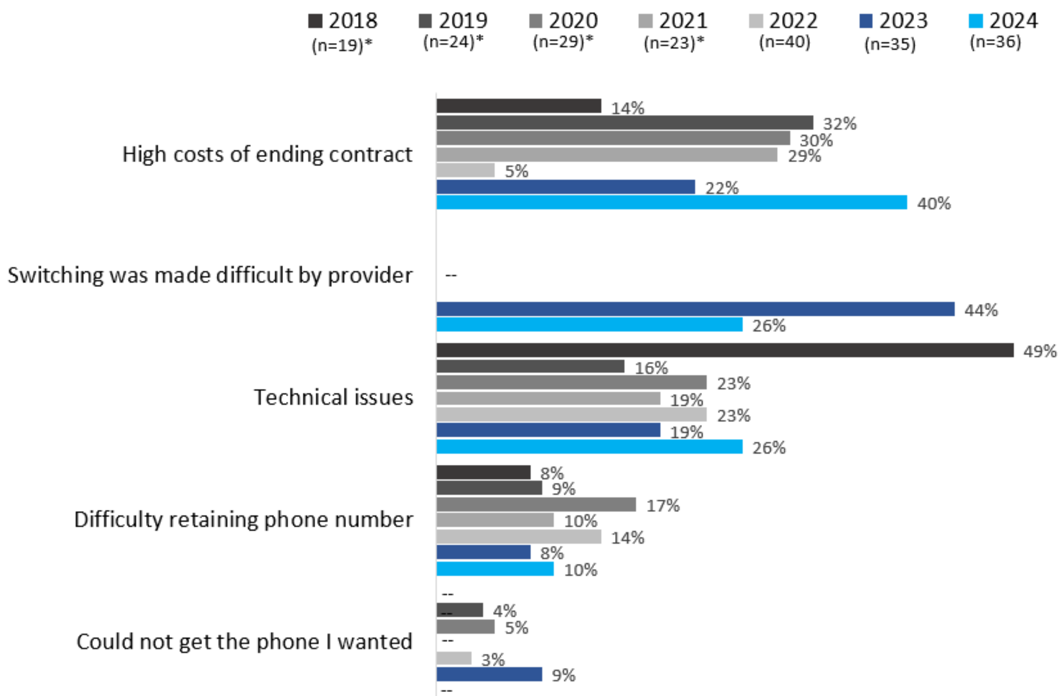


QWC24. How easy or difficult was it to switch service providers? Please use a 7-point scale where 1 means extremely difficult and 7 means extremely easy. Base: respondents who switched service providers. 2024: 1% did not know.

The likelihood of finding it easy to switch service providers was higher among those living in rural areas (91%) and men (87%), as well as subscribers who have not experienced bill shock (85%) nor filed a complaint about their wireless service (85%).

The top reason for the difficulty switching service providers was the high costs of ending one's contract (40%; up from 22% in 2023). Following this, approximately one-quarter reported that switching was made difficult by their provider (26%; down from 44% in 2023) or by technical issues (26%; up from 19% in 2023).

Figure 28: Reasons for difficulties switching service providers



WC25. Was there a reason why switching providers was difficult for you? [Multiple responses accepted] Base: respondents who switched service providers and found it difficult.

3. Television Provider Service Code

Exactly 6 in 10 (60%) Canadians reported that their household subscribes to a cable, satellite, or IPTV TV service. Consistent with 2023, Quebec residents (69%) were more likely than those residing in Ontario (60%), the Prairies (56%), British Columbia (51%) or the Territories (43%) to subscribe to a TV service. In addition, subscribing to a TV service increased with age, from 33% of 18- to 34-year-olds to 84% of those aged 65 and above, while those with at least a bachelor's degree (53%), Indigenous respondents (44%), and racialized respondents (44%) were less likely than their counterparts to subscribe to a TV service.

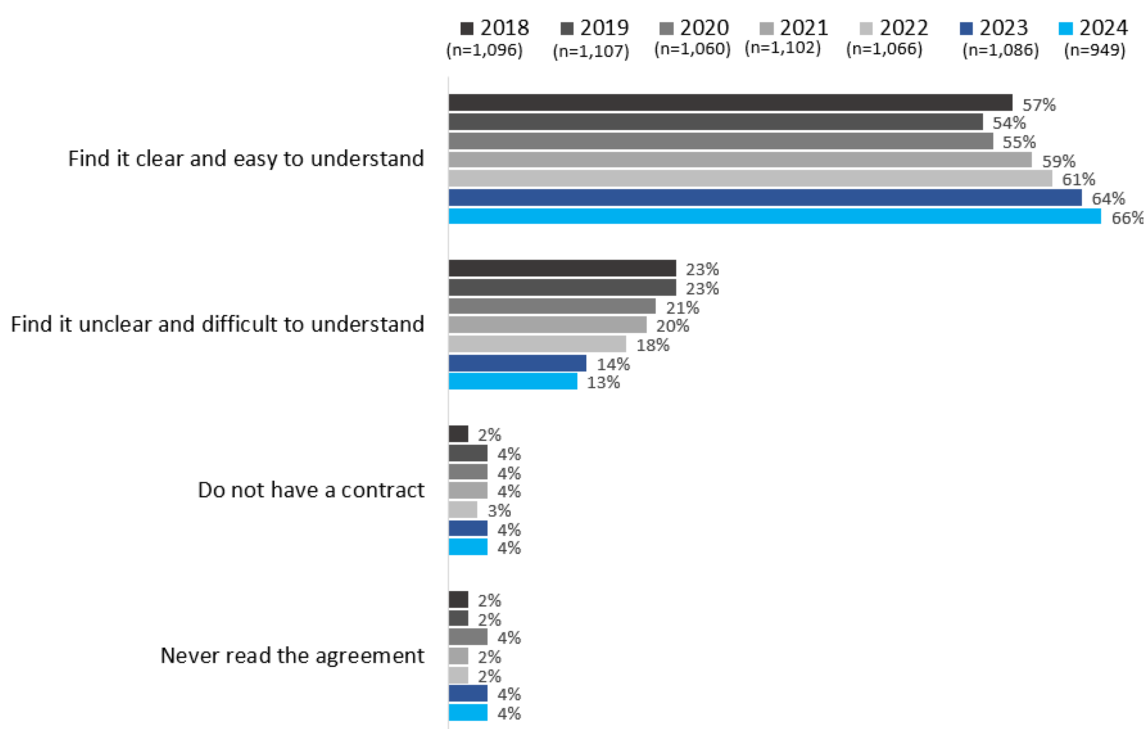
3.1 Contract Clarity

Two-thirds find their TV contract is clear and easy to understand.

Roughly two-thirds (66%) of Canadians who subscribe to a TV service find their contract clear and easy to understand (scores of 5, 6, or 7 on a 7-point scale). In this regard, since 2019, the proportion of respondents saying that their contract is clear and understandable has gradually increased, from 54% to 66% in 2024.

On the other hand, a little over 1 in 10 (13%) find their contract unclear and difficult to understand (scoring 1, 2, or 3 on a 7-point scale). Very few respondents reported not having a contract (4%) or admitted to never reading the agreement (4%).

Figure 29: Clarity of TV contracts



TVSP1. To what extent do you find your TV contract clear and easy to understand? Please use a 7-point scale where 1 means extremely unclear and difficult to understand and 7 means extremely clear and easy to understand. Base: respondents subscribed to a TV provider. 2024: 4% did not know.

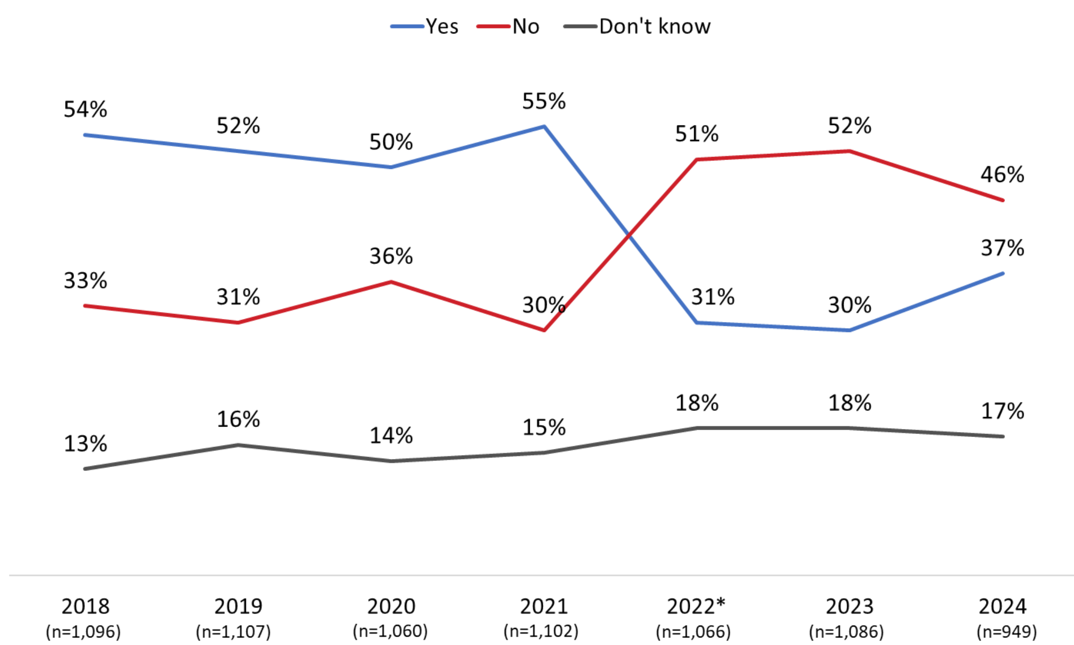
Compared to respondents in the Prairies (62%) and the Territories (55%), those from Quebec (71%) were more likely to have found their contract clear and easy to understand. In addition, those who have experienced bill shock (55%) and those who filed a complaint about their TV service (56%) were less likely than those who have not experienced bill shock (68%) nor filed a complaint (70%) to find their contract clear and easy to understand.

3.2 Basic TV Service Package

Canadians' awareness of providers' basic TV service package increased this year but is still far below 2021.

More than one-third (37%) of Canadians subscribed to a TV service said they were informed about their provider's basic service package (up from 30% in 2021). In 2022, this question was modified to clarify that the basic service package should not exceed $25 per month. This change led to a notable decrease in the number of respondents reporting awareness of their provider's basic service package (from 55% in 2021 to 31% in 2022).

Figure 30: Awareness of basic service package



TVSP2. The TVSP Code requires television service providers to ensure that customers are aware of the availability, price and content of their entry-level service offering, also known as the basic service package. Has your service provider informed you about their entry-level offering, to be offered at no more than $25 per month? This may have been by email, on the phone or via your monthly billing. *QUESTION WORDING CHANGED in 2022. Base: respondents subscribed to a TV service provider.

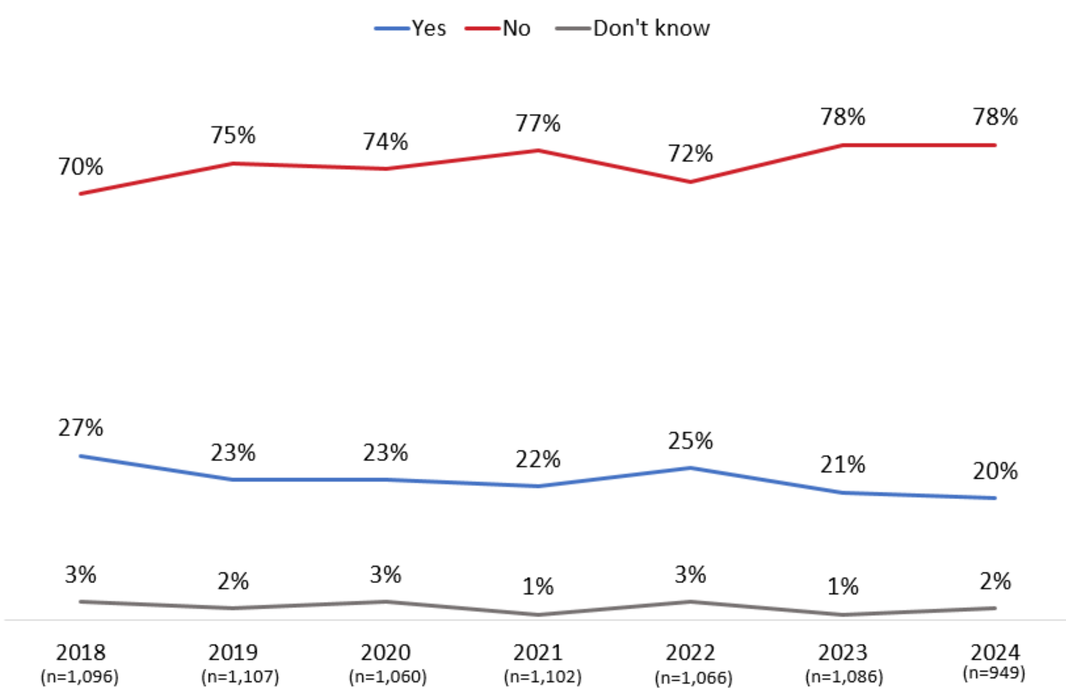
Residents of Ontario (41%) and Quebec (40%) were more likely than residents of British Columbia (25%) and the Territories (24%) to say that their service provider informed them about their entry-level offering. Moreover --- contrary to 2023 --- as age increased, the likelihood of reporting being informed decreased (from 48% of 18- to 34-year-olds to 33% of those 65 and older). In addition, those aware of the consumer protection codes (46%), those who are informed about the mandate and role of the CRTC (46%), and those with a favourable impression of the CTRC (45%) were more likely to say their service provider informed them about their entry-level offering.

3.3 Complaints

Consistent with 2023, 2 in 10 Canadians who subscribe to TV services have filed a complaint against their provider.

Among Canadians who subscribe to a TV service, 20% reported having filed a complaint about their TV services in the past 12 months (unchanged from 2023).

Figure 31: Complaints to TV service provider in the past 12 months

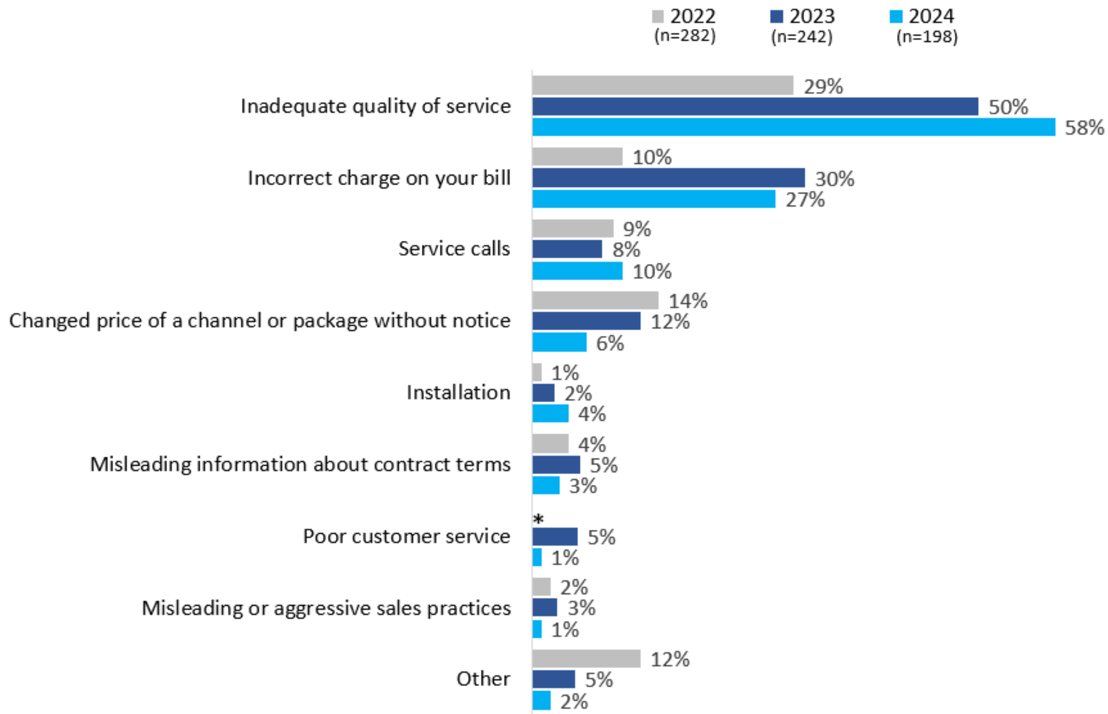


TVSP3. Have you made a complaint about your TV services within the last 12 months? Base: respondents subscribed to a TV service provider. 2024: 2% did not know.

Complaints continue to be lower in Quebec than elsewhere in the country, with 87% in Quebec saying they have not made a complaint. In addition, those who filed a complaint about their wireless (34%) or Internet (50%) services were more likely to report making a complaint about their TV services.

Among those who filed a complaint about their TV services (n=198), 58% complained about inadequate quality of service (up from 50% in 2023 and 29% from 2022). Just over one-quarter (27%) complained of incorrect charges on their bill (compared to 30% in 2023). The full list of complaints can be found in Figure 32.

Figure 32: Reasons for complaints to TV service provider



*Response volunteered by respondents [2023]; no corresponding set of responses for 2022.
TVSP4. What was your complaint about? [Multiple responses accepted] Base: respondents subscribed to a TV service provider and filed a complaint. 2024: 2% did not know.

4. Internet Code

The vast majority (93%) of households in Canada subscribe to a home Internet service. Canadians who do not subscribe to a home internet service are more likely to be aged 65+ (11%), have an annual household income of under $40,000 (21%), and have no more than a high school education (12%).

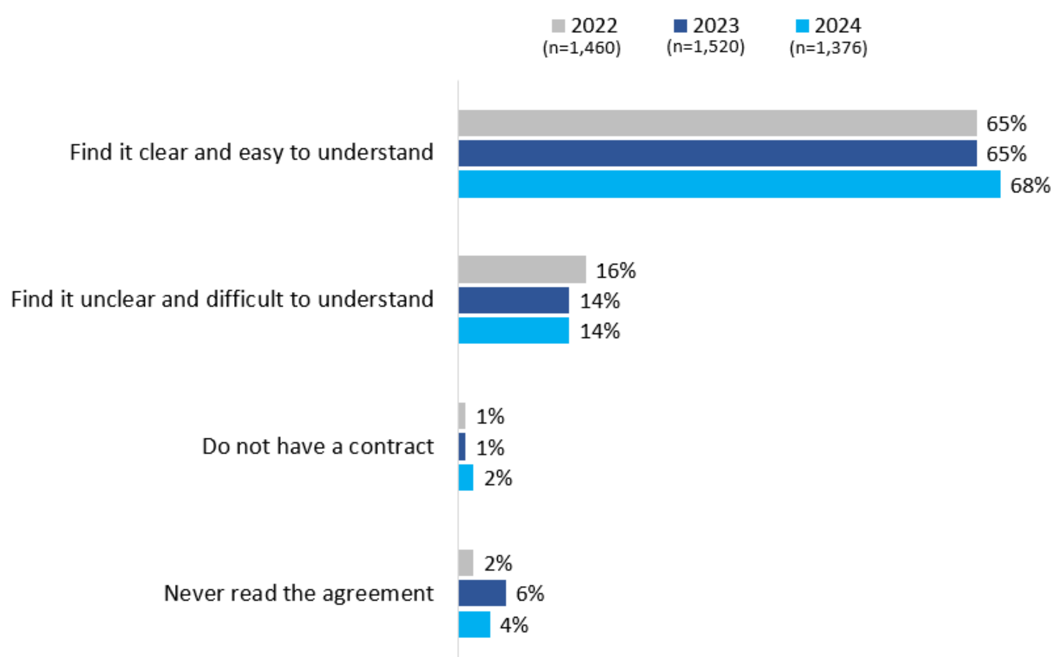
4.1. Contract Clarity

More than two-thirds of Canadians subscribed to a home Internet service find their contract clear and easy to understand.

Just over two-thirds (68%) of Canadians subscribed to an Internet service provider find their Internet contract clear and easy to understand (scores of 5, 6, or 7 on a 7-point scale), including 31% who said it is *extremely* clear. Perceptions of contract clarity has been stable since tracking began in 2022.

On the other hand, 14% of respondents --- consistent with 2023 --- find their contract unclear and difficult to understand (scores of 1, 2, or 3 on a 7-point scale). Very few reported never reading the agreement (4%) or not having a contract (2%).

Figure 33: Ease of understanding Internet contract



IC1. To what extent do you find your Internet contract clear and easy to understand? Please use a 7-point scale where 1 means extremely unclear and difficult to understand and 7 means extremely clear and easy to understand.
Base: respondents who subscribe to Internet service. 2024: 3% did not know.

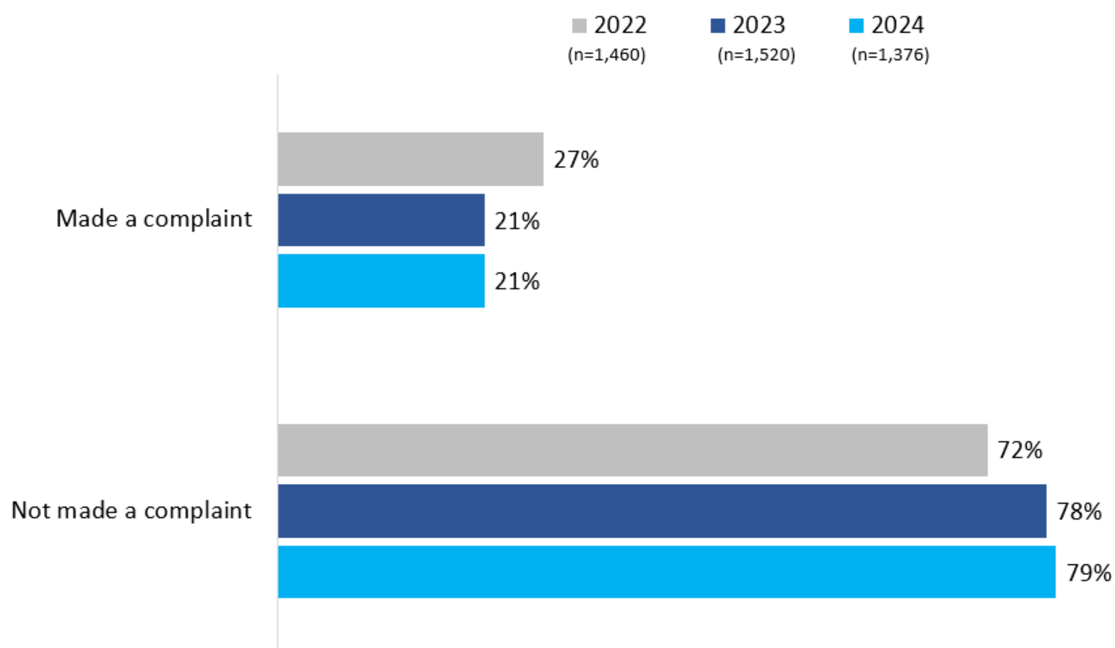
Those in British Columbia (54% versus 70% in each of Quebec and Ontario and 73% in the Prairies) and those aged 55 to 64 and those aged 65+ (63% and 64%, respectively, versus 74% of 18- to- 34-year-olds) were less likely to report finding their Internet contract clear and easy to understand.

4.2 Complaints

A little over 2 in 10 Canadians have filed a complaint about their Internet services, and among those who have, early cancellation charges continue to be the main reason.

A little over 2 in 10 (21%) Canadians with a home Internet service filed a complaint about their services in the last 12 months. The incidence of complaints is unchanged year over year.

Figure 34: Complaints about Internet services in the past 12 months

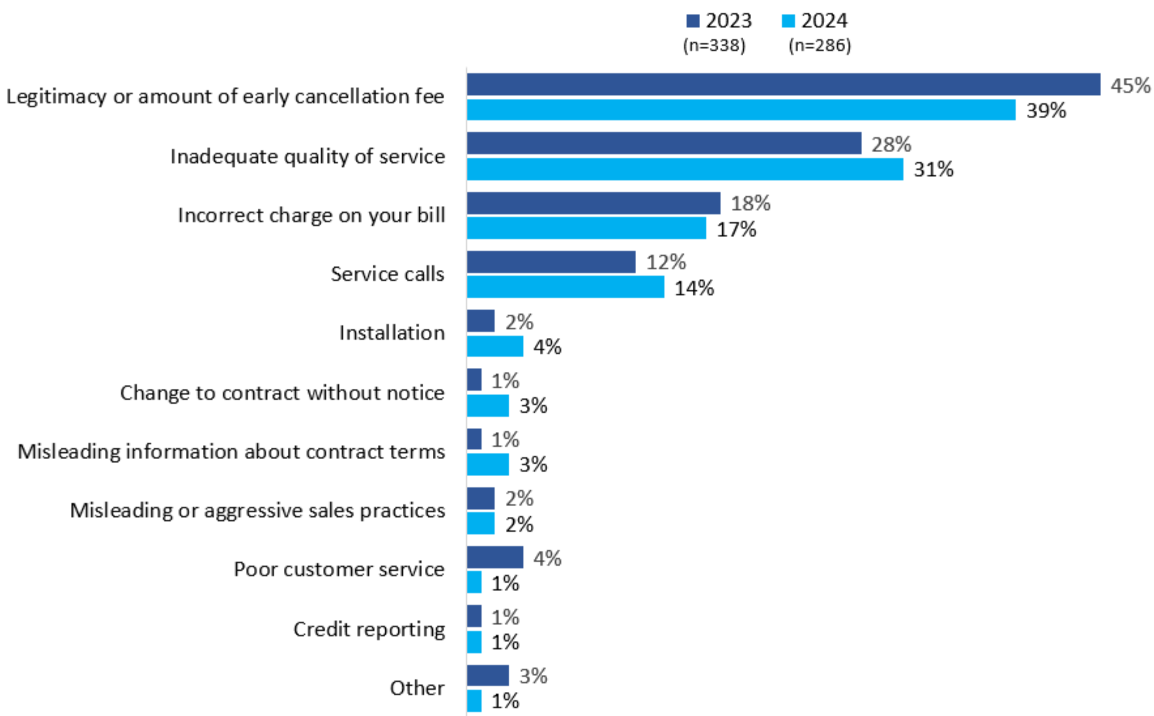


IC2. Have you made a complaint about your internet services within the last 12 months? Base: respondents who subscribe to Internet service. 2024: 1% did not know.

As was the case in 2023, complaints about Internet services are lower in Quebec than elsewhere in the country, with 9 in 10 (90%) respondents from Quebec saying they have *not* made a complaint. The likelihood of making a complaint was higher among racialized respondents (26%), those who have experience bill shock (29%), as well as those who also filed complaints about their wireless (41%) and TV (49%) services.

Nearly 4 in 10 (39%) of those who filed a complaint about their Internet services expressed concerns about the legitimacy or amount charged for early contract cancellation (compared to 45% in 2023). Moreover, 3 in 10 (31%) reported having issues related to inadequate service quality, while 17% reported incorrect charges on their bills and 14% reported having issues with service calls. For a full view of the types of complaints, please see Figure 35.

Figure 35: Nature of complaint about Internet service



IC3. What was your complaint about? [Multiple responses accepted] Base: respondents subscribed to Internet service and filed a complaint. 2024: 2% did not know.

5. Views of the CRTC

All respondents were asked a series of questions about the CRTC. By way of an introduction to the questions, respondents were told the following:

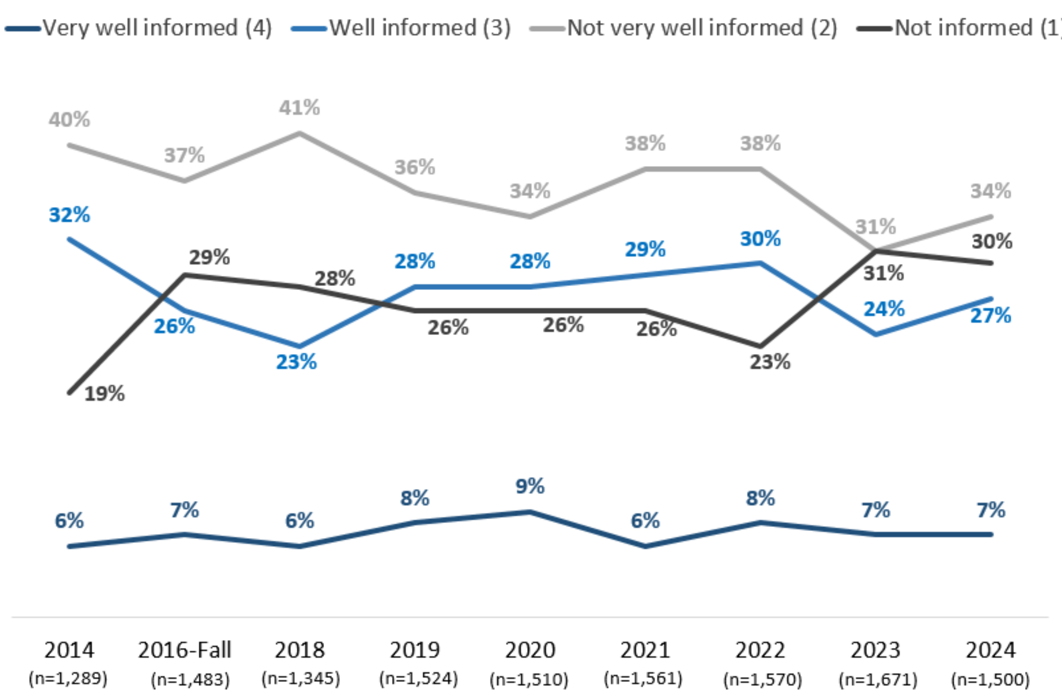
> The Canadian Radio-television and Telecommunications Commission or CRTC is an independent agency of government, responsible for regulating Canada's broadcasting and telecommunications systems.

5.1 Informed about the mandate and role of the CRTC

One-third of Canadians feel informed about the CRTC's role and mandate.

Consistent with 2023, approximately one-third of Canadians feel well (27%) or very well (7%) informed about the mandate and role of the CRTC. Conversely, almost two-thirds (64%) do not feel well informed.

Figure 36: Informed on CRTC role and mandate



C1. Overall, how informed are you about the mandate and role of the CRTC? Base: all respondents. 2024: 2% did not know.

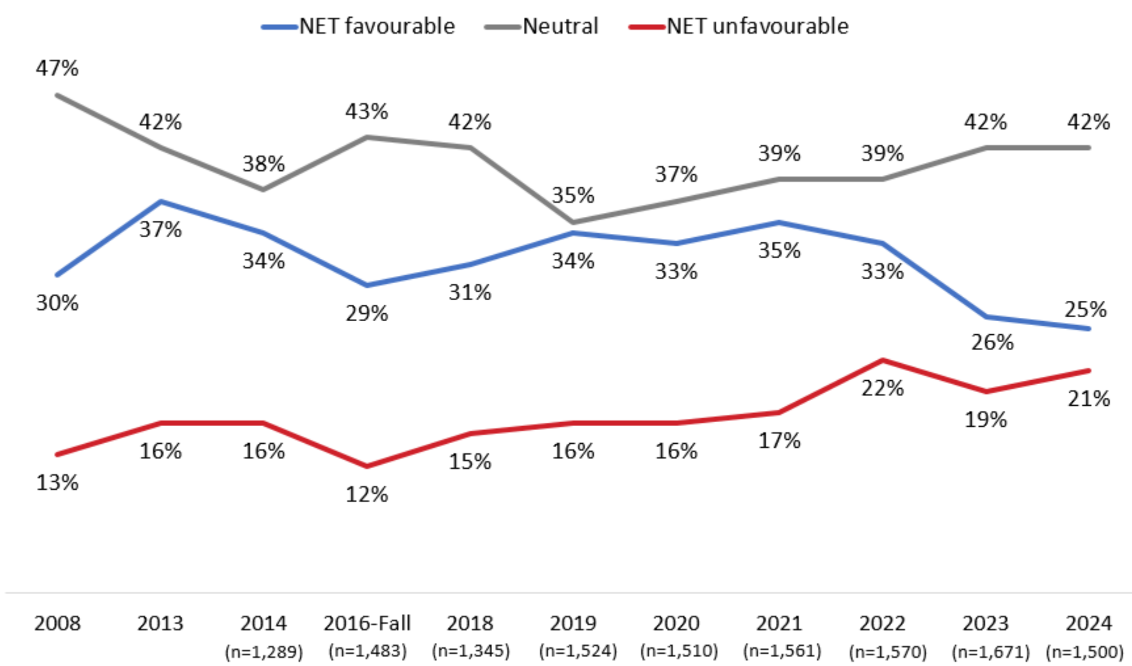
As age increased, so too did the likelihood of feeling informed about the mandate and role of the CRTC. On the other hand, allophones (78%), 18- to 34-year-olds (77%), members of racialized communities (71%), those not aware of the consumer protection codes (67%), and those who reported an unfavourable impression of the CRTC (58%) were more likely to feel not very well or not at all informed about the CRTC.

5.2 Impressions of the CRTC

Canadians generally hold neutral to positive impressions of the CRTC.

Canadians' impressions of the CRTC are unchanged this year, with exactly one-quarter (25%) holding a somewhat or very favourable impression of the CRTC. As was the case in 2023, favourability continues to sit at a record low, with the previous low of 29% recorded in Fall 2016. The single greatest proportion of Canadians (42%) have a neutral impression of the CRTC (i.e., they hold neither a favourable nor unfavourable impression). Canadians informed (43%) about the CRTC's role and mandate were more likely than those not informed (16%) to hold a favourable impression of the agency. The same was true of Canadians aware of the consumer protection codes—36% hold a favourable impression of the CRTC compared to 24% of those who are not aware of these codes.

Figure 37: Impressions of the CRTC



C2. What is your impression of the CRTC? Would you say it is? Base: all respondents. 2024: 12% did not know.

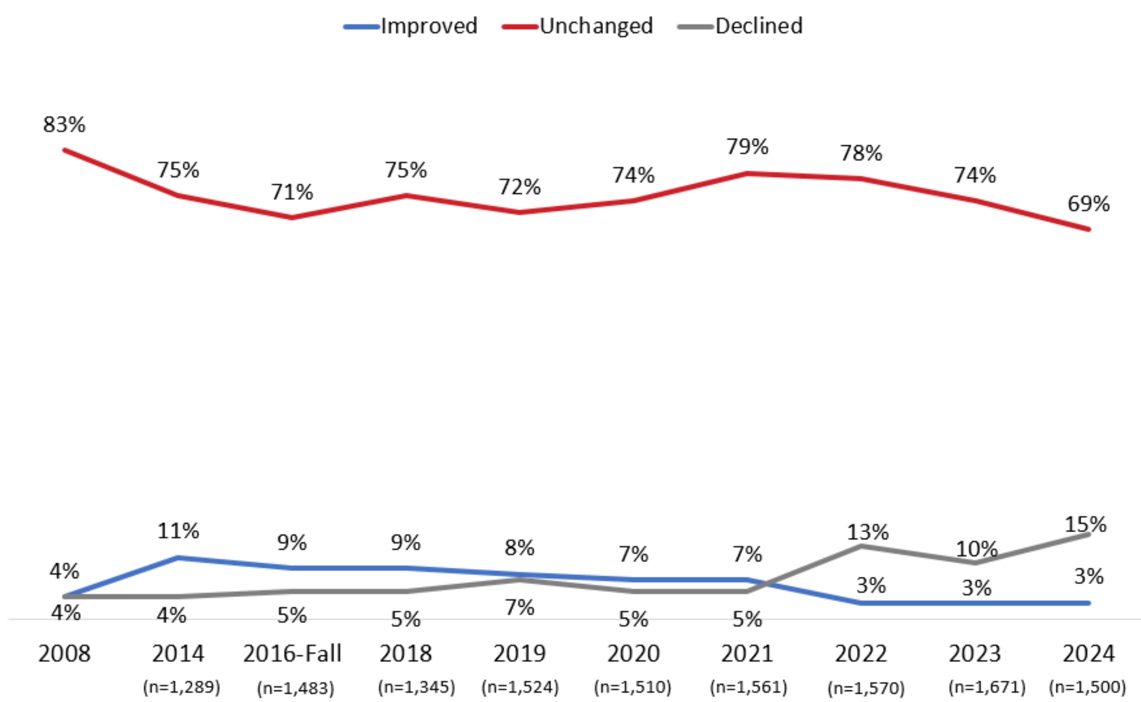
As age increased, so too did the likelihood of holding a favourable impression of the CRTC, from 21% of 18- to 34-year-olds to 32% of those aged 65+. In addition, those from Quebec (34%) were more likely than residents of Ontario (22%) and the Prairies (19%) to hold a favourable impression of the CRTC.

5.3 Impressions of the CRTC over the Past Year

Almost 7 in 10 Canadians said their impressions of the CRTC has remained unchanged over the past year.

The majority of Canadians (69%, down from 74% in 2023) said that their impression of the CRTC has not changed over the past year. Among those who reported a change, 15% said their impression has declined (compared to 10% in 2023).

Figure 38: Impressions of the CRTC over the past year



C3. Over the past year, would you say your impression of the CRTC has? Base: all respondents. 2024: 13% did not know.

6. Profile of survey respondents

The following tables present the characteristics of respondents (using weighted data).

Province and territories	Percent
Newfoundland and Labrador	2%
Prince Edward Island	1%
Nova Scotia	2%
New Brunswick	2%
Quebec	23%
Ontario	38%
Manitoba	5%
Saskatchewan	5%
Alberta	7%
British Columbia	14%
Yukon	<1%
Northwest Territories	<1%
Nunavut	<1%

Gender	Percent
Woman	51%
Man	48%
Another gender	1%
Prefer not to answer	*<1%*

Education	Percent
Less than a High School diploma or equivalent	3%
High School diploma or equivalent	16%
Registered Apprenticeship or other trades certificate or diploma	5%
College, CEGEP or other non-university certificate or diploma	24%
University certificate or diploma below bachelor's level	11%
Bachelor's degree	24%
Post graduate degree above bachelor's level	16%
Prefer not to answer	*2%*

Household income	Percent
Under $20,000	5%
$20,000 to just under $40,000	9%
$40,000 to just under $60,000	12%
$60,000 to just under $80,000	12%
$80,000 to just under $100,000	11%
$100,000 to just under $150,000	16%
$150,000 and above	19%
Prefer not to answer	*16%*

Age	Percent
18-34	27%
35-54	32%
55-64	14%
65+	27%

Location	Percent
Urban centre	75%
Rural community	16%
Prefer not to answer	*8%*

Indigenous	Percent
Indigenous	5%
Non-Indigenous	94%
Prefer not to answer	*1%*

Appendix

Technical Specifications

The following specifications applied to this research:

- A 15-minute random digit dialling (RDD) telephone survey was administered to 1,500 Canadians, 18 years of age or older, between November 28 and December 21, 2023.
- To facilitate comparisons over time, survey questions were the same or similar to the ones first used in the 2023 Wireless Code POR survey.
- The questionnaire was programmed using a computer assisted telephone interviewing (CATI) system and pre-tested in advance of the fieldwork to ensure that it measured what it intended to measure and that respondents understood the questions.
    - The pre-test included 10 English interviews and 10 French interviews. No changes were made after the pre-test; therefore, the pre-test data were included in the final survey dataset.
- An overlapping dual-frame (landline and cell phone) sample was used to minimize coverage error.[5] The sample source was ASDE Survey Sampler.
    - Two-thirds (67%) of the sample frame contained cell phone numbers and the remainder landline telephone numbers.
    - This was a probability sample; therefore, the results can be generalized to the full population of Canadians.
- The sample frame was geographically disproportionate to improve the accuracy of regional results.
- Based on the sample size for this study, the overall results can be considered accurate to within ±2.8%, 19 times out of 20 (adjusted for sample stratification). The margins of error are greater for results pertaining to subgroups of the total sample.
- The following table presents information about the final call dispositions for this survey and calculation of the response rate:

	Total	Landline	Cell
Total Numbers Attempted	**86,162**	**17,815**	**68,321**
Out-of-scope - Invalid	**45,370**	**6,480**	**38,890**
Unresolved (U)	**26,605**	**6,478**	**20,127**
No answer/Answering machine	26,605	6,478	20,127
In-scope - Non-responding (IS)	**12,461**	**4,273**	**8,188**
Language barrier	329	150	179
Incapable of completing (ill/deceased)	113	72	41
Callback (Respondent not available)	970	186	784
Refusal	10,557	3,756	6,801

[5] Coverage error occurs when not all segments of the target population are included in the sample frame. If only landlines were included in the sample frame for this survey, Canadians who only have a cell phone would not have an opportunity to participate in the survey. The survey results, therefore, would only reflect the views of Canadians who have a landline in their household.

	Total	Landline	Cell
Termination	492	109	383
In-scope - Responding units (R)	**1,726**	**589**	**1,137**
Completed Interview	1,500	500	1,000
Quota full	121	63	58
Not Qualified – Employment exclusions	72	19	53
Not Qualified – Age	26	5	21
Not Qualified – Refused to provide region	7	2	5

- The overall response rate was 4% (5% for the landline sample and 4% for the cell phone sample).
  - Using the numbers from the final call dispositions table (the bullet above), the survey response rate is calculated as follows: [R=R/(U+IS+R)]. This means that the response rate is calculated as the number of responding units [R] divided by the number of unresolved [U] numbers plus in-scope [IS] non-responding households and individuals plus responding units [R].
- The survey data have been weighted by region, age and gender using population figures from Statistics Canada's 2021 census data. The weights correct for the disproportionate regional sampling. Any respondents who refused to provide their age and/or gender were given a neutral weight so as not to skew the weighting proportions. The table below shows the unweighted and weighted proportions for the variables used to create the weights:

	Unweighted	Weighted
Base	n=1,500	n=1,500
Region		
Atlantic Canada	100	100
Quebec	300	344
Ontario	400	576
Prairies	395	268
British Columbia	155	207
Territories	150	5
Age		
18 to 34	232	405
35 to 54	466	482
55 to 64	275	205
65 or older	527	408
Gender		
Male	811	721
Female	668	758
Another gender[6]	-	-

- A non-response analysis was conducted to assess the potential for non-response bias. Survey non-response can bias results when there are systematic differences between survey respondents and non-respondents. As displayed in the table above, the survey

[6] Sample counts are too small to include.

sample differs from the population in terms of age (as is often the case with telephone surveys of the general population). Canadians under 35 were under-represented in the survey sample and those aged 65 and older were over-represented in the survey sample. Weights were applied to adjust for the discrepancy between the survey sample and the population.

All steps of this POR complied with market research industry standards, including *The Standards for the Conduct of Government of Canada Public Opinion Research – Telephone Surveys*.

Survey Questionnaire

Section: Introduction and Screening

Hello/Bonjour, my name is ___________. I'm calling on behalf of Phoenix, a public opinion research firm. We're doing a survey for the Government of Canada to explore issues of interest to Canadians. Would you prefer that I continue in English or French? Préférez-vous continuer en français ou en anglais?

This survey should take up to 15 minutes to complete. Your participation is voluntary and completely confidential. Your answers will remain anonymous and will be protected according to the requirements of the *Privacy Act, Access to Information Act* and any other related legislation.

This survey is registered with the Canadian Research Insights Council's survey validation system. [ACCESSIBILITY NOTE: If an alternative method of taking part in the survey is needed offer this to respondents.]

IF REQUESTED:
The registration number is: 20231122-PH110.

[LANDLINE SAMPLE]

A1a. I'd like to speak to someone in your household who is 18 years of age or older. Is that you?

01. Yes
02. No [ASK TO SPEAK TO THAT PERSON; REPEAT INTRODUCTION AS NEEDED]

A1b. May I continue with this survey?

01. Yes [SKIP TO A3]
02. No

A1c. When would be a good time for me to call back?

01. Schedule call-back if possible (time/day): ________________
02. No/refused [THANK/TERMINATE]

[CELL SAMPLE]

A2a. Are you 18 years of age or older?

01. Yes
02. No [THANK/TERMINATE]

A2b. Have I reached you on your cell phone?

01. Yes
02. No

TERMINATION MESSAGE: Thank you for your willingness to take part in this survey. Unfortunately, you do not meet the eligibility requirements of this study.

A2c. Are you in a place where you can safely talk on the phone and answer my questions?

01. Yes
02. No [SKIP TO A2e]

INTERVIEWER NOTE: If you think respondents' setting may endanger them (e.g., driving a vehicle), hinder their participation (e.g., background distractions), or hamper their ability to respond openly (e.g., lack of privacy), suggest rescheduling the interview.

A2d. Is this a good time to answer this survey?

01. Yes [SKIP TO A2f]
02. No

A2e. When would be a good time for me to call back?

01. Schedule call-back if possible (time/day): _______________
02. No/refused [THANK/TERMINATE]

A2f. Does your household subscribe to a home phone service, also known as a landline?

01. Yes [DUAL USE]
02. No [CODE AS CPO]
03. Don't know/no response

[ASK ALL]

A3. [ADD FOR CELL SAMPLE: I know I reached you on a cell phone, but…] Do you have your own cell phone, smartphone or other wireless device or do you only have a device provided and paid for by your employer?

01. Have own cell phone, smartphone or other wireless device
02. Only have a device provided and paid for by your employer
03. Have neither
04. [DO NOT READ] Don't know/no response

A4. Does your household subscribe to a cable, satellite or IPTV TV service?

01. Yes
02. No
03. [DO NOT READ] Don't know/no response

[IF ASKED: IPTV is a different way of getting traditional TV, similar to cable or satellite TV. IPTV is different from Netflix or other streaming services. (IPTV does not include Netflix)]

A5. Does your household subscribe to a home Internet service?

01. Yes
02. No
03. [DO NOT READ] Don't know/no response

A6. Are you or is any member of your household or immediate family employed in any of the following businesses? [READ LIST]

01. Market Research [THANK/TERMINATE]
02. Public or media relations or advertising [THANK/TERMINATE]
03. Any media company such as print, radio, TV [THANK/TERMINATE]
04. Media monitoring [THANK/TERMINATE]
05. Any telecommunications company [THANK/TERMINATE]
06. None of these [CONTINUE]
07. [DO NOT READ] Don't know/no response [THANK/TERMINATE]

A7. In what year were you born?

01. Record year: ____________
02. [DO NOT READ] Prefer not to answer

A7a. [IF A7=02] Would you be willing to tell me in which of the following age categories you belong? [READ; STOP WHEN A SELECTION IS MADE]

01. 18 to 24
02. 25 to 34
03. 35 to 44
04. 45 to 54
05. 55 to 64
06. 65 or older
07. [DO NOT READ] Prefer not to answer

A8. How do you identify your gender? [READ]

01. Woman
02. Man
03. Another gender
04. [DO NOT READ] Prefer not to answer

A9. In which province or territory do you live? [DO NOT READ]

01. Newfoundland and Labrador
02. Prince Edward Island
03. Nova Scotia
04. New Brunswick
05. Quebec
06. Ontario

07. Manitoba
08. Saskatchewan
09. Alberta
10. British Columbia
11. Yukon
12. Northwest Territories
13. Nunavut
14. [DO NOT READ] Prefer not to answer

Section: Wireless Code

[ASK ALL]

I. RECALL OF CONSUMER PROTECTION CODES

WC1. The Wireless Code, Internet Code, and TV Service Provider Code were created to make contracts easier to understand and to contribute to a more dynamic marketplace. To what extent, if any, would you say you recall hearing or seeing anything about these Codes? Would you say you clearly recall, vaguely recall or do not recall?"

01. Clearly Recall
02. Vaguely Recall
03. Do not recall
04. [DO NOT READ] Don't Know

PROGRAMMING INSTRUCTIONS:

IF NO OR DON'T KNOW/NO RESPONSE AT A3 AND YES AT A4, SKIP TO SECTION TVSP Code.
IF NO OR DON'T KNOW/NO RESPONSE AT A3 AND NO OR DON'T KNOW/NO RESPONSE AT A4 AND YES AT A5, SKIP TO INTERNET SECTION IC1.
IF NO OR DON'T KNOW/NO RESPONSE AT A3, A4 AND A5, SKIP TO CRTC SECTION.
EVERYONE ELSE, CONTINUE.

II. TYPE OF WIRELESS CONTRACT

The next few questions are about your cell or wireless phone service contract or plan.

[INTERVIEWER NOTE: If respondent says: "I don't have a plan/I have a pay-as-you-go/month-to-month," say: "This question is about your service agreement or plan, regardless of whether you have signed a contract for a specific time period, are month-to-month or use prepaid cards."]

WC2. Is it an individual plan or a family or shared plan?

[INTERVIEWER NOTE: If unsure about the difference, say "Do you pay only for one person (which is an individual plan) or do you share a plan with your family and pay together (which is a family plan)?"]

Phoenix
Strategic Perspectives Inc.

01. Individual plan [SKIP TO WC4]
02. Family/shared plan
03. [DO NOT READ] Other [SPECIFY] [SKIP TO WC4]
04. [DO NOT READ] Don't Know [SKIP TO WC4]

WC3. [ASK IF WC2=02] How many members are on your shared plan?

01. 2
02. 3
03. 4
04. 5+
05. [DO NOT READ] Don't Know

WC4. And, is it a monthly plan, or a prepaid or pay-as-you-go plan?

[INTERVIEWER NOTE: If unsure about the difference, say: "If you pay your bill *after* you use your wireless service, it's a monthly or post-paid plan. If you pay *before* you use your wireless service, it's a prepaid or pay-as-you-go plan."]

01. Monthly/post-paid (paying after)
02. Prepaid/pay-as-you-go (paying before)
03. [DO NOT READ] Other [SPECIFY]
04. [DO NOT READ] Don't Know

III. SERVICES INCLUDED IN THE WIRELESS SERVICE PLAN

Now I would like to ask you a few questions about the services that are included in your wireless plan.

WC5. Which of the following are included in your wireless plan? READ ITEMS AND RESPONSE OPTIONS.

a) Calling minutes [INTERVIEWER NOTE: If the respondent is unsure about the meaning, say "This is what you need to make or receive phone calls."]
b) Text messages [INTERVIEWER NOTE: If the respondent is unsure about the meaning, say "This can include both text messages and multimedia messages, like pictures or video sent via text."]
c) Data [INTERVIEWER NOTE: If unsure about the meaning of data, say "This is what you need to browse the Internet, access applications or your emails with your wireless device."]

RESPONSE OPTIONS
01. Yes
02. No
03. Don't Know

IV. DEVICES

WC6. When you signed up for your latest wireless plan, did you bring your own device, or did you buy, rent or lease a new phone from your wireless provider?

[INTERVIEWER NOTE: If the respondent is unsure about the meaning of bring your own device, say "bring your own device is where you already own your mobile device and are simply purchasing the cellular service from a wireless company."]

[INTERVIEWER NOTE: if the respondent is unsure about the meaning of renting a phone, say "some wireless companies offer a monetary rebate upfront if you agree to return your device at the end of your contract."]

01. Bring your own device [SKIP TO WC8 IF WC5c=03; ELSE GO TO WC12]
02. Buy a new phone from your wireless service provider
03. Rent a new phone from your wireless service provider
04. [DO NOT READ] Don't Know

WC7. [ASK IF WC6=02 OR 03] Which of the following did you do: [READ LIST; ROTATE ITEMS; ACCEPT ALL THAT APPLY]

01. Pay your wireless service provider full price for your phone
02. Get a reduction on the price of your phone
03. Choose a tab balance contract
04. Subscribe to a device rental or return plan
05. [DO NOT READ] Don't Know

[INTERVIEWER INSTRUCTION: If the respondent is unsure about the meaning of a tab balance, say "Tab balances are when you buy a phone at a reduced upfront cost and the leftover cost of the phone goes onto your account, creating a tab balance. Each month, a percentage of your bill is used to pay down your account balance"]

V. DATA SERVICES

[ASK IF WC5c=01]

Now, I would like to ask you a few questions about the data services that are included in your wireless plan.

WC8. Some wireless plans have unlimited data and some have limited data. When a plan includes a monthly data limit, you may have to pay data overage fees if you use more data in a month than is included in your plan. How much data is currently included in your plan each month? [DO NOT READ LIST]

[INTERVIEWER NOTE: If the respondent is unsure about the meaning of data, say: "This is what you need to browse the Internet, access applications or your emails with your wireless device when it is not connected to Wi-Fi."]

01. _____Mega Bytes (MB) – ALLOW NUMERIC ENTRY; DO NOT ALLOW ENTRY UNDER 100
02. _____Giga Bytes (GB) – ALLOW NUMERIC ENTRY;
03. Unlimited
04. None – no data in plan
05. Don't Know

[INTERVIEWER NOTE: If respondent indicates a number under 100 MegaBytes, please ask them if they mean MegaBytes or GigaBytes. If there is confusion, please code as “Don’t Know”.]

WC9. [ASK IF WC8=01, 02 or 03] Which of the following activities, if any, do you use to manage or limit your data use? [READ LIST; ACCEPT ALL THAT APPLY]

01. Use tools to track your data use
02. Reduce your data use after you get a notification that you are nearing your limit
03. Use WIFI when available instead of data
04. Other [SPECIFY]
05. [DO NOT READ] I do not limit my data use
06. [DO NOT READ] Don’t Know

WC10. [ASK IF WC5c=01 and WC8 ≠ 04] How easy do you find it to manage the data used by yourself and/or your family each month? Please use a 7-point scale where 1 means extremely difficult and 7 means extremely easy.

[INTERVIEWER NOTE: If unsure about the meaning of data, say: “This is what you need to browse the Internet, access applications or your emails with your wireless device.”]

01. 1 – Extremely difficult
02. 2
03. 3
04. 4
05. 5
06. 6
07. 7 – Extremely easy
08. [DO NOT READ] I don’t use my data
09. [DO NOT READ] Don’t Know

WC11. [ASK IF WC5c=01 and WC8 ≠ 04] In the past 12 months, how often have you paid data overage fees? READ LIST

[INTERVIEWER NOTE: If the respondent is unsure about the meaning of data, say: “This is what you need to browse the Internet, access applications or your emails with your wireless device.”]

01. Never
02. 1-2 times
03. 3-6 times
04. 7-9 times
05. 10-12 times
06. [DO NOT READ] Don’t Know

VI. BILL SHOCK

WC12. During the last year, have you experienced ‘bill shock, meaning a surprisingly high bill? READ LIST

01. Yes
02. No [SKIP TO WC15]
03. [DO NOT READ] Don't Know

WC13. [ASK IF WC12=01] What was the main reason for the 'bill shock you experienced? DO NOT READ LIST; ACCEPT ALL THAT APPLY

[INTERVIEWER NOTE: If respondent says 'roaming/roaming fees, clarify whether this was within Canada or in another country.]

01. Family/shared plans – difficulties managing use
02. International travel – roaming fees
03. Domestic travel – roaming fees
04. Data overage fees
05. Call minute overage fees
06. Long distance fees
07. Text overage fees
08. Billing issues/errors/mistakes
09. Unexpected set-up fee or service charge
10. Unexpected fees (Network access fee/9-1-1, etc.)
11. I was not given the plan/deal I was promised
12. [DO NOT READ] Other (Specify)
13. [DO NOT READ] Don't Know

WC14. [ASK IF WC12=01] What was the amount of the unexpected charges on your bill? READ LIST

01. Less than $50 more than your usual monthly bill
02. $50 - $100
03. $101 - $250
04. $251 - $500
05. $501 - $1000
06. Greater than $1000
07. [DO NOT READ] Don't Know

WC15. If you use your plan while travelling, you may be charged roaming fees. How easy do you find it to manage your roaming charges when you are travelling? Please use a 7-point scale where 1 means extremely difficult and 7 means extremely easy.

01. 1 – Extremely difficult
02. 2
03. 3
04. 4
05. 5
06. 6
07. 7 – Extremely easy
08. [DO NOT READ] I don't travel with my phone
09. [DO NOT READ] Don't Know

VII. COMPLAINTS

WC16. Have you made a complaint about your wireless services in the past 12 months?

01. Yes
02. No [SKIP TO WC19]
03. [DO NOT READ] Don't Know [SKIP TO WC19]

WC17. [ASK IF WC16=01] What was your complaint about? PROMPT WITH LIST IF NEEDED; ACCEPT ALL THAT APPLY

01. Misleading information about the terms of your contract
02. Misleading or aggressive sales practices
03. Incorrect charge on your bill
04. Legitimacy or amount of early cancellation fee
05. Inadequate quality of service
06. Credit or refund not received
07. Data charges
08. Breach of contract
09. Change to contract without notice
10. 30-day cancellation policy
11. Unlocking phone
12. Credit reporting
13. Unlimited data
14. Other [SPECIFY]
15. Don't Know

NOTES TO INTERVIEWER: READ IF REQUIRED

- **Misleading information about terms**: Some examples are what is included in a contract or how the contract should be interpreted, or whether the providers conduct meets its contractual obligations, or misunderstandings about the particulars of a contract or term.
- **Misleading or aggressive sales practices**: Some examples include salespeople providing details of wireless products or services you are not interested in or which end up being false, promotional offers changing over the course of the term, rebate or discount offers where terms differ from the original information provided by the service provider, or technical support representatives trying to sell you products or services during the support call or interaction.
- **Incorrect charge**: Some examples include complaints about customers having agreed to one price and subsequently being charged more, being overcharged due to either a billing system error or a price that is different than originally advertised, or about being billed for per-use services which they claim they did not use.
- **Early cancellation fee**: This would be a complaint about the amount or the legitimacy of an early cancellation fee charged to the customer when they cancel their service.
- **Inadequate quality of service**: This can include the installation, repair or disconnection of service, including the quality of the service or unreasonable interruptions to service and transfers of service from one provider to another.
- **Credit or refund not received**: This is fairly straightforward – refunds would normally be due upon cancellation of a service.

- **Data charges**: Any complaints relating to a customer's data plan or data services, including disputes over data overage fees, the ability of multiple users on family or shared plans to consent to exceeding data overage caps.
- **Breach of contract**: This would include disputes about compliance with terms and conditions of a customer's contract.
- **Change to contract without notice**: This is when a service provider changes a material term in a customer's contract without providing notice.
- **Credit reporting:** This issue relates to a customer's credit score and/or debt collection. For example, a customer is overbilled in error and does not pay the outstanding amount, this may impact their credit or they may have to deal with debt collection agencies while the complaint is being addressed.
- **Unlimited data:** Any complaints related to the perceived definition of unlimited data or the way in which unlimited data is delivered.

WC18. [ASK If WC16=01] Who did you complain to? Was it your service provider, the Commission for Complaints for Telecom-television Services, also known as the CCTS, or both?

01. Service provider
02. CCTS
03. Both
04. [DO NOT READ] Don't Know

VIII. CLARITY AND EXPLANATIONS

Now, I would like to ask you a few questions about how clear and easy you find your wireless contract to understand.

WC19. Do you find your contract clear and easy to understand? Please use a 7-point scale where 1 means extremely unclear and difficult to understand and 7 means extremely clear and easy to understand.

01. 1 – Extremely unclear and difficult to understand
02. 2
03. 3
04. 4
05. 5
06. 6
07. 7 – Extremely clear and easy to understand
08. [DO NOT READ] Do not have a contract
09. [DO NOT READ] Never read the agreement
10. [DO NOT READ] Can't recall/do not remember
11. [DO NOT READ] Non-response/refusal

WC20. The Wireless Code requires service providers to include a trial period for new contracts that include a device and to clearly explain any fees that would apply if you cancel your contract or agreement early. How clearly did your service provider explain these measures to you? Please use a 7-point scale where 1 means extremely unclear and 7 means extremely clear.

01. 1 – Extremely unclear

02. 2
03. 3
04. 4
05. 5
06. 6
07. 7 – Extremely clear
08. [DO NOT READ] Do not have a contract
09. [DO NOT READ] Never read the agreement
10. [DO NOT READ] Did not have a trial period
11. [DO NOT READ] Can't recall/do not remember
12. [DO NOT READ] Non-response/refusal

IX. CHANGES

WC21. Have you ever become aware that your service provider changed your plan without expressly making you aware of how the terms and conditions had changed?

01. Yes
02. No
03. [DO NOT READ] Don't Know

[ASK ALL]

WC22. Have you changed wireless service providers in the last two years?

01. Yes
02. No
03. [DO NOT READ] Don't Know

WC23. [ASK IF WC22=01] Why did you change service provider? DO NOT READ LIST; ACCEPT ALL THAT APPLY

01. Your contract had ended
02. You were no longer satisfied with your service provider
03. Offered a better deal with a different provider
04. Needed a new phone / to upgrade phone
05. Other [SPECIFY]
06. Don't Know

WC24 [ASK IF WC22=01] How easy or difficult was it to switch service providers? Please use a 7-point scale where 1 means extremely difficult and 7 means extremely easy.

01. 1 – Extremely difficult
02. 2
03. 3
04. 4
05. 5
06. 6
07. 7 – Extremely easy

08. [DO NOT READ] Don't Know

WC25 [ASK IF WC24=01, 02, OR 03] Was there a reason why switching providers was difficult for you? DO NOT READ LIST; ACCEPT ALL THAT APPLY

01. Technical issues
02. Difficulty retaining phone number
03. High costs of ending contract
04. Could not get the phone you wanted
05. Other [SPECIFY]
06. Don't Know

WC26. [ASK IF WC22=02] Why did you stay with your current service provider? PROMPT WITH LIST IF NEEDED, ACCEPT ALL THAT APPLY

01. No reason to switch / I am satisfied (general)
02. I am satisfied with the product quality / service (general)
03. I am satisfied with the cost / currently getting a good deal
04. Too much hassle to switch / making changes takes too much effort
05. High costs of ending contract
06. I am in a contract
07. I am receiving good customer service / satisfied with the staff
08. I am a loyal customer / value the relationship
09. I have no option / they are the only provider available
10. No reason to switch / I cannot get a better offer from another service provider
11. I have a bundle with my service provider and it would be complicated to change just my wireless service
12. Other [SPECIFY]
13. Don't Know

Section: TVSP Code

[ASK IF YES AT A4]

The next few questions are about your TV service provider. By this we mean your cable, satellite or IPTV provider. Please do not include streaming services such as Netflix

[INTERVIEWER INSTRUCTION: If respondent indicates they do not have cable, satellite or IPTV services skip this section]

TVSP1. To what extent do you find your TV contract clear and easy to understand? Please use a 7-point scale where 1 means extremely unclear and difficult to understand and 7 means extremely clear and easy to understand.

01. 1 – Extremely unclear and difficult to understand
02. 2
03. 3
04. 4

05. 5
06. 6
07. 7 – Extremely clear and easy to understand
08. [DO NOT READ] Do not have a contract
09. [DO NOT READ] Never read the agreement
10. [DO NOT READ] Don't Know

TVSP2. The TVSP Code requires television service providers to ensure that customers are aware of the availability, price and content of their entry-level service offering, also known as the basic service package. Has your service provider informed you about their entry-level offering, to be offered at no more than $25 per month? This may have been by email, on the phone or via your monthly billing.

01. Yes
02. No
03. [DO NOT READ] Don't Know

TVSP3. Have you made a complaint about your TV services within the last 12 months?

01. Yes
02. No
03. [DO NOT READ] Don't Know

TVSP4. [ASK If TVSP3=01] What was your complaint about? PROMPT WITH LIST IF NEEDED; ACCEPT ALL THAT APPLY

01. Misleading information about the terms of your contract
02. Misleading or aggressive sales practices
03. Incorrect charge on your bill
04. Legitimacy or amount of early cancellation fee
05. Inadequate quality of service
06. Credit or refund not received
07. Breach of contract
08. Change to contract without notice
09. 30-day cancellation policy
10. Credit reporting
11. Installation
12. Service calls
13. Changed the price of a TV channel or package of channels without informing you in advance
14. Other [SPECIFY]
15. Don't Know

NOTES TO INTERVIEWER: READ IF REQUIRED

- **Misleading information about terms**: Some examples are what is included in a contract or how the contract should be interpreted, or whether the providers conduct meets its contractual obligations, or misunderstandings about the particulars of a contract or term.
- **Misleading or aggressive sales practices**: Some examples include salespeople providing details of television products or services you are not interested in or which end up being

false, promotional offers changing over the course of the term, rebate or discount offers where terms differ from the original information provided by the service provider, or technical support representatives trying to sell you products or services during the support call or interaction.

- **Incorrect charge**: Some examples include complaints about customers having agreed to one price and subsequently being charged more, being overcharged due to either a billing system error or a price that is different than advertised, or about being billed for per-use services which they claim they did not use.
- **Early cancellation fee**: This would be a complaint about the amount or the legitimacy of an early cancellation fee charged to the customer when they cancel their service.
- **Inadequate quality of service**: This can include the quality of the service, unreasonable interruptions to service, disconnections, and issues transferring service from one provider to another.
- **Credit or refund not received**: This is fairly straightforward – refunds would normally be due upon cancellation of a service.
- **Breach of contract**: This would include disputes about compliance with terms and conditions of a customer's contract.
- **Change to contract without notice**: This is when a service provider changes a material term in a customer's contract without providing notice, including changes to television programming options (e.g. channels provided or rate increases).
- **Credit reporting**: issues related to a consumer's credit score and/or debt collection. For example, a customer is overbilled in error and does not pay the outstanding amount, this may impact their credit or they may have to deal with debt collection agencies while the complaint is being addressed.
- **Installation**: issues related to the installation of services.
- **Service calls**: issues related to service calls, including repair services, such as failure to arrive within the promised timeframe or charges related to service calls.

Section: Internet Code

[ASK IF YES AT A5]

IC1. To what extent do you find your Internet contract clear and easy to understand? Please use a 7-point scale where 1 means extremely unclear and difficult to understand and 7 means extremely clear and easy to understand.

01. 1 – Extremely unclear and difficult to understand
02. 2
03. 3
04. 4
05. 5
06. 6
07. 7 – Extremely clear and easy to understand
08. [DO NOT READ] Do not have a contract
09. [DO NOT READ] Never read the agreement
10. [DO NOT READ] Don't Know

IC2. Have you made a complaint about your internet services within the last 12 months?

01. Yes
02. No [SKIP TO C1, CRTC SECTION]
03. [DO NOT READ] Don't Know [SKIP TO C1, CRTC SECTION]

IC3. [ASK IF IC2=01] What was your complaint about? PROMPT WITH LIST IF NEEDED; ACCEPT ALL THAT APPLY

01. Misleading information about the terms of your contract
02. Misleading or aggressive sales practices
03. Incorrect charge on your bill
04. Legitimacy or amount of early cancellation fee
05. Inadequate quality of service
06. Credit or refund not received
07. Breach of contract
08. Change to contract without notice
09. 30-day cancellation policy
10. Credit reporting
11. Installation
12. Service calls
13. Other [SPECIFY]
14. Don't Know

Section: CRTC

[ASK ALL]

The Canadian Radio-television and Telecommunications Commission or CRTC is an independent agency of government, responsible for regulating Canada's broadcasting and telecommunications systems.

C1. Overall, how informed are you about the mandate and role of the CRTC? [READ LIST]

01. Very well informed
02. Well informed
03. Not very well informed
04. Not informed
05. [DO NOT READ] Don't Know

C2. What is your impression of the CRTC? Would you say it is: [READ LIST]

[REPEAT CRTC DEFINITION, IF NECESSARY: The Canadian Radio-television and Telecommunications Commission or CRTC is an independent agency of government, responsible for regulating Canada's broadcasting and telecommunications systems.]

01. Very favourable
02. Somewhat favourable

03. Neutral
04. Somewhat unfavourable
05. Very unfavourable
06. [DO NOT READ] Don't Know

C3. Over the past year, would you say your impression of the CRTC has: [READ LIST]

[REPEAT CRTC DEFINITION, IF NECESSARY: The Canadian Radio-television and Telecommunications Commission or CRTC is an independent agency of government, responsible for regulating Canada's broadcasting and telecommunications systems].

01. Improved
02. Declined
03. Remained about the same
04. [DO NOT READ] Don't Know

Section: Demographics

Thank you, now we have a few questions for classifications purposes. Please be assured that your responses will remain confidential.

D1. What is the highest level of formal education that you have completed? [READ LIST; STOP WHEN AN ANSWER IS SELECTED]

01. Less than a High School diploma or equivalent
02. High School diploma or equivalent
03. Registered Apprenticeship or other trades certificate or diploma
04. College, CEGEP or other non-university certificate or diploma
05. University certificate or diploma below bachelor's level
06. Bachelor's degree
07. Postgraduate degree above bachelor's level
08. [DO NOT READ] Prefer not to answer

D2. What is the language you first learned at home as a child and still understand? [READ LIST]

01. French
02. English
03. Other (SPECIFY____________
04. [DO NOT READ] Prefer not to answer

D3. Which of the following best describes your total household income last year, before taxes, from all sources for all household members? [READ LIST]

01. Under $20,000
02. $20,000 to under $40,000
03. $40,000 to under $60,000
04. $60,000 to under $80,000
05. $80,000 to under $100,000

06. $100,000 to under $150,000
07. $150,000 and above
08. [DO NOT READ] Prefer not to answer

D4. Which of the following categories best describes your current employment status? Are you…? [READ LIST]

01. Working full-time (35 or more hours per week)
02. Working part-time (less than 35 hours per week)
03. Self-employed
04. Unemployed, but looking for work
05. Full-time student
06. Retired
07. Not in the workforce (Full-time homemaker or unemployed but not looking for work)
08. [DO NOT READ] Other employment status
09. [DO NOT READ] Prefer not to answer

D5. Are you an Indigenous person, that is, First Nations, Métis or Inuk (Inuit)? First Nations includes Status and Non–Status Indians?

01. Yes
02. No
03. [DO NOT READ] Don't Know
04. [DO NOT READ] Prefer not to answer

D6. What is your ethnic or cultural background? [DO NOT READ; ACCEPT MULTIPLE RESPONSES]

01. White
02. South Asian (e.g., East Indian, Pakistani, Sri Lankan)
03. Chinese
04. Black
05. Filipino
06. Latin American
07. Arab
08. Southeast Asian (e.g., Vietnamese, Cambodian, Malaysian, Laotian)
09. West Asian (e.g., Iranian, Afghan)
10. Korean
11. Japanese
12. Other
13. Prefer not to answer

D7. What are the first 3 characters of your postal code?

01. 1st 3 characters of postal code
02. [DO NOT READ] Prefer not to answer

Finally,

D8. How many cellular phones are there in your household? [READ LIST]

01. None
02. 1
03. 2
04. 3
05. 4 or more
06. [DO NOT READ] Don't Know
07. [DO NOT READ] Prefer not to answer

Those are all the questions I have for you today. Thank you for your time on this important study! Once compiled, the results, will be made available on the Library and Archives Canada website. [IF ASKED: at https://www.bac-lac.gc.ca/].