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Public Opinion Research to Enhance the Transparency of Information Provided to Broadband Consumers
Executive Summary

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

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This public opinion research report presents the results of focus groups, interviews, and a survey conducted by Earnscliffe Strategy Group on behalf of the CRTC. The qualitative research was conducted in February 2024, and the quantitative research was in field from February 23rd to March 3rd, 2024.

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Executive summary

Earnscliffe Strategies (Earnscliffe) is pleased to present this report to the Canadian Radio-television and Telecommunications Commission (CRTC) summarizing the results of quantitative and qualitative research undertaken to better understand public opinion on strategies to enhance the transparency of information provided to broadband consumers.

Background

Earlier this year the Government of Canada issued a new policy direction to the CRTC to increase competition, improve affordability, enhance consumer rights, and universal access leading to lower prices and better telecommunications services for Canadian. The objective being to make it easier for customers to obtain and understand the information in their Internet service contracts.

To help achieve this objective, the CRTC undertook quantitative and qualitative research to inform policy development and to obtain a better understanding of consumer sentiment on the pre- and post-sale information currently provided for wireless and wireline broadband service offerings.

Research objectives

This research was undertaken to understand the views of members of the general population and a number of target audiences. These target audiences include seniors, Indigenous persons residing in Canada, and those who are blind, culturally Deaf, or deaf-blind.

The findings of this project will help inform the CRTC's future regulatory framework to ensure consumers are well-informed when choosing services that best meet their needs, to limit barriers faced by consumers in making those decisions, and to hold service providers accountable when the services do not align with their pre-sale descriptions.

The overall research objectives were to understand what information consumers need while selecting broadband wireline and wireless services. Within this overarching goal, the specific objectives for the research were to determine:

- the importance for pre-sale information to be provided in a standard format and contain the same information across different service providers;
- the importance for post-sale information to be provided in a standard format and contain the same information across different service providers;

- the information needs of consumers for selecting and comparing service offerings;
- and what barriers consumers face when selecting a service offering (such as understanding the terminology).

Methodological approach

To meet the objectives of this research, Earnscliffe employed a two-phased qualitative and quantitative research approach.

The first phase of this project was qualitative. As part of this, four focus groups were conducted on February 15, 2024. Three of these were done in English, while one was conducted in French. The target audiences for these focus groups were adults over the age of 65, adults over the age of 18 who are blind, and adults over the age of 18 who identify as Indigenous. In addition to these focus groups, 12 in-depth textual interviews. Eight of these were conducted with culturally Deaf adults (six in English and two in French) while four were done with adults who are deaf-blind (three in English and one in French). The process by which these interviews were completed is detailed in the methodological section at the end of this report.

It is important to note that qualitative research is a form of scientific, social, policy, and public opinion research. Focus group research is not designed to help a group reach a consensus or to make decisions, but rather to elicit the full range of ideas, attitudes, experiences, and opinions of a selected sample of participants on a defined topic. Because of the small numbers involved, the participants cannot be expected to be thoroughly representative in a statistical sense of the larger population from which they are drawn, and findings cannot be generalized.

For the quantitative phase, we conducted an online survey in collaboration with our quantitative subcontractor, Leger. The audience was a general population sample of Canadians over the age of 18 who had shopped for mobile wireless or home Internet service in the last 12 months. The survey was approximately 10 minutes in length and offered to respondents in English and French. This survey was in field from February 23rd to March 3rd, 2024.

Details about the design of the focus groups, the discussion guides used, and the target audiences can be found in the Qualitative Methodology Report in Appendix A. Similarly, the research design, details for the questionnaire, methodology, and sampling approach may be found in the Quantitative Methodology Report in Appendix B.

Key findings

Throughout the report, the term “respondents” refers to the results from the quantitative study whereas the term “participants” is used to refer to the results from the qualitative phases.

Study participant qualifications

- To participate in this study, respondents must have purchased new, changed, renewed, renegotiated, shopped for, or done research on, home Internet service or mobile wireless service in the past year.
    - It was noted in the focus groups that most do not tend to shop very often. Some do as they believe it is possible to get a better deal. Most indicated only doing research when their contract was up for renewal.
- Just over a quarter (27%) of respondents say that their mobile wireless services and home Internet are bundled together. A similar tendency was also found in the focus groups.

Pre-sale information needs

- When it comes to home Internet services, most Canadians feel that they are either very (28%) or moderately (44%) knowledgeable about what to look for and what they feel best suits their needs. A very similar pattern was noted with mobile wireless services, with a majority saying they are either very (28%) or moderately knowledgeable (48%).
    - The focus group discussions and interviews provided further nuance on this understanding, with participants expressing skepticism that they could ever be fully knowledgeable on this subject.
- Just over half of respondents say they will likely seek out information on different home Internet services (52%) or mobile wireless services (56%) in the next 12 months.
    - It is worth noting that these rates are likely informed by the preconditions for participating in this study – i.e., having done research within the past year – and the tendency noted in the focus groups to only search for new information at the end of a contract period.

- In terms of where participants describe going for more information, most cite family, friends, colleagues, and searching online. Some also indicated they seek out comparisons by third parties.
- A majority (63%) are at least somewhat satisfied with the pre-sale information available for home Internet services. A similar proportion (66%) are at least somewhat satisfied with the pre-sale information available to respondents when shopping for mobile wireless services.
    - The qualitative research provided more nuance. Many participants said that the pre-sale information they came across was hard to place a value on because they did not have enough context to appropriately value the information. Participants often described making a decision relying on advice rather than a deep understanding of the service.
- When asked about their satisfaction with their ability to get the information they really want when shopping, 56% say they were at least somewhat satisfied when shopping for home Internet services while 61% say the same of mobile wireless services.
- Three out of five (61%) are satisfied, or are at least somewhat satisfied, with the amount of information they are able to find when shopping for home Internet services. Slightly more (65%) are satisfied when measured for mobile wireless services.
- Half (49%) say they are at least somewhat satisfied with their ability to compare information provided by different home Internet providers and 22% are dissatisfied on this measure. Satisfaction is slightly higher with mobile service providers (56%) whereas dissatisfaction is at 19%.
    - Participants often described the information they get from providers to be biased in a marketing direction. Not that the information was necessarily inaccurate or misleading, but rather than differentiating aspects were highlighted to make it appear like that specification was important when they did not know if this was true for them.
- When it comes to ease of understanding the information provided, half or more say they are at least somewhat satisfied with that which is offered by home Internet services providers (55%) or mobile wireless services providers (63%).
    - Qualitative participants suggested that there are very few who feel like they are well versed in all aspects of pre-sale information outside of pricing.
    - For wireless mobile services, participants tended to say they understand things like minutes, long distance, rates for text messaging and geographic coverage.

Some found other things to not always be clear such as roaming charges or how much data they would personally need.

  - For home Internet, while some felt quite knowledgeable about what download speeds were suitable for their needs, some felt ill-equipped to judge, even as they acknowledged the information was usually readily available.

- Among those with accessibility needs, several offered comments about the unique requirements they have to make sure there is technology for communicating with the provider, as well as information about the compatibility of the services with applications or technology they may use. In many cases, this is solved most satisfactorily with direct one-on-one communication with providers rather than by accessing information posted anywhere.

- Most important information:

  - Price was deemed the most important criteria when shopping for home Internet services (85%) or mobile wireless services (85%). This was also found to be true in the focus groups.

  - When considering home Internet services, the length of contract (73%), how much data can be used each month (69%), and any costs associated with cancelling or changing the service (68%) were also seen by a majority of respondents to be absolutely necessary information. Policies for outages (35%) and metrics such as lagging or jittering (32%) were the least likely to be chosen as absolutely critical information.

  - For mobile wireless services, the most important criteria were the length of the contract (73%), how much data can be used each month (71%), and overage fees (68%). Far fewer respondents say the same about network performance metrics (30%) or policies for outages (27%).

  - The qualitative phases of the study echoed the findings above for both mobile wireless services and home Internet services. Few in the focus groups mentioned metrics such as lagging and/or jittering, with many saying that they were unfamiliar with these terms and what their implications were.

Post-sale information needs

- When asked about their satisfaction with the information available to them on home Internet services, nearly two-thirds (64%) report being either somewhat (43%) or very (22%) satisfied. For the post-sale environment with mobile wireless services, satisfaction is roughly the same with 69% being somewhat (45%) or very (24%) satisfied.
  - The lowest levels of overall satisfaction were found in British Columbia. This trend was noted across multiple different questions and is explored in more detail in the body of the report.
- When it comes to ease of understanding post-sale information for home Internet services just over half (53%) feel it is at least easy to understand. Again, slightly more respondents (58%) say it is at least easy (47%), if not very easy (11%), to understand the information offered by mobile wireless service providers.
- In terms of the availability of post-sale information, majorities say they have enough for home Internet services (67%) and mobile wireless services (69%).
- The focus groups provided some important caveats to these quantitative findings. Notably, it appears that very few participants actually ever referred back to their agreement or the post-sale information they received following the sale – except in instances when they are approaching the end of their term.
- The types of information consumers find most difficult to obtain about home Internet service providers are: policies for outages (26%), reliability (22%) and metrics on performance such as lagging or/or jittering (21%). For their mobile wireless service responses are: reliability and records of service outages (25%); policies for outages (25%); and policies for disconnection (21%); and network performance metrics such as jittering (21%).
  - The discussion of these items in the focus groups revealed that the same factors that were deemed to be missing from pre-sale information were the ones that often came up in the context of the post-sale environment.
- The focus groups also touched on satisfaction with the language of their current service agreement. Only a few were outright satisfied. Many interpreted this as being about the legal document and those who did tended to describe it as not being plain language and leaving them feeling like there must be some detail in there that could come back to haunt them. Others felt like information is provided but they are not necessarily equipped to evaluate its accuracy or value.

Reactions to proposed label concept

- Four-in-five (84%) say that it would be at least helpful (43%), if not very helpful (41%) when asked about if being provided with standardized information about home Internet services would be beneficial.
    - To this point, the ability to easily compare offers was a consistent pain point brought up in focus groups and interviews. Partly because it was not presented uniformly across providers, but even in some cases within a single provider's set of offers.
- When prompted specifically on the possibility of having something like a nutritional information label but for home Internet services, an almost equal number (81%) say that it would be at least helpful. Provided with an example, reactions were even more positive with four-in-five (87%) saying that it would be at least helpful with half (49%) saying that it would be very helpful.
    - This much was echoed in the focus groups, where the reaction was overwhelmingly positive. Participants indicated being familiar with the "nutrition label" style that was used for the concept and were nearly unanimously appreciative of the idea and thought of it as superior to their current experience.
- Support for introducing the label concept into Canada is strong at 79% with virtually no opposition (4%). Focus groups participants and interviewees were upbeat and offered constructive feedback on how to improve:
    - Participants wondered where this information would be displayed. It was easy to imagine hard copy material or physical packages having this displayed, but for shopping online, it was less clear how this would work.
    - There were many comments about the terminology used to describe some of the factors (e.g., jittering, latency) with some suggesting using qualified indicators of whether service was high, average, or low.
    - There was confusion as to how the "discounts and bundles" section would work – especially in relation to the "monthly price" displayed in bold at the top.
    - Those who are deaf and/or blind commented about making sure this label was accessible and worked well with any technology they use. It was suggested that this be available in a variety of formats, including a video with sign language and closed captioning as an example. There was significant discussion as well about

the discounts provided to those with accessibility needs and how those were conveyed.

  - The "unique plan identifier" at the bottom of the label was unnerving for some. These people felt it looked like offers they have seen in other markets that tended to protect or serve the interests of the vendor rather than the consumer.

  - Some asked where any label they saw would be saved for posterity, in order to be able to prove this was the offer they had come across. At least one wanted information on how long an offer would be valid. Clearly, participants tended not to see the "unique plan identifier" as the actual evidence they could cite.

  - Perhaps more than any other comment, participants often indicated hope that there would be a centralized site where they could see and compare all of these labels at once.

- A strong majority (87%) of respondents say that it would be at least important, if not very important, to have access to this type of information so that they could compare what they purchased to what else is available to other consumers.

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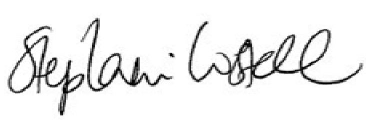
I hereby certify as a representative of Earnscliffe Strategy Group that the final deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Communications Policy of the Government of Canada and Procedures for Planning and Contracting Public Opinion Research. 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.

Signed: Date: April 12, 2024



Stephanie Constable
Principal, Earnscliffe