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

Public opinion research tracker: Wave 2

Report of findings

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

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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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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.

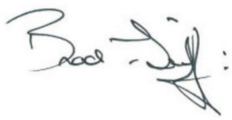
Differences by Demographics

- 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.



Brad Griffin
President
Ipsos Public Affairs

Detailed Findings

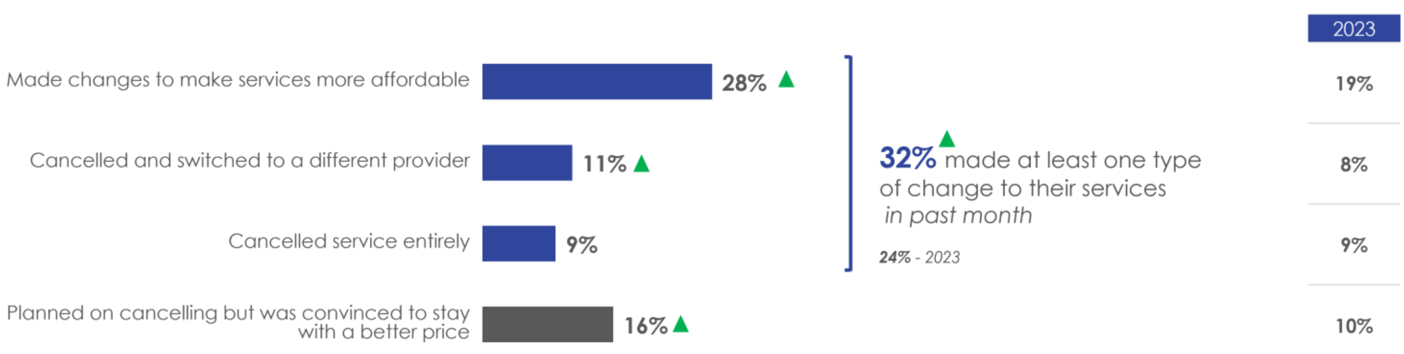
Changes to Services in Past Month

Among those who reported having telecommunications, TV, audio and/or video subscription services, roughly three in ten (32%) made some type of change to their services to improve the affordability in the past month. Nearly three in ten (28%) made changes in the past month to make their services more affordable, while one in ten cancelled and switched providers (11%) or cancelled their services entirely (10%). Sixteen percent (16%) planned on cancelling their service but were convinced to stay with a better price.

Compared to the baseline wave, a higher proportion of Canadians reported having made at least one type of change to make their services more affordable, and there has been an increase in those who made each specific type of change, except for cancelling their service entirely.

- Younger Canadians (in particular those under 35) were more likely than older Canadians 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 the service entirely, or cancelled and switched to a different provider.
- Anglophones were more likely than francophones to say they have made all types of changes, while francophones were more likely to say they have not made any changes in the last month.
- Those living in the North are more likely than those in other regions to say they made changes to make services more affordable (66%), and that they planned on cancelling but were convinced to stay with a better price (33%).
- Those with children in the household were more likely than those without to have made all types of changes, while those without children were more likely to say they have not made any changes in the last month.
- Those not born in Canada were more likely to have made all types of changes than those born in Canada, while those born in Canada were more likely to say they have not made any changes in the last month.
- Those who identify as Indigenous were more likely to have made all types of changes to their services than those who are not Indigenous.
- Racialized Canadians were more likely to have made all types of changes to their services than non-racialized Canadians. Non-racialized Canadians were more likely to say they have not made any changes in the last month.

Figure 1: Changes made to services to make them more affordable (in past month)



Base: Those who have cable TV, satellite TV, internet, cellphone, video streaming and/ or audio streaming services (n=1548)

Q10. Thinking about the last month, have you or anyone in your household made changes to any of your cellphone, television and/ or streaming services to make them more affordable? This may include altering the services you receive, that you planned on cancelling but were convinced to stay with a better price, cancelling and switching to a different provider or cancelling the service entirely.

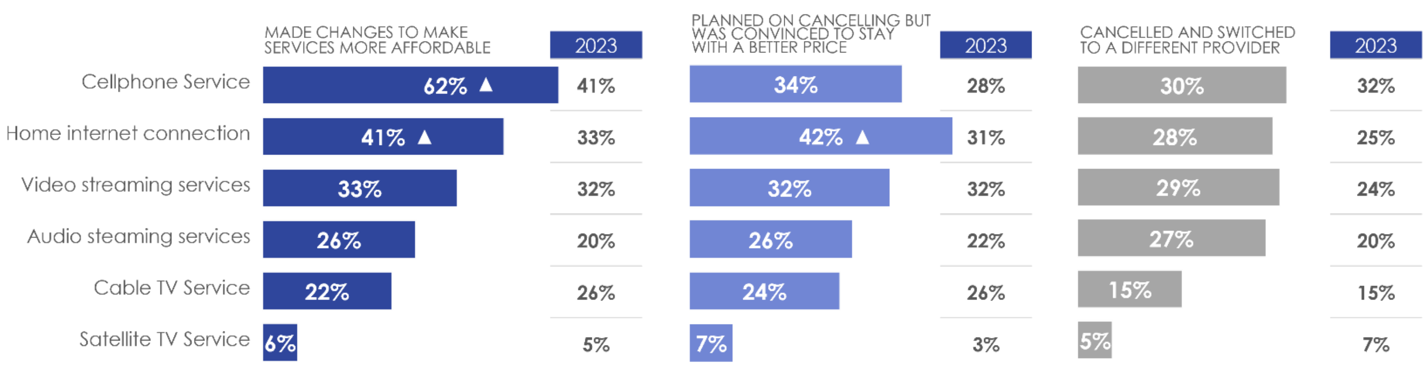
Among the 28% who made changes to make services more affordable, six in ten made changes to their cellphone service (62%), followed by home internet (41%), video streaming services (33%), cable TV service (22%), audio streaming services (26%), and satellite TV service (6%). Compared to the baseline wave, a higher proportion report having made changes to their cellphone service or their home internet.

Among the 16% who were convinced to stay with a better price, just over four in ten mention this was for home internet (42%), followed by cellphone (34%), video streaming services (32%), cable TV (24%), audio steaming services (26%), and satellite TV service (7%). Compared to the baseline wave, a higher proportion report that they had cancelled on cancelling their home internet connection but were convinced by their provider to stay with a better price.

Among the 11% who cancelled and switched to a different provider, one-third report this was for their cellphone service (30%), followed by video streaming services (29%), home internet (28%), audio streaming services (27%), cable TV (15%), and satellite TV service (5%). There have been no statistically significant shifts compared to the baseline wave.

- Canadians ages 25-44 were more likely to have made changes to their cellphone service to make it more affordable than older Canadians (in particular those over 55), while those under 25 were more likely to have changed their audio streaming services compared to those 45 or older.
- Anglophones were more likely to have made changes to their video streaming (36%) and their audio streaming (30%) services to make them more affordable than francophones.
- Those with children in the household were more likely to have made changes to their cellphone service (72%) to make it more affordable than those without children (58%).
- Racialized Canadians were more likely to report changing their home internet (50%) and video streaming (39%) services to make the more affordable than non-racialized Canadians (32% and 28% respectively), or to report having been convinced to stay with their audio streaming services for a better price (33% vs. 16% among non-racialized Canadians).

Figure 2: Changes made by type of service(s)

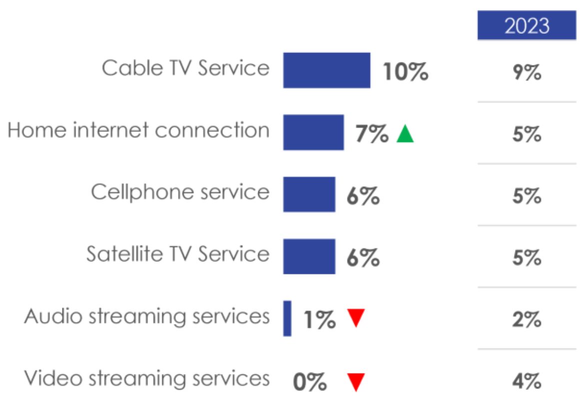


Base: Those who made changes (n=423); planned on cancelling but convinced to stay (n=234); cancelled and switched (n=157)
Q11. Which of these services did you, or someone in your household, ['make changes to'/'plan on cancelling but were convinced to stay with a better price instead'/'cancel and switch to a different provider'] in the last month?

One in ten (10%) Canadians report having cancelled their cable TV service in the past month, 7% home internet, 6% cellphone or satellite TV service, and one percent or less report having cancelled their audio streaming services (1%) or video streaming services (0.3%). Compared to the baseline wave, a higher proportion of Canadians report having cancelled their home internet connection, while fewer report having cancelled their video or audio streaming services.

- Older Canadians (specifically those 55 or older) were less likely to have cancelled any of the services they receive in the past month than younger Canadians (in particular those under 25).
- Lower income households (in particular those with income less than $60k) were more likely to have cancelled their home internet or cellphone service than higher income households.
- Those with children in the household were more likely to have cancelled their cable TV (16%), home internet (10%), or satellite TV (9%) services than those without children (8%, 6% and 5% respectively).
- Racialized Canadians were more likely to have cancelled their cable TV (14%), home internet (9%), cellphone (10%), or satellite TV service (9%) than those who are not racialized (8%, 4%, 4%, and 5% respectively).
- Those who identify as Indigenous were more likely to have cancelled their home internet service (18%) or satellite TV (12%) than those who do not (4% and 5% respectively).

Figure 3: Cancellation of service entirely



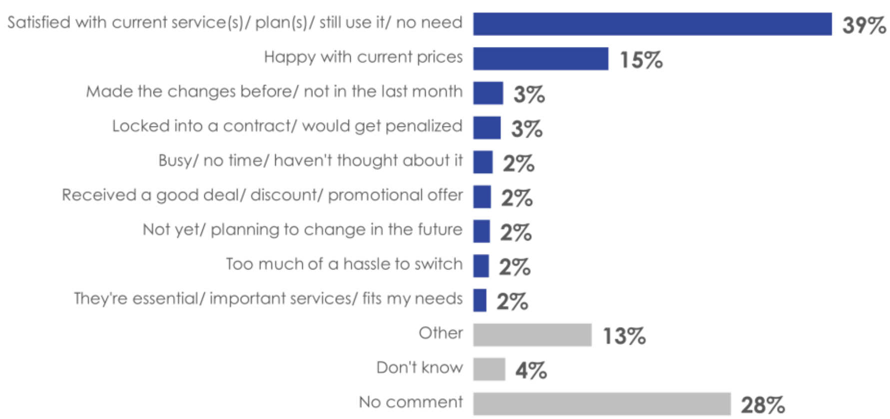
Base: All answering (n=1563)
Q12. And, which of these services did you, or someone in your household, cancel entirely?

Among those who indicated they did not make any changes to their services in the last month, by far the most common reason why was because they are satisfied with their current service (39%), followed by that they are happy with their current prices (15%). A variety of other less prominent reasons were provided, of which the most common were because they changes made prior to the past month (3%) or are locked into their contract (3%).

- Canadians under 25, and to a lesser extent those over 65, were more likely to say they are satisfied with their current service than those 25 to 55 years old, while those under 35 were more likely to mention they are happy with their current price than those over 35.
- Anglophones were more likely to say they are satisfied with their current service or happy with their current price than francophones (34% and 10% respectively) who were more likely to not provide a reason why they did not make any changes to their services in the last month.
- Those with children in the household were more likely to say they are happy with their current price (18%) than those without (14%).

- Racialized Canadians were more likely to say they are happy with their current price (24%) than non-racialized Canadians (13%).
- Canadians who identify as TSLGBTQ+ were more likely to say they are happy with their current price (24%) than those who do not (15%).

Figure 4: Reasons for not making changes



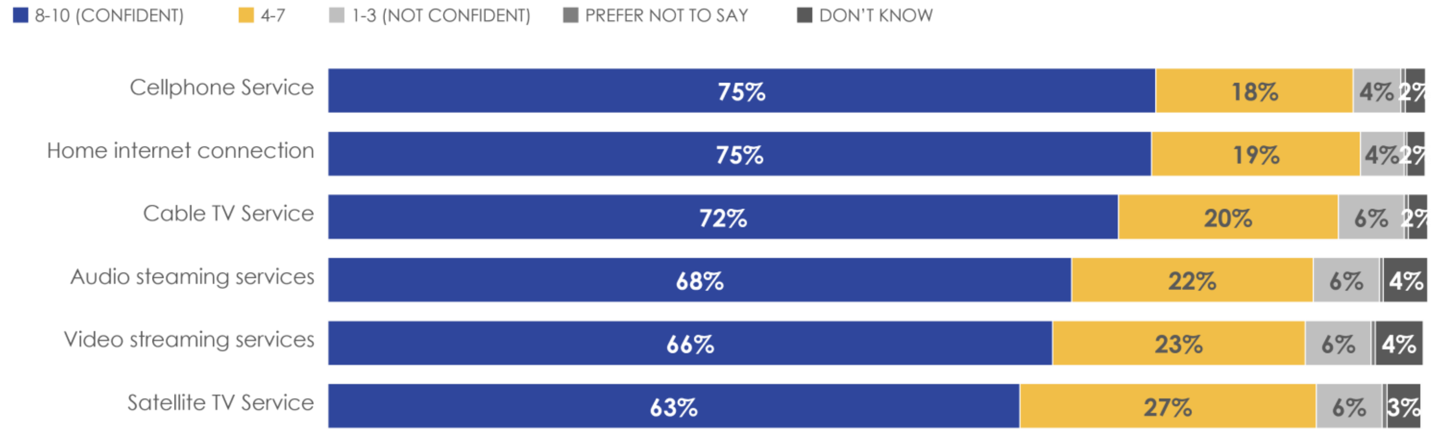
Base: Did not change any services (n=1515)
Q13NEW. You indicated that your household has not made changes to one or more of the telecommunications, television, audio and/or video subscription services you receive in the last month. Why would you say you have not made changes to these services?

Confidence in Ability to Pay for Services

Among those who reported having each type of service, confidence in their ability to pay for their services without making any changes in the next three month was highest for cellphone service (75%) and home internet (75%), followed closely by cable TV service (72%). Closer to two-thirds expressed confidence in their ability to pay for their audio (68%) or video (66%) streaming services, or satellite TV service (63%).

- Older Canadians (in particular those 65 or older) were more likely to feel confident in their ability to pay for all types of services than those under 65, except for video and audio streaming services where no differences by age were observed.
- Households with income more than $100k were more likely to feel confident in their ability to pay for all types of services than those with lower household income.
- Francophones were more likely to feel confident in their ability to pay for home internet (82%) and cable TV (80%) services than anglophones (75% and 71% respectively).
- Non-racialized Canadians (79%) were more likely to feel confident that they will be able to pay for their cellphone services than racialized Canadians (72%).
- Those who do not identify as Indigenous were more likely to feel confident in their ability to pay for their cellphone services (79%), and for their cable TV service (75%) than those who identify as Indigenous (70% and 62%, respectively).
- Those who reported having a disability were less likely to feel confident in their ability to pay for most types of services than those without a disability including home internet (77% vs. 69%), cable TV service (73% vs. 65%), audio streaming services (67% vs. 56%) and video streaming services (69% vs. 59%).

Figure 5: Confidence in ability to pay by type of service



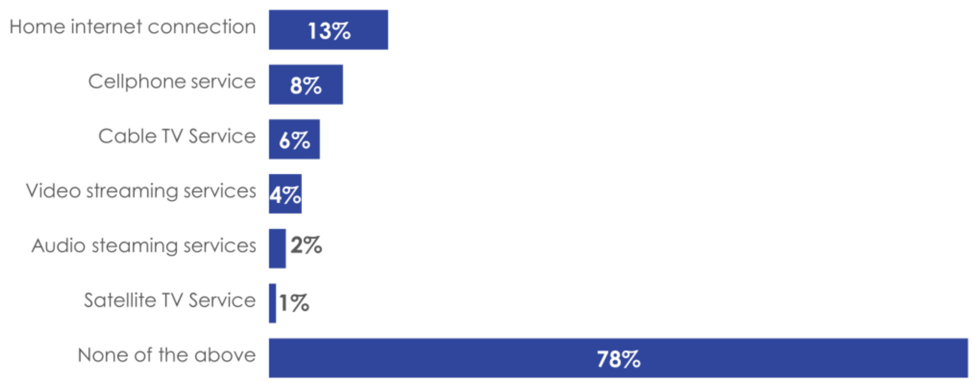
Base: Those who have cable TV, satellite TV, internet, cellphone, video streaming and/ or audio streaming services (n=varies)
Q14. How confident or not are you that you and your household will be able to pay for each of the telecommunications, television, audio and/or video subscription services you receive without making any changes in the next three months?

Service Disruptions

Nearly eight in ten (78%) reported not having experienced any major service disruptions lasting 24 hours or longer for any of the telecommunications, television, audio and/or video subscription services they receive. Just over one in ten said they have experienced a major service disruption to their home internet (13%), followed by their cellphone service (8%), cable TV service (6%), video streaming services (4%), audio streaming services (2%) or satellite TV service (1%).

- Younger Canadians (in particular those under 35) were more likely to report having experienced a major service disruption for nearly all types of services, except for TV service (Cable or Satellite), than older Canadians.
- Anglophones were more likely to report a major service disruption to their home internet (14%) or cable TV (7%) service than francophones, while francophones were more likely to report no disruptions at all (86%).
- Those in Quebec (84%) and Alberta (84%) were more likely than those in other regions to report having experienced no major service disruptions to any of the services they receive. Those living in the North were more likely to say they had disruptions to their cable TV service than those in other regions.
- Those without children in the household (81%) were more likely to say they did not experience any major service disruptions to any of the services they receive than those with children (72%).
- Racialized Canadians were more likely to report a major service disruption to their home internet (22%), cellphone service (14%) or video streaming services (6%) than non-racialized Canadians (10%, 5%, 2% respectively).
- Those who identify as Indigenous were more likely to report a major service disruption to their cellphone service (14%), video (13%) or audio steaming services (11%), or cable TV service (11%) than those who do not.

Figure 6: Reported service disruptions



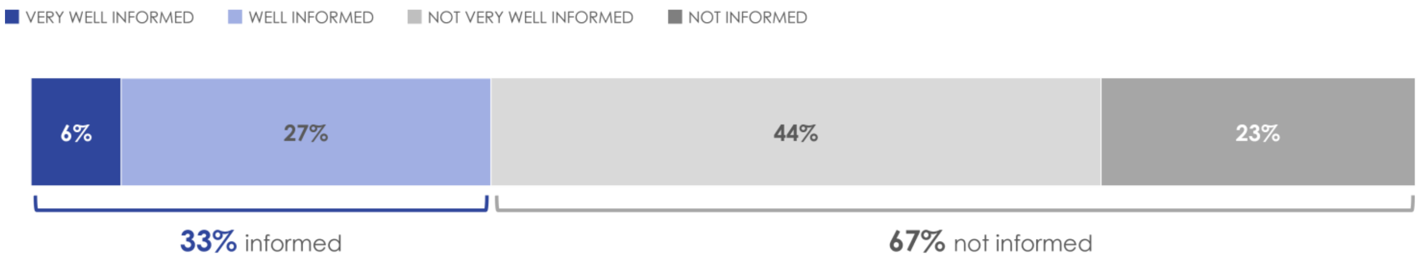
Base: All answering (n=1563)
Q14A.Have you experienced any major service disruptions lasting 24 hours or longer for any of the telecommunications, television, audio and/or video subscription services you receive?

Perceptions of the CRTC

One-third (33%) of Canadians said they feel either well informed (27%) or very well informed (6%) about the mandate and role of the CRTC, while two-thirds (67%) reported they feel less informed including more than four in ten (44%) who said they are not very well informed, and one-quarter (23%) not informed at all.

- Canadians over the age of 35, except for those 65+, were more likely to say they feel informed (very well informed/ well informed) about the mandate and the role of the CRTC than those under 35.
- Francophones (41% very well informed/ well informed) were more likely to say they feel informed about the mandate and the role of the CRTC than anglophones (32%).
- Those living in Quebec (40% very well informed/ well informed) were more likely than those in other regions to say they feel informed about the role of the CRTC, while those living in Alberta (77% not very well informed/ not informed) were more likely to say they *do not* feel informed.
- Households with income more than $100k were more likely to say they feel informed about the mandate and the role of the CRTC than lower income households.
- Those with a post-graduate degree were more likely to say they feel informed about the mandate and the role of the CRTC than those with lower education levels.
- Those born in Canada (34% very well informed/ well informed) were more likely to say they feel informed about the mandate and the role of the CRTC than those not born in Canada (30%).

Figure 7: Perceived understanding of CRTC's role and mandate, unprompted

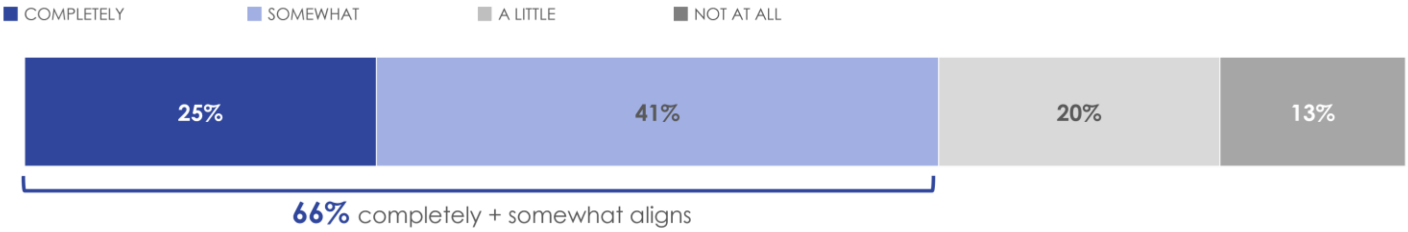


Base: All respondents (n=2541)
Q14B. Overall, how informed are you about the mandate and role of the Canadian Radio-television and Telecommunications Commission (CRTC)?

After being informed about the CRTC's mandate, two-thirds of Canadians said they feel the description aligns with their understanding of the mandate and role of the CRTC including one-quarter (25%) who said it aligns completely and four in ten (41%) aligns somewhat. Two in ten (20%) felt the description provided aligns a little with their understanding, and roughly one in ten (13%) does not align at all.

- Older Canadians (in particular those 65+) were more likely to feel the description aligns completely or somewhat with their understanding of the CRTC than younger Canadians.
- Francophones (72%) were more likely to say the information aligns completely or somewhat with their understanding of the CRTC than anglophones (66%), while anglophones were more likely to say it aligns only a little or not at all (34% vs. 27% among francophones).
- Those in Manitoba and Saskatchewan were most likely to say the description aligns only a little or not at all (43%) compared to those in other regions.
- Higher income households (in particular those with income more than $250k) were more likely to feel the description aligns completely or somewhat with their understanding of the CRTC than lower income households.
- Those with a post-graduate degree (34%) were more likely to say the description aligns completely with their understanding of the CRTC than those with lower levels of formal education, while those with less than a high school education were more likely to say it does not align at all (30%).
- Those born in Canada (68%) were more likely to say the description aligns completely or somewhat with their understanding than those not born in Canada (62%).
- Those who identify as Indigenous (61%) were less likely to feel the description aligns completely or somewhat with their understanding of the CRTC than those who do not (69%).

Figure 8: Perceived understanding of CRTC's role and mandate, prompt



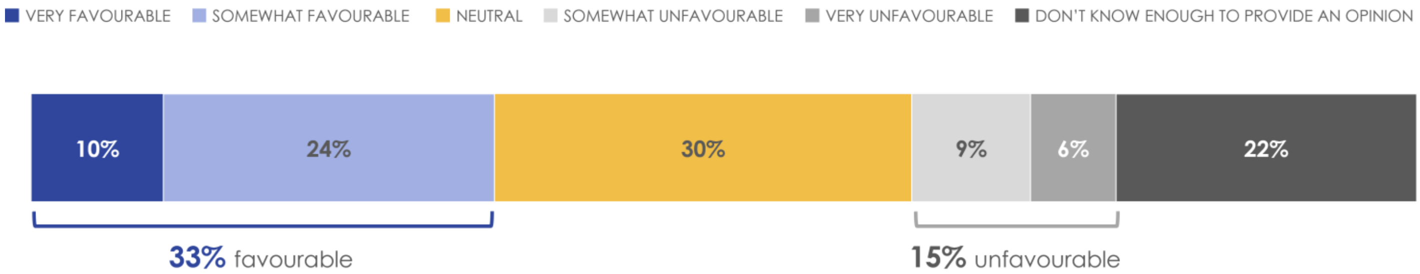
Base: All respondents (n=2541)
Q14C. The Canadian Radio-television and Telecommunications Commission (CRTC) is an administrative tribunal that regulates and supervises broadcasting and telecommunications in the public interest. It is dedicated to ensuring that Canadians have access to to a world-class communication system that promotes innovation and enriches their lives. How closely does this statement align with your understanding of the mandate and role of the CRTC before taking this survey?

One-third (33%) of Canadians said they have a favourable impression of the CRTC (10% very/ 24% somewhat), three in ten (30%) were neutral in their opinion, while roughly one in ten (15%) were unfavourable (9% somewhat/ 6% very). Just over two in ten (22%) said they do not know enough about the CRTC to provide an opinion.

Notably, those who felt more informed about the mandate and role of the CRTC were more likely to express a favourable opinion of the CRTC (47%) than those who felt less well informed (27%) who were more likely to say they don't know enough to have an opinion (29% vs. 6% among those who felt well informed/ very well informed).

- Canadians under 35 were more likely to say they don't know enough to have an opinion compared to older Canadians.
- Francophones were more likely to have a favourable impression of the CRTC (40%) compared to anglophones (32%). Similar differences were observed by region as those in Quebec (39%) were more likely to have a favourable opinion of the CRTC than those in other regions.
- Households with income more than $60k were more likely to have an unfavourable opinion of the CRTC compared to those with lower household income levels who were more likely to say they don't know enough to have an opinion.
- Those with a bachelor's degree or higher education were more likely to have a favourable view of the CRTC than those with less formal education, while those with a high school education or lower were more likely to say they don't know enough to have an opinion.
- Those with children in the household (38%) were more likely to have a favourable view of the CRTC than those without (32%).

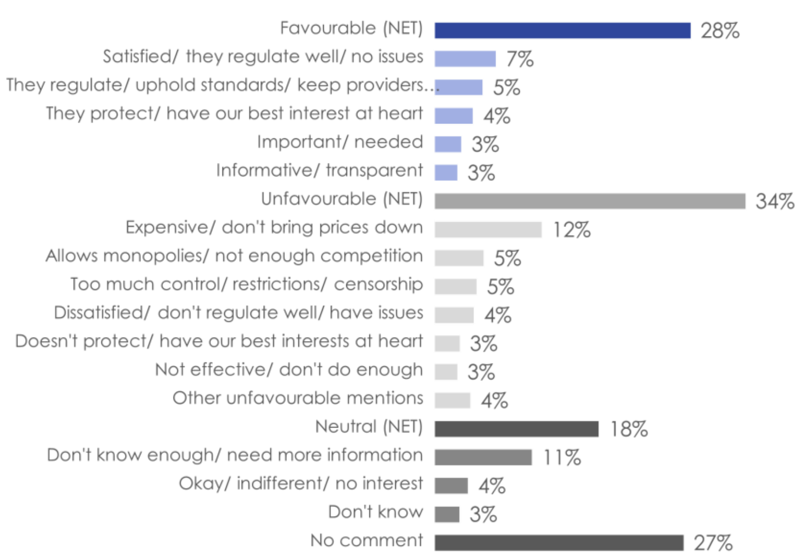
Figure 9: Favourability of the CRTC



Base: All respondents (n=2541)
Q14D. What is your impression of the CRTC?

When asked to explain the reasons behind their opinion of the CRTC, comments were roughly evenly split between favourable mentions (28%), unfavourable mentions (34%) and those who don't know or provided no comment (30%). The most common favourable comments included that they are satisfied/have no issues (7%), that the CRTC regulates well (5%), that it protects Canadians' best interests (4%), that it is important (3%), and that it is informative/ transparent (3%). The most common negative comments included that things are expensive/that the CRTC does not bring prices down (12%), that the CRTC allows monopolies (5%), that there is too much control or censorship (5%), that they are dissatisfied/the CRTC does not regulate well (4%), that the CRTC does not protect Canadians' best interests (3%), or that the CRTC is not effective (3%). Roughly two in ten (18%) provided neutral comments, including that they do not know enough to have an opinion/need more information (11%), or that they are indifferent (4%).

Figure 10: Reasons for opinion of CRTC

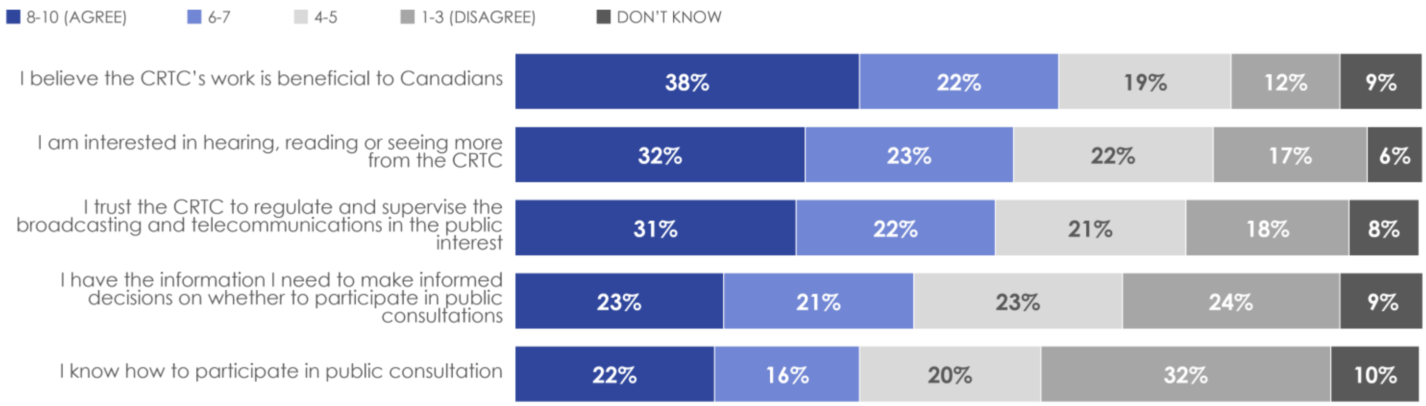


Base: Those with an opinion of the CRTC (n=2012)
Note: Coded mentions less than 3% not shown.
Q14E. You indicated you have a […] impression of the CRTC. Why do you say that?

When asked their opinion on a series of statements related to the work of the CRTC, trust in the organization and engagement in public consultations, most Canadians expressed softer levels of agreement. At nearly four in ten (38%), Canadians were most likely to agree that the CRTC's work is beneficial to Canadians, followed by roughly one-third who are interested in hearing reading, or seeing more from the CRTC (32%), and trust the CRTC to regulate and supervise the broadcasting and telecommunications in the public interest (31%). Around one-quarter (23%) agreed 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 (22%), and notably a higher proportion disagree than agree to the latter statement. Around one in ten said they don't know enough to provide an opinion for all statements.

- Canadians 18-24 (28%) were more likely to say they know how to participate in a public consultation than older Canadians (in particular those over 45).
- Francophones were likely to agree that they believe the CRTC's work is beneficial to Canadians (46%), trust the CRTC to regulate and supervise the broadcasting and telecommunications in the public interest (41%), and are interested in hearing, reading or seeing more from the CRTC (37%) than anglophones (36%, 29% and 30% respectively). Anglophones were more likely to say they know how to participate in a public consultation (23%) than francophones (19%). Similar differences were observed by region as those in Quebec were more likely to agree that they believe the CRTC's work is beneficial to Canadians, trust the CRTC to regulate and supervise the broadcasting and telecommunications in the public interest, and are interested in hearing, reading or seeing more from the CRTC than those in other regions.
- Those living in the North were more likely to agree with all statements except with respect to trust in the CRTC to regulate and supervise the broadcasting and telecommunications in the public interest than those in other regions.
- Those with a household income of $250K or more were more likely to agree that they know how to participate in a public consultation than those with lower household income.
- Those with a bachelor's degree or more formal education were more likely to agree that they know how to participate in a public consultation, and that they would be interested in hearing, reading, or seeing more from the CRTC compared to those with lower education levels.
- Racialized Canadians (36%) were 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 (27%) than non-racialized Canadians (22%).
- Those identifying as Indigenous (41%) were 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 (31%) than those who are not (22%).

Figure 11: Perceptions of CRTC work and public engagement



Base: All respondents (n=2541)
Q14F. To what extent do you agree or disagree with the following statements:

One-third of Canadians (34%) reported that they recall seeing or hearing something about the CRTC over the past year, while 66% say they do not. Those who said they recall seeing or hearing something about the CRTC were more likely to express an opinion of the organization in general, including a higher proportion with both favourable and unfavourable views, than those who did not. They were also more likely to agree to all statements related to the work of the CRTC, trust in the organization and engagement in public consultations.

- Canadians over 35 were more likely to say they have seen or heard something about the CRTC in the last year than those younger than 35.
- Those living in the North were more likely to say they have seen or heard something about the CRTC in the last year (45%) than those living in other regions.
- Higher income households (in particular those with income of $250k or more) were more likely to say they have seen or heard something about the CRTC in the last year compared to those with lower household income.
- Those with a post-graduate degree (44%) were more likely to say they have seen or heard something about the CRTC in the last year than those with lower education levels.
- Those born in Canada (37%) were more likely to say they have seen or heard something about the CRTC in the last year than those not born in Canada (25%).

Figure 12: Recall of seeing or hearing anything about the CRTC in last year

Base: All respondents (n=2541)
Q14G. Do you recall seeing or hearing anything about the CRTC over the past year?

Primary Source(s) and Satisfaction with Programming

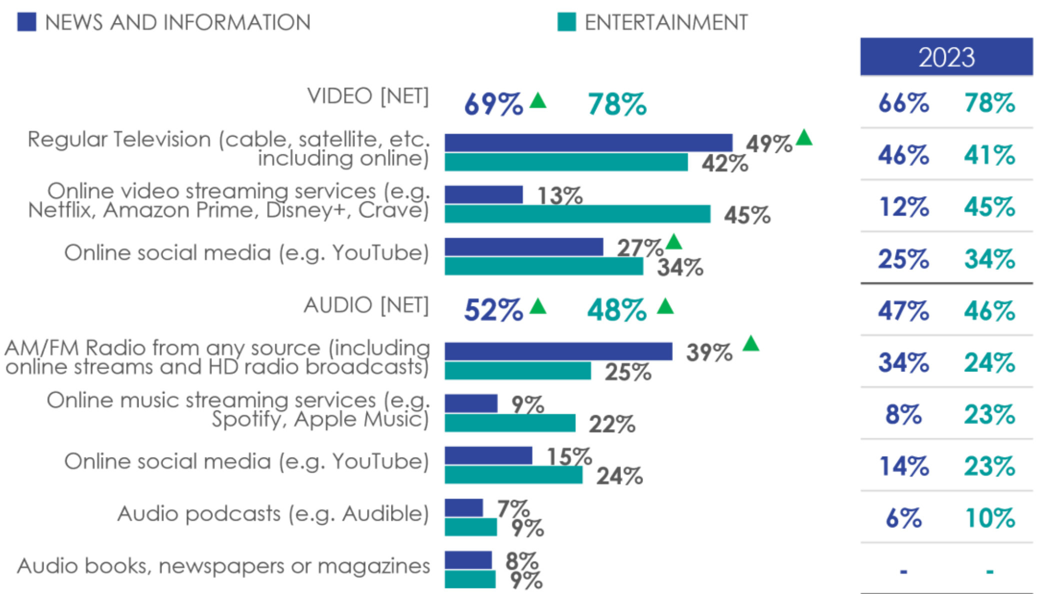
Canadians' primary sources of media content for both 'entertainment' and 'news and information' continued to be video (78% and 69% respectively). Roughly half reported their primary sources for either type of content are audio (49% and 52%) and nearly six in ten (56%) said they use other media sources for 'news and information' compared to roughly four in ten (37%) for 'entertainment' content. Compared to the baseline wave, a higher proportion reported audio as their primary source for both 'news and information' and 'entertainment', and video as their primary source of 'news and information.'

The most common sources of media content for 'news and information' continued to be regular television (49%), followed by AM/FM radio (39%), online media (36%), and online social media (27%). For 'entertainment,' the primary sources reported were also largely consistent with the baseline and include online video streaming (45%) and regular television (42%), followed by online social media (34%). Compared to the baseline wave, a higher proportion reported using regular television, online social media, and AM/FM radio for '**news and information**,', and using online media sources for '**entertainment**'. Fewer said they don't know what sources they use for both 'news and information' and 'entertainment.'

- Older Canadians (in particular those 55 or older) were more likely to report that their primary sources of 'news and information' content are regular television, AM/FM radio or print media sources than younger Canadians and that their primary source of 'entertainment' content is regular television.
- Younger Canadians were more likely to report that their primary sources of 'news and information' or 'entertainment' content are online social media, online video streaming services, audio podcasts, and social networking sites, as well as online music streaming services for 'entertainment' content than older Canadians.
- Francophones were more likely to report that their primary source of 'news and information' or 'entertainment' content is regular television and AM/FM radio than anglophones, while anglophones were more likely to rely on online video streaming services, online music streaming services, and social networking sites for both types of content.

- Similar differences were observed by region as those in Quebec were more likely to report that their primary sources of 'news and information' and 'entertainment' content are regular television and AM/FM radio than those from other regions, while those from Ontario and the Atlantic provinces were more likely to use social networking sites for 'news and information' and those in British Columbia were more likely to use podcasts for 'entertainment.' Those living in the North were more likely to say they use another source for 'news and information.'
- Racialized Canadians were more likely to report that their primary sources of 'news and information' content are online video streaming services and online social media and that their primary sources of 'entertainment' content are online social media and online music streaming services than those who are not racialized.
- Those who identify as Indigenous were more likely to report that their primary sources of 'news and information' content are online video streaming services and online social media than those who are not.

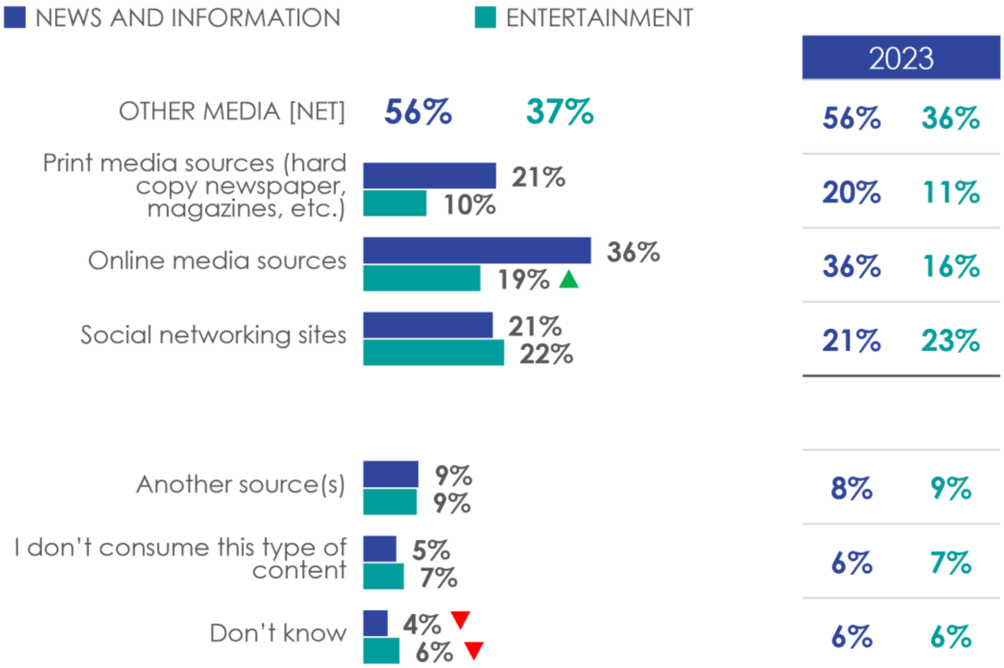
Figure 13: Primary source(s) for 'news and information' and 'entertainment' content (1/2)



Base: All respondents (n=2541)

Q18. What are your primary source(s) of media content for 'news and information' and 'entertainment'? Please select the most common source(s) you use for each.

Figure 14: Primary source(s) for 'news and information' and 'entertainment' content (2/2)



Base: All respondents (n=2541)
Q18. What are your primary source(s) of media content for 'news and information' and 'entertainment'? Please select the most common source(s) you use for each.

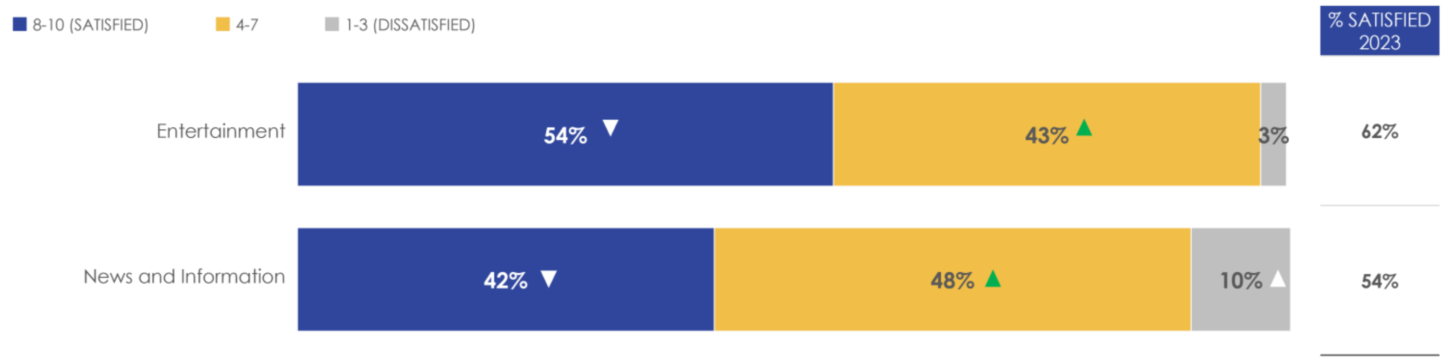
Satisfaction with programming by type of content

Among those who reported consuming each type of programming, over half (54%) expressed satisfaction with the 'entertainment' content they receive, while four in ten (42%) were satisfied with the 'news and information' content. Between four in ten and just under half expressed softer levels of satisfaction with either, while few were dissatisfied.

Compared to the baseline wave, fewer Canadians were satisfied with both 'entertainment' and 'news and information' content they receive, and a higher proportion expressed softer levels of satisfaction with either, and dissatisfaction with 'news and information' content.

- Canadians 65 or older were more likely to be satisfied with the 'news and information' content they receive (51%) than younger Canadians.
- Francophones were more likely to be satisfied with both the 'entertainment' (61% vs. 51%) and 'news and information' content they receive (55% vs. 38%) than anglophones. Similar differences were observed by region as those in Quebec were more likely to be satisfied with both the 'entertainment' (60%) and 'news and information' content they receive (54%) than those from other regions.

Figure 15: Satisfaction with quality of content for 'news and information' and 'entertainment'

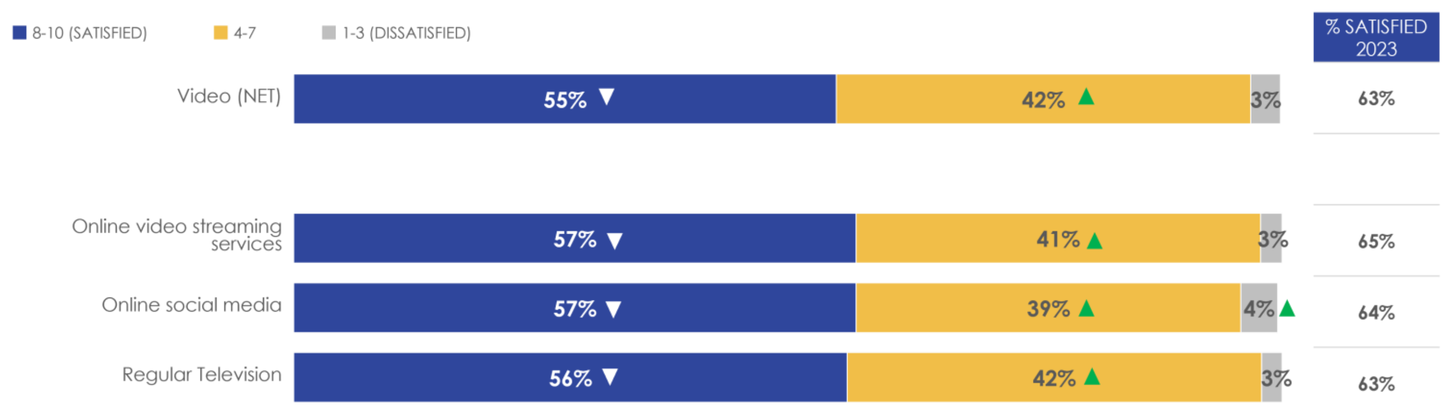


Base: Those who consume 'entertainment' (n=2226) and/or 'news and information' (n=2301) content
Q19. Overall, how satisfied are you with the quality of content you receive for…?

Over half were satisfied with the quality of 'entertainment' content they receive from video (55%), audio (55%), and other (53%) media sources.

Satisfaction was consistent by the type of video content they receive and just under than six in ten were satisfied with the content from online video streaming services (57%), online social media (65%) and regular television (56%). Compared to the baseline wave, satisfaction has declined for all types of video content, with more Canadians expressing softer views of each as well as a higher proportion who were dissatisfied with online social media.

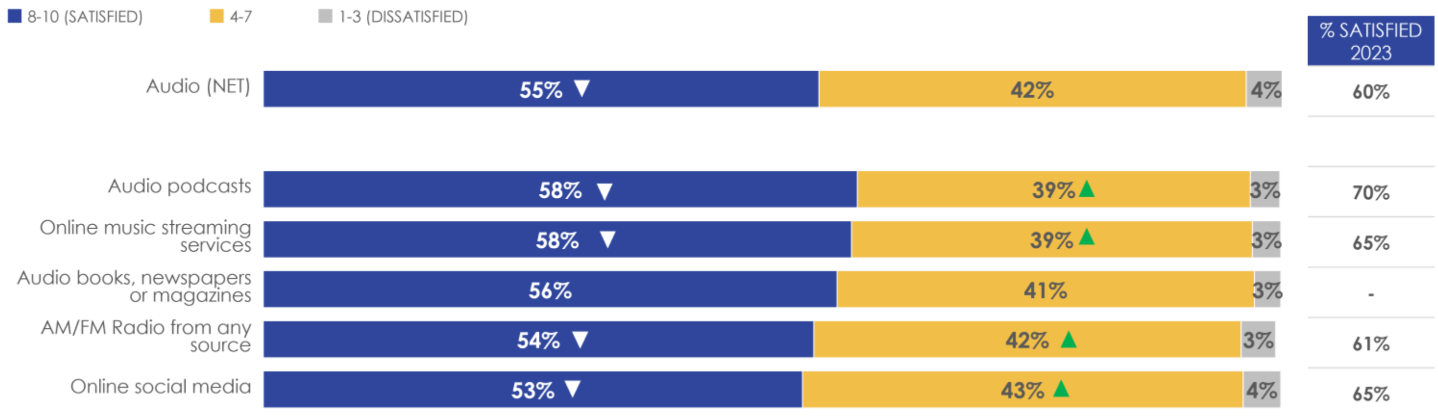
Figure 16: Satisfaction with quality of content for 'entertainment' by video source(s)



Base: Those who consume 'entertainment' (n=2226) content, base varies by source
Q19. Overall, how satisfied are you with the quality of content you receive for…?

Just under six in ten were satisfied with the content from audio podcasts (58%), and online music streaming (58%), followed by audio books, newspapers, or magazines (56%), AM/FR radio (54%), and online social media (53%). Compared to the baseline wave, satisfaction has declined for all types of audio content, with more Canadians expressing softer views of each.

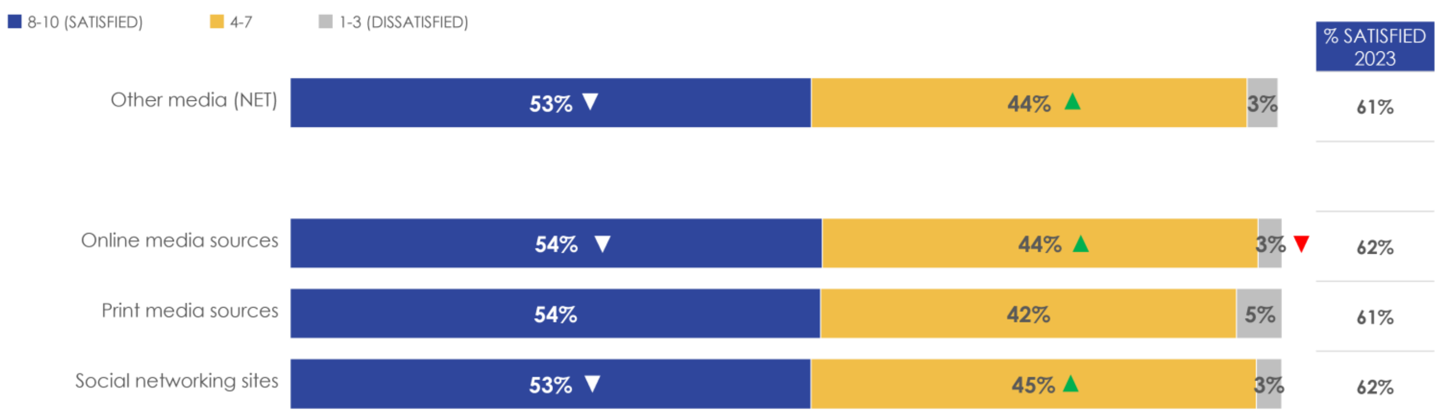
Figure 17: Satisfaction with quality of content for 'entertainment' by audio source(s)



Base: Those who consume 'entertainment' (n=2226) content, base varies by source
Q19. Overall, how satisfied are you with the quality of content you receive for…?

Satisfaction was consistent by the type of other media content and over half were satisfied with the content from online media (54%), print media sources (54%), and social networking sites (53%). Compared to the baseline wave, satisfaction has declined for most types of other content, with the exception of print media which has remained stable.

Figure 18: Satisfaction with quality of content for 'entertainment' by other media source(s)

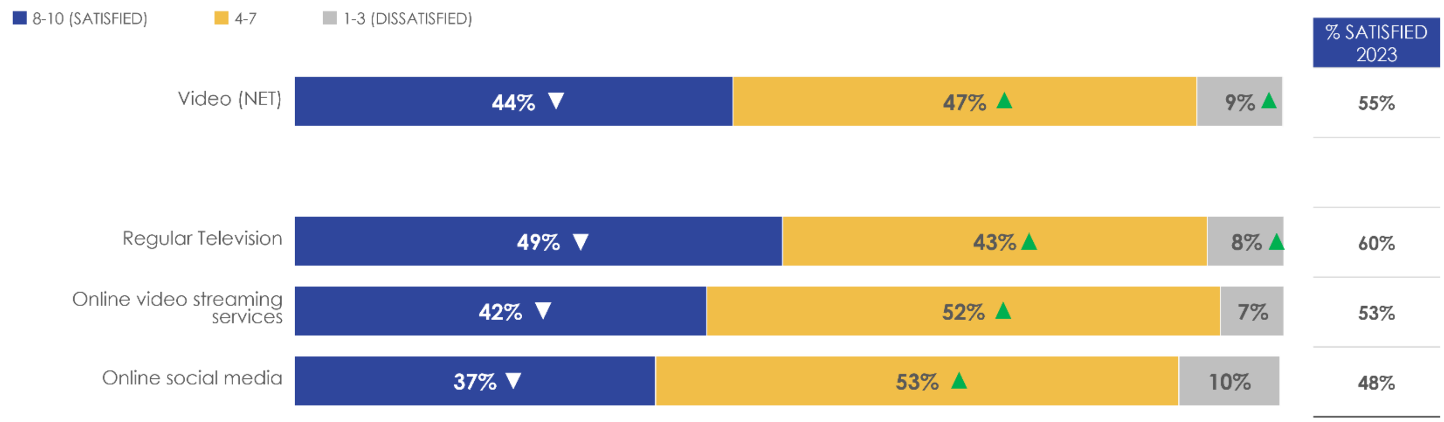


Base: Those who consume 'entertainment' (n=2226) content, base varies by source
Q19. Overall, how satisfied are you with the quality of content you receive for…?

Just over four in ten were satisfied with the quality of 'news and information' content they receive from video sources (44%), audio sources (45%), or other types of media sources (43%).

Half were satisfied with the video content from regular television (49%), followed by roughly four in ten for online video streaming (42%) and online social media (37%). Compared to the baseline wave, satisfaction has declined for all types of video content, with more Canadians expressing softer views as well as a higher proportion who were dissatisfied with regular television.

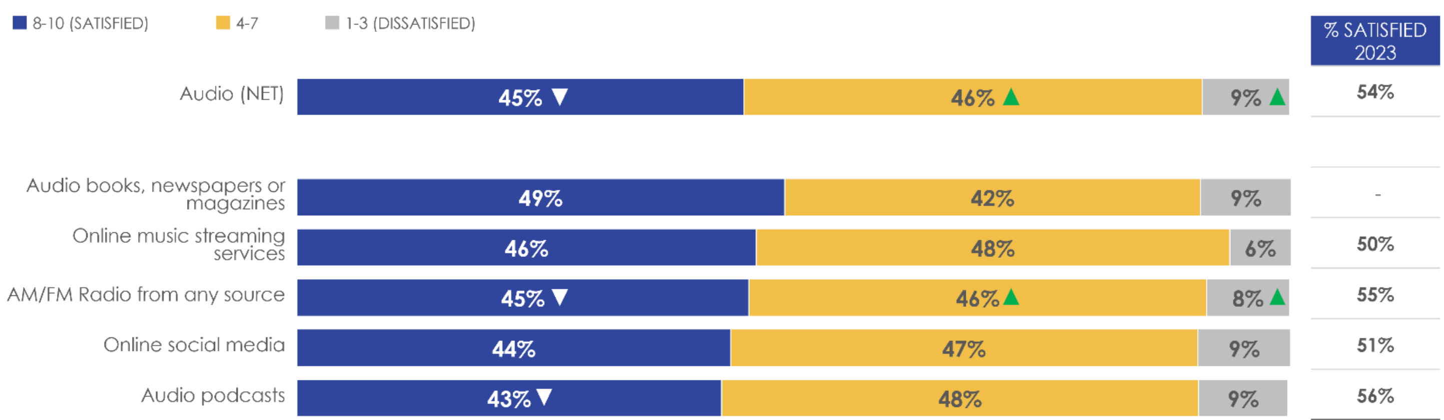
Figure 19: Satisfaction with quality of content for 'news and information' by video source(s)



Base: Those who consume 'news and information' (n=2301) content, base varies by source
Q19. Overall, how satisfied are you with the quality of content you receive for…?

Around half were satisfied with the content from audio books, newspapers, or magazines (49%), followed by online music streaming (46%), AM/FM radio (45%), online social media (44%) and audio podcasts (43%). Compared to the baseline wave, satisfaction has declined for AM/FM radio and audio podcasts with more Canadians expressing softer views as well as a higher proportion who were dissatisfied with AM/FM radio.

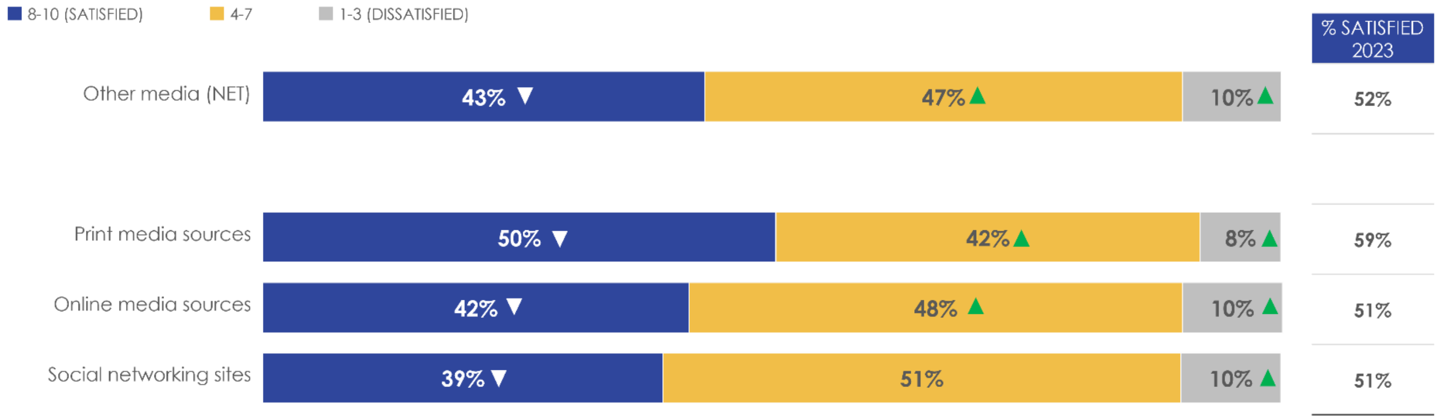
Figure 20: Satisfaction with quality of content for 'news and information' by audio source(s)



Base: Those who consume 'news and information' (n=2301) content, base varies by source
Q19. Overall, how satisfied are you with the quality of content you receive for…?

Half were satisfied with the content from print media (50%), followed by roughly four in ten for online media sources (42%) and social network sites (39%). Compared to the baseline wave, satisfaction has declined for all types of other media content, with more Canadians expressing softer views and dissatisfaction with each.

Figure 21: Satisfaction with quality of content for 'news and information' by other media source(s)



Base: Those who consume 'news and information' (n=2301) content, base varies by source
Q19. Overall, how satisfied are you with the quality of content you receive for…?

Broader Attitudes

Attitudes towards broadcasting

Roughly half of Canadians agreed that streaming video subscription services (49%) and television services (48% have become less affordable in the last year, while four in ten (38%) felt streaming audio subscription services have become less affordable.

Nearly four in ten agreed they are satisfied with the quality of Canadian music available today (38%), while three in ten said they 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%), and with the quality of Canadian television programs (31%), and that they see themselves reflected in the programming available (30%).

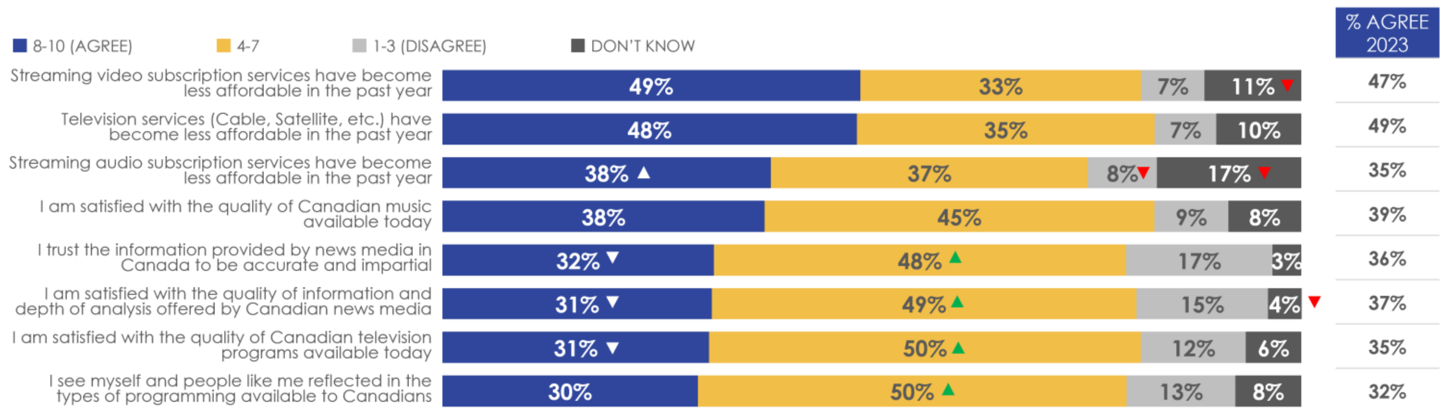
Compared to the baseline wave, more Canadians agreed that streaming audio subscriptions have become less affordable, while fewer expressed trust in Canadian news media, satisfaction with the quality and depth of news coverage, and with the quality of Canadian television programs.

Canadians aged 45-64 were more likely to agree that television services (Cable, Satellite, etc.) have become less affordable in the past year.

- Canadians 65 and older were more likely to agree that they trust the information provided by news media in Canada to be accurate and impartial, are satisfied with the quality of information and depth of analysis offered by Canadian news media, and with the quality of Canadian television programs available today.
- Francophones were more likely to agree that they are satisfied with the quality of Canadian music and television programs available today, trust the information provided by news media in Canada to be accurate and impartial, and are satisfied with the quality of information and depth of analysis offered by Canadian news media, and that they see themselves reflected in the types of programming available than anglophones. Similar differences were observed by region as those in Quebec were more likely to agree to the same statements as francophones when compared to those from other regions.

- Those living in the Atlantic provinces were more likely to feel that streaming audio subscription services have become less affordable in the past year than other regions.
- Those without children in the household (33%) were more likely to agree that they trust the information provided by news media in Canada to be accurate and impartial compared to those with children (27%), and that they see themselves reflected in the types of programming available to Canadians (33% vs. 29%).
- Non-racialized Canadians were more likely to agree that television services (Cable, Satellite, etc.) have become less affordable in the past year than racialized Canadians, while racialized Canadians were more likely to agree that streaming audio subscription services have become less affordable in the past year than non-racialized Canadians.
- Those identifying as Indigenous were more likely to be satisfied with the quality of Canadian music available today (48%) than those who do not (39%).

Figure 22: Attitudes towards broadcasting



Base: All answering (base varies)

Q20. Please indicate the extent to which you agree or disagree with each of the following statements.

Attitudes towards spam and nuisance

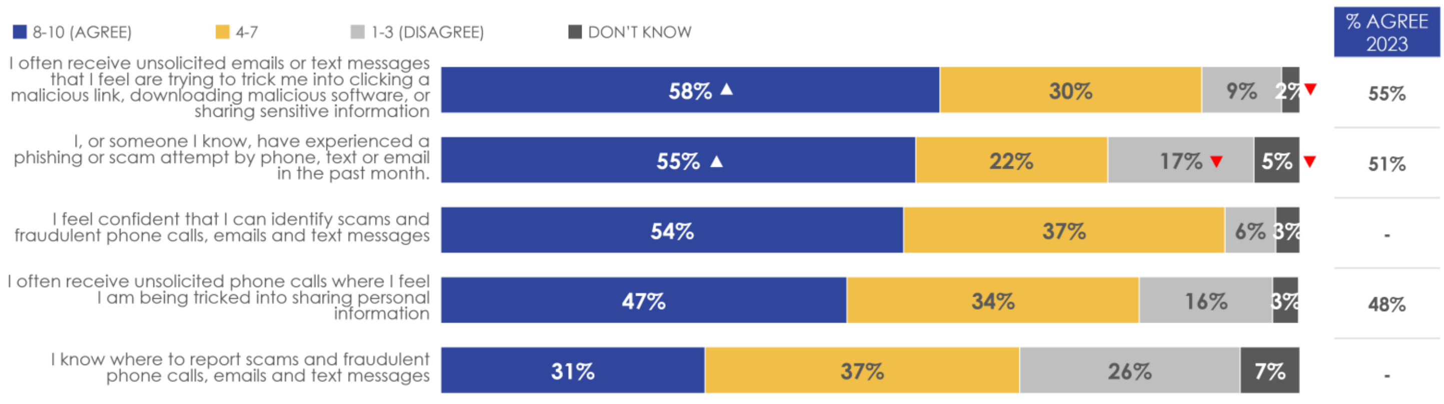
Six in ten Canadians agreed that they often receive unsolicited emails, texts and calls trying to trick them into clicking malicious links or sharing personal information (58%), more than half said that they or someone they know have experienced a scam attempt (55%), while just under half (47%) agreed that they often receive unsolicited calls trying to trick them into sharing personal information. More than half of Canadians agreed that they feel confident identifying fraudulent calls, emails, or text messages (54%), while three in ten (31%) said they know where to report scams.

Compared to the baseline wave, more Canadians agreed 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.

- Canadians over 65 were most likely to say they often receive unsolicited phone calls where they feel they are being tricked into sharing personal information, and that they know where to report scams and fraudulent phone calls, emails, and text messages than younger Canadians.
- Anglophones (58%) were more likely to say they or someone they know has experienced a phishing or scam attempt by phone, text or email in the past month than francophones (45%).

- Those living in Ontario were more likely to say they often receive unsolicited emails or text messages that they feel are trying to trick them into clicking a malicious link, downloading malicious software, or sharing sensitive information, that they often receive unsolicited phone calls where they feel they are being tricked into sharing personal information, and that they or someone they know have experienced a phishing or scam attempt by phone, text, or email in the past month than those in other regions.
- Higher income households were more likely to agree that they often receive unsolicited emails trying to trick them into clicking malicious links, and that they or someone they know have experienced a scam attempt than lower income households.

Figure 23: Attitudes towards spam and nuisance



Base: All answering (base varies)

Q20. Please indicate the extent to which you agree or disagree with each of the following statements.

Attitudes towards telecommunications

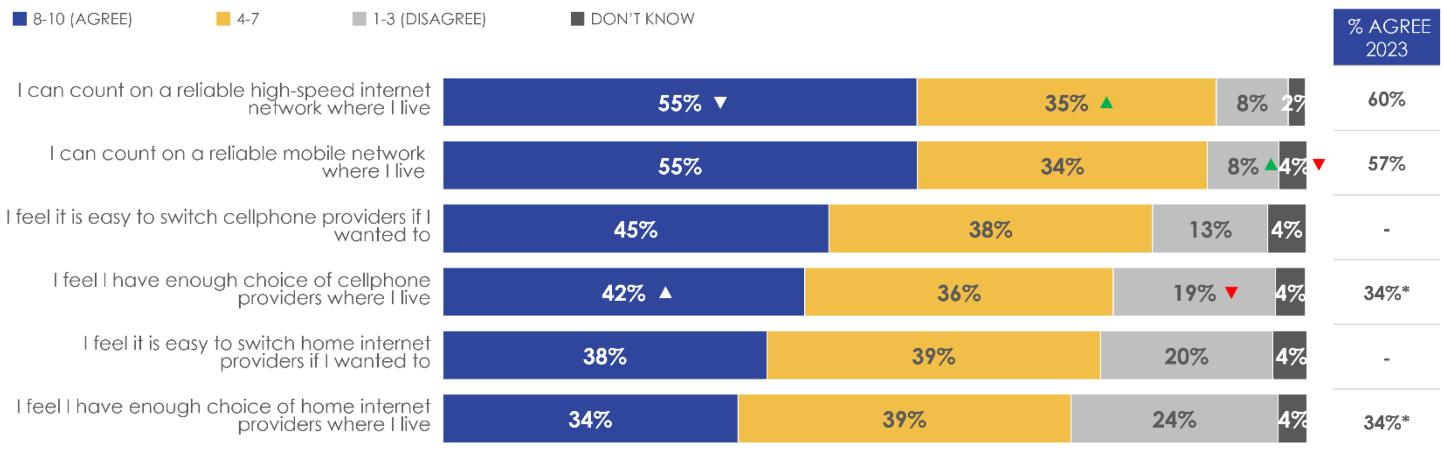
Over half of Canadians agreed that they can count on reliable high-speed internet (55%) and mobile networks (55%) where they live. Over four in ten agreed that it is easy to switch cellphone providers if they wanted to (45%), and that they have enough choice of cellphone providers where they live (42%), while fewer than four in ten felt it is easy to switch internet providers if they wanted to (38%), and one-third (34%) that they feel they have enough choice of cellphone providers.

Compared to the baseline wave, more Canadians agreed that they have enough choice of cellphone providers where they live, while fewer agreed that they can count on reliable high-speed internet where they live, and a higher proportion disagreed that they can count on reliable mobile networks.

- Canadians aged 65+ were more likely to say they can count on a reliable high-speed internet and mobile networks where they live, to feel they have enough choice of cellphone providers, and that it is easy to switch cellphone or internet providers if they wanted to than younger Canadians.
- Francophones were more likely to agree that they count on reliable high-speed internet and mobile networks where they live, that they have enough choice of cellphone or internet providers, and to feel it is easy to switch cellphone or internet providers if they wanted to compared to anglophones. Similar differences were observed by region as those in Quebec were more likely to agree to the same statements as francophones when compared to those from other regions.

- Those living in the North were 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.
- Canadians with household incomes under $60K were more likely to agree that they have enough choice of cellphone providers where they live than those with higher incomes.
- Racialized Canadians (52%) were less likely to agree that they can count on reliable high-speed internet networks where they live than those who are not racialized (58%).
- Those who identify as Indigenous (45%) were less likely to agree that they can count on reliable high-speed internet networks where they live than those who are not (58%).

Figure 24: Attitudes towards telecommunications (1/2)



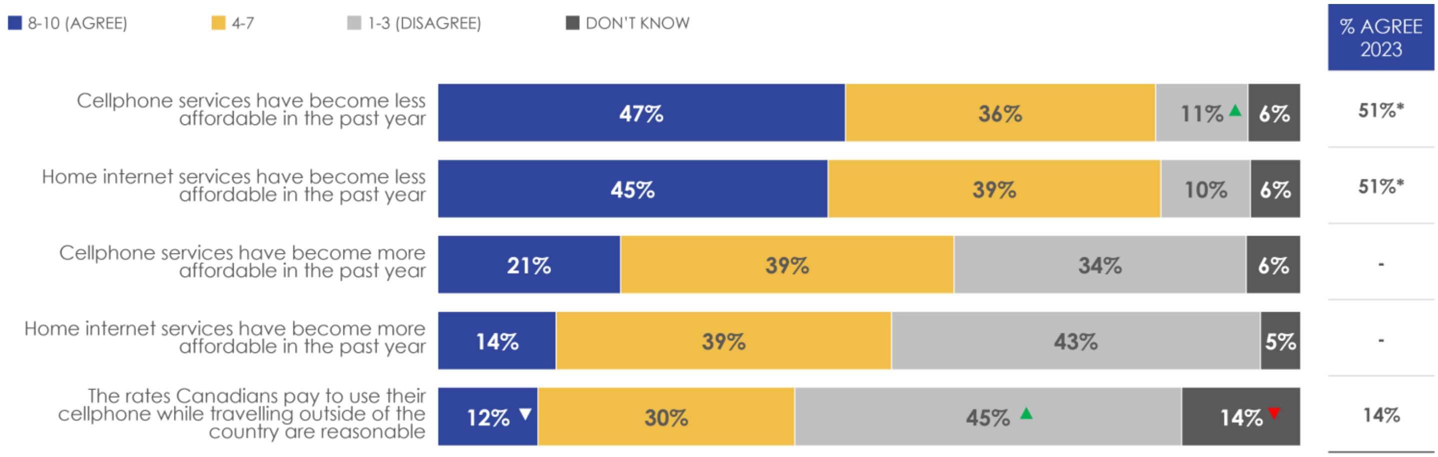
Base: All answering (base varies)
Q20. Please indicate the extent to which you agree or disagree with each of the following statements.
**Note: Broader statement was asked in 2023 as follows: 'I feel I have enough choice of telecommunications providers where I live'*

Just under half of Canadians agreed that cellphone (47%) and home internet services (45%) have become less affordable in the last year, while roughly one in ten felt the rates Canadians pay to use their cellphone while travelling internationally are reasonable (12%). Compared to the baseline wave (14%), fewer Canadians agreed that international cellphone usage rates are reasonable.

New this wave, alternative wording was included for both statements about affordability to assess if results differed when asked if each service were 'more affordable' in the past year. Results for home internet services largely consistent and the inverse of the previous wording, while there were greater differences in responses between statements about cellphone services. One in five (21%) agreed that cellphone services have become more affordable in the last year, while roughly one in ten felt home internet has become more affordable.

- Canadians ages 45-54 were more likely to agree that home internet services have become less affordable in the past year. Canadians under 55 were more likely to agree that the rates Canadians pay to use their cellphone while travelling outside of the country are reasonable than those over 55, while those 25-44 were more likely to agree that cellphone services have become more affordable in the past year. Canadians under 35 were more likely to agree that home internet services have become more affordable in the past year than those over 35.
- Those with children in the household (53%) were more likely to agree that cellphone services have become less affordable in the past year than those without (45%).

Figure 25: Attitudes towards telecommunications (2/2)



Base: All answering (base varies)

Q20. Please indicate the extent to which you agree or disagree with each of the following statements.

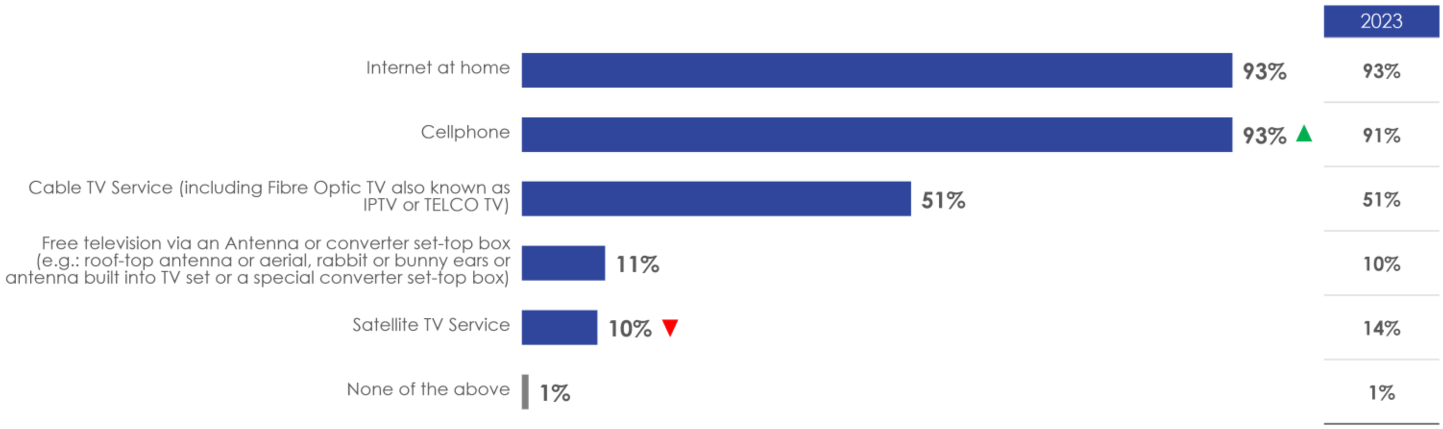
**Note: Broader statement was asked in 2023 as follows: 'Telecommunications services have become less affordable in the past year'*

Classification Questions

More than nine in ten Canadians reported they currently have internet (93%) or cellphone service (93%), while half said they receive cable TV service (51%). One in ten reported they currently have satellite TV (10%) or free television services (11%). Compared to the baseline wave, more Canadians reported having cellphone services, while fewer said they have satellite TV service.

- Canadians over the age of 45 (in particular 65 or older, 72%) were more likely to report they currently have cable TV service than those under the age of 45.
- Francophones (60%) were more likely to say they have cable TV service than anglophones (50%), while anglophones (11%) were more likely to report having satellite TV service than francophones (7%).
- Those living in Alberta (97%) were more likely to say they currently receive cellphone service than those in other regions, while those living in Quebec (58%) and British Columbia (60%) were more likely to say they receive cable TV service. Those living in the North were more likely to say they have satellite TV service (17%).
- Households with income less than $60k were less likely to report they currently have cellphone service than those with higher household income.
- Those with children in the household were more likely to report having cellphone (95%) or internet service (96%), while those without children were more likely to report having cable TV service (53%).
- Canadians who identify as TSLGBTQ+ were less likely to report they currently have cable TV service (37%) than those who identify as heterosexual (52%) and were more likely to say they have free television via an Antenna or converter set-top box (17% vs. 10%).
- Racialized Canadians were more likely to report they currently have cellphone service (95%) than those who are not racialized (93%). Racialized Canadians (13%) were more likely to report having free television via an antenna or converter set-top box than non-racialized Canadians (9%).
- Those who identify as Indigenous were more likely to report they currently have satellite TV service (18%) than those who are not (9%) and those who are Indigenous (15%) were more likely to report having free television via an antenna or converter set-top box than those who are not (9%).

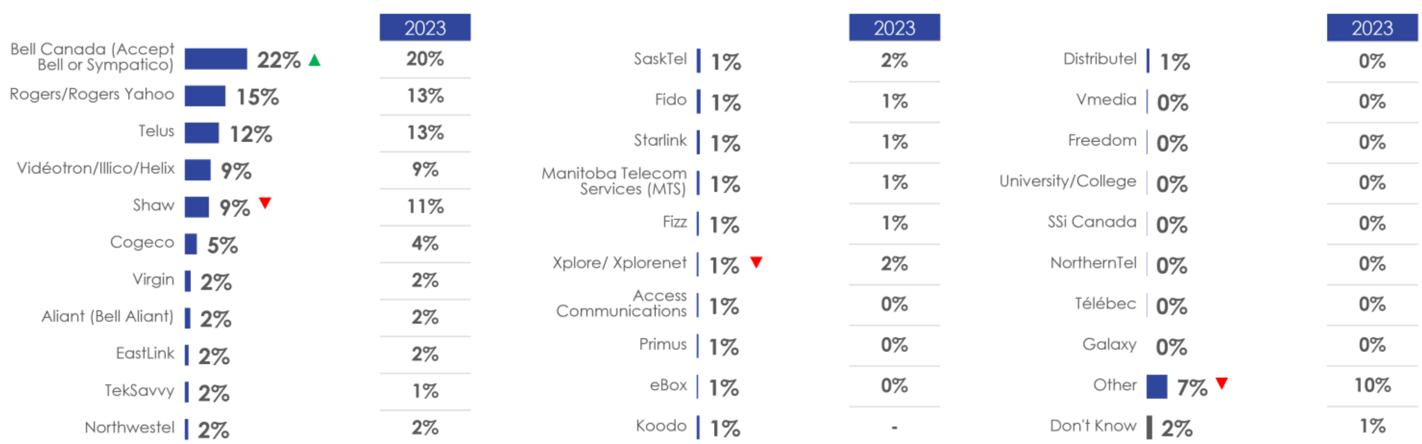
Figure 26: Service(s) received



Base: All respondents (n=2541)
Q1. Which of the following telecommunications and television services do you currently have for your personal use? Please select all that apply.

Among those who currently have **internet at home**, the most common service provider was Bell Canada (22%), followed by Rogers (15%) and Telus (12%), Videotron (9%), and Shaw (9%). Compared to the baseline wave, more reported that their service provider is Bell, while fewer said that their provider is Shaw, Xplore, or another provider.

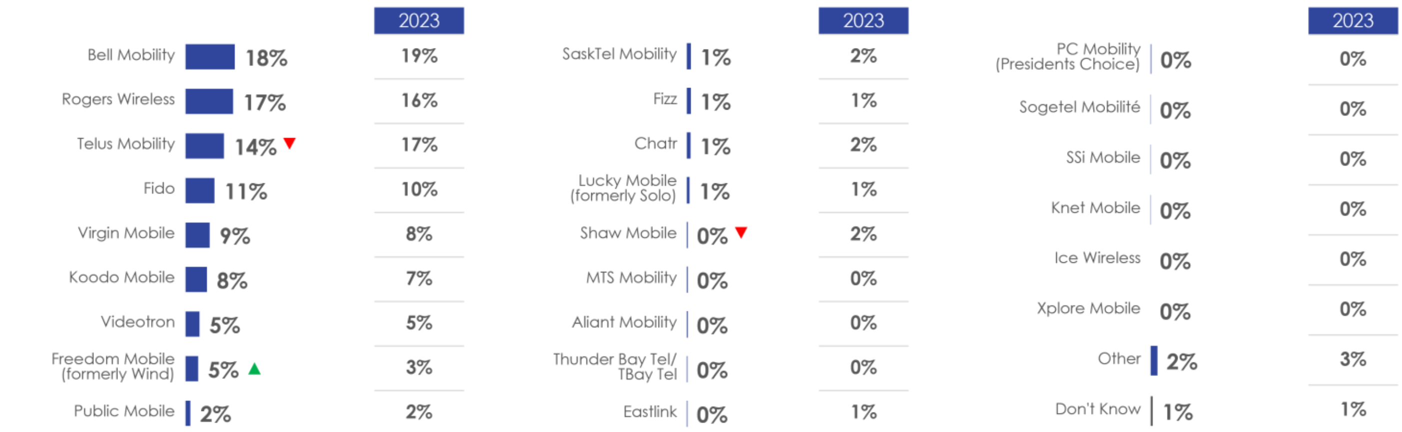
Figure 27: Internet service provider



Base: Those who have internet services (n=2375)
Q4. Which company provides your home Internet connection?

Among those who currently have **cellphone service**, the most common service provider was Bell Mobility (18%), followed by Roger Wireless (17%) and Telus Mobility (14%). Other more common service providers included Fido (11%), Virgin Mobile (9%), Koodo Mobile (8%) and Videotron (5%). Compared to the baseline wave, fewer reported that their service provider is Telus Mobility or Shaw Mobile, while more said that their provider is Freedom Mobile.

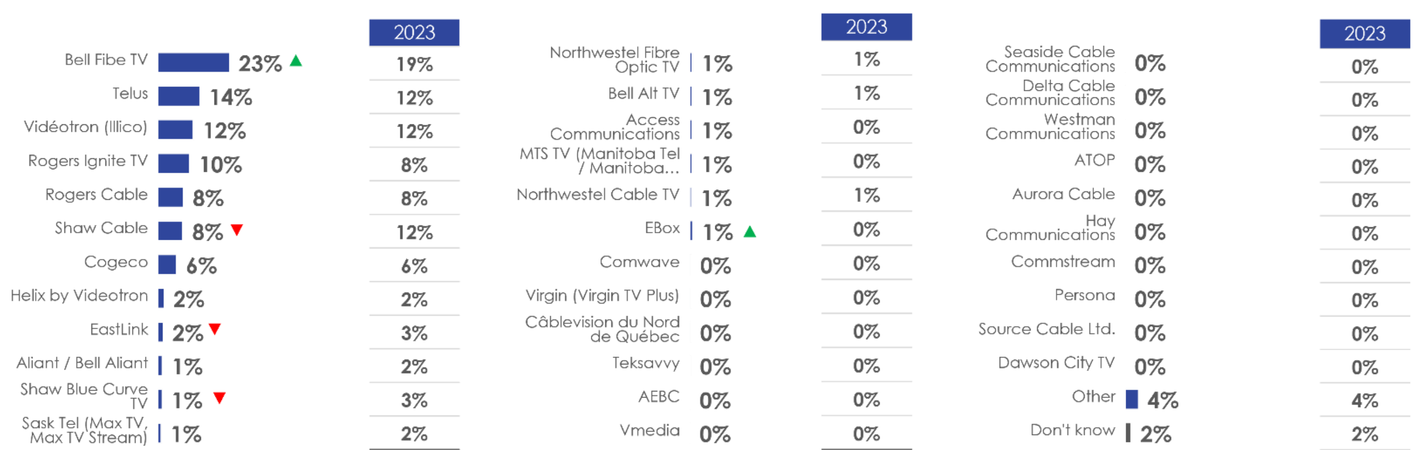
Figure 28: Cellphone service provider



Base: Those who have cellphone services (n=2364)
Q5. Which company provides your cellphone service?

Among those who currently have **cable TV service**, the most common service provider was Bell Fibe TV (23%), followed by Telus (14%), Vidéotron (12%), and Rogers Ignite TV (10%). Other more common providers included Rogers Cable and Shaw Cable (both 8%). Compared to the baseline wave, more reported that their cable TV service provider is Bell Fibre TV and EBox, while fewer said that their provider is Shaw Cable, EastLink, or Shaw Blue Curve TV.

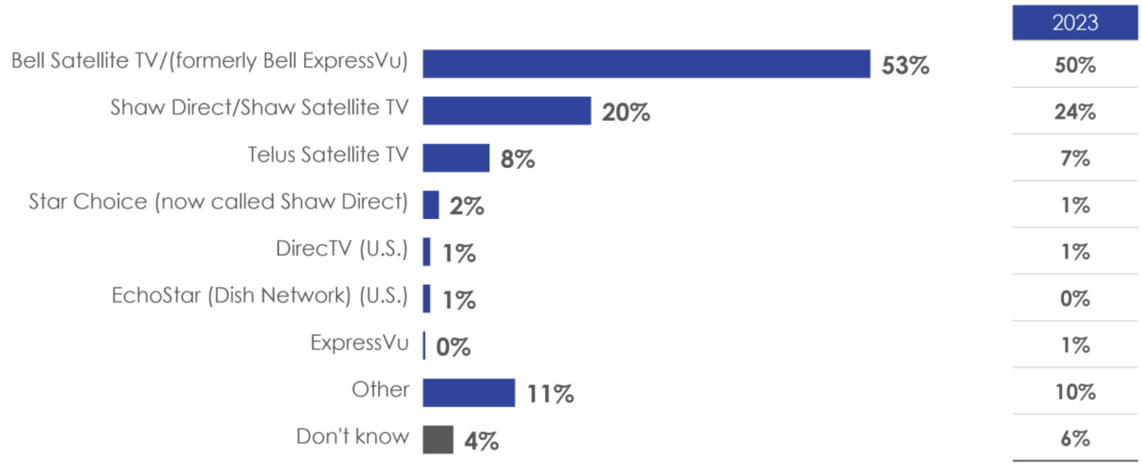
Figure 29: Cable TV service provider



Base: Those who have cable TV service (n=1312)
Q2. Which company provides your Cable TV Service?

Among those who currently have **satellite TV service**, the most common service provider was Bell Satellite TV (53%), followed by Shaw Direct/Shaw Satellite TV (20%), Telus (8%), or another provider (11%). There were no statistically significant shifts compared to the baseline wave.

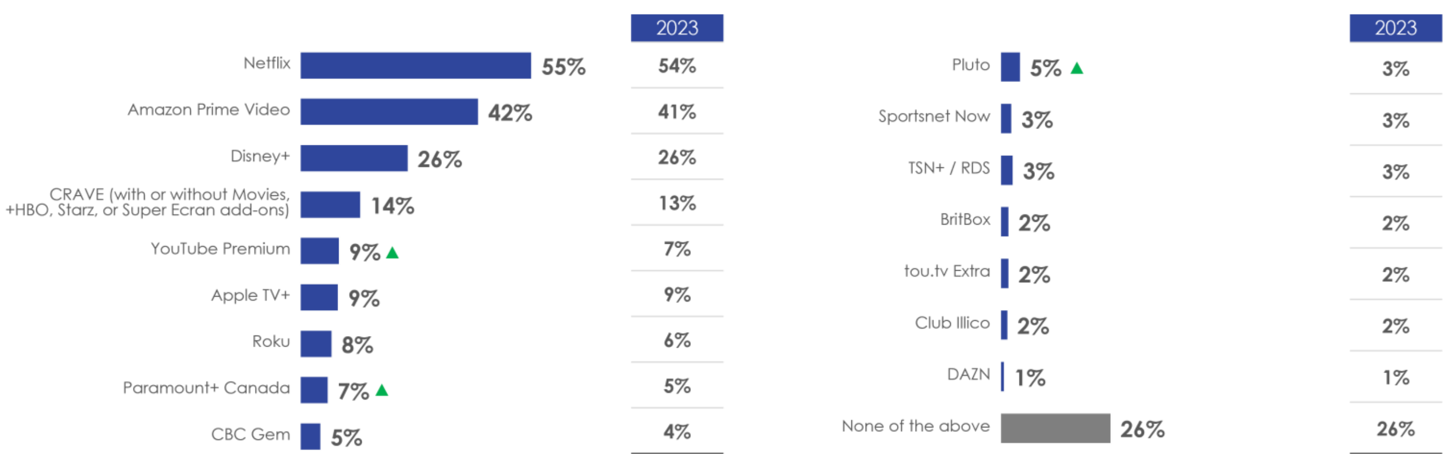
Figure 30: Satellite TV service provider



Base: Those who have satellite TV service (n=245)
Q3. Which company provides your Satellite TV Service?

Nearly three-quarters (74%) of Canadians reported they currently subscribe (or have access to) at least one type of **video streaming service**. The most common service received was Netflix (55%), followed by Amazon Prime Video (42%), and Disney+ (26%). Other more common services included CRAVE (14%), YouTube Premium (9%), Apple TV+ (9%), Roku (8%) and Paramount+ Canada (7%). Compared to the baseline wave, more reported being subscribed to YouTube Premium, Paramount+ Canada, or Pluto.

Figure 31: Video steaming services provider(s)



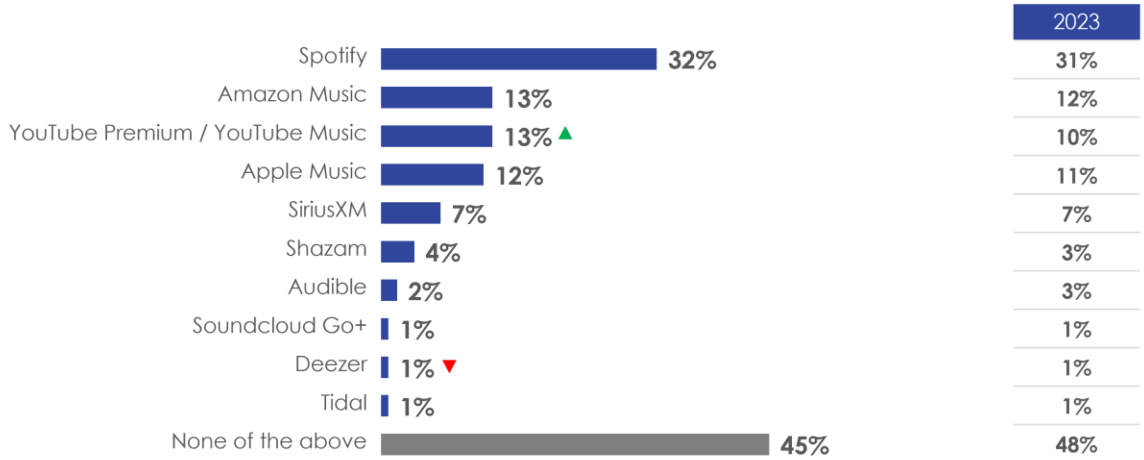
Base: All respondents (n=2541)
Q6. Do you currently subscribe (or have access) to any of the following video streaming services?

Over half (55%) of Canadians reported they currently subscribe (or have access to) at least one type of **audio streaming service**.[1] The most common service received was Spotify (32%), followed by Amazon Music and YouTube Music (13%

[1] Note: responses to this question are based on respondent perceptions of services to which they subscribe.

each), Apple Music (12%), and Sirius XM (7%). Compared to the baseline wave, more said they are subscribed to YouTube Music, while fewer said they are subscribed to Deezer.

Figure 32: Audio steaming services provider(s)



Base: All respondents (n=2541)
Q7. Do you currently subscribe (or have access) to any of the following audio streaming services?

Profile of Respondents

The demographic characteristics of the surveyed populations are presented below. Data presented are weighted proportions.

Figure 33: Profile of respondents (1/5)

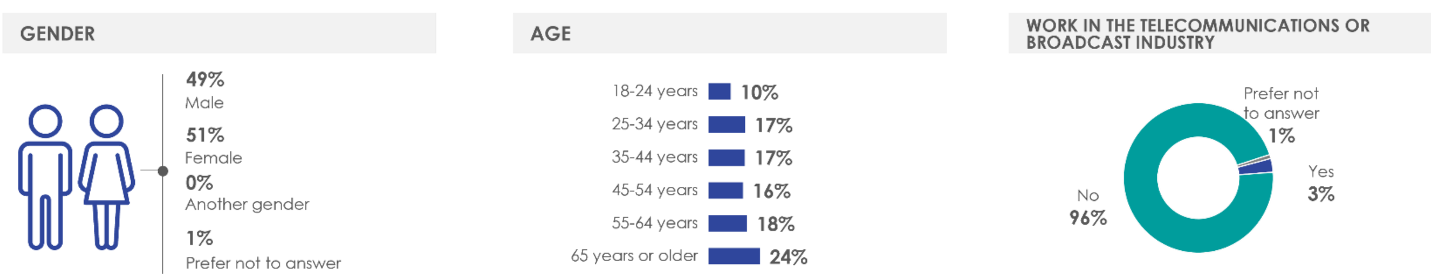


Figure 34: Profile of respondents (2/5)

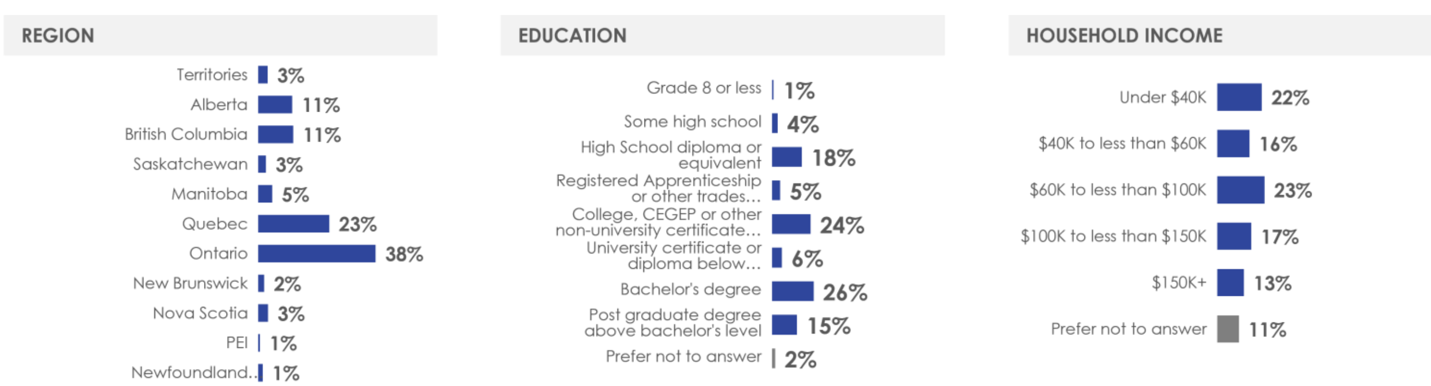


Figure 35: Profile of respondents (3/5)

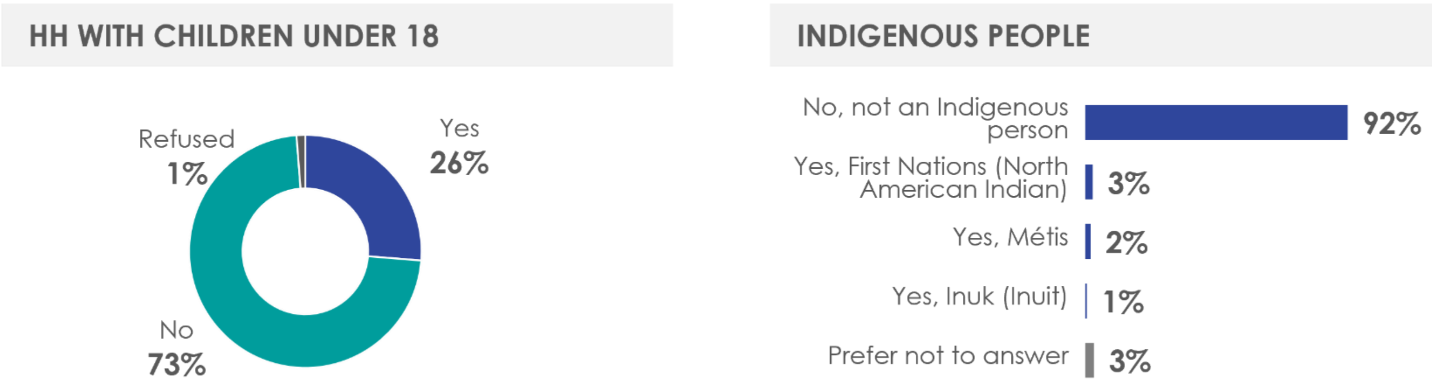


Figure 36: Profile of respondents (4/5)

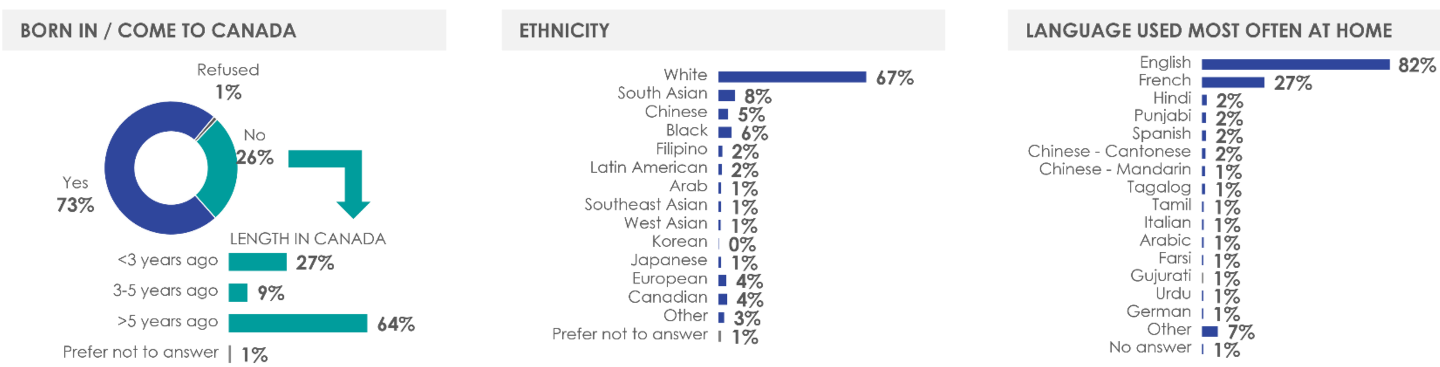
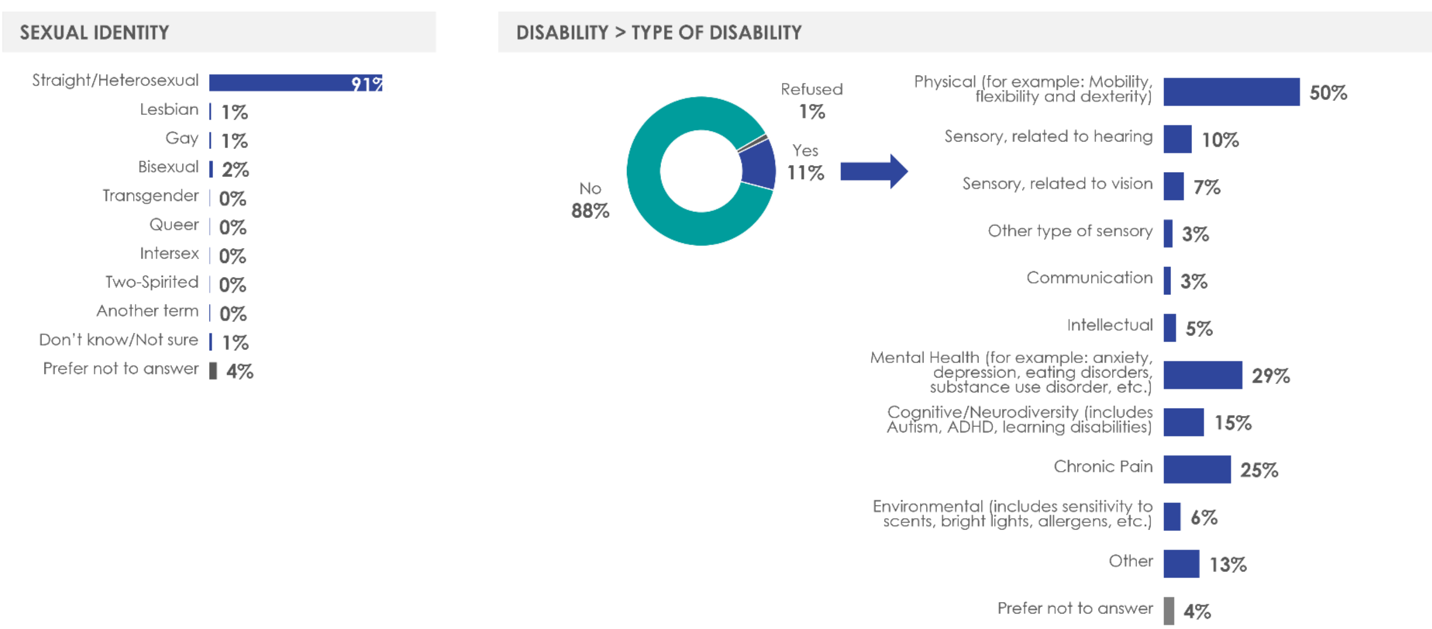


Figure 37: Profile of respondents (5/5)



Appendix

Detailed Methodology

Ipsos conducted a quantitative survey 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) stratified to the actual proportion of the Canadian population based on the 2021 Census by age, gender, and region. Results were accurate to within + 3.0 percentage points of what the results would have been had every Canadian been polled. Fieldwork was conducted from February 14 to March 29, 2024. Average survey length was 19 minutes (21 minutes online, 16 minutes by telephone) and the survey was offered in English and French.

Minimum sample sizes (of at least 100) were achieved among key audiences including Anglophones (n=1800), Francophones (n=513), Indigenous peoples (n=138), OLMCs (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 proved more challenging than anticipated and the target of n=100 could not be achieved in the fieldwork period (n=83 was achieved).

The online survey was administered using Computer Assisted Web Interviewing (CAWI) and the sample was sourced from the online panel from Ipsos' partner Canadian Viewpoint Inc. The survey platform will be Accessibility for Ontarians with Disabilities Act (AODA) compliant according to Web Content Accessibility Guidelines (WCAG2.0AA). Incentives are not used for recruitment purposes to ensure quality, but respondents are incentivized for completing survey directly proportionate to the amount of time taken to complete the survey and with comparable incentives offered by other online panel sources.

The telephone survey was administered through Computer Assisted Telephone Interviewing (CATI) and included a sampling of Canadians by landline and cell phone. Respondents will be selected at random utilizing a random digit dialing (RDD) approach. In order to help ensure the inclusion of people with disabilities TTY will be offered so that those respondents with hearing or speech impairment can readily participate.

The survey was registered with the Canadian Research Insights Council (CRIC) and a survey registration number made available so that survey respondents had the ability to verify the legitimacy of the survey as a research initiative sponsored by the Government of Canada.

Sample composition and weighting

The table below indicates the unweighted (counts and proportions) and weighted demographic distribution (proportions) of the sample. Weighting was applied to the responses to ensure that the final data reflects the adult population of Canada, as per Statistics Canada Census 2021, by age, gender, and region.

Figure 38: Sample frame

Age	Unweighted Sample Size	Unweighted Sample Proportions	Weighted Sample Proportions (Based on 2021 Census)
18-24	202	8%	10%
25-34	383	15%	17%

35-44	414	16%	17%
45-54	425	17%	16%
55-64	452	18%	18%
65+	665	26%	24%
Gender			
Men	1309	52%	49%
Women	1200	47%	51%
Other/ Prefer not to answer	32	1%	<1%
Region			
BC	347	14%	14%
AB	265	10%	11%
MB/ SK	163	6%	7%
ON	949	37%	38%
QC	571	23%	23%
ATLANTIC	183	6%	7%
NORTH	83	3%	<1%

Non-response Bias

If there is no systematic bias in responding to the survey, the unweighted profile of the survey participants would be very similar to the profile of the Canadian population according to the Statistics Canada Census 2021 (within the sampling error). The tables above demonstrate that, in most cases, the survey sample was very similar to the representative distribution of the Canadian population with respect to age, gender, and region. With respect to region, since disproportionate sampling was employed to provide larger sample sizes among those who reside in the North it was expected that the unweighted proportions for those regions would be higher than the actual proportion of the Canadian population. Aside from this, the unweighted profile of survey participants and the profile of the Canadian population are consistent, indicating that non-response bias was likely not an important factor in this research.

Response Rate

For the online survey, since a non-probability sample was used a response rate cannot be calculated. The following table provides the participation rate for this online survey. The participation rate for this survey was 3%, and it is calculated as follows:

Figure 39: Participation rate calculation

Disposition	Survey
Invalid Cases	683
Unresolved (U)	0
In-scope non-responding (IS)	57,970
Responding units (R)	3,765

Disposition	Survey
Participation Rate=R/(R+IS+U)	6%

Online survey cases can be broken down into four broad categories:

Invalid Cases

These can include only clearly invalid cases (for example, invitations mistakenly sent to people who did not qualify for the study, or incomplete or missing email addresses in a client-supplied list).

Unresolved (U)

These include all the cases where it cannot be established whether the invitation was sent to an eligible or an ineligible respondent or unit (for example, when email invitations bounce back or remain without an answer before the candidate could be qualified).

In-scope non-responding (IS)

These include all refusals, either implicit or explicit, all non-contacts and early break-offs of known eligible cases, and other eligible non-respondents (due to illness, leave of absence, vacation or other).

Responding units (R)

These include cases who have participated but who were disqualified afterwards (for example, when admissible quotas have been reached). It also includes all completed surveys or partially completed surveys that meet the criteria set by the researcher to be included in the analysis of the data.

Unresolved (U), in-scope (IS), and responding units (R) are all included in the broad category of ‘potentially eligible’ cases. However, invalid cases are not included in the calculation of outcome rates.

For this survey, a router was used to screen potential respondents and assign them to one of the surveys from the router. The router is a platform used to distribute and manage surveys. This means that individuals who were not eligible to participate in this study because they did not meet the screening criteria would be sent to participate in other surveys that might have been available in the router at that point.

The router assignment precedes the actual survey, and given this, it is not possible to estimate the number of cases ‘invited’ to participate and whether they were eligible or not. Therefore, it is not possible to estimate the ‘unresolved’ cases. For this survey, responding units are broken out as follows.

Figure 40: Completions

Disposition	Survey
Over quota	2,187
Qualified Completes	1,563
Partials	15

Disposition	Survey
Responding units (R)	3,765

For the telephone survey, the following table provides the response dispositions and response rate calculation. A minimum of five calls were placed in an effort to reach a selected respondent. The overall response rate achieved was 4% and was calculated as follows:

Figure 41: Call Disposition

Call outcome	Count of disposition
Call backs	**799**
Completed Interviews	**1000**
Disqualified	**575**
Language Barriers	**384**
No Answers	**28594**
Not In Service (Out of Scope)	**64137**
Over quota	**28**
Refusals	**12148**
Terminations	**103**
TOTAL IN SCOPE	**43631**
TOTAL RESPONDING	**1575**
OVERALL RESPONSE RATE	**4%**

Questionnaires

Online Questionnaire

Introduction

Thank you for your interest in taking this survey. The Canadian Radio-television and Telecommunications Commission (CRTC) has commissioned Ipsos, a market research firm, to conduct a public opinion survey. The CRTC is interested in learning your views on a variety of topics related to the telecommunications and broadcast services you use, the impressions of the service you receive and your general attitudes towards the communications sectors in Canada (i.e. cellphone, home phone, TV, radio, online services, etc.).

Your participation is voluntary and completely confidential. Your answers will remain anonymous. The information you provide will be used for research purposes only and will be administered according to the requirements of the *Privacy Act*, the *Access to Information Act*, and any other pertinent legislation.

The survey will take about 15 minutes to complete depending on your responses.

Should you wish to verify the credibility of this survey, you can utilize the Canadian Research Insights Council (CRIC) Research Verification Service by clicking here and entering the following project code: 20240220-IP036

If you have any questions about how to complete the survey or encountered any technical issues, please email Meghan.Miller@ipsos.com.

Thank you in advance for your participation.

Screeners

S1. What is your date of birth?
[DROPDOWN YEAR] 1910 – 2015
[DROPDOWN MONTH] January - December

[IF LESS THAN 18 YEARS OLD, THANK YOU AND TERMINATE]
HIDDEN VARIABLE- AGE QUOTAS
18-24 years
25-34 years
35-44 years
45-54 years
55-64 years
65 years or older

S2. What is your gender?
Male
Female

Non-binary person
Or, please specify:
Prefer not to say

S3. What is your postal code?
Please note: This question may be considered personal. We would like to remind you that your participation is strictly voluntary and that your responses are used for research purposes only. The answers that you provide will be presented in aggregate form and none of them will be linked back to you in any way. All data will be collected and processed in accordance with applicable data protection legislation.

Please enter your 6 digit postal code with no spaces.

Please specify:
Don't know / Prefer not to say

[IF S3 = Don’t know/ Prefer not to say ASK S4, OTHERWISE SKIP]

QS4. In which province or territory do you live?
Alberta
British Columbia
Manitoba
New Brunswick
Newfoundland and Labrador
Nova Scotia
Northwest Territories
Nunavut
Ontario
Prince Edward Island
Quebec
Saskatchewan
Yukon

31. Do you consider yourself to be:
Straight/Heterosexual
Lesbian
Gay
Bisexual
Transgender
Queer
Intersex
Two-Spirited
Another term

Don’t know/Not sure [MUTUALLY EXCLUSIVE][ANCHOR]

Prefer not to answer [MUTUALLY EXCLUSIVE][ANCHOR]

Provider Classification

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

Cellphone

Internet at home

Cable TV Service (including Fibre Optic TV also known as IPTV or TELCO TV)

Satellite TV Service

Free television via an Antenna or converter set-top box (e.g.: Roof-top antenna or aerial, rabbit or bunny ears or antenna built into TV set or a special converter set-top box)

None of the above [MUTUALLY EXCLUSIVE]

[IF SELECTED ‘Cable TV Service’ AT Q1 ASK Q2, OTHERWISE SKIP]

2. Which company provides your Cable TV Service?

Access Communications

AEBC

Aliant/ Bell Aliant

ATOP

Aurora Cable

Bell Fibe TV

Bell Alt TV

Hay Communications

Câblevision du Nord de Québec

Commstream

Comwave

Cogeco

Delta Cable Communications

EastLink

EBox

Helix by Videotron

MTS TV (Manitoba Tel/Manitoba Telecom Service)

Northwestel Fibre Optic TV

Persona

Rogers Cable

Rogers Ignite TV

Sask Tel (Max TV, Max TV Stream)

Seaside Cable Communications

Shaw Cable

Shaw Blue Curve TV

Source Cable Ltd.

Teksavvy

Telus

Vidéotron (Illico)

Westman Communications

Vmedia

Virgin (Virgin TV Plus)

Dawson City TV

Northwestel Cable TV

Other

Don't know

[IF SELECTED 'Satellite TV Service' AT Q1 ASK Q3, OTHERWISE SKIP]

3. Which company provides your Satellite TV Service?

Bell Satellite TV/ (formerly Bell ExpressVu)

DirecTV (U.S.)

EchoStar (Dish Network) (U.S.)

ExpressVu

Shaw Direct / Shaw Satellite TV

Star Choice (now called Shaw Direct)

Telus Satellite TV

Other

Don't know

[IF SELECTED 'Internet at home' AT Q1 ASK Q4, OTHERWISE SKIP]

4. Which company provides your home internet connection?

Access Communications

Aliant (Bell Aliant)

Bell Canada (Accept Bell or Sympatico)

Cogeco

Distributel

EastLink

Koodo

Manitoba Telecom Services (MTS)

NorthernTel

Primus

Rogers /Rogers Yahoo

SaskTel

Shaw

Starlink

TekSavvy

Telus

University/College

Vidéotron/Illico/Helix

Xplore/ Xplorenet)

Télébec

Fido

Virgin

eBox

Fizz

Freedom

Northwestel

Galaxy

SSi Canada

Vmedia

Other

Don't Know

[IF SELECTED ‘Cellphone’ AT Q1 ASK Q5, OTHERWISE SKIP]

5. Which company provides your cellphone service?

Aliant Mobility
Bell Mobility
Fido
Koodo Mobile
MTS Mobility
PC Mobility (Presidents Choice)
Public Mobile
Rogers Wireless
SaskTel Mobility
Telus Mobility
Videotron
Virgin Mobile
Freedom Mobile (formerly Wind)
Eastlink
Chatr
Lucky Mobile (formerly Solo)
Thunder Bay Tel/TBay Tel
Fizz
Shaw Mobile
Ice Wireless
Knet Mobile
Sogetel Mobilité

SSi Mobile
Xplore Mobile
Other
Don't Know

6. Do you currently subscribe (or have access) to any of the following video streaming services?
[RANDOMIZE]
Netflix
Amazon Prime Video
CRAVE (with or without Movies, +HBO, Starz, or Super Ecran add-ons)
Apple TV+
Disney+
YouTube Premium
Club Illico
Pluto
Roku
Paramount+ Canada
tou.tv Extra
BritBox
CBC Gem
Sportsnet Now
DAZN
TSN+/ RDS
None of the above [MUTUALLY EXCLUSIVE]

7. Do you currently subscribe (or have access) to any of the following audio streaming services?
[RANDOMIZE]
Spotify
Apple Music
YouTube Premium/YouTube Music
Soundcloud Go+
Amazon Music
SiriusXM
Tidal
Deezer
Audible
Shazam
None of the above [MUTUALLY EXCLUSIVE]

Sentiment towards Provider(s)

[ASK Q10 IF Q1 EQUAL ANY OF CELLPHONE, HOME INTERNET, CABLE TV, SATELLITE TV, OTHERWISE SKIP TO Q12 THEN SKIP TO Q18]

10. Thinking about the last month, have you or anyone in your household made changes to any of your cellphone, television and/ or streaming services to make them more affordable? This may include altering the services you receive, that you planned on cancelling but were convinced to stay with a better price, cancelling and switching to a different provider or cancelling the service entirely.

[ROWS]

Made changes to make services more affordable

Planned on cancelling but was convinced to stay with a better price

Cancelled and switched to a different provider

Cancelled service entirely

[COLUMNS]

Yes

No

[IF SELECTED YES TO EITHER 'Made changes', 'Planned on cancelling' OR 'Cancelled and switched to a different provider' AT Q10 ASK Q11, OTHERWISE SKIP]

11. Which of these services did you, or someone in your household, [IF SELECTED 'Made changes' at Q10 INSERT 'make changes to'],[IF SELECTED 'Planned on cancelling' at Q10 INSERT 'plan on cancelling but were convinced to stay with a better price instead'],[IF SELECTED 'Cancelled' INSERT 'cancel and switch to a different provider'] in the last month?

[ROWS]

[INSERT SERVICE(S) INDICATED AT Q1 AND Q6, Q7]

Cellphone service

Home internet connection

Cable TV Service

Satellite TV Service

Video streaming services

Audio steaming services

[COLUMNS]

Made changes to make services more affordable

Planned on cancelling but was convinced to stay with a better price

Cancelled and switched to a different provider

12. And, which of these services did you, or someone in your household, cancel entirely?

Cellphone service

Home internet connection

Cable TV Service

Satellite TV Service

[IF NONE OF THE ABOVE IS SELECTED AT Q6 INSERT 'Video streaming services']

[IF NONE OF THE ABOVE IS SELECTED AT Q7 INSERT 'Audio steaming services']

[IF SELECTED 'No' for any services asked at Q10 ASK Q13NEWOTHERWISE SKIP]

13NEW. You indicated that your household has not made changes to one or more of the telecommunications, television, audio and/or video subscription services you receive in the last month. Why would you say you have not made changes to these services?

[INSERT TEXT BOX]

No comment

14. How confident or not are you that you and your household will be able to pay for your telecommunications, television, audio and/or video subscription services without making any changes in the next three months?

[INSERT SERVICE(S) INDICATED AT Q1 AND Q6, Q7]

Cellphone service [SHOW IF SELECTED AT Q1]

Home internet connection [SHOW IF SELECTED AT Q1]

Cable TV Service [SHOW IF SELECTED AT Q1]

Satellite TV Service [SHOW IF SELECTED AT Q1]

Video streaming services [SHOW IF NONE IS NOT SELECTED AT Q6]

Audio steaming services [SHOW IF NONE IS NOT SELECTED AT Q7]

SCALE 1- 10: 1 'Not at all confident', 10 'Very confident'

Prefer not to say

Don't know

14A. Have you experienced any major service disruptions lasting 24 hours or longer for any of the telecommunications, television, audio and/or video subscription services you receive? Please select all that apply.

[INSERT SERVICE(S) INDICATED AT Q1 AND Q6, Q7]

Cellphone service [SHOW IF SELECTED AT Q1]

Home internet connection [SHOW IF SELECTED AT Q1]

Cable TV Service [SHOW IF SELECTED AT Q1]

Satellite TV Service [SHOW IF SELECTED AT Q1]

Video streaming services [SHOW IF NONE IS NOT SELECTED AT Q6]

Audio steaming services [SHOW IF NONE IS NOT SELECTED AT Q7]

None of the above

Perceptions of the CRTC

14B. Overall, how informed are you about the mandate and role of the Canadian Radio-television and Telecommunications Commission (CRTC)?

Very well informed
Well informed
Not very well informed
Not informed

14C. The Canadian Radio-television and Telecommunications Commission (CRTC) is an administrative tribunal that regulates and supervises broadcasting and telecommunications in the public interest. It is dedicated to ensuring that Canadians have access to a world-class communication system that promotes innovation and enriches their lives.

How closely does this statement align with your understanding of the mandate and role of the CRTC before taking this survey?

Completely
Somewhat
A little
Not at all

14D. What is your impression of the CRTC?

Very favourable
Somewhat favourable
Neutral
Somewhat unfavourable
Very unfavourable
Don’t know enough to provide an opinion

[IF VERY FAVOURABLE, SOMEWHAT FAVOURABLE, NEUTRAL, SOMEWHAT UNFAVOURABLE OR VERY UNFAVOURABLE ASK Q14E, OTHERWISE SKIP]

14E. You indicated you have a [INSERT RESPONSE FROM Q14D] impression of the CRTC. Why do you say that?

[INSERT TEXT BOX]

14F. To what extent do you agree or disagree with the following statements:

[RANODMIZE]
I trust the CRTC to regulate and supervise the broadcasting and telecommunications in the public interest
I believe the CRTC’s work is beneficial to Canadians
I am interested in hearing, reading or seeing more from the CRTC

I have the information I need to make informed decisions on whether to participate in public consultations
I know how to participate in public consultation

[COLUMNS][SCALE]
1- 10: 1 ‘Strongly disagree’, 10 ‘Strongly agree’, Don’t know

14G. Do you recall seeing or hearing anything about the CRTC over the past year?

Yes
No

Primary source(s) and satisfaction with programming

18. What are your primary source(s) of media content for ‘news and information’ and ‘entertainment’? *Please select the most common source(s) you use for each.*

[ROWS]
News and information
Entertainment

[COLUMNS]**Video [HEADER]**
Regular Television (cable, satellite, etc. including online)
Online video streaming services (e.g. Netflix, Amazon Prime, Disney+, Crave)
Online social media (e.g. YouTube)
Audio [HEADER]
AM/FM Radio from any source (including online streams and HD radio broadcasts)
Online music streaming services (e.g. Spotify, Apple Music)
Online social media (e.g. YouTube)
Audio podcasts (e.g. Audible)
Audio books, newspapers or magazines
Other Media [HEADER]
Print media sources (hard copy newspaper, magazines, etc.)
Online media sources
Social networking sites
Another source(s)
I don’t consume this type of content [MUTUALLY EXCLUSIVE]
Don’t know [MUTUALLY EXCLUSIVE]

[IF SELECTED ‘I don’t consume this type of programming’ OR ‘Don’t know’ FOR ALL ITEMS AT Q18 SKIP, OTHERWISE CONTINUE]

19. Overall, how satisfied are you with the quality of content you receive for…?

[ROWS][RANDOMIZE]
[INSERT ITEMS FROM Q18 WHERE RESPONSE IS NOT ‘I don’t consume this type of programming’ OR ‘Don’t know’]

News and information
Entertainment

[COLUMNS]
SCALE 1- 10: 1 ‘Very dissatisfied’, 10 ‘Very satisfied’

Broader Attitudes

20. Please indicate the extent to which you agree or disagree with each of the following statements.

[ROWS][RANDOMIZE]
BROADCASTING [HEADER, DO NOT PROGRAM]
I trust the information provided by news media in Canada to be accurate and impartial
I am satisfied with the quality of information and depth of analysis offered by Canadian news media
I am satisfied with the quality of Canadian music available today
I am satisfied with the quality of Canadian television programs available today
I see myself and people like me reflected in the types of programming available to Canadians
Television services (Cable, Satellite, etc.) have become less affordable in the past year
Streaming video subscription services have become less affordable in the past year
Streaming audio subscription services have become less affordable in the past year

SPAM AND NUISANCE [HEADER, DO NOT PROGRAM]
I, or someone I know, have experienced a phishing or scam attempt by phone, text or email in the past month.
I often receive unsolicited phone calls where I feel I am being tricked into sharing personal information
I often receive unsolicited emails or text messages that I feel are trying to trick me into clicking a malicious link, downloading malicious software, or sharing sensitive information
I feel confident that I can identify scams and fraudulent phone calls, emails and text messages
I know where to report scams and fraudulent phone calls, emails and text messages

BROADBAND AND MOBILE [HEADER, DO NOT PROGRAM]
Cellphone services have become [SPLIT SAMPLE. HALF ASKED ‘more’, HALF ASKED ‘less’] affordable in the past year
Home internet services have become [SPLIT SAMPLE HALF ASKED ‘more’, HALF ASKED ‘less’] affordable in the past year
I can count on a reliable high-speed internet network where I live
I can count on a reliable mobile network where I live
I feel I have enough choice of cellphone providers where I live
I feel I have enough choice of home internet providers where I live
[IF SELECTED ‘Internet at home’ AT Q1 ASK] I feel it is easy to switch home internet providers if I wanted to
[IF SELECTED ‘Cellphone’ AT Q1 ASK] I feel it is easy to switch cellphone providers if I wanted to
The rates Canadians pay to use their cellphone while travelling outside of the country are reasonable

[COLUMNS][SCALE]

1- 10: 1 ‘Strongly disagree’, 10 ‘Strongly agree’, Don’t know

Classification questions

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

22. Do you work in the telecommunications or broadcast industry?
Yes
No
Prefer not to answer

23. Please indicate your annual household income before taxes.

Less than $5,000
$5,000-$9,999
$10,000-$14,999
$15,000-$19,999
$20,000-$24,999
$25,000-$29,999
$30,000-$34,999
$35,000-$39,999
$40,000-$44,999
$45,000-$49,999
$50,000-$54,999
$55,000-$59,999
$60,000-$64,999
$65,000-$69,999
$70,000-$74,999
$75,000-$79,999
$80,000-$84,999
$85,000-$89,999
$90,000-$94,999
$95,000-$99,999
$100,000-$124,999
$125,000-$149,999
$150,000-$199,999
$200,000-$249,999
$250,000 or more
Prefer not to answer

24. What is the highest degree or level of school you have completed?

Grade 8 or less
Some high school
High School diploma or equivalent
Registered Apprenticeship or other trades certificate or diploma
College, CEGEP or other non-university certificate or diploma
University certificate or diploma below bachelor's level
Bachelor's degree
Post graduate degree above bachelor's level
Prefer not to answer

25. Are there any children under 18 years old living or staying at your current address?

Yes
No
Prefer Not to Answer

26. Were you born in Canada?

Yes
No
Prefer not to answer

[IF NO AT Q26 ASK Q27, OTHERWISE SKIP]
27. How long have you lived in Canada?

Less than three years
Three to five years
More than five years
Prefer not to answer

28. Are you an Indigenous person, that is, First Nations (North American Indian), Métis or Inuk (Inuit)? If 'Yes', choose the option(s) that best describe(s) you. First Nations (North American Indian) includes both Status and Non-Status Indians.

No, not an Indigenous person [EXCLUSIVE]
Yes, First Nations (North American Indian)
Yes, Métis
Yes, Inuk (Inuit)
Prefer not to answer [EXCLUSIVE]

[IF NO AT Q28 ASK Q29, OTHERWISE SKIP]

29. Are you? Mark more than one option or specify, if applicable.

White

South Asian (e.g., East Indian, Pakistani, Sri Lankan, etc.)

Chinese

Black

Filipino

Latin American

Arab

Southeast Asian (e.g., Vietnamese, Cambodian, Laotian, Thai, etc.)

West Asian (e.g., Iranian, Afghan, etc.)

Korean

Japanese

Other — specify

Prefer not to answer

30. What is the language you use most often at home? If you use more than one language at home, please rank the two most used languages.[RANKING QUESTION, MUST RANK AT LEAST 'FIRST']

French

English

American Sign Language (ASL)

Arabic

Bengali

Chinese - Cantonese

Chinese - Mandarin

Chinese - other

Cree

Farsi

German

Greek

Gujurati

Hindi

Inuktitut

Italian

Japanese

Korean

Ojibwe

Portuguese

Punjabi

Quebec Sign Language (LSQ)

Russian

Spanish
Tagalog
Tamil
Urdu
Vietnamese
Other
Prefer not to answer

32. Do you identify as a person with a disability?

Yes
No
Prefer not to answer

[IF YES AT Q32 ASK Q33, OTHERWISE SKIP]
33. What type of disability do you have?
Physical (for example: Mobility, flexibility and dexterity)
Sensory, related to hearing
Sensory, related to vision
Other type of sensory
Communication
Intellectual
Mental Health (for example: anxiety, depression, eating disorders, substance use disorder, etc.)
Cognitive/Neurodiversity (includes Autism, ADHD, learning disabilities)
Chronic Pain
Environmental (includes sensitivity to scents, bright lights, allergens, etc.)
Other
Prefer not to answer

Telephone Questionnaire

Introduction

Hello, my name is (FULL NAME), AND I'm calling from Ipsos, an independent research company. We're conducting a survey for the CRTC (IF NEEDED: Canadian Radio-television and Telecommunications Commission) to ask your opinions on a variety of topics related to the telecommunications and broadcast services you use, the impressions of the service you receive and your general attitudes towards the communications sectors in Canada.

This survey will only take around 15 minutes. Just to confirm are you 18 years of age or older?

Would you prefer to continue in English or French?

Bonjour, je m'appelle (NOM COMPLET) et j'appelle de la part d'Ipsos, une société indépendante d'études de marché. Nous menons un sondage pour le CRTC (SI NÉCESSAIRE : Conseil de la radiodiffusion et des télécommunications canadiennes) pour vous demander votre avis à propos de divers sujets liés aux services de télécommunications et de diffusion que vous utilisez, vos impressions sur le service que vous recevez et vos attitudes générales envers les secteurs des communications au Canada.

Il ne vous faudra que 15 minutes environ pour répondre au sondage. Seulement pour confirmer, avez-vous 18 ans ou plus ?

Préférez-vous continuer en français ou en anglais?

1 – Continue (English or French)
1 – Continuer (en français ou en anglais)
2 – French Callback
2 – Appel ultérieur en français
3 – English Callback
3 – Appel ultérieur en anglais

Your participation is voluntary and completely confidential. Your answers will remain anonymous. The information you provide will be used for research purposes only and will be administered according to the requirements of the *Privacy Act*, the *Access to Information Act*, and any other pertinent legislation.

(IF NEEDED: Should you wish to verify the credibility of this survey, you can utilize the Canadian Research Insights Council (CRIC) Research Verification Service by clicking here and entering the following project code: 20240220-IP036

If you have any questions about how to complete the survey or encountered any technical issues, please email Meghan.Miller@ipsos.com)

Votre participation est volontaire et entièrement confidentielle. Vos réponses demeureront anonymes. Les informations que vous fournissez seront utilisées à des fins de recherche uniquement et gérées conformément aux exigences de la *Loi* *sur la protection des renseignements personnels*, de la *Loi sur l'accès à l'information* et de toute autre législation pertinente.

(SI NÉCESSAIRE : Si vous souhaitez vérifier la crédibilité de ce sondage, vous pouvez utiliser le service de vérification de recherche du Conseil de recherche et d'intelligence marketing canadien [CRIC] en cliquant ici et en entrant le code de projet suivant : 20240220-IP036

Si vous avez des questions concernant la manière de répondre au sondage ou si vous éprouvez des problèmes techniques, veuillez faire parvenir un courriel à Meghan.Miller@ipsos.com)

Screeners

S1. As we are looking to speak to a broad cross-section of the public could you please let me know in which month and year were born.

S1. Étant donné que nous cherchons à parler à un large éventail de publics, pourriez-vous s'il vous plaît me dire votre mois et votre année de naissance?

January – December

Janvier à décembre

1910 – 2015

[IF LESS THAN 18 YEARS OLD, THANK YOU AND TERMINATE]

[IF S1 = DK/ REF ASK S1A, OTHERWISE SKIP TO S4]

S1a. Which of the following age ranges do you fall into? (INTERVIEWER: READ LIST UNTIL INTERUPTED.)

S1a. À laquelle des tranches d'âge suivantes appartenez-vous? (INTERVIEWEUR : LIRE LA LISTE JUSQU'À INTERRUPTION.)

18-24

18 à 24 ans

25-34

25 à 34 ans

35-44

35 à 44 ans

45-54

45 à 54 ans

55-64

55 à 64 ans

65 years or older

65 ans ou plus

[HIDDEN VARIABLE- AGE QUOTAS]

18-24 years

25-34 years

35-44 years

45-54 years

55-64 years

65 years or older

[GENDER- BY OBSERVATION]

S4. In which province or territory do you live? (DO NOT READ LIST, ACCEPT ONE RESPONSE)

S4. Dans quelle province ou quel territoire habitez-vous? (NE PAS LIRE LA LISTE, ACCEPTER UNE SEULE RÉPONSE)

[SINGLE PUNCH]

Alberta
Alberta
British Columbia
Colombie-Britannique
Manitoba
Manitoba
New Brunswick
Nouveau-Brunswick
Newfoundland and Labrador
Terre-Neuve-et-Labrador
Nova Scotia
Nouvelle-Écosse
Northwest Territories
Territoires du Nord-Ouest
Nunavut
Nunavut
Ontario
Ontario
Prince Edward Island
Île-du-Prince-Édouard
Quebec
Québec
Saskatchewan
Saskatchewan
Yukon
Yukon

[PROGAMMER: SET REGIONAL QUOTA FROM S4, IF DK/REF SET BASED ON SAMPLE VALUE]

Provider Classification

1. Which of the following telecommunications and television services do you currently have for your personal use? (READ LIST, ACCEPT ALL THAT APPLY)

Parmi les services de télécommunication et de télévision suivants, lesquels utilisez-vous actuellement à des fins personnelles? (LIRE LA LISTE, ACCEPTER TOUTES LES RÉPONSES QUI S’APPLIQUENT)

[MULTIPUNCH]

Cellphone

Téléphone cellulaire
Internet at home
Internet à la maison
Cable TV Service (IF NECESSARY: including Fibre Optic TV also known as IPTV or TELCO TV)
Service de télévision par câble (SI NÉCESSAIRE : y compris la télévision par fibre optique, également appelée télé IP ou télé TELCO)
Satellite TV Service
Service de télévision par satellite
Free television via an Antenna or converter set-top box (IF NECESSARY: e.g.: Roof-top antenna or aerial, rabbit or bunny ears or antenna built into TV set or a special converter set-top box)
Télévision gratuite avec une antenne ou un boîtier décodeur numérique (SI NÉCESSAIRE : p. ex. : antenne ou antenne de toit, antenne lapin ou oreilles de lapin, ou antenne intégrée au téléviseur ou un boîtier décodeur numérique particulier)
None of the above [MUTUALLY EXCLUSIVE][DO NOT READ]
Aucune de ces réponses [MUTUALLY EXCLUSIVE][DO NOT READ]

[IF SELECTED 'Cable TV Service' AT Q1 ASK Q2, OTHERWISE SKIP]

2. Which company provides your Cable TV Service? (DO NOT READ, ACCEPT ONE RESPONSE)

Quelle entreprise vous fournit un service de télévision par câble? (NE PAS LIRE, ACCEPTER UNE SEULE RÉPONSE)

Access Communications
Access Communications
AEBC
AEBC
Aliant/ Bell Aliant
Aliant/ Bell Aliant
ATOP
ATOP
Aurora Cable
Aurora Cable
Bell Fibe TV
Bell Fibe TV
Bell Alt TV
Alt Télé de Bell
Hay Communications
Hay Communications
Câblevision du Nord de Québec
Câblevision du Nord de Québec
Commstream
Commstream
Comwave
Comwave
Cogeco
Cogeco

Delta Cable Communications
Delta Cable Communications
EastLink
EastLink
EBox
EBox
Helix by Videotron
Helix de Vidéotron
MTS TV (Manitoba Tel/Manitoba Telecom Service)
MTS TV (Manitoba Tel/Manitoba Telecom Service)
Northwestel Fibre Optic TV
Télévision à fibre optique de Northwestel
Persona
Persona
Rogers Cable
Télévision par câble de Rogers
Rogers Ignite TV
Rogers Ignite TV
Sask Tel (Max TV, Max TV Stream)
Sask Tel (Max TV, Max TV Stream)
Seaside Cable Communications
Seaside Cable Communications
Shaw Cable
Shaw Cable
Shaw Blue Curve TV
Shaw Blue Curve TV
Source Cable Ltd.
Source Cable Ltd.
Teksavvy
Teksavvy
Telus
Telus
Vidéotron (Illico)
Vidéotron (Illico)
Westman Communications
Westman Communications
Vmedia
Vmedia
Virgin (Virgin TV Plus)
Virgin (Virgin TV Plus)
Dawson City TV
Dawson City TV
Northwestel Cable TV

Télévision par câble de Northwestel
Other
Autre

[IF SELECTED 'Satellite TV Service' AT Q1 ASK Q3, OTHERWISE SKIP]

3. Which company provides your Satellite TV Service? (DO NOT READ LIST, ACCEPT ONE RESPONSE)

Quelle entreprise vous fournit un service de télévision par satellite? (NE PAS LIRE LA LISTE, ACCEPTER UNE SEULE RÉPONSE)

Bell Satellite TV/ (formerly Bell ExpressVu)
Bell Télé Satellite (anciennement Bell ExpressVu)
DirecTV (U.S.)
DirecTV (É.-U.)
EchoStar (Dish Network) (U.S.)
EchoStar (Dish Network) (É.-U.)
ExpressVu
ExpressVu
Shaw Direct / Shaw Satellite TV
Shaw Direct/Shaw Satellite TV
Star Choice (now called Shaw Direct)
Star Choice (maintenant appelée Shaw Direct)
Telus Satellite TV
Telus Satellite TV
Other
Autre

[IF SELECTED 'Internet at home' AT Q1 ASK Q4, OTHERWISE SKIP]

4. Which company provides your home Internet connection? (DO NOT READ LIST, ACCEPT ONE RESPONSE)

Quelle entreprise fournit votre connexion Internet à domicile? (NE PAS LIRE LA LISTE, ACCEPTER UNE SEULE RÉPONSE)

Access Communications
Access Communications
Aliant (Bell Aliant)
Aliant (Bell Aliant)
Bell Canada (Accept Bell or Sympatico)
Bell Canada (accepter Bell ou Sympatico)
Cogeco
Cogeco
Distributel
Distributel
EastLink
EastLink

Koodo
Koodo
Manitoba Telecom Services (MTS)
Manitoba Telecom Services (MTS)
NorthernTel
NorthernTel
Primus
Primus
Rogers /Rogers Yahoo
Rogers /Rogers Yahoo
SaskTel
SaskTel
Shaw
Shaw
Starlink
Starlink
TekSavvy
TekSavvy
Telus
Telus
University/College
Université/cégep
Vidéotron/Illico/Helix
Vidéotron/Illico/Helix
Xplore/Xplorenet
Xplore/Xplorenet
Télébec
Télébec
Fido
Fido
Virgin
Virgin
eBox
eBox
Fizz
Fizz
Freedom
Freedom
Northwestel
Northwestel
Galaxy
Galaxy
SSi Canada

SSi Canada
Vmedia
Vmedia
Other
Autre

[IF SELECTED ‘Cellphone’ AT Q1 ASK Q5, OTHERWISE SKIP]

5. Which company provides your cellphone service? (DO NOT READ LIST, ACCEPT ONE RESPONSE)

Quelle entreprise vous fournit vos services de téléphonie mobile? (NE PAS LIRE LA LISTE, ACCEPTER UNE SEULE RÉPONSE)

Aliant Mobility
Aliant Mobility
Bell Mobility
Bell Mobilité
Fido
Fido
Koodo Mobile
Koodo Mobile
MTS Mobility
MTS Mobility
PC Mobility (Presidents Choice)
PC Mobile (Le Choix du Président)
Public Mobile
Public Mobile
Rogers Wireless
Rogers Sans-fil
SaskTel Mobility
SaskTel Mobility
Telus Mobility
Telus Mobilité
Videotron
Vidéotron
Virgin Mobile
Virgin Mobile
Freedom Mobile (formerly Wind)
Freedom Mobile (anciennement Wind)
Eastlink
Eastlink
Chatr
Chatr
Lucky Mobile (formerly Solo)
Lucky Mobile (anciennement Solo)

Thunder Bay Tel/TBay Tel
Thunder Bay Tel/TBay Tel
Fizz
Fizz
Shaw Mobile
Shaw Mobile
Ice Wireless
Ice Wireless
Knet Mobile
Knet Mobile
Sogetel Mobilité
Sogetel Mobilité
SSi Mobile
SSi Mobile
Xplore Mobile
Xplore Mobile
Other
Autre

6. What video streaming services do you currently subscribe or have access to? (DO NOT READ LIST, CLARIFY FROM LIST IF NEEDED)

À quels services de diffusion vidéo en continu êtes-vous actuellement abonné(e) ou auxquels avez-vous accès? (NE PAS LIRE LA LISTE, CLARIFIER À PARTIR DE LA LISTE SI NÉCESSAIRE)

[MULTIPUNCH]

[RANDOMIZE]
Netflix
Netflix
Amazon Prime Video
Amazon Prime Video
CRAVE (with or without Movies, +HBO, Starz, or Super Ecran add-ons)
CRAVE (avec ou sans extensions Films, +HBO, Starz ou Super Écran)
Apple TV+
Apple TV+
Disney+
Disney+
YouTube Premium
YouTube Premium
Club Illico
Club Illico
Pluto
Pluto

Roku
Roku
Paramount+ Canada
Paramount+ Canada
tou.tv Extra
tou.tv Extra
BritBox
BritBox
CBC Gem
CBC Gem
Sportsnet Now
Sportsnet Now
DAZN
DAZN
TSN+/ RDS
TSN+/ RDS
None of the above [MUTUALLY EXCLUSIVE]
Aucune de ces réponses [MUTUALLY EXCLUSIVE]

7. What audio streaming services do you currently subscribe or have access to? (DO NOT READ LIST, CLARIFY FROM LIST IF NEEDED)

À quels services de diffusion audio en continu êtes-vous actuellement abonné(e) ou auxquels avez-vous accès? (NE PAS LIRE LA LISTE, CLARIFIER À PARTIR DE LA LISTE SI NÉCESSAIRE)

[MULTIPUNCH]
Spotify
Spotify
Apple Music
Apple Music
YouTube Premium/YouTube Music
YouTube Premium/YouTube Music
Soundcloud Go+
Soundcloud Go+
Amazon Music
Amazon Music
SiriusXM
SiriusXM
Tidal
Tidal
Deezer
Deezer
Audible
Audible

Shazam
Shazam
None of the above [MUTUALLY EXCLUSIVE]
Aucune de ces réponses [MUTUALLY EXCLUSIVE]

Sentiment towards Provider(s)

14. How confident or not are you that you and your household will be able to pay for each of the telecommunications, television, audio and/or video subscription services you receive without making any changes in the next three months? Using a scale from 1 to 10, where 1 is not at all confident and 10 is very confident.

Dans quelle mesure êtes-vous certain(e) que vous et votre foyer serez en mesure de payer pour chacun de vos services de télécommunications, de télévision, de diffusion audio et/ou vidéo en continu que vous recevez sans apporter de modifications au cours des trois prochains mois? Utilisez une échelle de 1 à 10, où 1 signifie « Pas du tout confiant(e) » et 10, « Très confiant(e) ». (Pour ce qui est) [INSERT SERVICE]?

[PROGRAMMER INSERT BASED ON SELECTIONS AT Q1, Q6, Q7. MULTIPUNCH]
Cellphone service **[SHOW IF CELLPHONE SELECTED AT Q1]**
Service de téléphonie mobile **[SHOW IF CELLPHONE SELECTED AT Q1]**
Home internet connection **[SHOW IF INTERNET AT HOME SELECTED AT Q1]**
Connexion Internet à domicile **[SHOW IF INTERNET AT HOME SELECTED AT Q1]**
Cable TV Service **[SHOW IF CABLE TV SELECTED AT Q1]**
Service de télévision par câble **[SHOW IF CABLE TV SELECTED AT Q1]**
Satellite TV Service **[SHOW IF SATELLITE TV SELECTED AT Q1]**
Service de télévision par satellite **[SHOW IF SATELLITE TV SELECTED AT Q1]**
Video streaming services **[DO NOT SHOW IF NONE/DK/REF SELECTED AT Q6]**
Services de diffusion vidéo en continu **[DO NOT SHOW IF NONE/DK/REF SELECTED AT Q6]**
Audio streaming services **[DO NOT SHOW IF NONE/DK/REF SELECTED AT Q7]**
Services de diffusion audio en continu **[DO NOT SHOW IF NONE/DK/REF SELECTED AT Q7]**

[SCALE 1- 10: 1 ‘Not at all confident’, 10 ‘Very confident’]

Perceptions of the CRTC

15a. Overall, how informed are you about the mandate and role of the Canadian Radio-television and Telecommunications Commission (CRTC)? (READ LIST)
Dans l’ensemble, dans quelle mesure estimez-vous être bien informé(e) du mandat et du rôle du Conseil de la radiodiffusion et des télécommunications canadiennes (CRTC)? (LIRE LA LISTE)

Very well informed
Très bien informé(e)
Well informed

Bien informé(e)
Not very well informed
Pas très bien informé(e)
Not informed
Pas informé(e)

16a. The Canadian Radio-television and Telecommunications Commission (CRTC) is an administrative tribunal that regulates and supervises broadcasting and telecommunications in the public interest. It is dedicated to ensuring that Canadians have access to a world-class communication system that promotes innovation and enriches their lives.
How closely does this statement align with your understanding of the mandate and role of the CRTC before taking this survey? (READ LIST)
Le Conseil de la radiodiffusion et des télécommunications canadiennes (CRTC) est un tribunal administratif qui réglemente et supervise la radiodiffusion et les télécommunications dans l'intérêt public. Son objectif est de garantir que les Canadiens ont accès à un système de communication de classe mondiale qui favorise l'innovation et enrichit leur vie.
Dans quelle mesure cet énoncé correspond-il à votre compréhension du mandat et du rôle du CRTC avant de répondre à ce sondage? (LIRE LA LISTE)

Completely
Tout à fait
Somewhat
Plus ou moins
A little
Un peu
Not at all
Pas du tout

17a. What is your impression of the CRTC? (READ LIST)
Quelle est votre opinion sur le CRTC? (LIRE LA LISTE)

Very favourable
Très favorable
Somewhat favourable
Plutôt favorable
Neutral
Neutre
Somewhat unfavourable
Plutôt défavorable
Very unfavourable
Très défavorable
Don't know enough to provide an opinion
Je n'en sais pas suffisamment pour en avoir une opinion

[IF VERY FAVOURABLE, SOMEWHAT FAVOURABLE, NEUTRAL, SOMEWHAT UNFAVOURABLE OR VERY UNFAVOURABLE ASK Q18a, OTHERWISE SKIP]

18a. Why do you say that? (PROBE ONCE FOR ADDITIONAL RESPONSES). (You indicated you have a **[INSERT RESPONSE FROM Q18a]** impression of the CRTC.)
Pourquoi dites vous cela? (SONDER UNE SEULE FOIS POUR OBTENIR D'AUTRES RÉPONSES.) (Vous avez indiqué que vous avez une opinion **[INSERT RESPONSE FROM Q18a]** du CRTC.)

[INSERT TEXT BOX]
No comment
Aucun commentaire

19a. To what extent do you agree or disagree with the following statements. Using a scale from 1 to 10, where 1 is strongly disagree and 10 is strongly agree. How about [INSERT ITEM]?
Dans quelle mesure êtesvous d'accord ou en désaccord avec les énoncés suivants? Utilisez une échelle de 1 à 10, où 1 signifie « Tout à fait en désaccord » et 10, « Tout à fait d'accord ». Qu'en est-il de [INSERT ITEM]?

[RANDOMIZE]
I trust the CRTC to regulate and supervise broadcasting and telecommunications in the public interest
Je fais confiance au CRTC pour réglementer et superviser la radiodiffusion et les télécommunications dans l'intérêt public
I believe the CRTC's work is beneficial to Canadians
Je crois que le travail du CRTC profite aux Canadiens
I am interested in hearing, reading or seeing more from the CRTC
Je souhaite entendre, lire ou voir plus d'informations de la part du CRTC
I have the information I need to make informed decisions on whether to participate in public consultations
J'ai les informations dont j'ai besoin pour prendre des décisions éclairées quant à ma participation aux consultations publiques
I know how to participate in public consultations
Je sais comment participer aux consultations publiques

[SCALE 1 to 10]

20a. Do you recall seeing or hearing anything about the CRTC over the past year?
Vous souvenez-vous d'avoir vu ou entendu quoi que ce soit au sujet du CRTC au cours de la dernière année?

Yes
Oui
No
Non

Primary source(s) and satisfaction with programming

18. What are your primary source(s) of media content for 'news and information'? And how about 'entertainment'? (DO NOT READ LIST, CLARIFY FROM LIST IF NEEDED)
Quelles sont vos principales sources de contenu médiatique pour les « actualités et information »? Et pour les « divertissements »? (NE PAS LIRE LA LISTE, CLARIFIER À PARTIR DE LA LISTE SI NÉCESSAIRE)

[MULTIPUNCH PER ITEM]

[ROWS]
News and information
Actualités et information
Entertainment
Divertissements

[COLUMNS]Video [HEADER]
[COLUMNS]Vidéo [HEADER]
Regular Television (cable, satellite, etc. including online)
Télévision classique (câble, satellite, etc., y compris en ligne)
Online video streaming services (e.g. Netflix, Amazon Prime, Disney+, Crave)
Services de diffusion vidéo en ligne (p. ex., Netflix, Amazon Prime, Disney+, Crave)
Online social media (e.g. YouTube)
Réseaux sociaux en ligne (p. ex., YouTube)

Audio [HEADER]
Audio [HEADER]
AM/FM Radio from any source (including online streams and HD radio broadcasts)
Radio AM/FM à partir de n'importe quelle source (y compris la diffusion en continu en ligne et les émissions de radio HD)
Online music streaming services (e.g. Spotify, Apple Music)
Services de diffusion de musique en ligne (p. ex., Spotify, Apple Music)
Online social media (e.g. YouTube)
Réseaux sociaux en ligne (p. ex., YouTube)
Audio podcasts (e.g. Audible)
Baladodiffusions (p. ex., Audible)
Audio books, newspapers or magazines
Livres audio, journaux ou revues
Other Media [HEADER]
Autre média [HEADER]
Print media sources (hard copy newspaper, magazines, etc.)
Sources de médias imprimés (journaux papier, magazines, etc.)
Online media sources
Sources médiatiques en ligne
Social networking sites (e.g. Instagram, Facebook, Twitter, Tiktok, etc.)
Sites de réseautage social (p. ex., Instagram, Facebook, Twitter, TikTok, etc.)

Another source(s) (SPECIFY)
Autres sources (PRÉCISER)
I don't consume this type of content [MUTUALLY EXCLUSIVE]
Je ne consomme pas ce type de contenu [MUTUALLY EXCLUSIVE]
Don't know [MUTUALLY EXCLUSIVE]
Je ne sais pas [MUTUALLY EXCLUSIVE]

[IF SELECTED 'I don't consume this type of programming' OR 'Don't know' FOR ALL ITEMS AT Q18 SKIP, OTHERWISE CONTINUE]

19. Overall, how satisfied are you with the quality of **[INSERT ITEM]** content you receive? Using a scale from 1 to 10, where 1 is very dissatisfied and 10 is very satisfied. How about the **[INSERT NEXT ITEM]** content you receive?

De manière générale, dans quelle mesure êtes-vous satisfait(e) de la qualité du contenu de **[INSERT ITEM]** que vous recevez? Utilisez une échelle de 1 à 10, où 1 signifie « Très insatisfait(e) » et 10, « Très satisfait(e) ». Et qu'en est-il du contenu de **[INSERT NEXT ITEM]** que vous recevez?

[ROWS][RANDOMIZE]
[INSERT ITEMS FROM Q18 WHERE RESPONSE IS NOT 'I don't consume this type of programming' OR 'Don't know/REF']
News and information
Actualités et information
Entertainment
Divertissements

[COLUMNS]
[SCALE 1- 10: 1 'Very dissatisfied', 10 'Very satisfied']

Broader Attitudes

[INITIALLY SET ALL COMPLETES TO ASK ALL ITEMS, IF PRETEST LENGTH IS LONG UPDATE TO ASK 2 OF 3 GROUPS]

Q20quota. [QUOTA MARKER]
Ask all items
Demander pour tous les éléments
ASK GROUP 1 & 2 ONLY
DEMANDER POUR LES GROUPES 1 ET 2 SEULEMENT
ASK GROUP 1 & 3 ONLY
DEMANDER POUR LES GROUPES 1 ET 3 SEULEMENT
ASK GROUP 2 & 3 ONLY
DEMANDER POUR LES GROUPES 2 ET 3 SEULEMENT

20. Please indicate the extent to which you agree or disagree with each of the following statements. Using a scale from 1 to 10, where 1 is strongly disagree and 10 is strongly agree. How about [INSERT ITEM]? (READ LIST)

Veuillez indiquer dans quelle mesure vous êtes d'accord ou en désaccord avec chacun des énoncés suivants. Utilisez une échelle de 1 à 10, où 1 signifie « Tout à fait en désaccord » et 10, « Tout à fait d'accord ». Qu'en est-il de [INSERT ITEM]? (LIRE LA LISTE.)

[ROWS][RANDOMIZE WITHIN GROUPS]
BROADCASTING [HEADER, DO NOT PROGRAM, GROUP 1]
I trust the information provided by news media in Canada to be accurate and impartial
Je crois que l'information fournie par les médias d'information au Canada est exacte et impartiale
I am satisfied with the quality of information and depth of analysis offered by Canadian news media
Je suis satisfait(e) de la qualité de l'information et de la profondeur de l'analyse offerte par les médias d'information canadiens
I am satisfied with the quality of Canadian music available today
Je suis satisfait(e) de la qualité de la musique canadienne offerte aujourd'hui
I am satisfied with the quality of Canadian television programs available today
Je suis satisfait(e) de la qualité des émissions télévisées canadiennes offertes aujourd'hui
I see myself and people like me reflected in the types of programming available to Canadians
Je me vois et des gens comme moi représentés dans les types d'émissions offertes aux Canadiens
Television services (Cable, Satellite, etc.) have become less affordable in the past year
Les services de télévision (câble, satellite, etc.) sont devenus moins abordables au cours de la dernière année
Streaming video subscription services have become less affordable in the past year
Les services d'abonnement à la diffusion vidéo en continu sont devenus moins abordables au cours de la dernière année
Streaming audio subscription services have become less affordable in the past year
Les services d'abonnement à la diffusion audio en continu sont devenus moins abordables au cours de la dernière année

[SPAM AND NUISANCE [HEADER, DO NOT PROGRAM, GROUP 2]
I, or someone I know, have experienced a phishing or scam attempt by phone, text or email in the past month.
J'ai subi, ou quelqu'un que je connais a subi une tentative d'hameçonnage ou d'escroquerie par téléphone, message texte ou courriel au cours du dernier mois.
I often receive unsolicited phone calls where I feel I am being tricked into sharing personal information
Je reçois souvent des appels téléphoniques non sollicités où j'ai l'impression d'être incité(e) à donner des informations personnelles
I often receive unsolicited emails or text messages that I feel are trying to trick me into clicking a malicious link, downloading malicious software, or sharing sensitive information
Je reçois souvent des courriels ou des messages texte non sollicités qui, à mon avis, tentent de m'inciter à cliquer sur un lien malveillant, à télécharger un logiciel malveillant ou à donner des informations sensibles
I feel confident that I can identify scams and fraudulent phone calls, emails and text messages
J'ai confiance de pouvoir repérer les escroqueries ainsi que les appels téléphoniques, courriels et messages texte frauduleux

I know where to report scams and fraudulent phone calls, emails and text messages
Je sais où signaler les escroqueries ainsi que les appels téléphoniques, courriels et messages texte frauduleux
[BROADBAND AND MOBILE [HEADER, DO NOT PROGRAM, GROUP 3]

Cellphone services have become [RANDOM INSERT HALF ‘more’, RANDOM INSERT HALF ‘less’] affordable in the past year
Les services de téléphonie mobile sont devenus [RANDOM INSERT HALF ‘plus’, RANDOM INSERT HALF ‘moins’] abordables au cours de la dernière année
Home internet services have become [RANDOM INSERT HALF ‘more’, RANDOM INSERT HALF ‘less’] affordable in the past year
Les services Internet à domicile sont devenus [RANDOM INSERT HALF ‘plus’, RANDOM INSERT HALF ‘moins’] abordables au cours de la dernière année
I can count on a reliable high-speed internet network where I live
Je peux compter sur un réseau Internet haut débit fiable là où je vis
I can count on a reliable mobile network where I live
Je peux compter sur un réseau mobile fiable là où je vis
I feel I have enough choice of cellphone providers where I live
J’estime avoir suffisamment de choix de fournisseurs de services de téléphonie mobile où j’habite
I feel I have enough choice of home internet providers where I live
J’estime avoir suffisamment de choix de fournisseurs de services Internet à domicile où j’habite
The rates Canadians pay to use their cellphone while travelling outside of the country are reasonable
Les tarifs que les Canadiens paient pour utiliser leur téléphone cellulaire lorsqu’ils voyagent à l’étranger sont raisonnables
[IF SELECTED ‘Internet at home’ AT Q1 ASK] I feel it is easy to switch home internet providers if I wanted to
[IF SELECTED ‘Internet at home’ AT Q1 ASK] Je pense qu'il est facile de changer de fournisseur d'accès Internet à domicile si je le souhaite
[IF SELECTED ‘Cellphone’ AT Q1 ASK] I feel it is easy to switch cellphone providers if I wanted to
[IF SELECTED ‘Cellphone’ AT Q1 ASK] Je pense qu'il est facile de changer de fournisseur de téléphonie cellulaire si je le souhaite

[COLUMNS][SCALE]
[1- 10: 1 ‘Strongly disagree’, 10 ‘Strongly agree’]

Classification questions

We have some final questions for statistical classification purposes. Please indicate the answer that best describes you. Be assured that your responses will be held in strict confidence.
Nous avons quelques dernières questions à vous poser, aux fins de classification statistique seulement. Veuillez indiquer l’option qui décrit le mieux votre situation. Soyez assuré(e) que vos réponses demeureront strictement confidentielles.

22. Do you work in the telecommunications or broadcast industry?
Travaillez-vous dans le secteur des télécommunications ou de la radiodiffusion?

Yes
Oui
No
Non

S3. What is your postal code? [READ IF NECESSARY: This question may be considered personal. We would like to remind you that your participation is strictly voluntary and that your responses are used for research purposes only. The answers that you provide will be presented in aggregate form and none of them will be linked back to you in any way. All data will be collected and processed in accordance with applicable data protection legislation.
Quel est votre code postal? [LIRE SI NÉCESSAIRE : Veuillez prendre note que cette question peut être considérée comme étant personnelle. Nous aimerions vous rappeler que votre participation est strictement volontaire et que vos réponses sont uniquement utilisées à des fins de recherche. Les réponses que vous fournissez seront présentées sous forme regroupée et aucune d'entre elles ne sera associée à vous. Toutes les données seront recueillies et traitées conformément aux lois applicables en matière de protection des données.

[OPEN END]

23. What is your annual household income before taxes? (READ LIST UNTIL INTERUPTED)
Quel est le revenu annuel brut de votre foyer? (LIRE LA LISTE JUSQU'À INTERRUPTION)

Less than $40,000
Moins de 40 000 $
$40,000 to less than $60,000
De 40 000 $ à moins de 60 000 $
$60,000 to less than $100,000
De 60 000 $ à moins de 100 000 $
$100,000 to less than $150,000
De 100 000 $ à moins de 150 000 $
$150,000 to less than $250,000
De 150 000 $ à moins de 250 000 $
$250,000 or more
250 000 $ ou plus

24. What is the highest degree or level of school you have completed? (DO NOT READ)
Quel est le niveau d'éducation le plus élevé que vous avez atteint? (NE PAS LIRE)

Grade 8 or less
Études secondaires de premier cycle ou moins (Québec); 8e année ou moins (ailleurs au Canada)
Some high school
Études secondaires non terminées
High School diploma or equivalent
Diplôme d'études secondaires ou l'équivalent
Registered Apprenticeship or other trades certificate or diploma
Apprentissage enregistré ou diplôme ou certificat d'une école de métiers
College, CEGEP or other non-university certificate or diploma
Diplôme d'études collégiales, ou certificat ou diplôme non universitaire
University certificate or diploma below bachelor's level

Certificat universitaire ou diplôme inférieur au baccalauréat
Bachelor's degree
Baccalauréat

Post graduate degree above bachelor's level
Certificat universitaire supérieur au baccalauréat

25. Are there any children under 18 years old living or staying at your current address?
Y a-t-il des enfants de moins de 18 ans qui vivent ou séjournent à votre adresse actuelle?

Yes
Oui
No
Non

26. Were you born in Canada?
Êtes-vous né(e) au Canada?

Yes
Oui
No
Non

[IF NO AT Q26 ASK Q27, OTHERWISE SKIP]
27. How long have you lived in Canada? (DO NOT READ)
Depuis combien d'années vivez-vous au Canada? (NE PAS LIRE)

Less than three years
Depuis moins de trois ans
Three to five years
Depuis trois à cinq ans
More than five years
Depuis plus de cinq ans

28. Are you an Indigenous person, that is, First Nations (North American Indian), Métis or Inuk (Inuit)? (DO NOT READ)
Êtes-vous une personne autochtone, c'est-à-dire membre des Premières Nations (Indiens de l'Amérique du Nord), Métis ou Inuk (Inuit)? (NE PAS LIRE)

No, not an Indigenous person [EXCLUSIVE]
Non, je ne suis pas une personne autochtone [EXCLUSIVE]
Yes, First Nations (North American Indian)
Oui, je suis membre des Premières Nations (Indiens de l'Amérique du Nord)

Yes, Métis
Oui, je suis Métis
Yes, Inuk (Inuit)
Oui, je suis Inuk (Inuit)

[IF NO/DK/REF AT Q28 ASK Q29, OTHERWISE SKIP]
29. Thinking about your ethnicity or background, how would you describe yourself? (READ ONLY IF NEEDED TO CLARIFY INTENT OF QUESTION)
En songeant à votre origine ethnique ou à vos origines, comment vous décririez-vous? (LIRE UNIQUEMENT SI NÉCESSAIRE POUR CLARIFIER L'INTENTION DE LA QUESTION)
[MULTI PUNCH]

White
Blanc(he)

South Asian (e.g., East Indian, Pakistani, Sri Lankan, etc.)
Asiatique du Sud (Indien[ne] d'Asie, Pakistanais[e], Sri Lankais[e], etc.)

Chinese
Chinois(e)
Black
Noir(e)
Filipino
Philippin(e)
Latin American
Latino-Américain(e)
Arab
Arabe

Southeast Asian (e.g., Vietnamese, Cambodian, Laotian, Thai, etc.)
Asiatique du Sud-Est (Vietnamien[ne], Cambodgien[ne], Laotien[ne], Thaïlandais[e], etc.)

West Asian (e.g., Iranian, Afghan, etc.)
Asiatique de l'Ouest (Iranien[ne], Afghan[e], etc.)

Korean
Coréen(ne)
Japanese
Japonais(e)

Other — specify
Autre (veuillez préciser)

Prefer not to answer
Je préfère ne pas répondre

30. What is the language you use most often at home? If you use more than one language at home, please identify the two most used languages. (DO NOT READ LIST, ACCEPT UP TO TWO MENTIONS)
Quelle est la langue que vous utilisez le plus souvent chez vous? Si vous utilisez plus d'une langue chez vous, veuillez indiquer les deux langues que vous utilisez le plus. (NE PAS LIRE LA LISTE, ACCEPTER JUSQU'À DEUX RÉPONSES)

French
Français
English
Anglais
American Sign Language (ASL)
Langue des signes américaine (ASL)
Arabic
Arabe
Bengali
Bengali
Chinese - Cantonese
Chinois – cantonnais
Chinese - Mandarin
Chinois – mandarin
Chinese - other
Chinois – autre
Cree
Cri
Farsi
Persan
German
Allemand
Greek
Grec
Gujurati
Gujurati
Hindi
Hindi

Inuktitut
Inuktitut
Italian
Italien
Japanese
Japonais(e)

Korean
Coréen
Ojibwe
Ojibwé
Portuguese
Portugais
Punjabi
Pendjabi
Quebec Sign Language (LSQ)
Langue des signes québécoise (LSQ)
Russian
Russe
Spanish
Espagnol
Tagalog
Tagalog
Tamil
Tamoul
Urdu
Ourdou
Vietnamese
Vietnamien
Other
Autre

[IF TWO LANGUAGES SELECTED AT Q30 ASK Q30B, OTHERWISE SKIP]
30B. And, which of these languages do you use more often at home? (READ LIST IF NEEDED, ACCEPT ONE RESPONSE)
Et laquelle de ces langues utilisez-vous le plus souvent chez vous? (LIRE LA LISTE AU BESOIN, ACCEPTER UNE SEULE RÉPONSE)

[INSERT ITEMS SELECTED AT Q30]

S2. What is your gender? [DO NOT READ]
Quel est votre sexe? [DO NOT READ]

Male
Homme
Female
Femme
Non-binary person
Personne non binaire
Or, please specify:
Autre (veuillez préciser) :

Prefer not to say
Je préfère ne pas répondre

31. Which of the following do you consider yourself to be? Please stop me when I reach your category. Are you [INSERT ITEM]? (READ LIST, UNTIL INTERUPTED)
Auquel des groupes suivants vous identifiez-vous? Veuillez m'arrêter lorsque j'aurai mentionné la bonne catégorie. Êtes-vous [INSERT ITEM]? (LIRE LA LISTE JUSQU'À INTERRUPTION)

Straight/Heterosexual
Hétéro/Hétérosexuel(le)
Lesbian
Lesbienne
Gay
Gai
Bisexual
Bisexuel(le)
Transgender
Une personne transgenre
Queer
Queer
Intersex
Intersexué(e)
Two-Spirited
Bispirituel(le)
Another term
Un autre terme

32. Do you identify as a person with a disability?
Vous identifiez-vous comme une personne handicapée?

Yes
Oui
No
Non

[IF YES AT Q32 ASK Q33, OTHERWISE SKIP]
33. What type of disability do you have? (DO NOT READ, ACCEPT ALL THAT APPLY)
Quel type de handicap avez-vous? (NE PAS LIRE, ACCEPTER TOUTES LES RÉPONSES QUI S'APPLIQUENT)

Physical (for example: Mobility, flexibility and dexterity)
Physique (par exemple : mobilité, flexibilité et dextérité)
Sensory, related to hearing
Sensoriel, lié à l'ouïe

Sensory, related to vision
Sensoriel, lié à la vision
Other type of sensory
Autre type de handicap sensoriel
Communication
Communication
Intellectual
Intellectuel
Mental Health (for example: anxiety, depression, eating disorders, substance use disorder, etc.)
Santé mentale (par exemple : anxiété, dépression, troubles de l'alimentation, troubles liés à la consommation de substances, etc.)
Cognitive/Neurodiversity (includes Autism, ADHD, learning disabilities)
Cognitif/neurodiversité (comprend l'autisme, le TDAH et les troubles d'apprentissage)
Chronic Pain
Douleur chronique
Environmental (includes sensitivity to scents, bright lights, allergens, etc.)
Environnemental (comprend la sensibilité aux odeurs, aux lumières vives, aux allergènes, etc.)
Other
Autre

Thank you! Those are all the questions we have for you today. On behalf of Ipsos and the CRTC we appreciate you taking the time to share your opinions with us.
Merci. Nous n'avons plus de question à vous poser aujourd'hui. Au nom d'Ipsos et du CRTC, nous vous remercions d'avoir pris le temps de nous faire part de vos opinions.