



Online Consultation on Mobile Wireless Services in Canada Executive Summary

Prepared for Canadian Radio-television and Telecommunications

January 2020

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This report presents the results of an online questionnaire available for completion by all Canadians. In total, 28,705 people aged 16 and older who have a cell phone for personal use provided feedback between December 3 and December 31, 2019.

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EXECUTIVE SUMMARY

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. The results of that survey are presented under separate cover. 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. In total, 28,705 Canadians who indicated that they have a personal cell phone completed the online questionnaire between December 3 and 31, 2019. **The results of this consultation are not representative of the Canadian population.**

Results can be found in the report: Online Consultation on Mobile Wireless Services in Canada.

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:



Alethea Woods, President
Phoenix Strategic Perspectives