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

Public opinion research tracker: Wave 2

Executive Summary

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

Supplier: Ipsos Limited Partnership
Contract Number: CW2343098
Contract Value: $121,075.57 (including HST)
Award Date: December 20, 2023
Delivery Date: May 10, 2024

Registration Number: POR102-23

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

Ce rapport est aussi disponible en français

Canada

This public opinion research report presents the results of an online and phone survey conducted by Ipsos Limited Partnership on behalf of the Canadian Radio-television and Telecommunications Commission (CRTC). The research study was conducted with 2,541 Canadians between February 14 to March 29, 2024, and constitutes the second wave of research in this area.

Cette publication est aussi disponible en français sous le titre : *Suivi de la recherche sur l'opinion publique : Vague 2*

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Catalogue Number: BC92-129/2-2024E-PDF

International Standard Book Number (ISBN): 978-0-660-72689-2

Executive Summary

Introduction

Ipsos was commissioned by the Canadian Radio-television and Telecommunications Commission (CRTC) to conduct the second wave of public opinion research on Canadians views with respect to their broadcasting, online, and telecommunications services to compare results to the baseline research conducted in 2023.

Background

The CRTC regulates the communications industry in the public interest in a time of significant socio-cultural, economic, and technological change and is looking to increase its capacity to measure and track Canadian public opinion to support new regulatory measures. The CRTC received new policy directions for a new telecommunications policy in February 2023, and a policy direction for the Online Streaming Act (Bill C-11) has been released. To address these policy directions, the CRTC will be required to develop new regulatory approaches and to ensure that they take into account the views of all Canadians.

To help accomplish this goal and following the success of the POR Tracker baseline pilot study conducted in 2023, the CRTC conducted a second phase of research. The POR report for the baseline wave of research can be found on the Library and Archives Canada (LAC) website. Moving forward, it is envisioned that the POR will be conducted on a bi-annual basis.

Research Objectives

The second phase of the POR tracker sought to understand the views of Canadians with respect to their broadcasting, online, and telecommunications services. The survey was used to track issues of strategic importance to the CRTC, such as customers' satisfaction with providers, affordability, importance of local media, trust in media, and cybersecurity.

As with the baseline wave, an essential component of the POR research was to ensure the inclusion and representation of all Canadians. Further, there was specific focus on ensuring sufficient participation from Anglophones, Francophones, Indigenous Peoples, Official Language Minority Communities (OLMC), Racialized Canadians, TSLGBTQ+, and those living in the North.

In developing the questionnaire, Ipsos worked with CRTC staff to synthesize and incorporate input from all relevant sectors. This included conducting a series of meetings with staff in the Broadcasting, Telecommunications, Compliance, and Enforcement (C&E), and Consumer, Research, and Communications (CRC) units.

The questionnaire included a core section of key tracking measures in order to make comparisons to the baseline research and sections to address more topical information needs that are custom to each wave of research.

The second wave of the POR survey addressed the following areas:

- Consumers' satisfaction with their telecommunications service providers;
- Canadians' broader attitudes, including affordability, trust in media, perceptions of CRTC; and
- Classification questions that outline diversity and inclusion groups and how the methodology is designed to be able to report on them.

Methodology

The POR was conducted through a quantitative survey executed through a mixed methodology approach including online and telephone interviews among a national sample of 2,541 Canadians aged 18 years and older (1,563 online, 978 telephone). Fieldwork was conducted from February 14 to March 29, 2024. Average survey length was 19 minutes (21 minutes online, 16 minutes by telephone). In order to ensure the ability to compare results between waves, methodologies between the baseline wave and the present research remained consistent.

Quotas and weighting were employed by gender, age, and region to reflect the composition of the Canadian general population based on the latest Census. Results were accurate to within + 2.2 percentage points of what the results would have been had every Canadian been polled.

Minimum sample sizes (of at least 100) were achieved among key audiences including Anglophones (n=1800), Francophones (n=513), Indigenous peoples (n=138), Official Language Minority Communities (OLMC) (n=144), racialized Canadians (n=759), and 2SLGBTQI+ (n=212). Oversamples of TSLGBTQ+ Canadians and those residing in the North were required and notably, fieldwork in the North continued to prove challenging and the target of n=100 could not be achieved in the fieldwork period (n=83 was achieved).

Notes to Readers

- All results in the report are expressed as a percentage, unless otherwise noted.
- Throughout the report, percentages may not always add to 100 due to rounding.
- When reporting sub-group variations, only differences that are significant at the 95% confidence level, indicative of a pattern and pertaining to a sub-group sample size of more than n=30 are discussed.
- For open-ended measures, results have been coded into thematic category and expressed as individual codes that align most closely to respondent's answers and broader themes (NETs) for comparison purposes.
- Statistically significant differences between waves are noted in charted data using upward-facing arrows for increases and downward-facing arrows for decreases. If no arrow is shown next to a datapoint, this indicates that there is no statistically significant difference between waves.

Expenditure

The contract value for the POR survey was $121,075.57 (including HST).

Key Findings

Few Canadians feel well informed about the CRTC's mandate and role. Impressions of the organization, while largely neutral to positive, are inhibited by limited familiarity. Those who feel more informed about the CRTC's work have stronger, more positive impressions.

- Thirty-three percent (33%) of Canadians say they feel either well or very well informed about the mandate and role of the CRTC, while 67% are either not very well or not informed at all. After being presented with the CRTC's mandate, 66% of Canadians say the information aligns either completely or somewhat with their prior understanding, while 34% say it aligns a little or not at all.
- Thirty-three percent (33%) of Canadians have a favourable impression of the CRTC, 30% are neutral in their opinion, while 15% are unfavourable, and 22% do not know enough to provide an opinion.

- The most common reasons driving positive impressions of the CRTC include satisfaction with its work, that the CRTC regulates well, that it protects Canadians' best interests, that it is informative/ transparent. The most common reasons driving negative impressions include high prices, presence of monopolies, excessive control or censorship, lack of protection for Canadians' interests, and ineffectiveness.
- Regarding the work of the CRTC, trust in the organization and engagement in public consultations, most Canadians express softer levels of agreement:
  - 38% of Canadians agree that the CRTC's work is beneficial;
  - 32% are interested in hearing more from the CRTC;
  - 31% trust the CRTC to regulate in the public interest;
  - 23% feel they have enough information to make informed decisions on participating in public consultations; and
  - 22% know how to participate in public consultations.
- Thirty-four percent (34%) of Canadians recall seeing or hearing anything about the CRTC over the past year, while 66% do not.

Canadians remain largely confident in their ability to pay for the telecommunications, broadcast or streaming services they receive, most notably for cellphone service or home internet. However, a higher proportion report making recent changes to their services to improve affordability compared to the baseline wave. Impressions that services are becoming less affordable over time, and that they have limited choice of providers, persist.

- Thirty-two percent (32%) of Canadians receiving telecommunications, broadcast or streaming services report making changes to improve affordability in the last month, higher than in the baseline wave (24%).
  - 28% made changes to make services more affordable
  - 11% cancelled and switched providers
  - 10% cancelled services entirely
  - An additional 16% planned to cancel but were convinced to stay with a better price, excluded from the above calculation.
- Compared to the baseline, more Canadians made changes to their cellphone service or home internet, or cancelled their home internet connection, while fewer cancelled their video or audio streaming services.
- Confidence among Canadians in their ability to pay for their services in the next three month is highest for cellphone service (75%) and home internet (75%), followed closely by cable TV service (72%). Closer to two-thirds express confidence in their ability to pay for their audio (68%) or video (66%) streaming services, or satellite TV service (63%).
- Roughly half of Canadians agree that streaming video subscription services (49%), television services (48%), cellphone services (47%) and home internet services (45%) have become less affordable in the last year, while 38% feel streaming audio subscription services have become less affordable. Compared to the baseline wave, more agree that streaming audio subscriptions have become less affordable.
- Roughly four in ten Canadians agree that it is easy to switch cellphone providers if they wanted to (45%), and that they have enough choice of cellphone providers where they live (42%), while fewer feel it is easy to switch internet providers if they wanted to (38%), and that they have enough choice of internet providers (34%). Compared to the baseline wave, more agree that they have enough choice of cellphone providers where they live.

Most Canadians feel they can count on the telecommunications networks where they live. The vast majority have not experienced any major service distributions to the services they receive, however impressions have softened with respect to reliable high-speed internet compared to the baseline wave.

- Fifty-five percent (55%) of Canadians agree that they can count on reliable high-speed internet and mobile networks where they live, however compared to the baseline fewer agree that they can count on reliable high-speed internet.
- Seventy-eight percent (78%) report not having experienced any major service disruptions lasting 24 hours or longer for any of the telecommunications, broadcast or streaming services they receive. Thirteen percent (13%) have experienced a disruption to their home internet, 8% their cellphone service, 6% cable TV service, 4% video streaming services, 2% audio streaming services, and 1% satellite TV service.

Canadians continue to consume media content primarily through video sources for both 'entertainment' and 'news and information,' followed by audio and other media sources. Impressions of the quality of content has decreased for nearly all sources compared to the baseline, and fewer Canadians express trust in the news media, express satisfaction with Canadian television programming, and feel reflected in content currently available.

- The most common sources for 'news and information' are regular television (49%), AM/FM radio (39%), online media (36%), and online social media (27%). For 'entertainment,' the primary sources are online video streaming (45%), regular television (42%), and online social media (34%). Compared to the baseline wave, a higher proportion report relying on regular television, online social media, and AM/FM radio for 'news and information,' and online media sources for 'entertainment.'
- Satisfaction has decreased for most types of 'entertainment' content and all types of 'news and information' content compared to the baseline wave. More Canadians express softer levels of satisfaction and increased dissatisfaction, with the most notable declines for regular television video content, AM/FM radio audio content, and online social media video content.
- Satisfaction by type of 'entertainment' content are consistent across video (55%), audio (55%), and other media sources (53%), while satisfaction with news and information content are lower, with 44% satisfied with video sources, 45% with audio sources, and 43% with other media sources.
- Thirty-eight percent (38%) agree they are satisfied with the quality of Canadian music available, while three in ten trust the information provided by news media in Canada to be accurate and impartial (32%), are satisfied with the quality of information and analysis offered by Canadian news media (31%), with the quality of Canadian television programs (31%), and that they see themselves reflected in the programming available (30%). Compared to the baseline, fewer express trust in news media (-4 pts compared to 2023), and satisfaction with the quality of news coverage (-6 pts) and Canadian television programs (-4 pts).

More than half of Canadians report they often receive unsolicited emails, text and calls with malicious intent or have experienced a scam attempt either directly or indirectly, and prevalence of both have increased since the baseline. Most are confident in their ability to identify fraudulent communication, however, relatively few know how or where to report scams when they happen.

- Fifty-eight percent (58%) of Canadians say that they often receive unsolicited emails, texts and calls trying to trick them into clicking malicious links or sharing personal information, 55% say that they or someone they know have experienced a scam attempt, and 47% agree that they often receive unsolicited calls trying to trick them into sharing personal information.

- Fifty-four percent (54%) of Canadians feel confident identifying fraudulent calls, emails, or text messages, while 31% say they know where to report scams.
- Compared to the baseline wave, more Canadians agree that they often receive unsolicited emails, texts and calls trying to trick them into clicking malicious links or sharing personal information, and that they or someone they know have experienced a phishing or scam attempt in the last month.

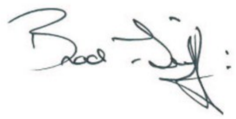
Differences by Demographics

- Francophones tended to express more positive impressions of telecommunications services and broadcasting in general and greater stability in the services they receive than anglophones. In particular, they were:
    - More likely to say they have not made any changes to their services to improve affordability in the last month and to feel confident in their ability to pay for home internet and cable TV services. They were also more likely to report no service disruptions for any of the services they received and to agree they can count on reliable high-speed internet and mobile networks where they live, that they have enough choice of cellphone and home internet providers, and that it is easy to switch providers.
    - More likely to be satisfied with both the entertainment and news/information content they receive and to express trust in Canadian news media, be satisfied with the quality of Canadian news, television, and music, and see themselves reflected in available programming.
    - More informed about the CRTC and favourable towards the organization and its work than anglophones, but they were less likely to say they know how to participate in public consultations.
- Younger Canadians (in particular those under 35) tended to experience more difficulty in terms of the affordability and distribution with the services they receive and were less well informed and knowledgeable about the CRTC than older Canadians. Specifically, they were:
    - More likely to have made changes to their services to make them more affordable, planned on cancelling but were convinced to stay with a better price, cancelled service entirely, or cancelled and switched to a different provider, and were less likely to feel confident in their ability to pay for most services.
    - More likely to report having service disruptions, perhaps due to their higher likelihood to use a wider variety of services than older Canadians.
    - They were also more likely to rely on online social media, online video streaming services, audio podcasts, and social networking sites for ‘news and information’, and ‘entertainment’.
    - By contrast, older Canadians tended to feel more well informed about the CRTC than younger Canadians (as did higher-income Canadians and those with higher education levels).
- Gaps remained in experience comparing racialized Canadians and non-racialized Canadians, as well as comparing those self-identifying as Indigenous and those who are not Indigenous, with several similarities between groups.
    - More likely to have made all types of changes to their services in the last month. Racialized Canadians were also more likely to have cancelled their cable TV, home internet, cellphone, or satellite TV service, while those who identify as Indigenous were more likely to have cancelled their home internet service and satellite TV.
    - Less likely to agree they can count on reliable high-speed internet where they live.

    - More likely to say they would be interested in hearing, reading, or seeing more from the CRTC and that they know how to participate in a public consultation.
    - Indigenous respondents were also more likely to be satisfied with the quality of Canadian music available today.
- There were also differences among respondents living in the North compared to other regions. In particular, they were:
    - More likely to say they made changes to make services more affordable, or that they planned on cancelling but were convinced to stay with a better price than those in other regions. They were also more likely to say they had disruptions to their cable TV service than those in other regions.
    - More likely to agree the CRTC's work is beneficial to Canadians, that they are interested in hearing reading, or seeing more from the CRTC, that they have the information they need to make informed decisions on whether to participate in public consultations, and that they know how to participate in public consultations. They were also more likely to say they have seen or heard something about the CRTC in the last year than those living in other regions.
    - More likely to *disagree* that they have enough choice of cellphone or internet providers where they live, that it would be easy for them to switch cellphone or internet providers if they wanted to, and that they can count on reliable high-speed internet or mobile networks where they live.

POLITICAL NEUTRALITY STATEMENT

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



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