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

Telephone Survey on Mobile Wireless Services in Canada
Final Report

Prepared for Canadian Radio-television and Telecommunications

January 2020

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Canada

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This public opinion research report presents the results of a telephone survey conducted with 1,208 Canadians aged 18 and older who have a cell phone for personal use. The fieldwork was conducted between November 25 and December 12, 2019.

Canadian Radio-television and Telecommunications Commission
1 Promenade du Portage
Gatineau, Quebec J8X 4B1
T: 877-249-2782
Fax: 819-994-0218
communications@crtc.gc.ca

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INTRODUCTION

The Canadian Radio-television and Telecommunications Commission (CRTC) commissioned Phoenix Strategic Perspectives Inc. (Phoenix SPI) to conduct research to better understand the needs, behaviours and habits of Canadians when it comes to mobile wireless services.

Background and Objectives

In recent years, Canadians have come to rely on mobile wireless services in many aspects of their lives: to communicate with each other, for entertainment, to conduct business, to interact with all levels of government, and to further their education. At the same time, mobile wireless services are enabling Canadian businesses to increase efficiency and productivity, which in turn enables them to remain competitive in the global marketplace.

The retail mobile wireless service market continues to be the largest and fastest-growing telecommunications market sector in Canada. In 2018, retail mobile wireless services generated revenues of $27.1 billion, representing an increase of $2.6 billion, or 10.7%, over 2017 revenues. The number of Canadian subscribers continues to grow, with total subscribers reaching 33.2 million in 2018, an increase of 4.8% from the previous year.

In Telecom Notice of Consultation 2019-57, issued on February 28, 2019, the CRTC began a proceeding to review the wireless market with a focus on: (1) competition in the retail market, (2) wholesale regulation, and (3) the future of mobile wireless services in Canada. Interested parties have made written submissions on each of these issues and will also make oral representations at a public hearing. Parties' submissions will be considered by the Commission, and ultimately the Commission will determine if any changes to the regulatory regime are required to ensure: (1) the regulatory regime remains relevant, (2) the needs of Canadians continue to be met, and (3) the policy objectives set out in the Telecommunications Act are being achieved.

The CRTC engaged the services of Phoenix SPI to conduct a study designed to help the Commission better understand the needs, behaviours and habits of Canadians when it comes to mobile wireless services. This resulted in two reports, both on the public record of the proceeding: (1) A public opinion research (POR) report; and (2) a consultation report.

Methodology

This study involved two initiatives: POR and a consultation. The POR involved a representative telephone survey to understand the views of Canadians on related issues. Specifically, an 8-minute random digit dialling (RDD) telephone survey was administered to a nationally representative sample of 1,208 Canadians[1] aged 18 or older. To be eligible to complete the survey, respondents had to have a cell phone for personal use. An overlapping dual-frame (landline and cell phone) sample was used to minimize coverage error; approximately 70% of the numbers were cell phones and 30% were landlines.

The sample frame was geographically disproportionate to improve the accuracy of regional results. Based on a sample of this size, the overall results can be considered to be accurate within ±2.9%, 19 times out of 20 (adjusted to reflect the geographically disproportionate sampling). The margin of error is greater for results pertaining to subgroups of the total sample. The fieldwork was conducted between November 25 and December 12, 2019.

[1] This includes Canadian citizens and permanent residents.

The survey data has been weighted by region, age and gender to ensure results that are representative of the Canadian population. Population figures from Statistics Canada's 2016 census data were used to construct the weights.

In addition to the representative telephone sample, the questionnaire was made available online for completion on a voluntary basis by all Canadians. This consultation offered Canadians who have an interest in the subject an opportunity to provide feedback to the CRTC. The results of the broader consultation are not representative of the Canadian population and are included under separate cover.

Key Findings

- **More than eight in 10 Canadians are satisfied with their cell phone provider. Of those who indicated being dissatisfied, cost is the main reason for dissatisfaction with cell phone providers.**
    - Just over eight in 10 (83%) Canadians say they are satisfied with their current cell phone provider, with 35% saying they are very satisfied. Fewer than one in five are somewhat or very dissatisfied with their provider.
    - Those who are dissatisfied with their current cell phone provider pointed to cost to explain their dissatisfaction. Specifically, 65% attribute their dissatisfaction to the cost or price of their cell phone service, 38% to the cost or price of data, and 12% to the cost or price of overage changes.
- **Half of Canadians with a cell phone have switched providers, and many found it somewhat or very easy.**
    - Fifty-three percent of Canadians with a cell phone say they have switched cell phone providers. Canadians who switched providers are more likely to be 25 to 34 years old (61%) or 35 to 54 years old (57%) than 55+ (45%).
    - Most Canadians (81%) who switched cell phone providers say it was easy to do, with 53% saying it was very easy. In contrast, more than one-third (37%) of Canadians who have not switched providers think it would be somewhat or very difficult to do so.
- **Currently, most Canadians are not likely to switch cell phone providers. Canadians are divided about switching to flanker brands.**
    - Nearly half (47%) said they have not switched cell phone providers. The main reason these Canadians stayed with their current provider is because their plan covers their needs (51%). Those who stayed because their plan covers their needs were more likely to live in Quebec (68%) and report household incomes of under $40,000 (63%).
    - Approximately two-thirds (65%) of Canadians say they are not likely to switch cell phone providers at the end of their contract.
    - One in four (25%) Canadians say they have told their cell phone provider they plan to switch to another provider in order to lower their bill, of whom 72% said their provider offered them a better cell phone package or the same package at a lower rate to not switch .
    - More than half the Canadians surveyed do not use a flanker brand for their cell phone services. When asked if they would consider switching to a flanker brand, four in 10 (41%) say they would consider it after having been provided with the following description of a flanker brand: A flanker brand is a brand used by a large cell phone provider to offer services and plans under a different name and often at a lower price. For example, Virgin mobile, FIDO, and Koodo are flanker brands. Those reporting

annual household incomes under $40,000 (25%) are less likely to consider switching to a flanker brand than those from households with higher annual incomes.

- In contrast, 47% of Canadians who do not currently use a flanker brand say they would **not** consider switching to one. When asked why not, one-third (34%) said they would not consider switching because they are satisfied with their current provider. Additionally, nearly three in 10 (28%) would not make the switch because they are concerned about the quality or coverage of the cell phone service.

- **Few think that Canada's cell phone prices are better compared to other countries.**
  - Canadians were asked if they think Canada's cell phone prices are better, worse or about the same as what they would find in other countries. Few (4%) think Canada's cell phone prices are better than prices compared to other countries. In contrast, two-thirds (66%) think Canada's cell phone prices are worse.

Notes to Readers

- For editorial purposes, the terms "Canadians", "Canadian wireless consumers" and "respondents" are used interchangeably to denote survey participants. Additionally, "Canadians" is used to refer to Canadian citizens and permanent residents.
- All results in the report are expressed as percentages, unless otherwise noted. Percentages may not always add to 100% due to rounding or multiple mentions.
- The number of respondents changes throughout the report because some questions were not asked of all respondents. Accordingly, readers should be aware of this and exercise caution when interpreting results based on smaller numbers of respondents.
- Demographic differences are identified in the report.
  - When reporting subgroup variations, only differences that are significant at the 95% confidence level and that pertain to a subgroup sample size of more than n=30 are discussed in the report.
  - If one or more categories in a subgroup are not mentioned in a discussion of subgroup differences (for example, if one out of four age segments are compared), it can be assumed that significant differences were found only among the categories reported.

The contract value was $83,043.36 (including HST).

Political Neutrality Certification

I hereby certify, as a Senior Officer of Phoenix Strategic Perspectives, that the deliverables fully comply with the Government of Canada political neutrality requirements outlined in the Policy on Communications and Federal Identity of the Government of Canada and Procedures for Planning and Contracting Public Opinion Research. Specifically, the deliverables do not contain any reference to electoral voting intentions, political party preferences, standings with the electorate, or ratings of the performance of a political party or its leader.

Signed:

AWoods

Alethea Woods, President
Phoenix Strategic Perspectives

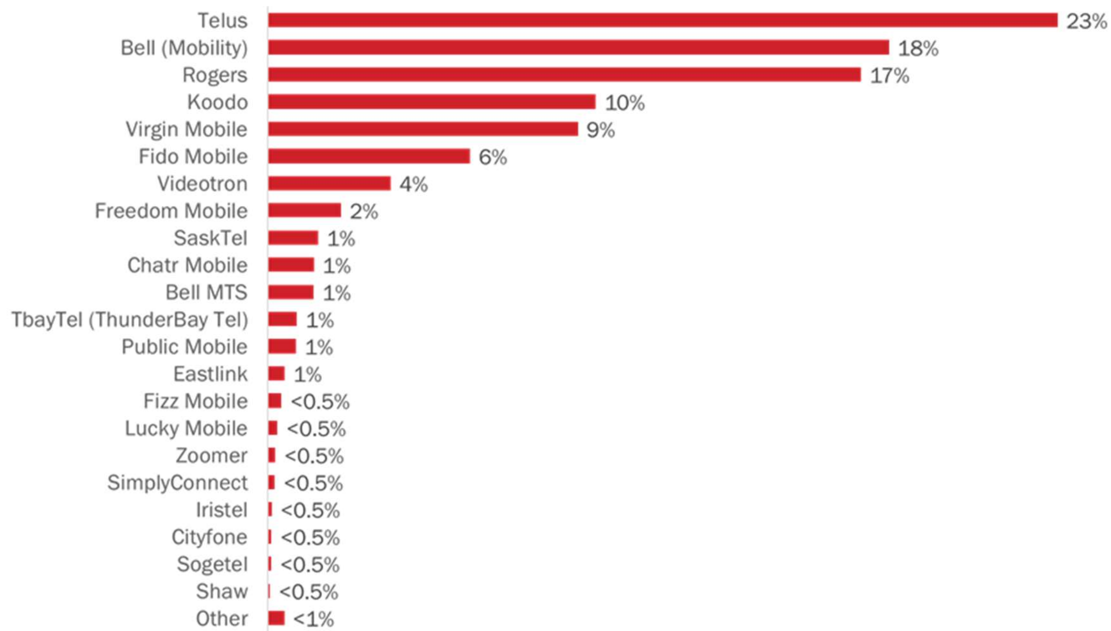
SURVEY FINDINGS

Attitudes and Behaviours Towards Current Cell Phone Providers

Telus, Bell and Rogers top list of cell phone providers

When asked which cell phone provider they use, most respondents mentioned Telus (23%), Bell Mobility (18%) and Rogers (17%). Fewer respondents identified Koodo (10%), Virgin Mobile (9%), Fido Mobile (6%), or Videotron (4%). The full range of cell phone providers identified by respondents can be found in figure 1.

Figure 1: Cell phone provider



Q3. Who is your cell phone provider?
Base: n=1,208; all respondents. Don't know/refused: 2%

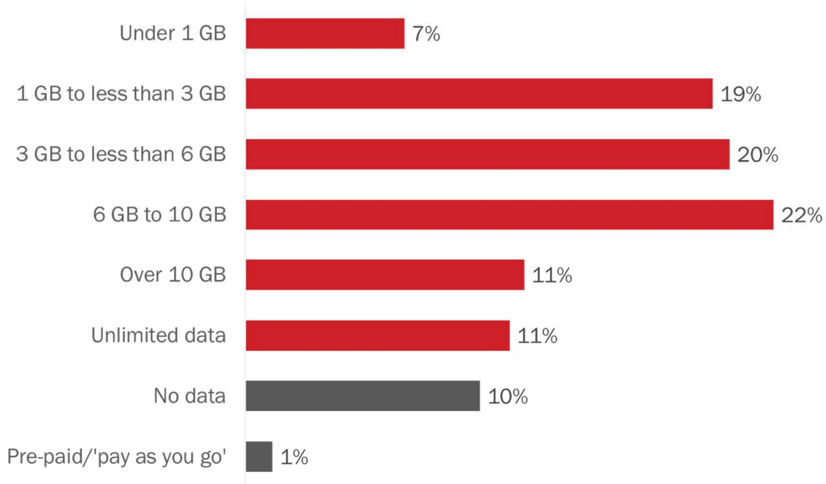
Demographic Differences:

- Canadian wireless consumers who use Telus are more likely to live in Western Canada (36%), Quebec (23%) and Atlantic Canada (19%) than Ontario (14%).
- Atlantic Canadians (37%) are more likely to use Bell Mobility as their cell phone provider than residents of Ontario (19%), Quebec (16%) and Western Canada (16%).
- Those who live in Ontario (28%) are more likely to use Rogers than those who live in Western Canada (13%), Atlantic Canada (9%) and Quebec (9%).

Nine in 10 Canadians have data included in their cell phone plans

Nine in 10 (91%) Canadians say they have data included in their cell phone plans. As presented in figure 2, the amount of data included in plans varies from under 1 GB (7%) to unlimited (11%). Additionally, 10% say they do not have data included in their cell phone plans, while very few (1%) have a "pre-paid" or "pay as you go" plan which includes no data.

Figure 2: Data included in cell phone plan



Q4. How much data is included in your cell phone plan?
Base: n=1,009; all respondents [REMOVED: Don't know/refused: n=199].

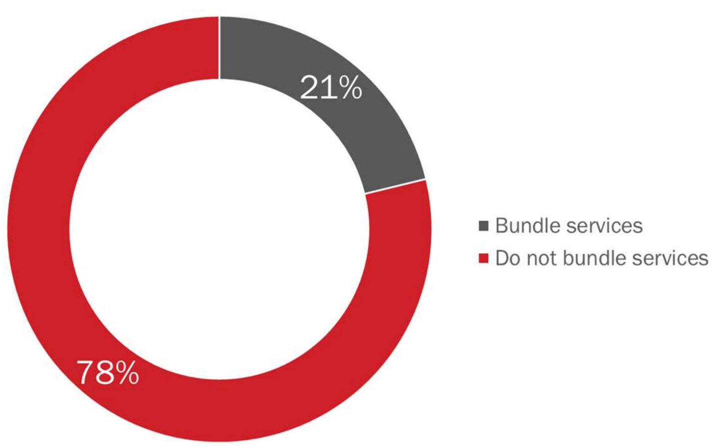
Demographic Differences:

- Canadians who have over 10 GB of data included in their plan are more likely to be between the ages of 25 and 34 (17%) and 35 and 54 (14%) than aged 55+ (8%).
- Canadians who have unlimited data are more likely to live in Western Canada (15%) than Quebec (6%) .
- Canadian wireless consumers who do not have data included in their plan are more likely to be 55+.

One in five Canadians bundle cell phone service with other services

One in five (21%) Canadians who subscribe to a wireless plan bundle their cell phone service with other services from their provider. In contrast, nearly eight in 10 (78%) say they do not bundle their cell phone service with other services.

Figure 3: Bundling cell phone services

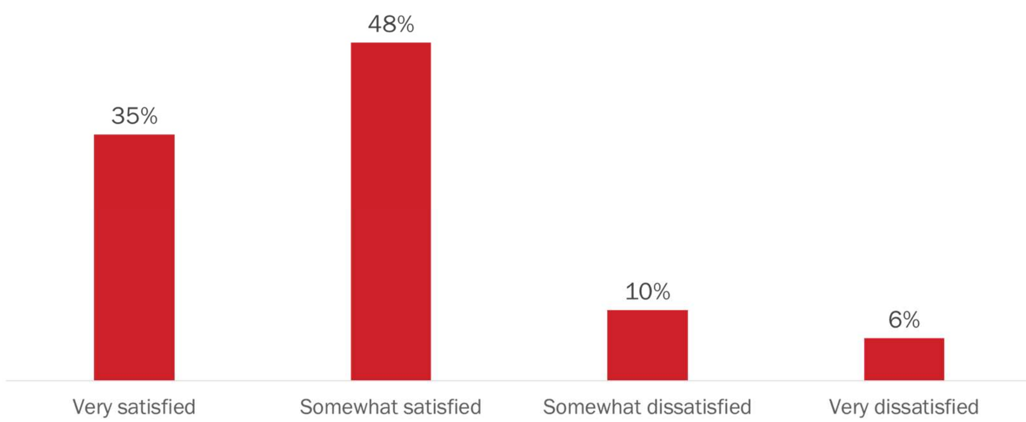


Q5. Do you bundle your cell phone service with other services from your provider?
Base: n=1,198; all respondents who subscribe to a wireless plan. Don't know/refused: <2%

More than eight in 10 Canadians are satisfied with their cell phone provider

Just over eight in 10 (83%) Canadians say they are satisfied with their current cell phone provider, with 35% saying they are very satisfied. One in six are somewhat (10%) or very (6%) dissatisfied with their provider.

Figure 4: Satisfaction with current cell phone provider



Q6. Are you very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied with your current cell phone provider?
Base: n= 1,208; all respondents. Don't know/refused: 1%

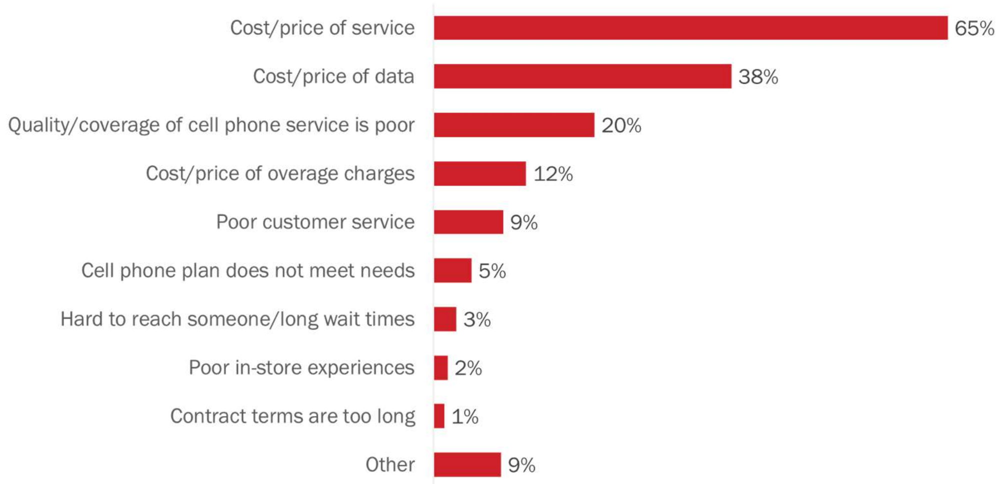
Demographic Differences:

- Canadian wireless consumers somewhat or very satisfied with their cell phone provider are more likely to live in Quebec (89%) than Ontario (81%) and Western Canada (81%).
- Those who reported a household income of under $40,000 (86%) are more likely than those reporting a household income of $100,000 and above (80%) to be somewhat or very satisfied with their provider.
- Additionally, those who are very satisfied with their cell phone provider are more likely to be 55+ (40%) than between the ages of 35 and 54 (31%).

Cost is main reason for dissatisfaction with cell phone providers

Those dissatisfied with their current cell phone provider (n=183) were most likely to point to cost to explain their dissatisfaction. Specifically, 65% attribute their dissatisfaction to the cost or price of their cell phone service, 38% to the cost or price of data, and 12% to the cost or price of overage changes. Other reasons for dissatisfaction include poor service quality or coverage (20%) and poor customer service. The full range of reasons are depicted in figure 5.

Figure 5: Reasons for dissatisfaction with current cell phone provider



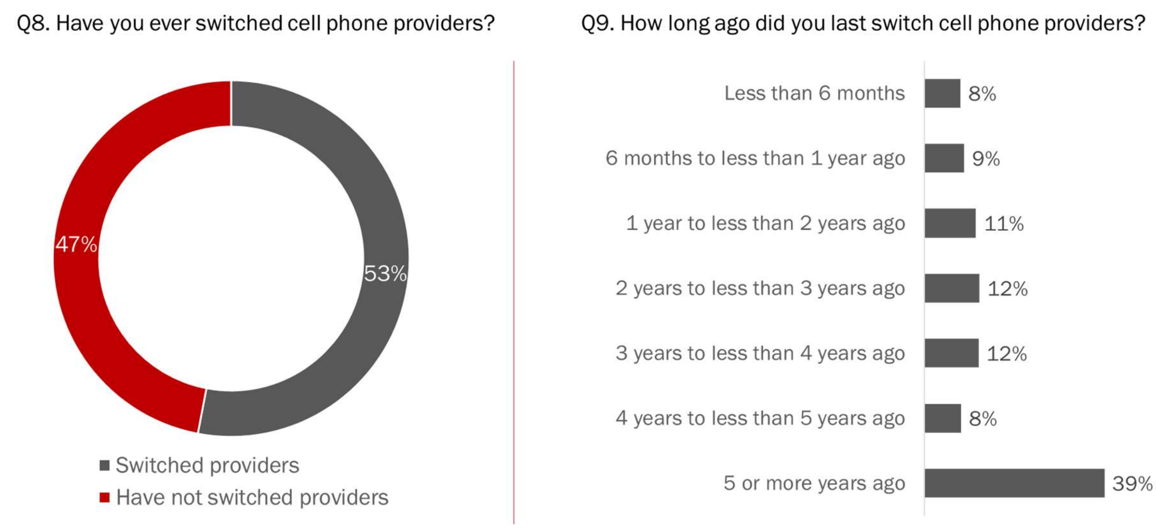
Q7. Why are you dissatisfied with your current cell phone provider? [multiple responses accepted]
Base: n= 183; respondents who were dissatisfied with their current cell phone providers. Don't know/refused: <0.5%.

Attitudes and Behaviours Towards Switching Cell Phone Providers

Half of Canadians with a cell phone have switched providers; of whom 60% did within the past 5 years

Fifty-three percent of Canadians with a cell phone say they have switched cell phone providers. Among those who switched providers (n=631), six in 10 did so within the past five years. In contrast, four in 10 (39%) say they last switched cell phone providers five or more years ago.

Figure 6: Switching cell phone providers



[LEFT] Q8. Have you ever switched cell phone providers?
Base: n=1,208; all respondents.
Don't know/refused: <0.5%.

[RIGHT] Q9. How long ago did you last switch cell phone providers?
Base: n=631; respondents who switched providers.
Don't know/refused: 1%.

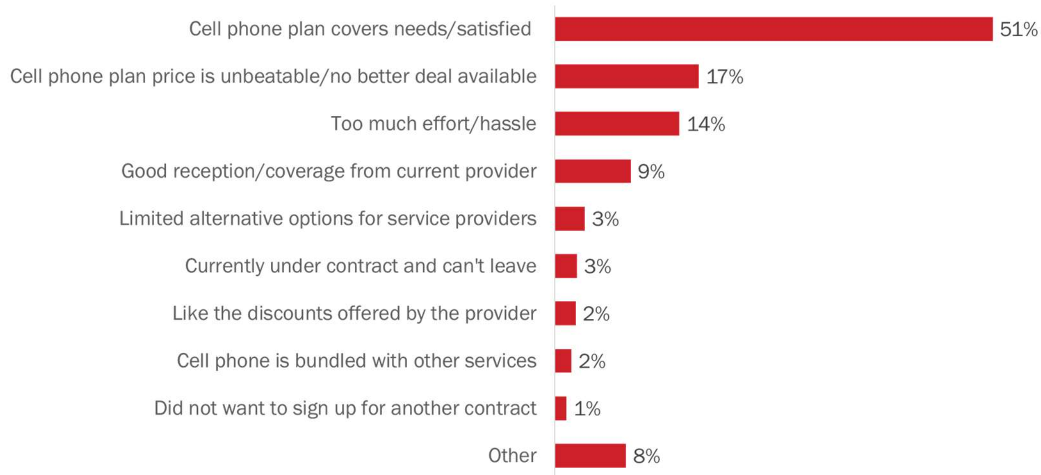
Demographic Differences:

- Canadians who switched cell phone providers are more likely to be 25 to 34 years old (61%) or 35 to 54 years old (57%) than 55+ (45%).
- Additionally, those who switched are more likely to live in Ontario (57%) than in Western Canada (47%) and report annual household incomes of $100,000 or more (61% versus 49% of those reporting household incomes of $40,000 to just under $80,000 and 50% of those reporting incomes under $40,000).

Satisfaction with current cell phone provider is the main reason for not switching

Respondents who have not switched cell phone providers (n=525) were asked why they have chosen to stay with their current provider. Half (51%) say they have stayed with their current cell phone provider because their plan covers their needs or because they are satisfied with their current plan. Other reasons are depicted in figure 7.

Figure 7: Reasons for staying with current cell phone provider



Q10. What is the main reason you have stayed with your current cell phone provider? [multiple responses accepted]
Base: n=525; respondents who stayed with their current cell phone providers. Don't know/refused: 2%.

Demographic Differences:

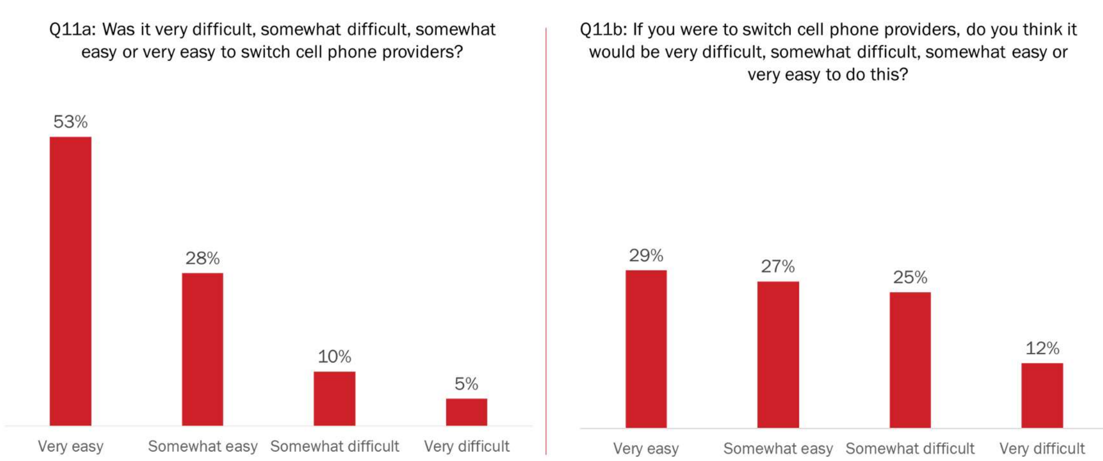
Canadian wireless consumers who have stayed with their current cell phone provider because their plan covers their needs are most likely to live in Quebec (68%) and report annual household incomes of under $40,000 (63%).

Half say it was very easy to switch providers, while fewer think this would be the case

Experience and perceptions of switching cell phone providers do not align. Eight in 10 (81%) respondents who switched cell phone providers (n=631) say it was easy to do, with 53% saying it was very easy.

In contrast, just over half (56%) of those who have not switched cell phone providers (n=577) think it would be easy to do so, with just 29% saying it would be very easy, while more than one-third (37%) think it would be difficult to do so.

Figure 8: Ease of switching cell phone provider: Experience + Perceptions



[LEFT] Q11a: Was it very difficult, somewhat difficult, somewhat easy or very easy to switch cell phone providers?
Base: n= 631; respondents who switched cell phone providers. Don't know/refused: 3%.

[RIGHT] Q11b: If you were to switch cell phone providers, do you think it would be very difficult, somewhat difficult, somewhat easy or very easy to do this?
Base: n= 577; respondents who haven't switched cell phone providers. Don't know/refused: 7%.

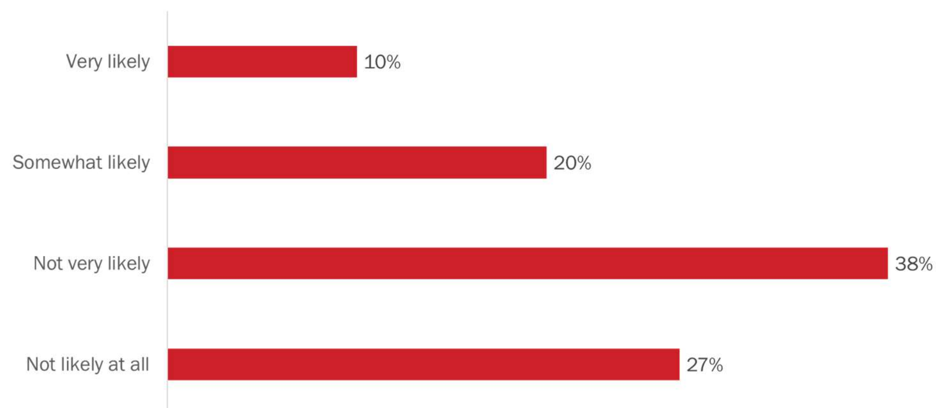
Demographic Differences:

- Respondents who say it was somewhat or very easy to switch cell phone providers are more likely to reside in Quebec (87%) than Ontario (79%).
- The same pattern was evident among respondents who have not switched cell phone providers: those who thought it would be easy to switch providers are more likely to reside in Quebec (65%) than Ontario (51%).

Most Canadians not likely to switch cell phone providers

Approximately two-thirds (65%) of Canadians say they are not likely to switch cell phone providers at the end of their contract.

Figure 9: Likelihood of switching cell phone providers



Q12. At the end of your contract with your current cell phone provider, will you be very likely, somewhat likely, not very likely or not at all likely to consider switching to another provider?
Base: n= 1,208; all respondents. Don't know/refused: 5%.

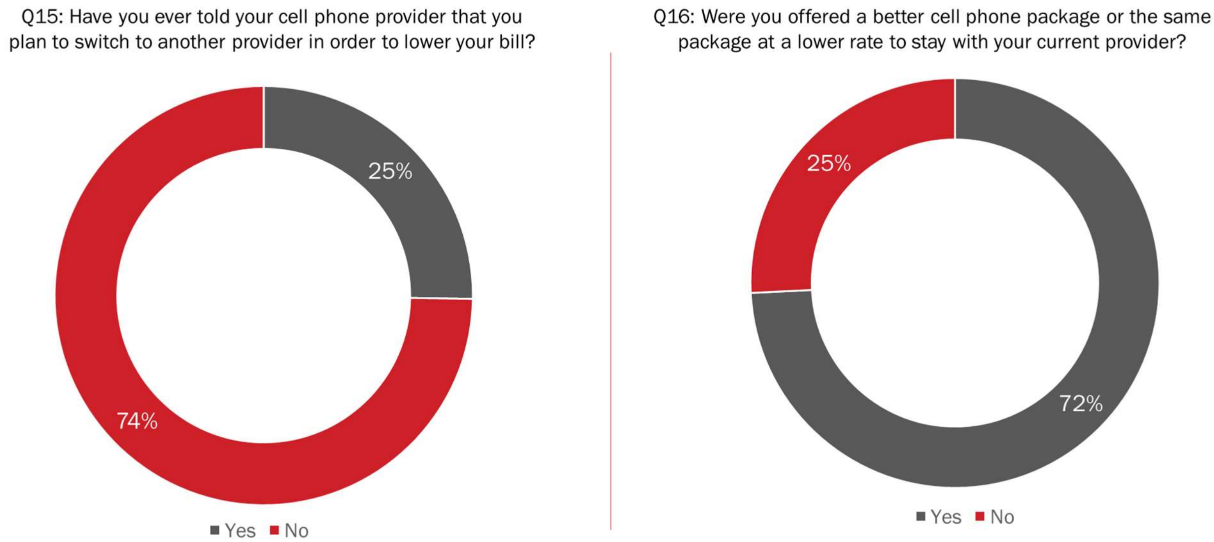
Demographic Differences:

- Canadian wireless consumers who are somewhat or very likely to consider switching to another cell phone provider at the end of their contract are more likely to be 25 to 34 years old (37%) and 35 to 54 years old (34%) than 55+ (24%).
- Additionally, these respondents are more likely to live in Atlantic Canada (36%) and Ontario (33%) than Quebec (24%) and report annual household incomes of $100,000 or more (38% versus 30% of those reporting incomes of $40,000 to just under $80,000 and 25% of those with annual household incomes of under $40,000).

Majority of Canadians who told their provider they planned to switch were rewarded

One in four (25%) Canadians say they have told their cell phone provider they plan to switch to another provider in order to lower their bill, of whom 72% said their provider offered them a better cell phone package or the same package at a lower rate to not switch.

Figure 10: Negotiating with cell phone provider



[LEFT] Q15: Have you ever told your cell phone provider that you plan to switch to another provider in order to lower your bill? Base: n= 1,208; all respondents. Don't know/refused: <1%.
[RIGHT] Q16: Were you offered a better cell phone package or the same package at a lower rate to stay with your current provider? Base: n= 307; those who told their provider they're planning on leaving to lower their bill. Don't know/refused: 4%

Demographic Differences:

- Canadians who have told their cell phone provider that they plan to switch in order to lower their bill are more likely to report annual household incomes of $100,000 or more (30%) than household incomes of under $40,000 (20%) or $40,000 to $80,000 (23%).

Perceptions of Flanker Brands

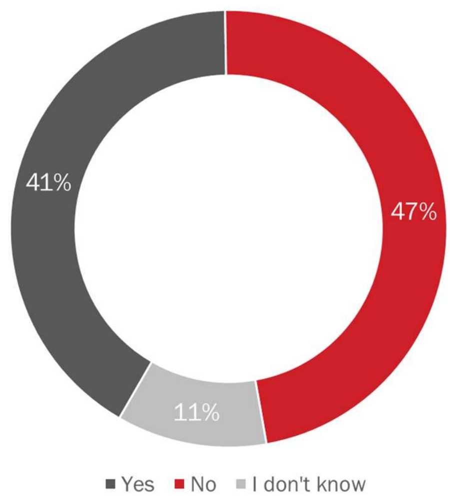
Canadians are divided about switching to Flanker Brands

More than half the Canadians surveyed do not use a flanker brand for their cell phone services. When these respondents (n=839) were asked if they would ever consider switching to a flanker brand, four in 10 (41%) say they would consider it. In contrast, slightly more (47%) say they would **not** consider switching to a flanker brand. The rest (11%) are unsure.

These respondents were read with the following description of a flanker brand:

> "A flanker brand is a brand used by a large cell phone provider to offer services and plans under a different name and often at a lower price. For example, Virgin mobile, FIDO, and Koodo are flanker brands."

Figure 11: Switching to a Flanker Brand



Q13: Would you ever consider switching to a flanker brand?
Base: n= 839; respondents who do not use a flanker brand.
Don't know/refused: 1%.

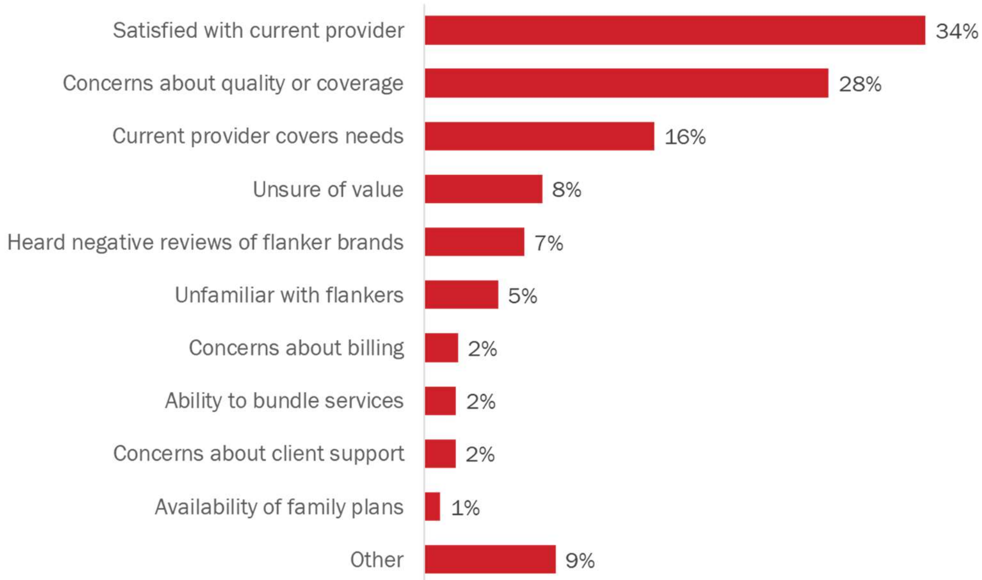
Demographic Differences:

- Respondents aged 55+ (33%) are less likely than younger wireless consumers to say they would consider switching to a flanker brand.
- Additionally, those reporting annual household incomes of under $40,000 a year (25%) are less likely than those from households with higher annual incomes to say they would consider a flanker brand.

Satisfaction with current provider and concerns about quality/coverage are the top reasons for not considering a flanker brand

One-third (34%) of those who would not consider switching to a flanker brand (n=382) would not consider it because they are satisfied with their current provider. Nearly three in 10 (28%) say they would not switch to a flanker brand because they are concerned about the quality or coverage of the cell phone service. Sixteen percent would not switch to a flanker brand because their current provider covers their needs. Other reasons were mentioned by smaller proportions (8% or less) and are depicted in figure 12.

Figure 12: Reasons for not switching to a Flanker Brand



Q14: Why would you **not** consider switching to a flanker brand?
Base: n= 382; respondents who wouldn't switch to a flanker brand
Don't know/refused: 2%. [multiple responses accepted]

Perceptions of Cell Phone Services in Canada

Canadians have varying perceptions of Canada's cell phone services

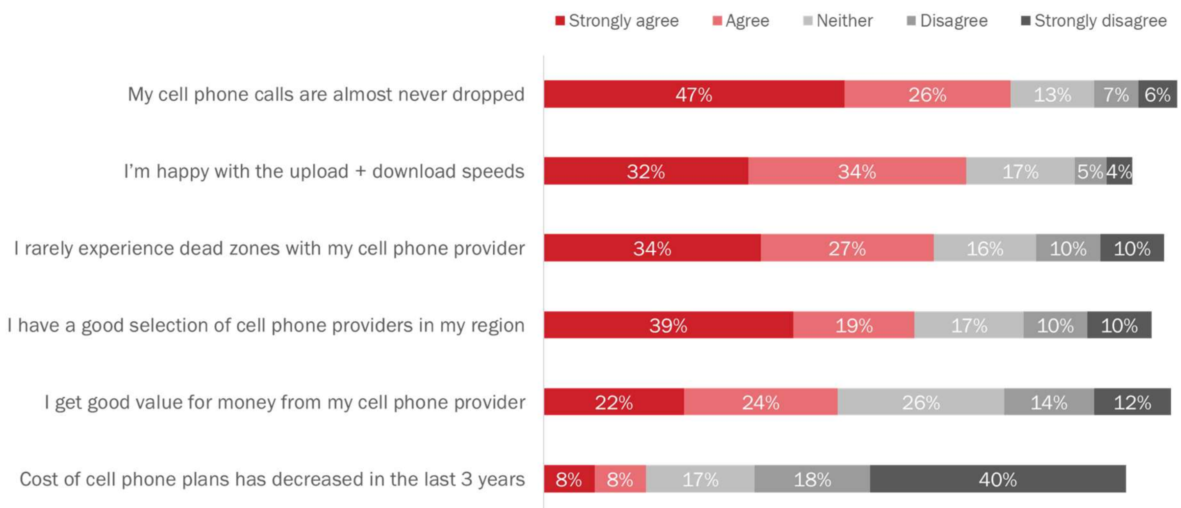
Canadians were asked to rate their level of agreement with the following statements:

- The cost of cell phone plans has decreased in the last three years.
- I get good value for money from my cell phone provider.
- My cell phone calls are almost never dropped.
- I'm happy with the upload and download speeds I get with my cell phone provider.
- I rarely experience dead zones with my cell phone provider.
- I have a good selection of cell phone providers in my region.

The majority agree that their cell phone calls are almost never dropped (73%, with 47% saying they strongly agree). Two-thirds (66%) are happy with the upload and download speeds they get with their cell phone provider, while approximately six in 10 agree that they rarely experience dead zones with their provider (61%) and that they have a good selection of cell phone providers in their region (58%).

Nearly half agree (46%) they get good value for money from their cell phone provider (46%, with 22% saying they strongly agree), although the majority (58%) disagrees that the cost of cell phone plans has decreased in the last three years, with 40% saying they strongly disagree.

Figure 13: Perceptions of cell phone services in Canada



Q17. Please tell me how much you agree or disagree with each of the following statements using a scale of one to five.
Base: n=1,208; all respondents. Don't know/refused: ranged from 1% to 9%.

Demographic Differences:

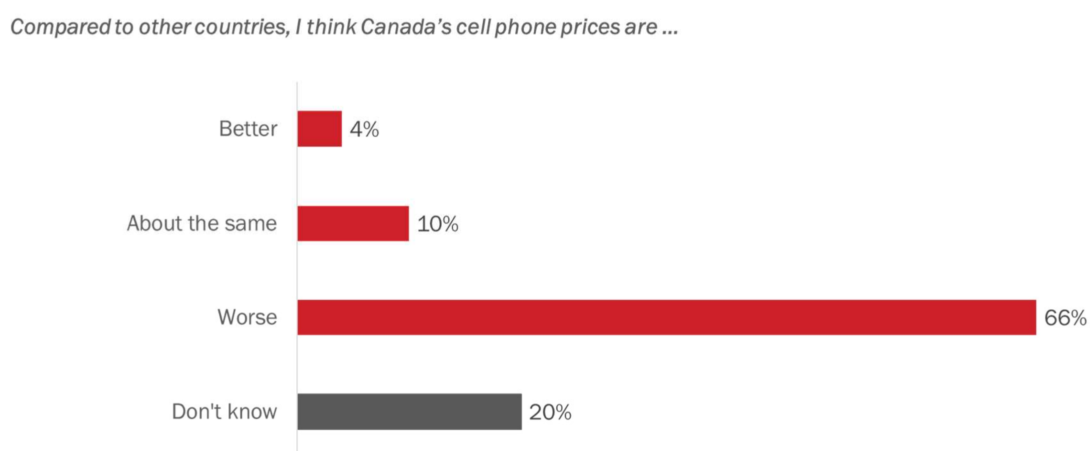
- Canadian wireless consumers who agree or agree strongly with these statements are generally more likely to reside in Quebec and more likely to be satisfied with their current cell phone provider. The exception is the statement: The cost of cell phone plans has decreased in the last 3 years. No regional differences were evident in views on cost.
- In addition, those who are happy with the upload and download speeds they get with their cell phone provider are more likely to be 18 to 24 years old (76%) and 25 to 34 years old (72%) than 55+ (62%).

- Respondents who agree they have a good selection of cell phone providers in their region are more likely to be 18 to 24 years old (70%) and 25 to 34 years old (65%) than 35 to 54 years of age (54%) or aged 55+ (56%) and less likely to live in Atlantic Canada (43%).
- Those who agree they get good value for money from their cell phone provider are more likely to be 55+ (49%) than 35 to 54 years old (42%) and most likely to report household incomes of under $40,000 (57%).
- Canadians who disagree that the cost of cell phone plans has decreased in the last three years are more likely to be 25 to 34 years old (62%) and 35 to 54 (66%) than 55+ (52%), dissatisfied (72%) with their current provider, and have reported household incomes of $80,000 or more a year (71% of those reporting an annual household income of $80,000 to under $100,000 and 65% of those reporting an income of $100,000+).

Few think that Canada's cell phone prices are better compared to other countries

Canadians were asked if they think Canada's cell phone prices are better, worse or about the same as what they would find in other countries. Few (4%) think Canada's cell phone prices are better than prices compared to other countries. In contrast, two-thirds (66%) think Canada's cell phone prices are worse compared to other countries. The rest think Canada's cell phone prices are about the same (10%) or do not know how prices compare (20%).

Figure 14: Views on cell phone prices in Canada



Q18. In your view, are Canada's cell phone prices better, worse or about the same as what you would find in other countries?
Base: n= 1,208; all respondents

Demographic Differences:

- Respondents who think Canada's cell phone prices are about the same as what you would find in other countries are more likely to be 25 to 34 years old (13%) than 55+ (7%).
- In addition, these respondents are more likely to reside in Quebec (13%) than Western Canada (7%) and are more likely to be satisfied (11%) with their current cell phone provider.

PROFILE OF SURVEY RESPONDENTS

The following tables present the weighted and unweighted demographic characteristics of survey respondents. In total, 75% of respondents completed the survey in English, and 25% completed the survey in French.

Age	Weighted		Unweighted	
	n	%	n	%
18 to 24	96	8	79	7
25 to 34	222	18	181	15
35 to 54	390	32	444	37
55-64	247	20	255	21
65 or older	253	21	249	21

Gender	Weighted		Unweighted	
	n	%	n	%
Male	580	48	652	54
Female	617	52	546	46

Region	Weighted		Unweighted	
	n	%	n	%
Atlantic Canada	85	7	100	8
Quebec	286	24	300	25
Ontario	463	38	353	29
Saskatchewan and Manitoba	73	6	96	8
Alberta	139	12	179	15
British Columbia	161	13	178	15
North	*[2]	*	*	*

[2] Sample size too small to report.

Education	Weighted		Unweighted	
	n	%	n	%
Grade 8 or less	17	1	16	1
Some high school	40	3	43	4
High school diploma or equivalent	241	20	240	20
Registered Apprenticeship / trades certificate or diploma	64	5	74	6
College, CEGEP or other non-university certificate or diploma	292	24	288	24
University certificate or diploma below bachelor’s level	69	6	69	6
Bachelor’s degree	285	24	287	24
Post-graduate degree above bachelor’s level	187	16	178	15
Don't know	7	0.6	7	0.6
Prefer not to answer	6	0.5	6	0.5

Household Income	Weighted		Unweighted	
	n	%	n	%
Under $20,000	84	8	79	7
$20,000 to just under $40,000	190	18	182	17
$40,000 to just under $60,000	171	16	169	16
$60,000 to just under $80,000	132	12	133	12
$80,000 to just under $100,000	135	13	142	13
$100,000 to just under $150,000	188	18	187	17
$150,000 and above	171	16	181	17
Don’t Know / Not Applicable	34	3	32	3
Prefer not to answer	102	9	103	9

APPENDIX

1: Methodological Notes

The following specifications applied to this survey:

- An 8-minute random digit dialling (RDD) telephone survey was administered to 1,208 Canadian residents, 18 years of age or older, using a computer aided telephone interviewing or "CATI" methodology. To be eligible to complete the survey, Canadians needed to use a cell phone.
- An overlapping dual-frame (landline and cell phone) sample was used to minimize coverage error: 70 percent of the sample frame were wireless numbers and 30 percent were landline numbers.
- The sample frame was geographically disproportionate to improve the accuracy of regional results. The distribution of completed surveys was as follows:

Strata	Completed Interviews
Atlantic	100
Quebec	300
Ontario	353
West (includes the territories)	455
Total	1,208

- Based on a sample of this size, the overall results can be considered to be accurate within ±2.9%, 19 times out of 20 (adjusted to reflect the geographically disproportionate sampling).
- The survey data have been weighted by region, age and gender using population figures from Statistics Canada's 2016 census data.
- The table below presents information about the final call dispositions for this survey broken out by sample source.

	Total	Landline	Cell
Total Numbers Attempted	**33,854**	**11,897**	**21,957**
Invalid: not in service, fax/modem, business	**4,697**	3,367	1,330
Unresolved (U)	**18,108**	5,179	12,929
In-scope - Non-responding (IS)	**8,693**	2,756	5,937
Language problem, illness, incapable	187	63	124
Selected respondent not available	15	4	11
Household refusal	4950	1,600	3,350
Respondent refusal	3530	1,079	2,451
Qualified respondent partial complete	11	10	1
In-scope - Responding units (R)	**2,356**	**595**	**1,761**
Under 18 years old	691	84	607
Works in industry	100	19	81
No personal cell phone	145	112	33

	Total	Landline	Cell
Refused to provide province	4	1	3
Does not qualify	203	24	179
Quota filled	5	0	5
Completed the survey	1,208	355	853
Response Rate = R / (U + IS + R)	**8.1%**	**7.0%**	**8.5%**

- The overall response rate was 8% (9% for the wireless sample, and 7% for the landline sample).
- The potential for non-response bias was assessed by comparing the characteristics of respondents through unweighted and weighted data. As is typically the case for general population telephone surveys, Canadians aged 18 to 34 were slightly underrepresented (4 percentage points) in the final survey sample and Canadians aged 35 to 54 were overrepresented (5 percentage points). This was corrected with weighting.

2: Survey Questionnaire

Hello, my name is [Interviewer's name]. I'm calling from Phoenix SPI on behalf of the Government of Canada to conduct a survey on Wireless Services in Canada. Would you prefer to continue in English or French? / Préférez-vous continuer en français ou en anglais?

The survey takes about 8 minutes and is voluntary. Your responses will be kept entirely confidential and anonymous.

[LANDLINE SAMPLE]

A. We would like to speak to the person in your household, 18 years of age or older, who has had the most recent birthday. Would that be you?

*[INTERVIEWER: IF NEEDED: We choose telephone numbers at random and then select one person from each household to be interviewed.]

01. Yes — GO TO E
02. No — ASK TO SPEAK TO ELIGIBLE PERSON; REPEAT INTRODUCTION

[CELL SAMPLE]

B. Are you 18 years of age or older?

01. Yes — CONTINUE
02. No — THANK/DISCONTINUE

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

01. Yes — GO TO E
02. No — ASK D

D. We would like to conduct this interview with you when it is safe and convenient to do so. When would it be more convenient for me to call back?

SCHEDULE CALL-BACK IF POSSIBLE (TIME/DAY): _______________

[EVERYONE]

E. Do you work in any of the following areas? [READ LIST]

01. Advertising or Market Research or Public Relations
02. The media (i.e. TV, radio, newspapers)
03. Telecommunications
04. Competition Bureau
05. Innovation, Science and Economic Development Canada (ISED)
06. Canadian Radio-television and Telecommunications Commission (CRTC)
THANK/DISCONTINUE IF ANY OF THE ABOVE
TERMINATE IF "DON'T KNOW" OR "REFUSED"

THANK/DISCONTINUE MESSAGE: "Thank you for your willingness to take part in this survey, but you do not meet the eligibility requirements of this study."

F. In what year were you born?

Record year: ____________
TERMINATE IF "DON'T KNOW" OR "REFUSED"

G. In which province or territory do you live?

01. Newfoundland and Labrador
02. Prince Edward Island
03. Nova Scotia
04. New Brunswick
05. Quebec
06. Ontario
07. Manitoba
08. Saskatchewan
09. Alberta
10. British Columbia
11. Yukon
12. Northwest Territories
13. Nunavut
TERMINATE IF "DON'T KNOW" OR "REFUSED"

H. RECORD GENDER [BY OBSERVATION]

01. Male

02. Female

PROGRAMMING NOTES:

- Accept Don't know and Refused for all questions if volunteered by a respondent.
- Record Don't know and Refused separately for all questions.

NOTE TO INTERVIEWERS:
If you are asked about the purpose of the survey, reiterate that <u>you are not trying to sell anything</u> and that <u>the research is being conducted for the Government of Canada</u>.

Section A: Survey Questions

To start,

1. [LANDLINE SAMPLE] Do you currently have a cell phone for your <u>personal</u> use? [DO NOT READ LIST]

01. Yes [GO TO Q3]
02. No [THANK/TERMINATE]
TERMINATE IF "DON'T KNOW" OR "REFUSED"

2. [CELL SAMPLE] Is the cell phone we've reached you on, a cell phone for personal or business use? [DO NOT READ LIST]

01. Personal [GO TO Q3]
02. Business [ASK Q2A]
TERMINATE IF "DON'T KNOW" OR "REFUSED"

2a. In addition to the cell phone that you use for business, do you also have a cell phone for your <u>personal</u> use? [DO NOT READ LIST]

01. Yes [GO TO Q3]
02. No [ASK Q2B]
TERMINATE IF "DON'T KNOW" OR "REFUSED"

2b. Are you the person responsible for making decisions about the cell phone you use for business? [DO NOT READ LIST] <u>INTERVIEWER</u>: IF ASKED WHAT IS MEANT BY MAKING DECISIONS, SAY: In other words, are you the person who manages the account and does things like select your data plan or service features?

01. Yes [GO TO Q3]
02. No [THANK/TERMINATE]

3. Who is your cell phone provider? [DO NOT READ LIST]

01. Bell (Mobility)
Virgin Mobile

Lucky Mobile
Solo Mobile
Bell MTS
02. Rogers
Fido Mobile
Chatr Mobile
Cityfone
Primus
Zoomer
SimplyConnect
03. Telus
Koodo
Public Mobile
04. Shaw
Freedom Mobile
05. Videotron
Fizz Mobile
06. SaskTel
07. Eastlink
08. Sogetel
09. Xplore Mobile
10. Iristel
Ice Wireless
Sugar Mobile
11. SSi Mobile
12. TbayTel (ThunderBay Tel)
13. TNW Wireless
14. Lynx Mobility
15. K-Net Mobile
16. SpeakOut (by 7Eleven)
17. Petro-Canada Mobility
18. PC Mobile (President's Choice)
88. Other (specify)

4. How much data is included in your cell phone plan? [READ LIST; STOP WHEN RESPONDENT PROVIDES AN ANSWER]

01. Under 1GB
02. 1 to less than 3 GB
03. 3 to less than 6 GB
04. 6 to 10 GB
05. Over 10 GB
06. Unlimited
07. [DO NOT READ] Data is not included in my plan
08. [DO NOT READ] Do not subscribe to a wireless plan (i.e., uses a prepaid or "pay as you go" plan)

[DO NOT ASK IF Q4 = 08]

5. Do you bundle your cell phone service with other services from your provider?

01. Yes
02. No

[ASK ALL]

6. Are you very satisfied, somewhat satisfied, somewhat dissatisfied, or very dissatisfied with your current cell phone provider? [DO NOT READ LIST]

01. Very satisfied
02. Somewhat satisfied
03. Somewhat dissatisfied
04. Very dissatisfied

[ASK IF Q6 = 03 or 04]

7. Why are you dissatisfied with your current cell phone provider? [DO NOT READ LIST; ACCEPT MULTIPLE RESPONSES]

01. Cost/price of service
02. Cost/price of data
03. Poor customer service [unspecified]
04. Hard to reach someone/long wait times to speak to a customer representative
05. Poor in-store experiences
06. Quality (coverage) of cell phone service is poor
07. Contract terms are too long
08. My cell phone plan does not meet my needs [unspecified]
09. Cost/price of overage charges
88. Other (specify)

8. Have you ever switched cell phone providers? [DO NOT READ LIST]

01. Yes
02. No

[ASK IF Q8 = 01]

9. How long ago did you last switch cell phone providers? [ONLY READ LIST IF HELPFUL; STOP WHEN RESPONDENT PROVIDES AN ANSWER]

01. Less than 6 months
02. 6 months to less than 1 year
03. 1 year to less than 2 years ago
04. 2 years to less than 3 years ago
05. 3 years to less than 4 years ago
06. 4 years to less than 5 years ago

07. 5 or more years ago

[ASK IF Q8 = 02]

10. What is the main reason you have stayed with your current cell phone provider? [DO NOT READ LIST; ACCEPT MULTIPLE RESPONSES]

01. My cell phone plan covers my needs/I’m satisfied
02. I didn’t want to sign up for another contract
03. Cell phone plan price is unbeatable/No better deal available
04. Too much effort/hassle
05. Currently under contract and can’t leave
06. Because my cell phone is bundled with other services
07. I like the discounts I get because my cell phone is bundled with other services
08. I have limited alternative options for service providers
09. Good reception/coverage from my current provider
88. Other (specify)

11. [IF Q8 = 01] Was it very difficult, somewhat difficult, somewhat easy or very easy to switch cell phone providers? [IF Q8 = 02] If you were to switch cell phone providers, do you think it would be very difficult, somewhat difficult, somewhat easy or very easy to do this? [DO NOT READ LIST]

01. Very difficult
02. Somewhat difficult
03. Somewhat easy
04. Very easy

[DO NOT ASK IF Q4 = 08]

12. At the end of your contract with your current cell phone provider, will you be very likely, somewhat likely, not very likely or not at all likely to consider switching to another provider? Interviewer note: IF RESPONDENTS VOLUNTEER THAT THEY ARE NOT UNDER CONTRACT, RECORD THIS AND ASK Q12B.

01. Very likely
02. Somewhat likely
03. Not very likely
04. Not likely at all
05. [DO NOT READ] Not under contract

[ASK IF Q4 = 08 OR Q12 = 05]

12b. [IF Q12 = 05: In that case…] In the next year or so, are you very likely, somewhat likely, not very likely or not at all likely to consider switching to another provider?

01. Very likely
02. Somewhat likely

03. Not very likely
04. Not likely at all

[ASK IF Q3 ≠ A FLANKER BRAND]

13. Would you ever consider switching to a flanker brand? A flanker brand is a brand used by a large cell phone provider to offer services and plans under a different name and often at a lower price. For example Virgin mobile, FIDO, and Koodo are flanker brands. [DO NOT READ LIST]

01. Yes	[SKIP TO Q15]
02. No	**[CONTINUE]**
03. I don't know	**[SKIP TO Q15]**

14. Why would you not consider switching to a flanker brand? [DO NOT READ LIST; ACCEPT MULTIPLE RESPONSES]

01. Availability of family plans
02. Ability to bundle services
03. Concerns about quality or coverage
04. Unfamiliar with flankers
05. Unsure of value
06. Concerns about client support
07. Concerns about billing
08. Current provider covers my needs
09. I'm satisfied with my current provider
10. I've heard negative reviews of flanker brands
88. Other (specify)

15. Have you ever told your cell phone provider that you plan to switch to another provider in order to lower your bill? [DO NOT READ LIST]

01. Yes	[CONTINUE]
02. No	[SKIP TO Q17]

16. Were you offered a better cell phone package or the same package at a lower rate to stay with your current provider? [DO NOT READ LIST]

01. Yes
02. No

17. Please tell me how much you agree or disagree with each of the following statements using a scale of one to five, where "1" means strongly disagree and "5" means strongly agree. [READ/RANDOMIZE LIST]

a. The cost of cell phone plans has decreased in the last three years.
b. I get good value for money from my cell phone provider.

c. My cell phone calls are almost never dropped. [INTERVIEWER: IF ASKED WHAT THIS MEANS, SAY: A dropped call occurs when you are disconnected from the person you are speaking with due to a cellular interruption]
d. I'm happy with the upload and download speeds I get with my cell phone provider.
e. I rarely experience dead zones with my cell phone provider. [INTERVIEWER: IF ASKED WHAT THIS MEANS, SAY: A dead zone is an area in which there is no cell phone service available].
f. I have a good selection of cell phone providers in my region.

18. In your view, are Canada's cell phone prices better, worse or about the same as what you would find in other countries? [DO NOT READ LIST]

01. Better
02. Worse
03. About the same
99. Don't know

We have a couple final questions for statistical classification purposes. Be assured that your responses will be held in strict confidence.

19. Which of the following categories best describes your total household income? That is, the total income of all persons in your household combined, before taxes. [READ LIST; STOP WHEN RESPONDENT PROVIDES AN ANSWER]

01. Under $20,000
02. $20,000 to just under $40,000
03. $40,000 to just under $60,000
04. $60,000 to just under $80,000
05. $80,000 to just under $100,000
06. $100,000 to just under $150,000
07. $150,000 and above

20. What is the highest level of formal education that you have completed? [READ LIST; STOP WHEN RESPONDENT PROVIDES AN ANSWER]

01. Grade 8 or less
02. Some high school
03. High School diploma or equivalent
04. Registered Apprenticeship or other trades certificate or diploma
05. College, CEGEP or other non-university certificate or diploma
06. University certificate or diploma below bachelor's level
07. Bachelor's degree
08. Post graduate degree above bachelor's level

Thank you. Those are all the questions we have for you today. We greatly appreciate your participation in this research.