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

Wireless Code Public Opinion Research – Spring 2020

Final Report

Prepared for Canadian Radio-television and Telecommunications Commission

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Canada

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February 2020

The Canadian Radio-television and Telecommunications Commission (CRTC) commissioned Kantar to conduct a public opinion research survey to obtain tracking data on how consumers understand their wireless service contracts and their related rights as well as to further explore a variety of topics such as wireless complaints, data usage, bill shock, and ease of switching service providers. This wave of research will again explore Canadians perceptions of the CRTC as well as issues related to the TV Service Provider Code. This publication reports on the findings of this research.

Cette publication est aussi disponible en français sous le titre: Recherche sur l'opinion publique concernant le Code sur les services sans fil – printemps 2020.

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1. Executive Summary

1.1 Research Purpose and Objectives

The Wireless Code, which was established in 2013 by the CRTC, is a mandatory code of conduct for wireless service providers and applies to all retail mobile wireless voice and data services provided to individual and small business consumers in Canada. The Wireless Code applied to all wireless contracts as of June 3, 2015.

The CRTC committed to evaluating the effectiveness of the Wireless Code and the first review was completed in 2017 to assess whether the Wireless Code meets and continues to meet its objectives, which included ensuring that consumers are empowered to make informed decisions about wireless services. On June 15, 2017, the CRTC announced multiple changes to the Wireless Code, which came into effect on December 1, 2017.

The information collected in the 2020 Wireless Code public opinion research (POR) will help the CRTC assess whether Canadians are satisfied with the changes and whether further changes are required to ensure the objectives of the Wireless Code continue to be met. The 2020 research further explores a variety of topics such as wireless complaints, data usage, bill shock, and ease of switching service providers. This research also explores Canadians perceptions of the CRTC as well as issues related to the TV Service Provider Code.

The methodology was designed to ensure consistency with previous iterations of Wireless Code research conducted from 2014-2019.

This research was designed to address the following objectives:

– Better understand some of the issues that affect Canadians the most as it relates to their wireless and TV services;

– Obtain data to assess whether the Wireless Code continues to meet its objectives, which include ensuring that consumers are empowered to make informed decisions about wireless services; and

– Better understand Canadians' perceptions of the CRTC and how they are changing over time.

1.2 Summary of Findings

Wireless Data Usage

The majority of Canadians continue to select plans that include data (83%), with a small but increasing number now opting for unlimited data plans (13% vs. 8% in 2019). Among those with data plans, virtually all (97%) take steps to manage their data so as not to incur additional costs.

Those with data plans continue to feel confident in their ability to manage their data, with the majority reporting they find it easy (81%). This is translating into fewer Canadians reporting overage fees than in previous years (41% vs. 48-49% in 2018 and 2019).

Bill shock and Roaming Fees

However, despite fewer Canadians paying overage fees overall, one-in-five (22%) Canadians continue to experience bill shock, consistent with previous years. This disconnect suggests that while Canadians are having greater success managing their data, many may not fully understand their contracts or how to manage other fees and services in a way that prevents bill shock.

Data overage fees continue to be the predominant source of bill shock but have decreased over the past year (50% vs. 56%), while unexpected set-up fees or service charges appear to be on the rise (7% in 2020 vs. 2% in 2019). Further, while most Canadians continue to report they find roaming fees clear and easy to understand (51%); international travel accounts for a greater proportion of bill shock versus last year (17% vs. 12%).

The Wireless Code mandates that providers must suspend data overage charges once they exceed $50 unless an authorized user consents to paying additional fees. Despite this, two-thirds (66%) of those who experienced bill shock continue to report they have had charges in excess of $50 during the past year, with most of these falling in the $50 to $100 range (55%).

Understanding of Contracts

Little has changed compared to 2019 with regard to Canadians' understanding of their wireless contracts. The majority (57%) continue to find their wireless contract clear and easy to understand, and close to half (49%) of Canadians continue to find the explanation of cancellation fees clear and easy to understand, consistent with 2019.

However, after being in place for two years, many Canadians continue to find the explanation of the trial period somewhat unclear (41%). This may signal that general confusion continues to exist among some Canadians related to the trial period.

Changes

The number of Canadians who have changed their service provider is slowly increasing (up 4% since 2017). Overall, one-in-five Canadians report having changed their service provider in the past two years (20%). Being offered a better deal is the most commonly stated incentive to switch providers (58%), and few (14%) found the process of switching providers difficult.

Complaints

The number of complaints Canadians report making has remained stable since Fall 2016, suggesting the Wireless Code is having a positive impact for wireless consumers. Levels of complaints have decreased nine percent overall from 2014 (17% vs. 26%).

The causes of complaints have undergone a shift in the past year, likely reflecting the decrease in data overage charges noted earlier. Incorrect charges are now the leading cause of complaints (35% vs. 26% in 2019). Other causes continue to include data charges (27%) and inadequate quality of service (22%). Compared to 2019, more Canadians now cite misleading information about contract terms as a cause for complaint (19% vs. 8%).

The Commission for Complaints for Telecom-television Services (CCTS) responds to complaints from consumers if the consumer believes the complaint remains unresolved by the service provider. Consumers continue to primarily complain to their service providers (93%) with few of these complaints also going to the CCTS (5%).

Canadians' Wireless Plans

Little has changed over the past year regarding the type of plans Canadians purchase. Most continue to purchase post-paid services in 2020 (89%), with few purchasing pre-paid services (10%). Similar to the past two years, many also continue to use an individual plan (65%), with one-third (33%) opting for a family plan.

Demographic Differences

A number of additional demographic analyses were also undertaken, including age, gender, education, income and language. Compared to previous years, regional differences have dissipated. Demographic differences were noted in the following areas:

Age:

Canadians aged 18-54 continue to differ than their older counterparts (55+) in a number of ways:

- Younger Canadians (18-54) continue to be more likely to have data included in their wireless plans than Canadians aged 55+ (87-92% vs. 72%);
- Younger Canadians continue to be more likely to employ activities to manage or limit data usage. This is true for switching to Wi-Fi when available (93-97% for 18-54-year olds vs. 85% for 55+), reducing data usage when notified (74-75% for 18-54-year olds vs. 54% for 55+), and monitoring data usage with tools (46-54% for 18-54-year olds vs. 36% for 55+); and
- Younger Canadians continue to be more likely to have experienced bill shock than those 55+ (24-27% vs. 17%);

Canadians in the youngest age cohort (18-34) differ from those 35+ in the following areas:

- Those in the youngest age group (18-34) remain more likely than their older (35+) counterparts to have paid data overage fees (48% vs. 38-40%); and
- Those in the youngest age group (18-34) are more likely to say they find their wireless contract easy to understand than those 35+ (66% vs. 51-53%).

An in-depth analysis of older Canadians (55+) was undertaken to identify any significant differences between those 55-64, 65-74, and 75+ and their younger counterparts (18-54). The analysis found that while there is some variation between the 55-64, 65-74, and 75+ age groups, overall, those 55-64, 65-74, and 75+ consistently vary in the same manner (i.e., all three age groups are higher or lower than those 18-54). Thus, to ease reader burden and ensure clarity, the older cohort in this report has been grouped as 55+.

Language:

A few notable differences exist among Canadian's whose primary spoken language is not an official language:

- Those who do not speak an official language are more likely to experience bill shock (30% vs. 18-21%); and
- Those who do not speak an official language are more likely to have found the explanation of the trial period for new contracts unclear (55% vs. 38-39%).

Television Service Provider Code

Despite having been introduced more than two years ago, awareness of the Television Service Provider (TVSP) remains low and has declined from previous years. In 2020, fewer (13% vs 17%) can recall the TV service provider code while more do not recall it at all (60% vs 56%). This may be a function of the reduced media attention on the Code as time goes on.

Only half of TV subscribers (50%) believe they have been informed of the basic service package, despite the requirement that all customers should have been informed. Given that this has remained steady over time, it may signal issues with the way in which the information is being disseminated to Canadians.

At an overall level, most Canadians continue to find their TV contracts clear and easy to understand (55%) and few (14%) have experienced difficulties related to TV service calls. Most Canadians continue to say they have not experienced an uninformed price change to their channels or package (76%).

The number of Canadians who have made a complaint about their TV services in the past 12 months has remained steady since 2019 (23% for both) but remains lower than in 2018 (27%). The nature of these complaints varies, but most continue to centre around incorrect charges (32%), inadequate quality of service (22%), or price (18%).

CRTC

Canadians' understanding of the mandate and role of the CRTC has remained stable compared to 2019 and is approaching 2014 levels. Thirty-six per cent now consider themselves very well/well informed about the CRTC, compared to 38 per cent in 2014.

Canadians' impressions of the CRTC are similar to 2019 and remain more positive than in Fall 2016 (33% vs. 29%). This may be reflecting the increase in Canadians who feel well informed about the role of the CRTC over the past two years. However, it is worth noting that 62% of Canadians say they are not well informed about the role of the CRTC, which implies that many consumers' impressions of the CRTC are based on little to no knowledge.

Strategic implications

The results of this research provide evidence that suggests the Wireless Code continues to have positive impacts on Canadians. It also provides information to be considered for future updates of the Wireless Code and/or the Television Service Provider Code.

1. Data, and consequently data management, continue to be of primary importance to Canadians. An increase in the number of Canadians choosing unlimited data plans, as well as a reduction in the number of Canadians paying data overage fees, suggest Canadians are increasingly aware of and involved with plan management. This signals a positive change, however, the incidence of paying overage fees remains high. While it is possible some Canadians are comfortable with paying occasional overage fees in the interest of having a lower monthly bill, higher rates of bill shock among those who have paid overage fees in the past year suggest the Wireless Code may be able to further support some consumers in this area.
2. Despite fewer Canadians paying data overage fees overall, Canadians continue to experience bill shock on par with 2016 levels. Other factors are increasingly contributing to unexpected charges, namely international travel and unexpected set-up fees or service charges. This may be an area where the Wireless Code could further support Canadians.

3. Results suggest many Canadians do not fully understand the terms surrounding trial periods, with more consumers finding the explanation unclear than clear. This is exacerbated among those who do not speak an official language. An opportunity exists for the Wireless Code to support consumers in this area, ensuring Wireless Service Providers make better efforts to ensure the explanation of the trial period easier to understand and thus consumers can take better advantage of it.
4. The TVSP Code is starting to show its impact. The number of complaints has continued to be below 2018 levels. Little had changed in other aspects of TVSP Code; awareness continues to be low, but few are having difficulty understanding contracts or issues with service calls suggesting the low awareness is not critical. Many Canadians continue to be unaware of the basic service package and as such, encouraging service providers to draw attention to this may be beneficial to Canadians.
5. Canadians' impressions of the CRTC have improved with time and are increasingly positive. However, many Canadians say they are not well informed about the role of the CRTC, signalling an opportunity to further educate consumers.

1.3 Methodology

The methodology was designed to ensure consistency with previous waves of Wireless Code surveys conducted from 2014-2019. The sample was split into two distinct segments: Canadians who currently have a personal (or retail) wireless plan covering services such as voice, text and data and Canadians who do not currently have a personal (or retail) wireless plan. A telephone survey was conducted among 1,510 Canadians aged 18 years and older; 1,322 with those who have their own wireless plan and 188 with those who do not have a wireless plan. Included in this sample were Canadians who reside in cell phone only households (n=502). This sample also included Canadians that are under contract with TV service providers (n=1,060).

Interviews were conducted using a combination of random digit dialling (RDD) for the landline sample frame and pre-screened cell-phone only (CPO) sample. The RDD approach ensures that all telephone numbers are given an equal probability of being selected thereby minimizing sampling bias for this portion of the sample. Random sampling for CPO households is cost prohibitive and as such pre-screened CPO sample was used for the CPO household subsample.

A pre-test consisting of 10 completed English interviews and 10 completed French interviews was undertaken on January 10th, 2020. No changes were made after the pre-test and as such the data were included in the final data set. The survey was in field from January 16th – January 30th, 2020.

Due to the inclusion of pre-screened cell phone only sample, the sample is a non-probability sample and as such margin of error does not apply.

1.4 Contract Value

The total contract value for the project was **$114,337.12** including applicable taxes.

1.5 Statement of Political Neutrality

I hereby certify as a representative of Kantar 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.

Tanya Whitehead

Kantar

Senior Director, Public Practice Leader

2. Foreword

2.1 Background

The Wireless Code, which was established in 2013 by the CRTC, is a mandatory code of conduct for wireless service providers. The Code serves two primary goals: to ensure consumers are empowered to make informed decisions about wireless services; and to make it easier for consumers to take advantage of competitive offers. The Code includes provisions that address clarity; contracts and related documents; changes to contracts; bill management; mobile device issues; and cancellation.

The Code applies to all retail mobile wireless voice and data services (wireless services) provided to individual and small business consumers in Canada. The Code applies to all wireless contracts as of June 3, 2015.

The CRTC committed to evaluating the effectiveness of the Code and to use the results in formal reviews. The first formal review was completed in 2017. The review of the Wireless Code over time assesses whether it meets and continues to meet its objectives, which includes ensuring that consumers are empowered to make informed decisions about wireless services. Benchmarks were collected in 2014 and further tracking was conducting from 2015 to 2019.

On June 15, 2017, the CRTC announced multiple changes to the Wireless Code. The information collected in the 2017 through 2019 surveys helped the CRTC assess whether Canadians were satisfied with the changes and whether further changes are required to ensure the objectives of the Wireless Code continue to be met. The Commission now needs to obtain an additional year of data to continue tracking the Code's effectiveness and Canadians' opinions over time.

2.2 Research Objectives

The overall objective of this research was to obtain tracking data on how consumers understand their wireless service contracts and their related rights as well as to further explore a variety of topics such as wireless complaints, data usage, bill shock, and ease of switching service providers. This wave of research also explores Canadians' perceptions of the CRTC as well as issues related to the TV Service Provider Code.

To ensure consistent tracking and comparability over time, the survey used for the Wireless Code POR research in 2019 was used with minimal changes.

More specifically, the survey was designed to address the following objectives:

- Better understand some of the issues that affect Canadians the most as it relates to their wireless and TV services;
- Obtain data to assess whether the Wireless Code continues to meet its objectives, which include ensuring that consumers are empowered to make informed decisions about wireless services; and
- Better understand Canadians' perceptions of the CRTC and how they are changing over time.

2.3 Methodological Overview

For tracking purposes and comparability over time, most questions remained the same or similar to the ones used for the 2019 Wireless Code POR survey.

A telephone survey was conducted among 1,510 Canadians age 18 years and older; 1,322 with those who have their own wireless plan and 188 with those who do not have their own wireless plan. Included in this sample were Canadians who reside in cell phone only households (n=502). This sample also included Canadians that are under contract with TV service providers (n=1,060).

Interviews were conducted using a combination of random digit dialling (RDD) for the landline sample frame and pre-screened cell phone only households (CPO) sample. Since this survey included pre-screened sample it is considered a non-probability sample and as such margin of error does not apply and conclusions from these results cannot be generalized to any population.

A pre-test consisting of 10 completed English interviews and 10 completed French interviews was undertaken on January 10th, 2020. No changes were made after the pre-test and as such the data were included in the final data set. The survey was in field from January 16th – January 30th, 2020.

A detailed methodology can be found in Chapter 4.10.

Please note: Analysis was undertaken to establish the extent of the relationship among variables such as gender, age, region, level of education attained, language spoken, household income, type of plan (family vs. individual; prepaid vs, postpaid; employee; limited vs. unlimited data; tab contract), ease of managing data, recall of Television Service Provider code, informed role of the CRTC, complaints, bill shock, and CPO sample. Only differences significant at the 95% confidence level are presented in this report. Any differences that are statistically significant between subgroups are indicated with an uppercase letter to refer to the applicable column.

The numbers presented throughout this report are rounded to the closest full number. Due to this rounding, in some cases it may appear that ratings collapsed together are different by a percentage point from when they are presented individually, and totals may not add up to 100%. Also, the data for 2014 and 2015 was taken directly from the 2014 and 2015 Wireless Code Public Opinion Research reports. Kantar has incorporated these results as well as results from Spring and Fall 2016, 2017, 2018, and 2019 research into the 2020 report for year-over-year comparison where applicable.

3. Highlights and Strategic Implications

Wireless Data Usage

The majority of Canadians continue to select plans that include data (83%), with a small but increasing number now opting for unlimited data plans (13% vs. 8% in 2019). Among those with data plans, virtually all (97%) take steps to manage their data so as not to incur additional costs.

Those with data plans continue to feel confident in their ability to manage their data, with the majority reporting they find it easy (81%). This is translating into fewer Canadians reporting overage fees than in previous years (41% vs. 48-49% in 2018 and 2019).

Bill shock and Roaming Fees

However, despite fewer Canadians paying overage fees overall, one-in-five (22%) Canadians continue to experience bill shock, consistent with previous years. This disconnect suggests that while Canadians are having greater success managing their data, many may not fully understand their contracts or how to manage other fees and services in a way that prevents bill shock.

Data overage fees continue to be the predominant source of bill shock but have decreased over the past year (50% vs. 56%), while unexpected set-up fees or service charges appear to be on the rise (7% in 2020 vs. 2% in 2019). Further, while most Canadians continue to report they find roaming fees clear and easy to understand (51%); international travel accounts for a greater proportion of bill shock versus last year (17% vs. 12%).

The Wireless Code mandates that providers must suspend data overage charges once they exceed $50 unless an authorized user consents to paying additional fees. Despite this, two-thirds (66%) of those who experienced bill shock continue to report they have had charges in excess of $50 during the past year, with most of these falling in the $50 to $100 range (55%).

Understanding of Contracts

Little has changed compared to 2019 with regard to Canadians' understanding of their wireless contracts. The majority (57%) continue to find their wireless contract clear and easy to understand, and close to half (49%) of Canadians continue to find the explanation of cancellation fees clear and easy to understand, consistent with 2019.

However, after being in place for two years, many Canadians continue to find the explanation of the trial period somewhat unclear (41%). This may signal that general confusion continues to exist among some Canadians related to the trial period.

Changes

The number of Canadians who have changed their service provider is slowly increasing (up 4% since 2017). Overall, one-in-five Canadians report having changed their service provider in the past two years (20%). Being offered a better deal is the most commonly stated incentive to switch providers (58%), and few (14%) found the process of switching providers difficult.

Complaints

The number of complaints Canadians report making has remained stable since Fall 2016, suggesting the Wireless Code is having a positive impact for wireless consumers. Levels of complaints have decreased nine percent overall from 2014 (17% vs. 26%).

The causes of complaints have undergone a shift in the past year, likely reflecting the decrease in data overage charges noted earlier. Incorrect charges are now the leading cause of complaints (35% vs. 26% in 2019). Other causes continue to include data charges (27%) and inadequate quality of service (22%). Compared to 2019, more Canadians now cite misleading information about contract terms as a cause for complaint (19% vs. 8%).

The CCTS responds to complaints from consumers if the consumer believes the complaint remains unresolved by the service provider. Consumers continue to primarily complain to their service providers (93%) with few of these complaints also going to the Commissioner for Complaints for Telecommunications Services (CCTS) (5%).

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Little has changed over the past year regarding the type of plans Canadians purchase. Most continue to purchase post-paid services in 2020 (89%), with few purchasing pre-paid services (10%). Similar to the past two years, many also continue to use an individual plan (65%), with one-third (33%) opting for a family plan.

Demographic Differences

A number of additional demographic analyses were also undertaken, including age, gender, education, income and language. Compared to previous years, regional differences have dissipated. Demographic differences were noted in the following areas:

Age:

Canadians aged 18-54 continue to differ than their older counterparts (55+) in a number of ways:

- Younger Canadians (18-54) continue to be more likely to have data included in their wireless plans than Canadians aged 55+ (87-92% vs. 72%);
- Younger Canadians continue to be more likely to employ activities to manage or limit data usage. This is true for switching to Wi-Fi when available (93-97% for 18-54-year olds vs. 85% for 55+), reducing data usage when notified (74-75% for 18-54-year olds vs. 54% for 55+), and monitoring data usage with tools (46-54% for 18-54-year olds vs. 36% for 55+); and
- Younger Canadians continue to be more likely to have experienced bill shock than those 55+ (24-27% vs. 17%);

Canadians in the youngest age cohort (18-34) differ from those 35+ in the following areas:

- Those in the youngest age group (18-34) remain more likely than their older (35+) counterparts to have paid data overage fees (48% vs. 38-40%); and
- Those in the youngest age group (18-34) are more likely to say they find their wireless contract easy to understand than those 35+ (66% vs. 51-53%).

An in-depth analysis of older Canadians (55+) was undertaken to identify any significant differences between those 55-64, 65-74, and 75+ and their younger counterparts (18-54). The analysis found that while there is some variation between the 55-64, 65-74, and 75+ age groups, overall, those 55-64, 65-74, and 75+ consistently vary in the same manner (i.e., all three age groups are higher or lower than those 18-54). Thus, to ease reader burden and ensure clarity, the older cohort in this report has been grouped as 55+.

Language:

A few notable differences exist among Canadian's whose primary spoken language is not an official language:

- Those who do not speak an official language are more likely to experience bill shock (30% vs. 18-21%); and
- Those who do not speak an official language are more likely to have found the explanation of the trial period for new contracts unclear (55% vs. 38-39%).

Television Service Provider Code

Despite having been introduced more than two years ago, awareness of the Television Service Provider (TVSP) remains low and has declined from previous years. In 2020, fewer (13% vs 17%) can recall the TV service provider code while more do not recall it at all (60% vs 56%). This may be a function of the reduced media attention on the Code as time goes on.

Only half of TV subscribers (50%) believe they have been informed of the basic service package, despite the requirement that all customers should have been informed. Given that this has remained steady over time, it may signal issues with the way in which the information is being disseminated to Canadians.

At an overall level, most Canadians continue to find their TV contracts clear and easy to understand (55%) and few (14%) have experienced difficulties related to TV service calls. Most Canadians continue to say they have not experienced an uninformed price change to their channels or package (76%).

The number of Canadians who have made a complaint about their TV services in the past 12 months has remained steady since 2019 (23% for both) but remains lower than in 2018 (27%). The nature of these complaints varies, but most continue to centre around incorrect charges (32%), inadequate quality of service (22%), or price (18%).

CRTC

Canadians' understanding of the mandate and role of the CRTC has remained stable compared to 2019 and is approaching 2014 levels. Thirty-six per cent now consider themselves very well/well informed about the CRTC, compared to 38 per cent in 2014.

Canadians' impressions of the CRTC are similar to 2019 and remain more positive than in Fall 2016 (33% vs. 29%). This may be reflecting the increase in Canadians who feel well informed about the role of the CRTC over the past two years. However, it is worth noting that 62% of Canadians say they are not well informed about the role of the CRTC, which implies that many consumers' impressions of the CRTC are based on little to no knowledge.

Strategic implications

The results of this research provide evidence that suggests the Wireless Code continues to have positive impacts on Canadians. It also provides information to be considered for future updates of the Wireless Code and/or the Television Service Provider Code.

6. Data, and consequently data management, continue to be of primary importance to Canadians. An increase in the number of Canadians choosing unlimited data plans, as well as a reduction in the number of Canadians paying data overage fees, suggest Canadians are increasingly aware of and involved with plan management. This signals a positive change, however, the incidence of paying overage fees remains high. While it is possible some Canadians are comfortable with paying occasional overage fees in the interest of having a lower monthly bill, higher rates of bill shock among those who have paid overage fees in the past year suggest the Wireless Code may be able to further support some consumers in this area.

7. Despite fewer Canadians paying data overage fees overall, Canadians continue to experience bill shock on par with 2016 levels. Other factors are increasingly contributing to unexpected charges, namely international travel and unexpected set-up fees or service charges. This may be an area where the Wireless Code could further support Canadians.
8. Results suggest many Canadians do not fully understand the terms surrounding trial periods, with more consumers finding the explanation unclear than clear. This is exacerbated among those who do not speak an official language. An opportunity exists for the Wireless Code to support consumers in this area, ensuring Wireless Service Providers make better efforts to ensure the explanation of the trial period easier to understand and thus consumers can take better advantage of it.
9. The TVSP Code is starting to show its impact. The number of complaints has continued to be below 2018 levels. Little had changed in other aspects of TVSP Code; awareness continues to be low, but few are having difficulty understanding contracts or issues with service calls suggesting the low awareness is not critical. Many Canadians continue to be unaware of the basic service package and as such, encouraging service providers to draw attention to this may be beneficial to Canadians.
10. Canadians' impressions of the CRTC have improved with time and are increasingly positive. However, many Canadians say they are not well informed about the role of the CRTC, signalling an opportunity to further educate consumers.

4. Wireless Code

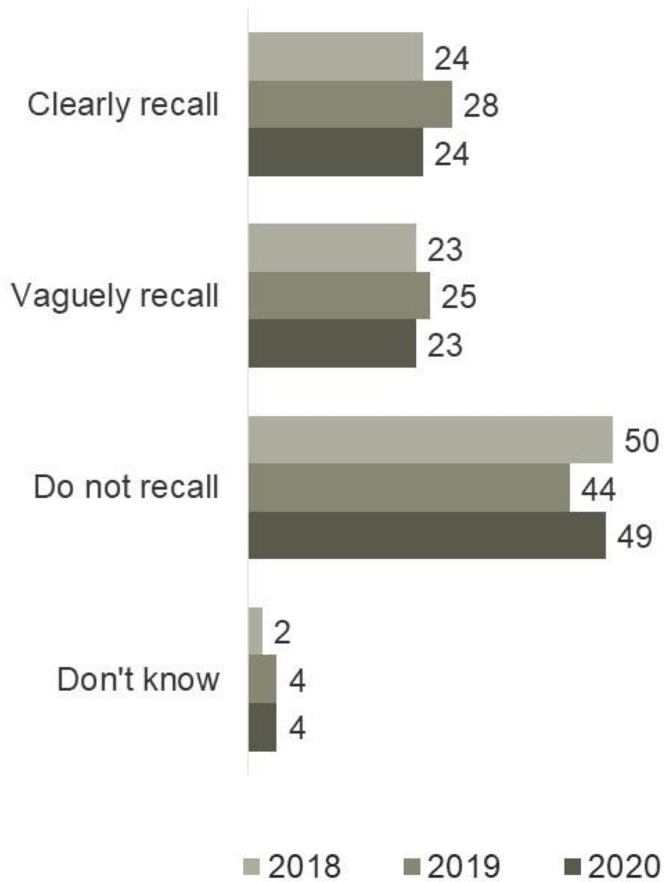
4.1 Recall of the Wireless Code

The Wireless Code came into effect in 2013 and was updated in 2017. As a result, the Wireless Code now ensures that customers will be provided with unlocked devices, gives families/share plans more control over data overages, sets minimum usage limits for the trial period that correspond to at least half of the monthly usage limits of the customer's plan, and clarifies that data is a key contract term that cannot be changed during the commitment period without the customer's consent.

Compared to 2019, fewer Canadians are aware of the Wireless Code, with more saying they do not recall hearing anything about it (49% vs. 44% in 2019), which is in-line with 2018 results (50%). This may be reflective of an ebb in media coverage over the past year.

As outlined in Table 4.1.b, age continues to play a factor in awareness of the Wireless Code. Recall is higher among middle-aged Canadians (35-54) than their younger (18-34) or older (55+) counterparts (clearly recall 31% vs. 21-22% respectively). As noted in Table 4.1.c, those with higher incomes ($100k+) are also more likely to recall the Wireless Code than those who make less than $100K (clearly recall 35-39% vs. 16-26%), as are those with a higher education level (27-29% for College or University graduates vs. 15% for those with no tertiary education).

Exhibit 4.1.a Recall of the Wireless Code



QWC1. In 2013 a Wireless Code was created to make wireless contracts clearer, limit early cancellation fees, and to contribute to a more competitive wireless marketplace. In 2017, the Code was updated to end unlocking fees. To what extent, if any would you say you recall hearing or seeing anything about this Code? Would you say you clearly recall, vaguely recall or do not recall?

Base: Total respondents 2020 (n=1,510); 2019 (n=1,524); 2018 (n=1,345)

Table 4.1.b Recall of the Wireless Code

Recall of the Wireless Code	Total (A)	Age 18-34 (D)	Age 35-54 (E)	Age 55+ (F)	Education HS or Less (P)	Education College (Q)	Education University or More (R)
Base = actual	**1510**	**233**	**513**	**716**	**398**	**363**	**685**
Do not recall	49	50 E	39	55 E	61 QR	48	41
Clearly Recall	24	22	31 DF	21	15	27 P	29 P
Vaguely Recall	23	24	26	21	16	23	28 P
Don’t know	4	5	3	3	8 QR	2	2

QWC1. In 2013 a Wireless Code came into effect establishing guidelines for wireless service providers. The Code ensures that wireless consumers are empowered to make informed decisions and that there is a more competitive wireless marketplace. The Code was updated in 2017 to end unlocking fees and offer longer trial periods for new contracts. To what extent, if any would you say you recall hearing or seeing anything about this Code? Would you say you clearly recall, vaguely recall or do not recall?

Note: Letters denote statistically significant difference. For example, if there is a B then the result is significantly higher than the corresponding result in column B.

Table 4.1.c Recall of the Wireless Code

Recall of the Wireless Code	Total (A)	Income <$40K (E)	$40K-<$60K (F)	$60K-<$100K (G)	$100K-<$150K (H)	$150K+ (I)
Base = actual	**1510**	**297**	**188**	**352**	**221**	**203**
Do not recall	49	64 GHI	56 HI	48 HI	31	31
Clearly Recall	24	16	23	26 E	35 EFG	39 EFG
Vaguely Recall	23	14	19	25 E	34 EF	29 E
Don't know	4	6 G	2	2	*	2

QWC1. In 2013 a Wireless Code came into effect establishing guidelines for wireless service providers. The Code ensures that wireless consumers are empowered to make informed decisions and that there is a more competitive wireless marketplace. The Code was updated in 2017 to end unlocking fees and offer longer trial periods for new contracts. To what extent, if any would you say you recall hearing or seeing anything about this Code? Would you say you clearly recall, vaguely recall or do not recall?

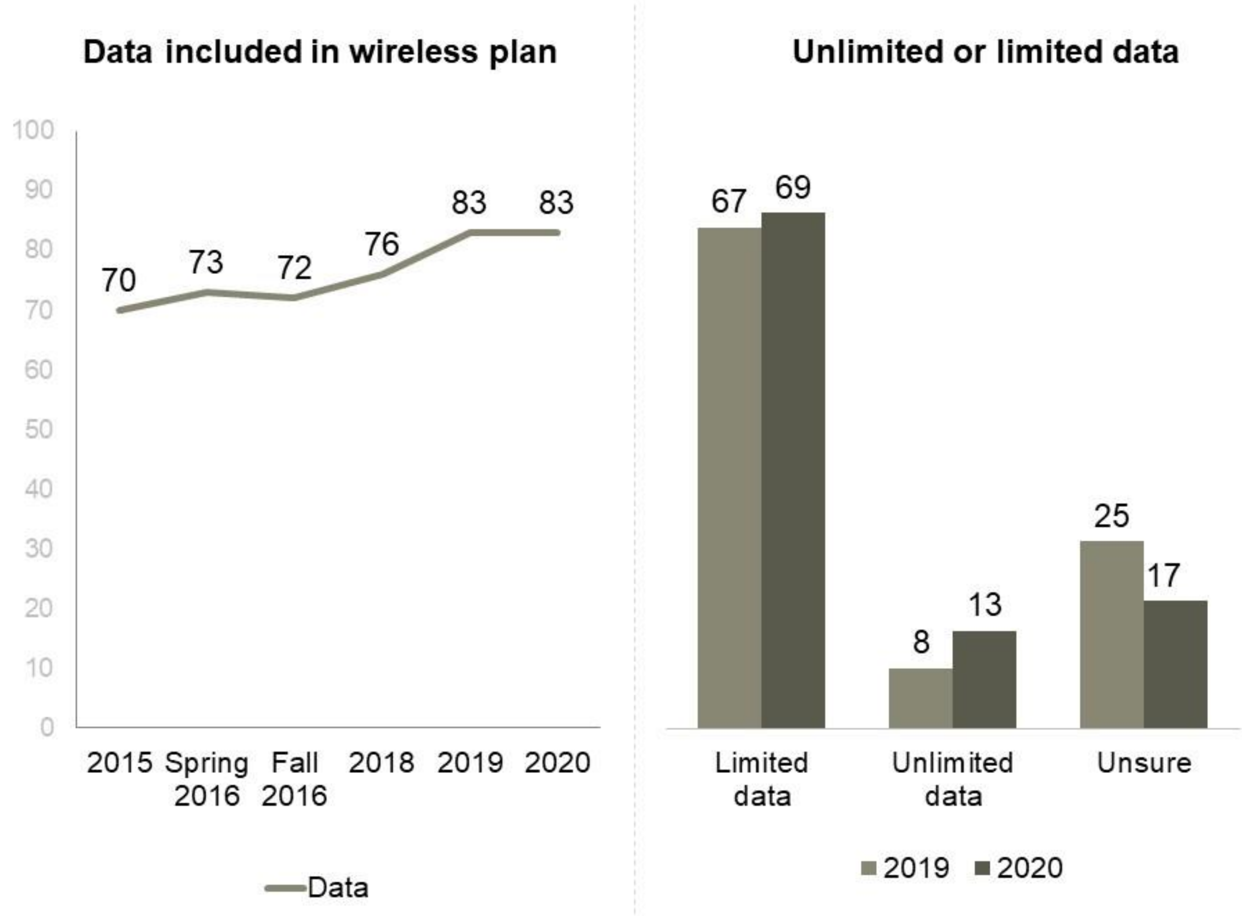
Note: Letters denote statistically significant difference. For example, if there is a B then the result is significantly higher than the corresponding result in column B.

** Denotes less than 1%*

4.2 Wireless Data Usage

The percentage of Canadians choosing plans with data remains high; over eighty per cent of Canadians have wireless plans that include data (83%, consistent with 2019). Limited data plans continue to be the most common type of plan (69%), though there has been an increase in the number of Canadians with unlimited data plans (13% vs. 8% in 2019). Further, more Canadians appear to be clear about whether their plan includes data, as fewer report being unsure of their type of plan (17% in 2020 vs. 25% in 2019).

Exhibit 4.2.a. Data included in wireless plan over time and limited or unlimited plans



QB2a. Which of the following are included in your wireless plan?

Base: Respondents who own a cell phone, 2020 (n=1,306); 2019 (n=1,322)

QB4. Does your plan include unlimited or limited data?

Base: Respondents who have data included in the wireless plan, 2020 (n=1,054); 2019 (n=1,076)

As outlined in Tables 4.2.b and 4.2.c, a variety of demographic factors continue to influence whether or not Canadians have wireless plans that include data:

– **Age** – Younger Canadians (18-54) continue to be more likely to have data included in their wireless plans than Canadians 55+ (87-92% vs. 72%).

– **Income** – Those with higher household incomes ($60K per year or more) are more likely than those in the lowest income bracket (under $40K per year) to have data included in their wireless plans (85-93% vs. 74% respectively).

– **Region** – Fewer Canadians in the Territories (55%) have data included in their plans compared to the rest of Canada (77-88%).

Table 4.2.b. Data included in wireless plan by age and region

Data included in wireless plan	Total (A)	Age 18-34 (D)	35-54 (E)	55+ (F)	Region Atlantic (G)	Quebec (H)	Ontario (I)	Prairies (J)	B.C. (K)	Territories (O)
Base=actual	**1306**	**225**	**460**	**585**	**127**	**251**	**350**	**378**	**150**	**50**
Yes	83	92 F	87 F	72	77 O	81 O	84 O	86 GO	88 GO	55

QB2a. Which of the following are included in your wireless plan?

Note: Letters denote statistically significant difference. For example, if there is a B then the result is significantly higher than the corresponding result in column B.

Table 4.2.c. Type of data included in wireless plan by region

Data included in wireless plan	Total (A)	Income Under $40K (E)	$40K to under $60K (F)	$60K to under $100K (G)	$100K to under $150K (H)	$150K + (I)
Base=actual	**1054**	**169**	**130**	**272**	**174**	**169**
Limited Data	69	71	75	70	71	69
Unlimited Data	13	10	12	13	11	14
Don’t know	17	16	13	16	17	17

QB4. Some wireless plans have unlimited data and some have limited data. When a plan includes a monthly data limit, you may have to pay data overage fees if you use more data in a month than is included in your plan.

Note: Letters denote statistically significant difference. For example, if there is a B then the result is significantly higher than the corresponding result in column B.

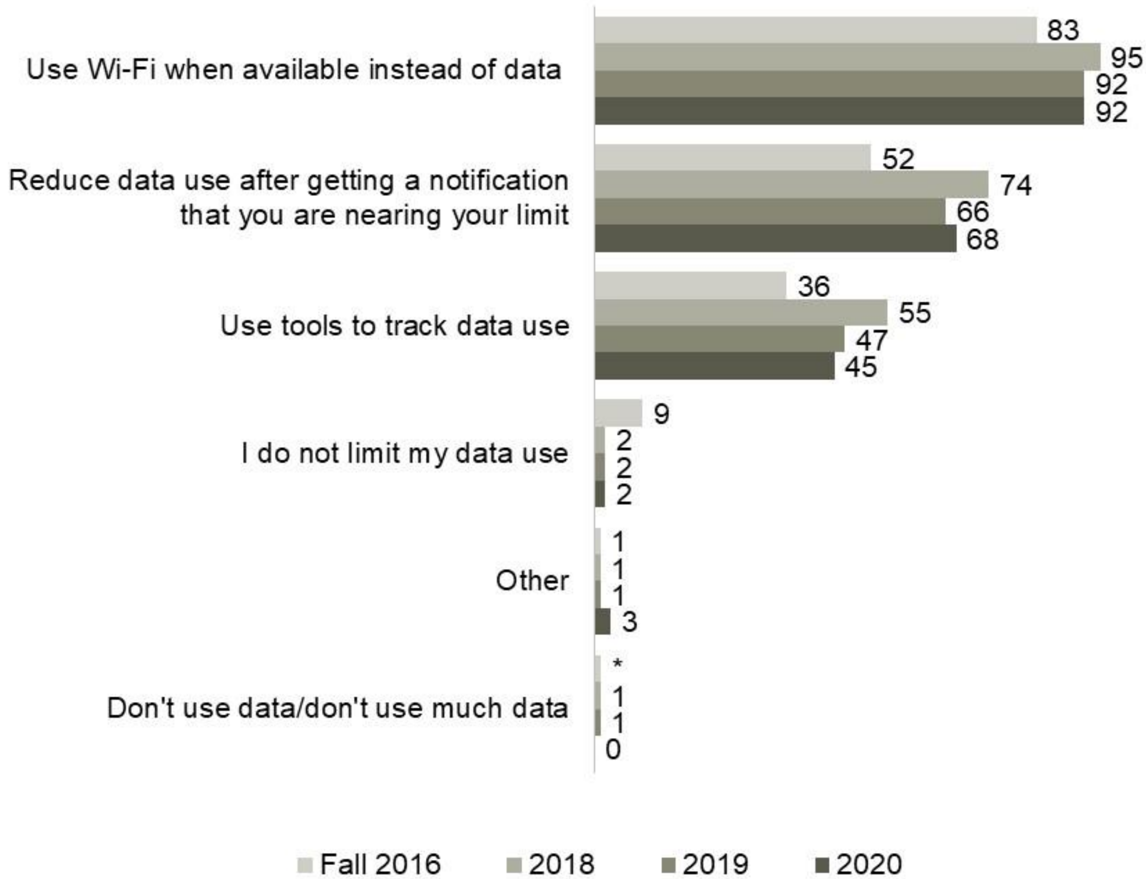
4.2.1 Activities to Manage or Limit Data Use

Consistent with previous years, the vast majority of Canadians who have data in their wireless plans try to manage or limit their data use (97%). The primary methods for doing this continue to be using Wi-Fi where available (92%), followed by reducing data when notified (68%), and/or actively monitoring data usage (45%).

As outlined in Table 4.2.1.b, younger Canadians (18-54) are more likely to employ activities to manage or limit data usage than their older counterparts (55+) (99% vs. 94%). This is also true for switching to Wi-Fi when available (93-97% for 18-54-year olds vs. 85% for 55+), reducing data usage when notified (74-75% for 18-54-year olds vs. 54% for 55+), and monitoring data usage with tools (46-54% for 18-54-year olds vs. 36% for 55+). These trends are consistent with 2019, and suggest older Canadians continue to be less likely to manage their data usage.

As expected, those who have experienced bill shock in the past are more likely to reduce data usage when notified (76% vs. 66%) and to utilize tools to help them monitor data usage (53% vs. 43%). This is outlined in Table 4.2.1.b.

Exhibit 4.2.1.a. Activities to manage or limit data use



QB5a. [ASK If do not answer "Unlimited or None" to B4] Which of the following activities, if any, do you use to manage or limit your data use? Select all that apply.

Base: Respondents who have data included in the wireless plan, 2020 (n=898), 2019 (n=971), 2018 (n=651), fall 2016 (n=831)

Table 4.2.1.b. Activities to manage or limit data use by age and past bill shock

Activities to manage or limit data use	Total (A)	Age 18-34 (D)	Age 35-54 (E)	Age 55+ (F)	Bill Shock Yes (P)	Bill Shock No (Q)
Base=actual	**898**	**185**	**347**	**349**	**199**	**696**
ANY (NET)	97	99 F	99 F	94	99	97
Use Wi-Fi	92	93 F	97 F	85	93	91
Reduce your data use after you get a notification that you are nearing your limit	68	74 F	75 F	54	76 Q	66
Monitor data usage using phone/Application on phone	45	46 F	54 F	36	53 Q	43
Turn off data when reached data limit	2	2	2	1	3	1
Monitor data usage/Review bill	1	1	*	1	1	1
Avoid activities that use large amounts of cellular data (e.g. streaming video, games, etc.)	3	5	2	2	3	3
I do not limit my data use	2	2	1	4	2	2
Notifications when reached/close to data limit	1	1	1	-	*	1
Don’t use cellular data at all	*	1	-	*	-	*
Use another device (e.g. computer) to access Internet	1	-	1	1	1	*
Purchase more data	*	-	*	-	*	*
Other	3	3	4	1	5	2
None	3	1	1	6 DE	1	3

QB5a. Which of the following activities, if any, do you use to manage or limit your data use? Select all that apply.

Note: Letters denote statistically significant difference. For example, if there is a B then the result is significantly higher than the corresponding result in column B.

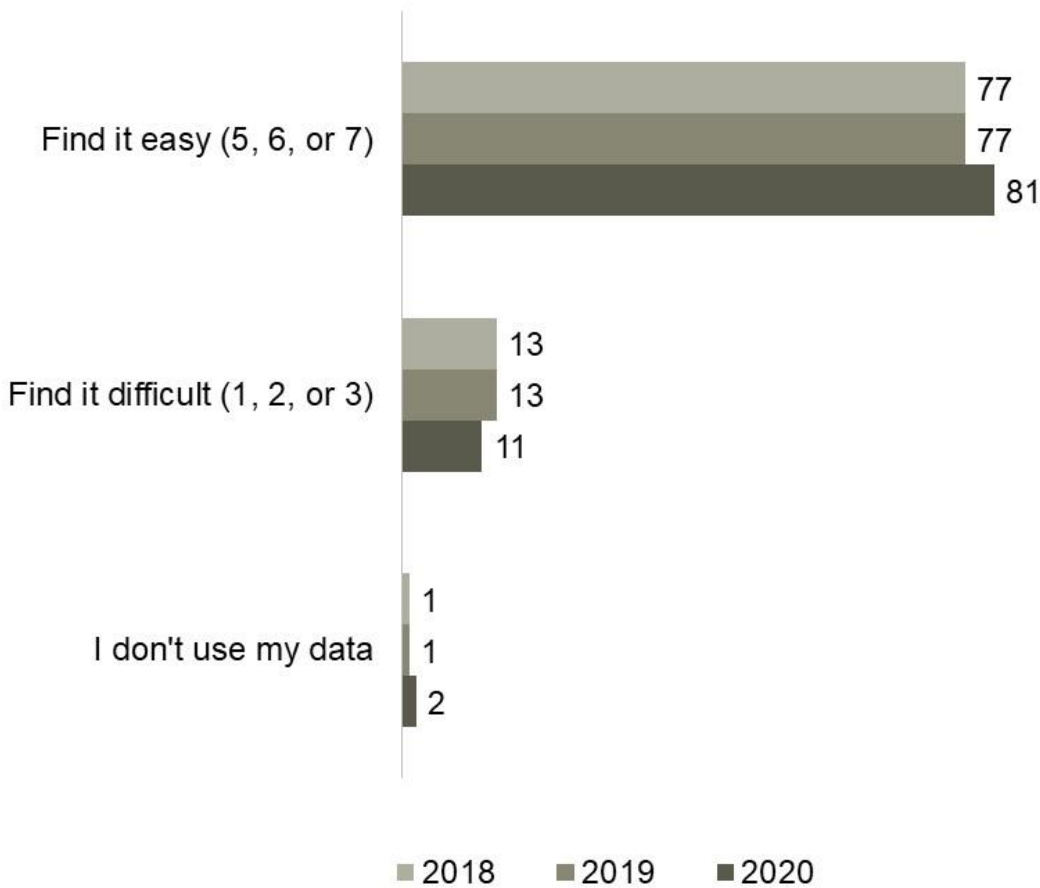
** Denotes less than 1%*

- Denotes 0

4.2.2 Ease of Managing Data Use

In-line with previous years, most Canadians continue to find it easy to manage their data each month. More than four-in-five Canadians (81%) consider it easy (5, 6 or 7 on a scale of 1-7).

Exhibit 4.2.2.a. Level of difficulty managing data use each month among those with data



WC6. [ASK If answered "Data" to B2a and not code 3 (NO DATA) at B4]

How easy do you find it to manage the data used by yourself and/or your family each month?

Please use a 7-point scale where 1 means extremely difficult and 7 means extremely easy.

Base: Total respondents who have data included in their plan, 2020 (n=1,039), 2019 (n=1,069), 2018 (n=792)

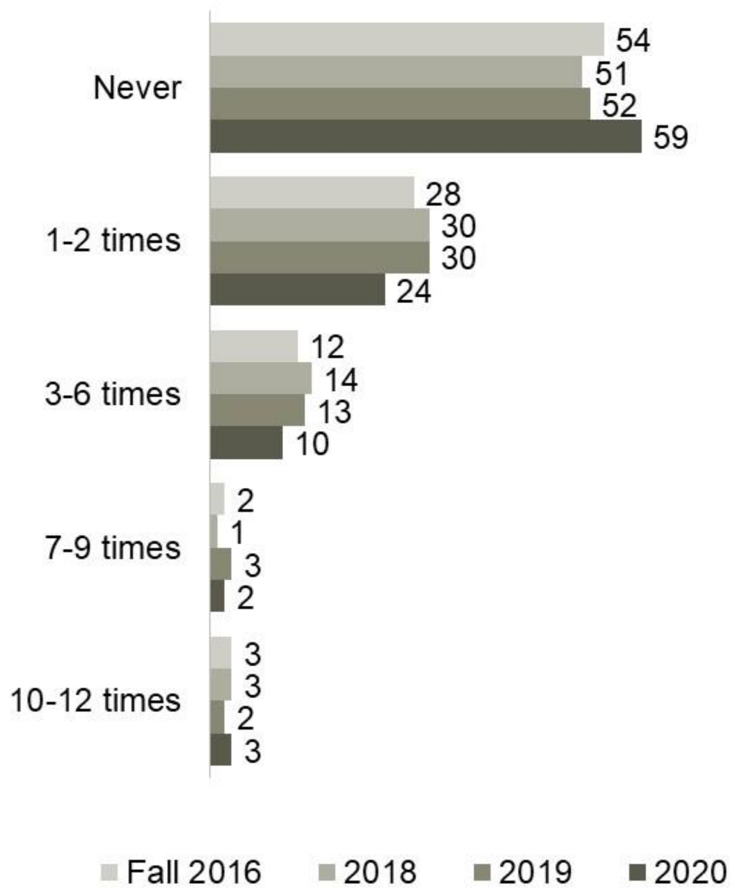
4.2.3 Data Overage Fees

Fewer Canadians are paying data overage fees compared to previous years. Four-in-ten (41%) have paid data overages in the past 12 months, compared to nearly half (48-49%) in 2018 and 2019. Further, data overage fees appear to be less likely to be a source of bill shock, as the incidence of paid data overages has decreased among those who experienced bill shock in the past year (69% in 2020 vs. 89% in 2019).

Age differences in data overage fees continue to exist (see Table 4.2.3.b). However, while younger Canadians (18-34) remain more likely than their older (55+) counterparts to have paid data overage fees (48% vs. 38%), the gap between middle-aged (35-54) and older Canadians is narrowing, with fewer in the middle-age cohort having paid overage fees in the past year (40% in 2020 vs. 52% in 2019).

As noted in Table 4.2.3.c, those using family plans are more likely to have incurred data overage fees in the past year (46% vs. 38%), as are those who find data management difficult (71% vs. 35% among those who find it easy).

Exhibit 4.2.3.a. Data overage fees paid in the past 12 months



QB8. In the past 12 months, how often have you paid data overage fees?

Base: Respondents who have data included in their plan, 2020 (n=1,039), 2019 (n=1,069), 2018 (n=796), fall 2016 (n=831)

Table 4.2.3.b. Data overage fees paid in the past 12 months by age

Data overage fees paid in the past 12 months	Total (A)	Age 18-34 (D)	Age 35-54 (E)	Age 55+ (F)
Base=actual	**1039**	**206**	**396**	**414**
Never	59	52	60	66 D
1-2 times	24	24	26	23
3-6 times	10	15 F	9	7
7-9 times	2	3	2	1
10-12 times	3	3	3	1
Don’t know	2	2	*	2

QB8. In the past 12 months, how often have you paid data overage fees?

Note: Letters denote statistically significant difference. For example, if there is a B then the result is significantly higher than the corresponding result in column B.

** Denotes less than 1%*

Table 4.2.3.c. Data overage fees paid in the past 12 months by plan and data

Data overage fees paid in the past 12 months		Plan		Manage Data	
	Total (A)	Family (J)	Individual (K)	Easy (F)	Difficult (G)
Base=actual	**1039**	**392**	**636**	**839**	**107**
Never	59	54	62 J	65 G	29
1-2 times	24	27	23	24	28
3-6 times	10	11	10	7	31 F
7-9 times	2	2	2	1	3
10-12 times	3	3	2	2	6 F
Don’t know	2	3 K	1	1	3

QB8. In the past 12 months, how often have you paid data overage fees?

Note: Letters denote statistically significant difference. For example, if there is a B then the result is significantly higher than the corresponding result in column B.

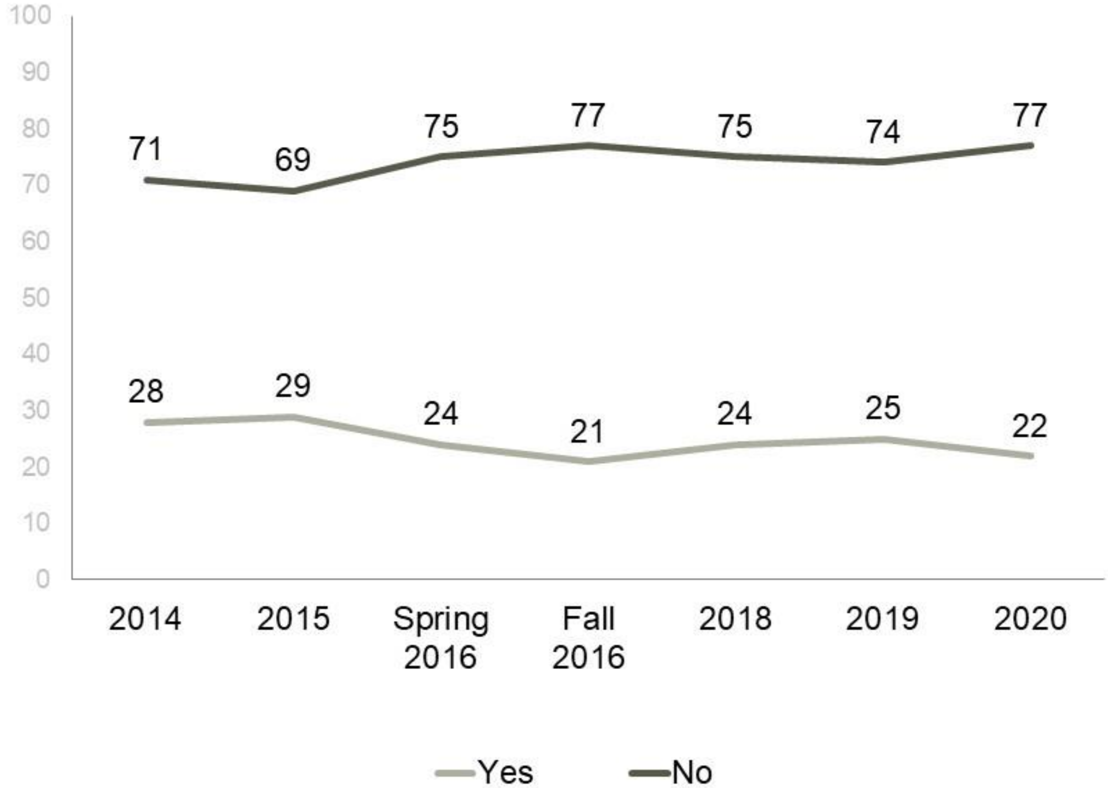
4.3 Bill Shock and Roaming Fees

4.3.1 Bill Shock

Incidence

Bill shock continues to be experienced by more than one-in-five Canadians (22%). While incidence is low, this signals that despite changes to the Code in 2017, Canadians continue to experience levels of bill shock on par with that of 2016.

Exhibit 4.3.1.a. Experienced bill shock



QB10/B6. During the last year, have you experienced 'bill shock', meaning a surprisingly high bill?

Base: Respondents who own a cell phone, 2020 (n=1,306); 2019 (n=1,322), 2018 (n=1,111), fall 2016 (n=1,277), total respondents winter 2016 (n=925), 2015 (n=1,005), 2014 (n=1,016)

As in 2019, younger and middle-aged Canadians (18-54) continue to be more likely to experience bill shock than their older counterparts (24-27% vs. 17%). Further, those whose primary language is not an official language experience greater difficulty with bill shock (30% vs. 18-21%). This is outlined in Table 4.3.1.b.

As expected, bill shock continues to be higher among and those who find data management difficult (50% vs. 19%). This is also true among those with tab contracts (29% vs. 21%); see Table 4.3.1.c for details.

Table 4.3.1.b. Experienced bill shock by age and language spoken

Experienced Bill Shock	Total (A)	Age 18-34 (D)	35-54 (E)	55+ (F)	Language English (B)	French (C)	Other (D)
Base = actual	**1306**	**225**	**460**	**585**	**901**	**244**	**139**
Yes	22	27 F	24 F	17	21	18	30BC
No	77	72	76	81 D	78D	81D	69
Don't Know	1	1	1	1	1	2	1

QB10. During the last year, have you experienced 'bill shock', meaning a surprisingly high bill?

Note: Letters denote statistically significant difference. For example, if there is a B then the result is significantly higher than the corresponding result in column B.

Table 4.3.1.c. Experienced bill shock by tab contract and data management

Experienced Bill Shock	Total (A)	Tab Contracts Yes (B)	No (C)	Manage Data Easy (F)	Difficult (G)
Base = actual	**1306**	**305**	**496**	**839**	**107**
Yes	22	29 C	21	19	50 F
No	77	70	78 B	81 G	48
Don't Know	1	1	1	*	2

QB10. During the last year, have you experienced 'bill shock', meaning a surprisingly high bill?

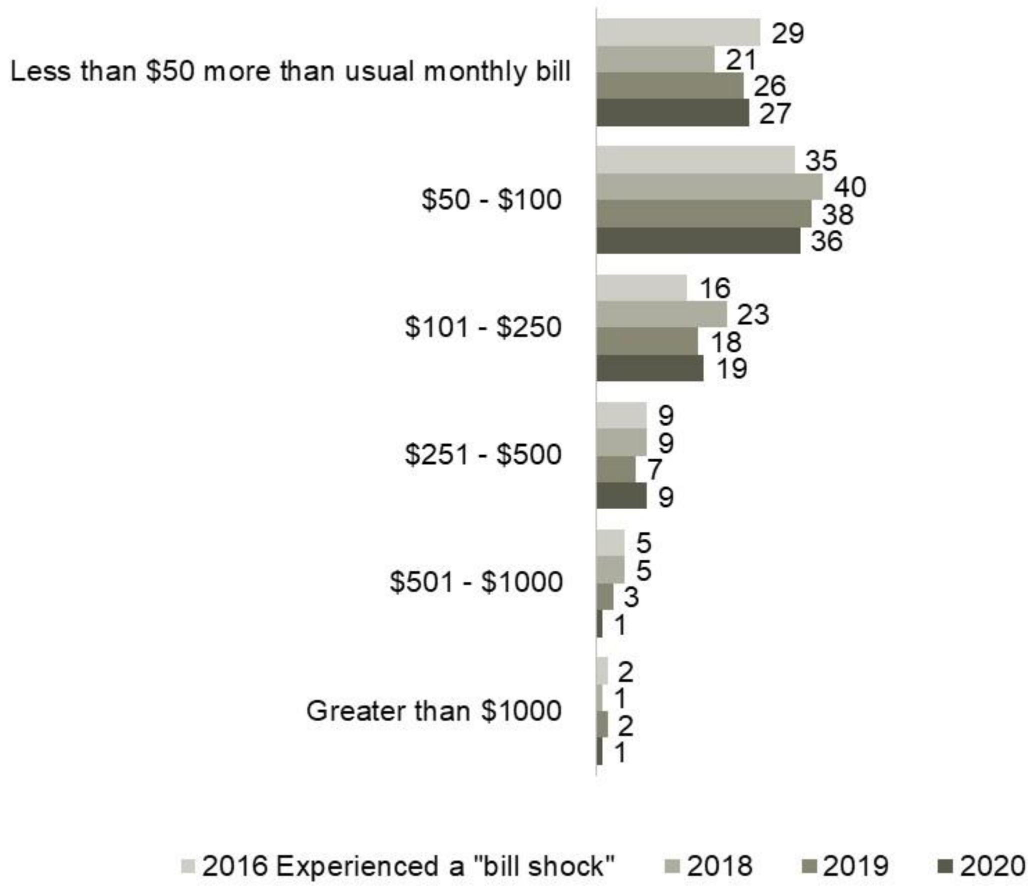
Note: Letters denote statistically significant difference. For example, if there is a B then the result is significantly higher than the corresponding result in column B.

**Denotes less than 1%*

Amount

The Wireless Code mandates that providers must suspend data overage charges once they exceed $50 unless an authorized user consents to paying additional fees. Despite this, Canadians continue to experience a range of unexpected charges, varying from less than $50 to over $1,000 per billing cycle. As in previous years, most of the unexpected charges continue to be less than $50 (27%) or between $50-$100 (36%).

Exhibit 4.3.1.d. Amount of unexpected charges on bill among those who have experienced a “bill shock”



Q10b. What was the amount of the unexpected charges on your bill?

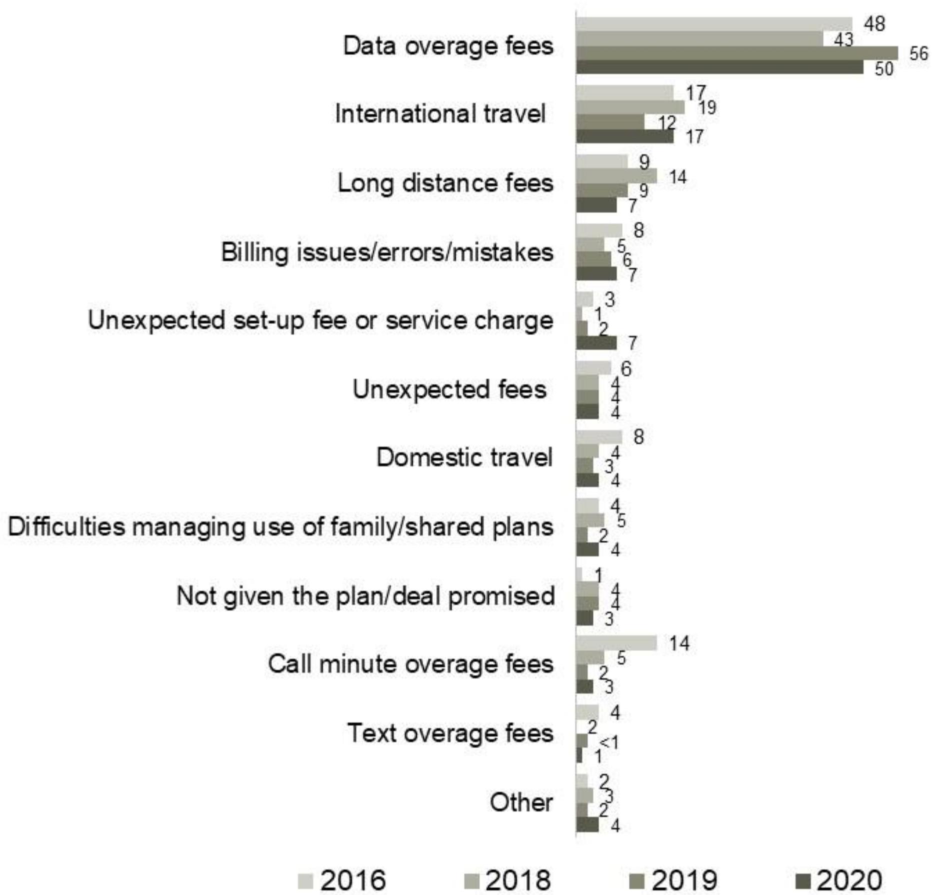
Base: Respondents who have experienced a “bill shock”, 2020 (n=261); 2019 (n=320), 2018 (n=211); Fall 2016 (n=285)

Reason

Data overage fees continue to be the primary stated reason for bill shock (50%), followed by international roaming fees (17%), long-distance fees and billing errors (7% each). Unexpected set-up fees or service charges appear to be on the rise (7% in 2020 vs. 2% in 2019). Complete details can be found in Exhibit 4.3.1.e below.

As noted in Table 4.3.1.f, data overage fees are more common among younger Canadians (18-34) (66%) than older Canadians (35+) (38-42%). This signals an improvement among middle-aged Canadians (35-54), who, in 2019, reported significantly higher levels of bill shock (60% vs 42% in 2020), as well as a directional decrease among older Canadians (55+) (38% in 2020 vs. 45% in 2019).

<u>Exhibit 4.3.1.e. Main reason for bill shock</u>



QB10a/B6a. What was the main reason for the 'bill shock' you experienced?

Base: Those who experienced 'bill shock', 2020 (n=261); 2019 (n=320), 2018 (n=211), fall 2016 (n=250), winter 2016 (n=208), 2015 (n=289), 2014 (n=282)

Table 4.3.1.f. Main reason for bill shock by age

Main reason for bill shock.	Total (A)	Age 18-34 (D)	35-54 (E)	55+ (F)
Base = actual	**261**	**54**	**106**	**96**
Data overage fees	50	66 EF	42	38
International travel – roaming fees	17	11	27 F	12
Long distance fees	7	6	8	8
Billing issues/errors/mistakes	7	4	7	10
Unexpected fees (Network access fee/911, etc.)	4	2	4	6
I was not given the plan/deal I was promised	3	-	4	5
Domestic travel – roaming fees	4	3	8	1
Family/shared plans – difficulties managing use	4	4	7	1
Call minute overage fees	3	2	5	2
Text overage fees	1	-	2	1
Unexpected set-up fee or service charge	7	8	4	11
Other (Specify)	4	4	5	3
Don't know	6	2	3	13 DE

QB10a. [If answered "Yes" to B10] What was the main reason for the 'bill shock you experienced?

Note: Letters denote statistically significant difference. For example, if there is a B then the result is significantly higher than the corresponding result in column B

- Denotes 0

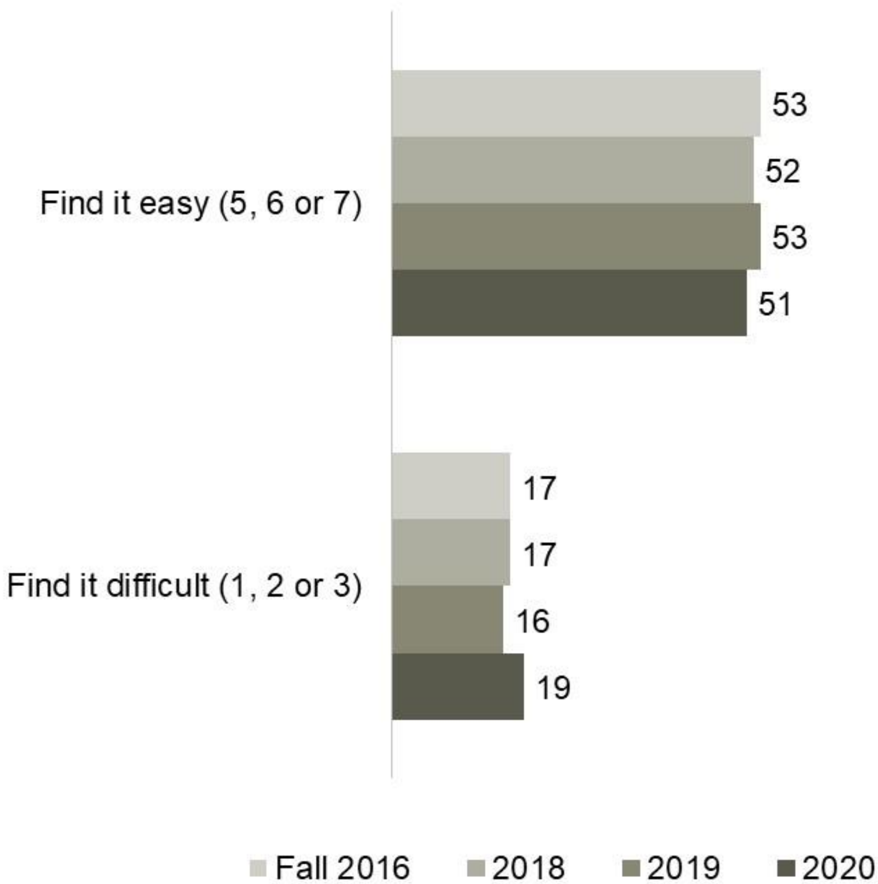
4.3.2 Roaming Fees

The Wireless Code requires service providers to notify customers when they are roaming and to cap data roaming fees at $100 per billing cycle, unless the customer expressly consents to pay additional charges.

Most Canadians feel they are able to manage their roaming charges while travelling and little has changed since 2016. More than half of Canadians (51%) continue to find it easy to manage roaming fees (5, 6 or 7 on a scale of 1-7) while 19 per cent Canadians find it difficult (1, 2 or 3 on a scale of 1-7).

As outlined in Table 4.3.2.b, those who have filed complaints in the past 12 months are more likely to report difficultly managing roaming charges than those who have not (53% vs. 43%), as are those who have experienced bill shock (54% vs. 42%).

Exhibit 4.3.2.a. Level of difficulty managing roaming charges when travelling



QB9. If you use your plan while traveling, you may be charged roaming fees. How easy do you find it to manage your roaming charges when you are traveling? Please use a 7-point scale where 1 means extremely difficult and 7 means extremely easy.

Base: Respondents who own a cell phone, 2020 (n=1,306); 2019 (n=1,322), 2018 (n=1,111); fall 2016 (n=1,277)

Unsurprisingly, those who have made a complaint (31%) are more likely to find it difficult to manage roaming charges than those who have not (12%), as are those who have experienced bill shock compared to those who have not (33% vs. 11%).

Table 4.3.2.b. Level of difficulty managing roaming charges by bill shock and complaint

Level of difficulty managing roaming charges when travelling	Total (A)	Bill Shock: Yes (P)	Bill Shock: No (Q)	Complaints: Made one (S)	Complaints: Did not make one (T)
Base = actual	**1306**	**261**	**1034**	**222**	**1076**
Find it easy (5,6,7)	51	42	54 P	43	53 S
Find it difficult (1, 2, 3)	19	30 Q	15	31 T	16

QB9. If you use your plan while traveling, you may be charged roaming fees. How easy do you find it to manage your roaming charges when you are traveling?

Note: Letters denote statistically significant difference. For example, if there is a B then the result is significantly higher than the corresponding result in column B.

4.4 Understanding of Contracts

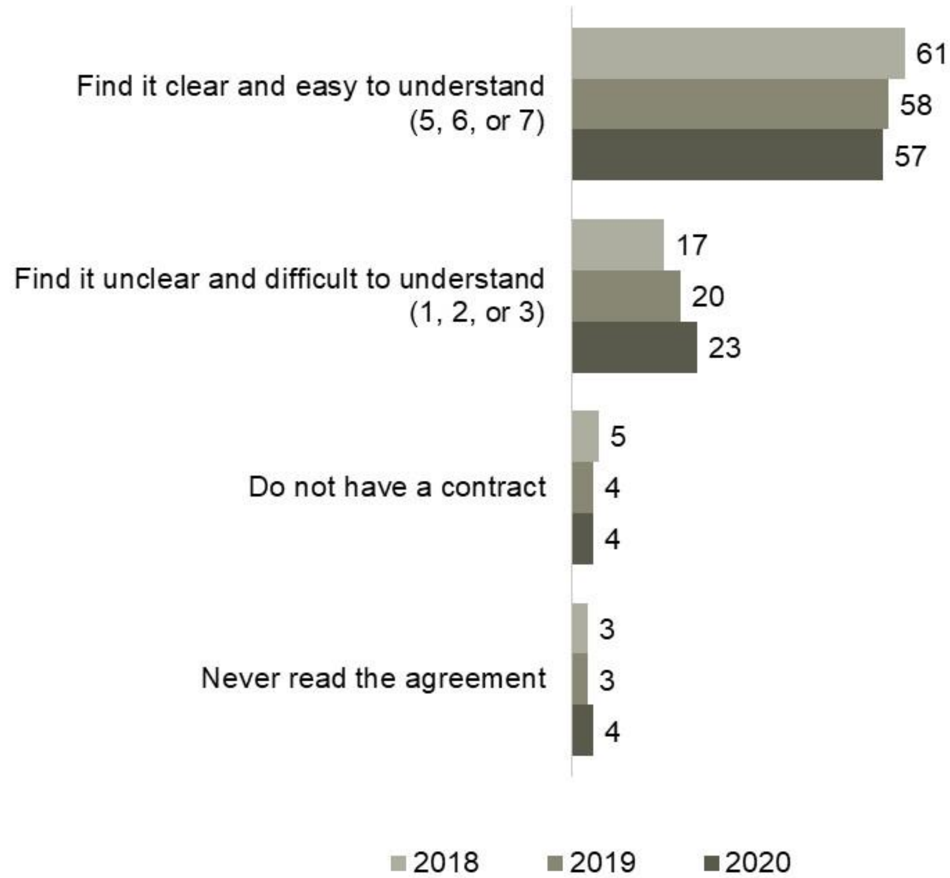
4.4.1 Understanding of Contract

The Wireless Code includes several rules related to contract clarity, including requiring service providers to give customers a critical information summary that highlights the most important terms of their contract.

Canadian's understanding of their contracts has remained steady over the past two years, with the majority (57%) continuing to find their wireless contract clear and easy to understand (5, 6 or 7 on a scale of 1-7). This is especially true for those aged 18-34 when compared to those aged 35+ (66% vs. 51-53%); see table 4.4.1.b.

As in previous years, those who have experienced bill shock are much more likely to state they find their contract difficult to understand (36% vs. 19%; 1,2 or 3 on a scale of 1-7), which may signal that confusion around contracts is contributing to bill shock. This is outlined in Table 4.4.1.b.

Exhibit 4.4.1.a. Level of ease of understanding wireless contract



WC10. Do you find your contract clear and easy to understand? Please use a 7-point scale where 1 means extremely unclear and difficult to understand and 7 means extremely clear and easy to understand.

Base: Total respondents who own a cell phone, 2020 (n=1,306); 2019 (n=1,322), 2018 (n=1,111)

Table 4.4.1.b. Level of ease of understanding wireless contract by age and bill shock

Level of ease of understanding wireless contract	Total (A)	Age: 18-34 (D)	Age: 35-54 (E)	Age: 55+ (F)	Bill Shock: Yes (P)	Bill Shock: No (Q)
Base=actual	**1306**	**225**	**460**	**585**	**261**	**1034**
Find it easy (5, 6 or 7)	57	66 EF	53	51	38	63 P
Find it difficult (1, 2 or 3)	23	14	28 D	27 D	36 Q	19

WC10. Do you find your contract clear and easy to understand? Please use a 7-point scale where 1 means extremely unclear and difficult to understand and 7 means extremely clear and easy to understand.

Note: Letters denote statistically significant difference. For example, if there is a B then the result is significantly higher than the corresponding result in column B.

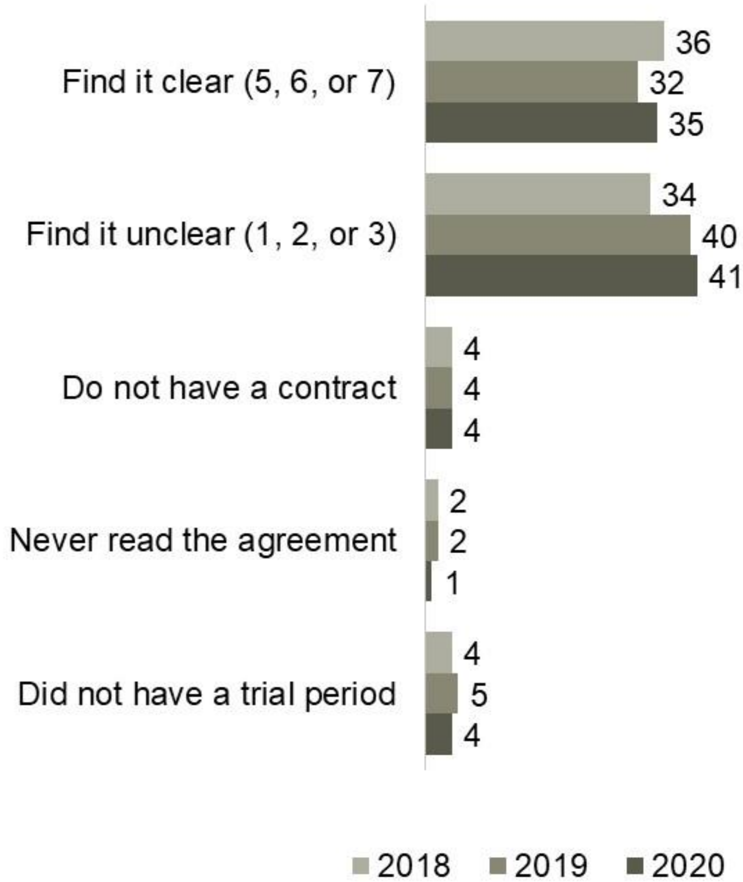
4.4.2 Trial Period

Since 2013, the Wireless Code has required service providers to include a trial period for new contracts. During the trial period, wireless contract holders can cancel their contract without penalty. The trial period must be a minimum of 15 days service and as of December 1st, 2017, it must permit the customer to use up to half the voice, text, and data usage amounts included in their monthly plan.

Little has changed over the past year regarding how clear Canadians found the explanation of the trial period when they took out their wireless contract. More found it unclear (41%; 1, 2 or 3 on a scale of 1-7) than clear (35%; 5, 6 or 7 on a scale of 1-7). A minority continue to have not read the contract (1%) or state they do not have a contract (4%) or trial period (4%).

As outlined in Table 4.4.2.b, Canadians whose primary language is not an official language are more likely to have found the explanation of the trial period unclear (55% vs. 38-39%). As with other aspects related to the ease of managing and understanding plans, Canadians who experienced bill shock are more likely to have found the explanation of the trial period unclear (55% vs. 37%), as are those who have filed a complaint in the past 12 months (58% vs. 38%). This may signal that general confusion continues to exist among some Canadians related to both setting up and later managing their contracts.

Exhibit 4.4.2.a. Ease of understanding explanation of the trial period



WC8. The Code requires service providers to include a trial period for new contracts that include a device. During the trial period, you can cancel your contract without penalty. This trial period now has to be half of a month of service and include half the service included in your monthly plan.

How clearly did your service provider explain the trial period to you?

Please use a 7-point scale where 1 means extremely unclear and 7 means extremely clear.

Base: Total respondents who own a cell phone, 2020 (n=1,306); 2019 (n=1,322), 2018 (n=1,111)

**Denotes less than 1%*

Table 4.4.2.b. Ease of understanding explanation of the trial period by bill shock and complaint

Explanation of trial period	Total (A)	Language: Eng (B)	Language: Fr (C)	Language: Other (D)	Bill Shock: Yes (P)	Bill Shock: No (Q)	Complaints: Made one (S)	Complaints: Did not make one (T)
Base=actual	**1306**	901	244	139	**261**	**1034**	**222**	**1076**
7 - Extremely clear	18	19	18	15	11	20 P	10	20 S
6	7	7	7	5	4	7	3	7
5	10	10	15 BD	6	7	11	7	11
4	6	6	5	5	7	6	8	6
3	6	5	1	14 BC	5	7	12 T	5
2	7	5	7	13 B	11 Q	5	8	6
1 - Extremely unclear	28	28	31	28	39 Q	25	39 T	26
Do not have a contract	4	5	3	3	3	5	3	4
Never read the agreement	1	1	1	-	1	1	*	1
Did not have a trial period	4	4	5	4	3	4	3	4
Don't Know	10	11	6	7	9	9	7	10

WC8. The Code requires service providers to include a trial period for new contracts that include a device. During the trial period, you can cancel your contract without penalty. This trial period now has to be half of a month of service and include half the service included in your monthly plan.

Note: Letters denote statistically significant difference. For example, if there is a B then the result is significantly higher than the corresponding result in column B.

**Denotes less than 1%*

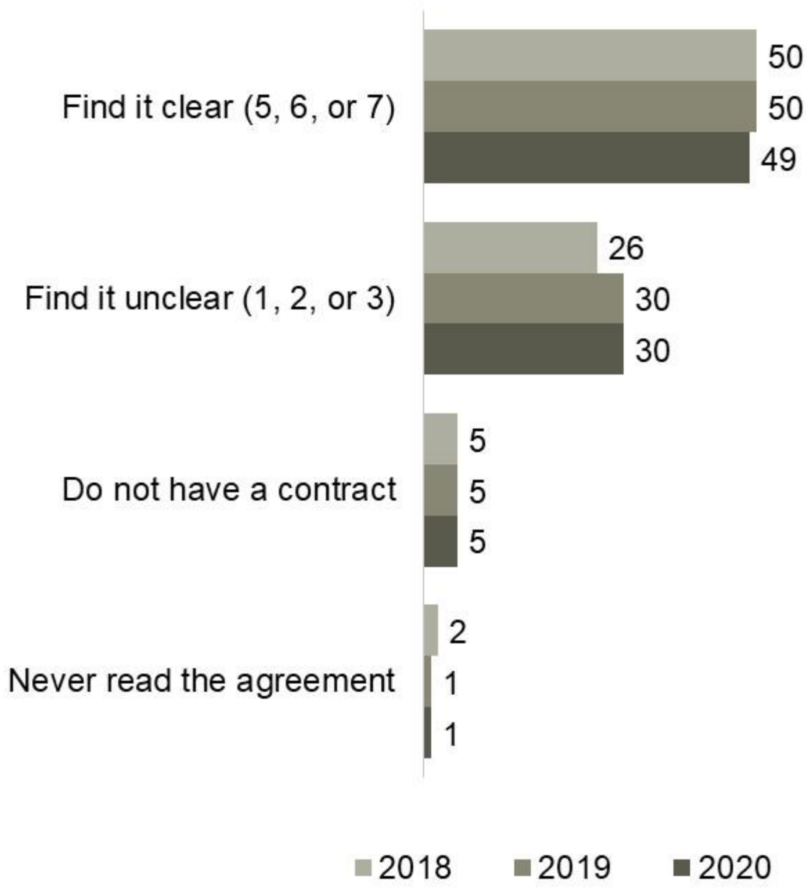
- Denotes 0

4.4.3 Cancellation Fees

The Wireless Code includes several rules on cancellation fees, establishing formulas for calculating the maximum cancellation fee that a service provider may charge, requiring disclosure of any fees in the contract and critical information summary, and limiting cancellation fees to two years.

Most service providers require customers to pay a cancellation fee if they cancel their contracts before the agreed upon end date. This needs to be carefully explained to the consumer for them to be fully aware of the implications of early cancellation. Consistent with 2019, half (49%) of Canadians who have wireless plans find the explanation to be clear, while close to one-third find it unclear (30%; rated 1, 2 or 3 on a scale from 1-7). Given that this has not changed over the past two years, this signals a need for service providers to provide greater clarity around cancellation fees, or that current contracts may continue to be difficult for many consumers to understand.

Exhibit 4.4.3.a. Clear explanation of early cancellation of contract



WC9. When you signed your contract or accepted your service agreement, how clearly did your service provider explain any fees that would apply if you cancel your contract or agreement early? Please use a 7-point scale where 1 means extremely unclear and 7 means extremely clear.

Base: Total respondents who own a cell phone, 2020 (n=1,306); 2019 (n=1,322), 2018 (n=1,111)

4.5 Change

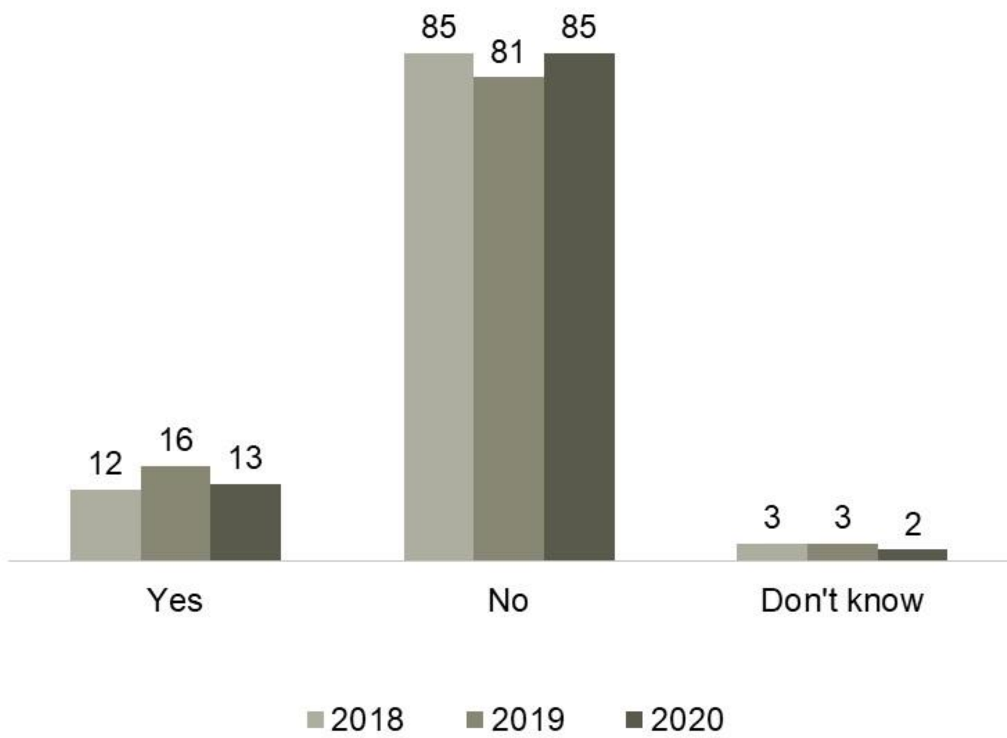
4.5.1 Changes to Contract

The Wireless Code prevents service providers from making changes to the key terms of postpaid contracts without the customer's express consent and requires providers to notify customers prior to making changes to non-key terms.

A small but significant portion of Canadians state that changes to wireless services were made without expressly making the consumer aware of the new terms and conditions (13%), which has remained steady over the previous two years (12-16%).

As outlined in Table 4.5.1.b, changes to wireless services without expressly making the consumer aware of the new terms and conditions is reported more often by those who have made a complaint in the last 12 months (32% vs. 9%), as well as by those who report bill shock (24% vs. 10%), or those who experience difficulty managing data (24% vs. 12%). This suggests there may be a common factor for these issues, such as unexpected service changes or an unclear contract.

Exhibit 4.5.1.a. Changes to contract without disclosure of changes in terms and conditions



WC11. Have you ever become aware that your service provider changed your plan without expressly making you aware of how the terms and conditions had changed?

Base: Total respondents who own a cell phone, 2020 (n=1,306); 2019 (n=1,322), 2018 (n=1,111)

Table 4.5.1.b. Changes to contract without disclosure of changes in terms and conditions by data management, bill shock and complaint

Changes to contract without disclosure of changes in terms and conditions		Bill Shock		Manage Data		Complaints	
	Total (A)	Yes (P)	No (Q)	Easy (F)	Difficult (G)	Made one (S)	Did not make one (T)
Base=actual	**1306**	**261**	**1034**	**839**	**107**	**222**	**1076**
Yes	13	24 Q	10	12	24 F	32 T	9
No	85	75	89 P	87 G	73	67	89 S
Don't know	2	1	2	1	3	2	2

WC11. Have you ever become aware that your service provider changed your plan without expressly making you aware of how the terms and conditions had changed?

Note: Letters denote statistically significant difference. For example, if there is a B then the result is significantly higher than the corresponding result in column B.

4.5.2 Changing Service Providers

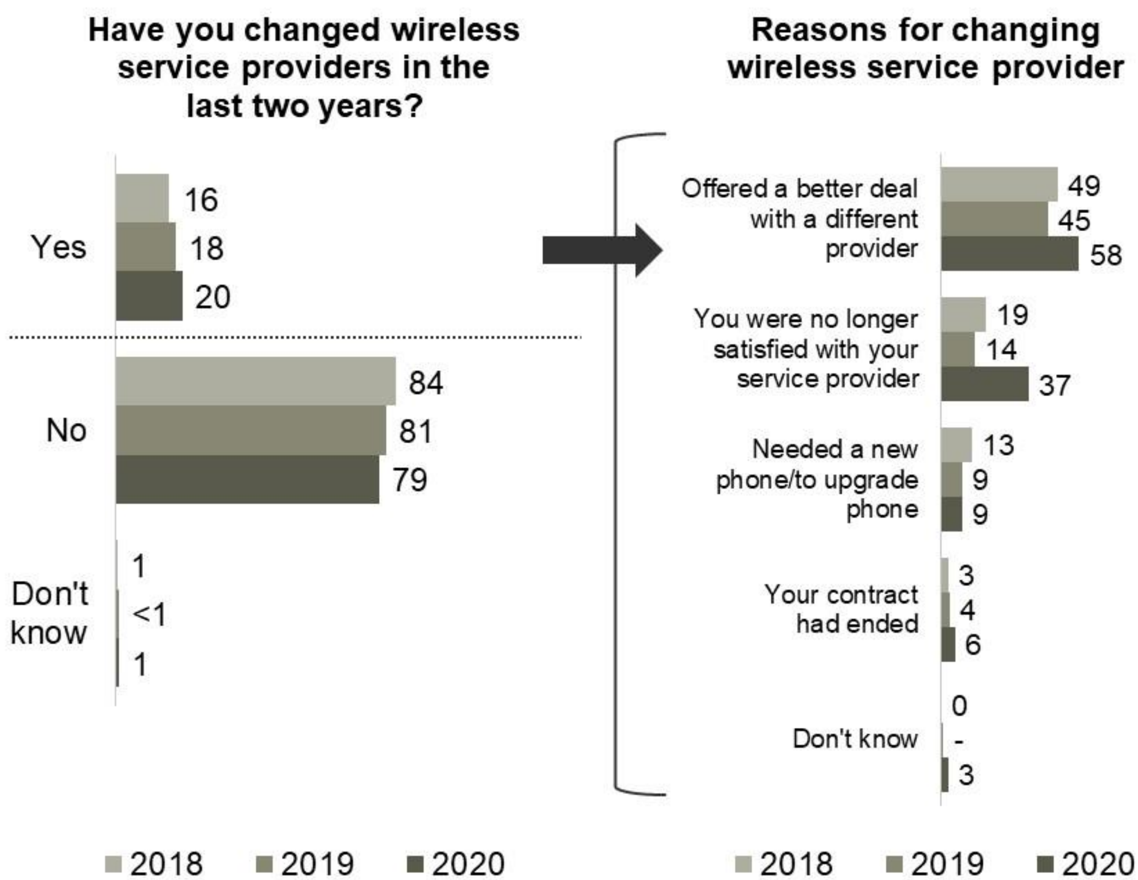
When the Wireless Code was created in 2013, it prevented service providers from charging early cancellation fees for more than 2 years, in the interest of making it easier for consumers to switch providers to take advantage of competitive offers.

The number of Canadians who have changed their service provider is slowly increasing (up 4% since 2017). Overall, one-in-five Canadians report having changed their service provider in the past two years (20%).

Exhibit 4.5.2.a outlines the most common reasons stated for changing providers among those that have switched over the past two years. Compared to 2019, more Canadians cite including finding a better deal (58% in 2020 vs. 45% in 2019), and a lack of satisfaction with service provider (37% vs. 14%). Less common reasons include needing a new or upgraded phone (9%) or their contract ending (6%). This suggests that the Wireless Code is having a positive impact on Canadians abilities to leverage a better and potentially more economical plan.

Most continue to state that they were easily able to navigate the change process, with over four-fifths (82%) saying it was easy to switch providers (5, 6 or 7 on a scale of 1-7).

Exhibit 4.5.2.a. Switching wireless service providers and reasons for change



WC16. Have you changed wireless service providers in the last two years?

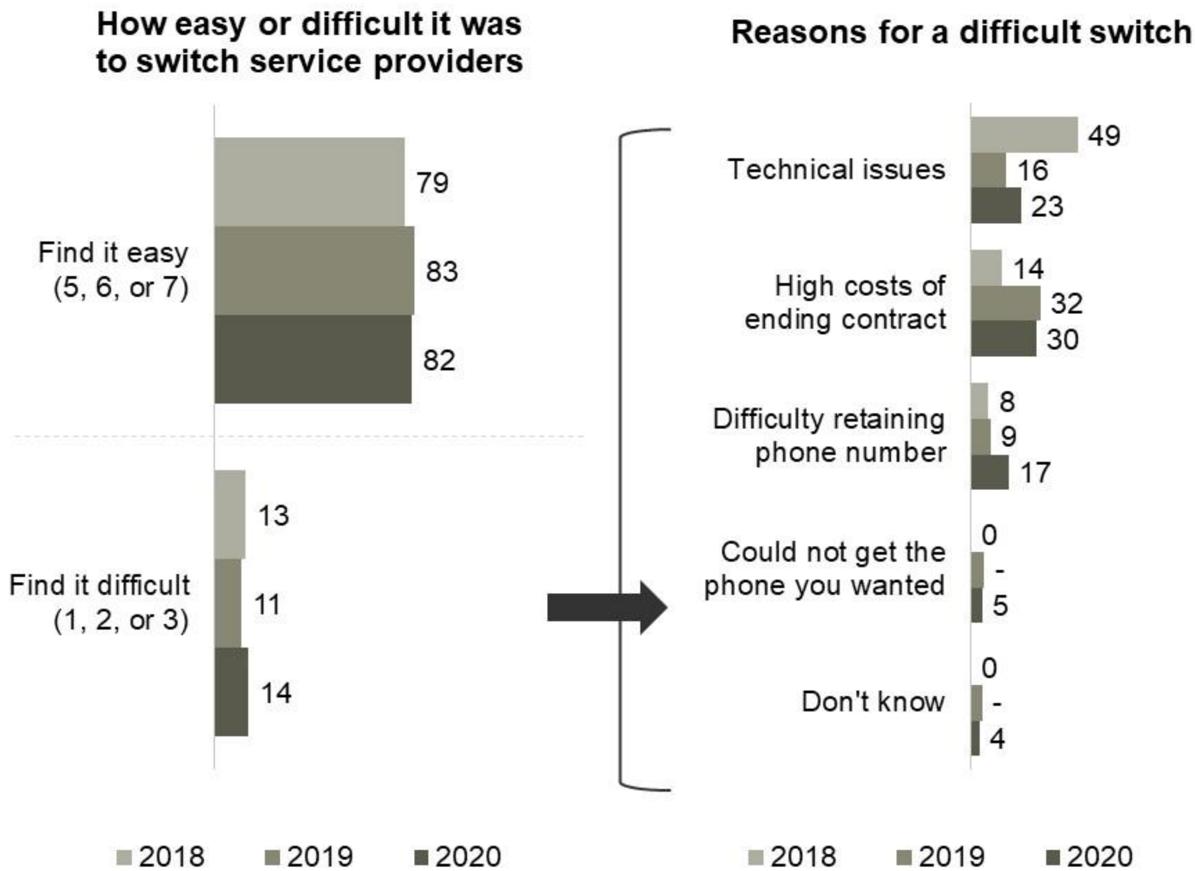
Base: Total respondents who own a cell phone, 2020 (n=1,306); 2019 (n=1,322), 2018 (n=1,111)

WC12. [If answered "Yes" to WC16] Why did you change service provider?

Base: Total respondents who changed their service provider in P2Y, 2020 (n=233), 2019 (n=231), 2018 (n=152)

Among the fourteen per cent of Canadians who found the process difficult (rated 1, 2 or 3 on a scale from 1-7), the high cost of ending their contract (30%), technical issues (23%), or difficulty retaining a phone number (17%) were the main reasons for difficulties. Further, there was a directional increase in the number who experienced difficulty retaining a phone number (17% in 2020 vs. 9% in 2019). See Exhibit 4.5.2.b for more details.

Exhibit 4.5.2.b. Ease of switching wireless service providers and reasons for difficulty



WC13. [If answered "Yes" to WC16] How easy or difficult was it to switch service providers? Please use a 7-point scale where 1 means extremely difficult and 7 means extremely easy.

Base: Total respondents who changed their service provider in P2Y, 2020 (n=233), 2019 (n=231), 2018 (n=152)

WC14. [If answered 1,2 OR 3 at WC13] Was there a reason why switching providers was difficult for you?

*Base: Total respondents who find it difficult to switch, 2020 (n=29)**; 2019 (n=24)**, 2018 (n=19)***

*** Very Low Base < 30*

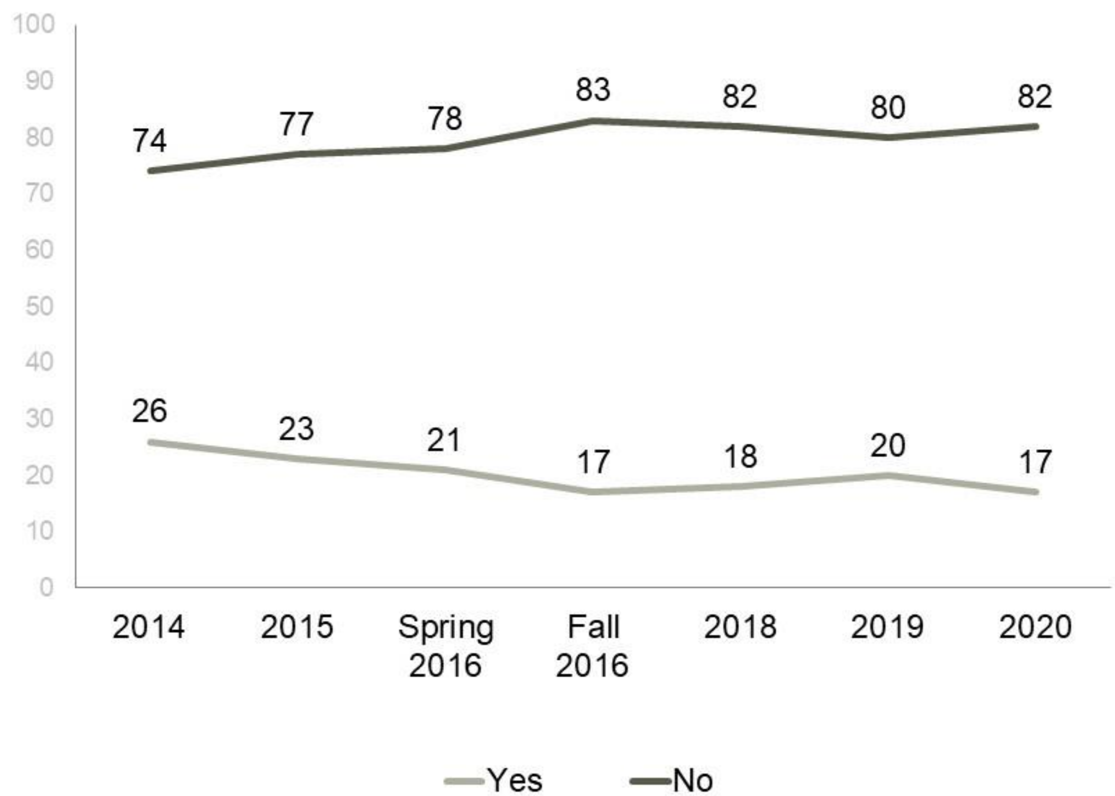
4.6 Complaints

4.6.1 Complaints in the Last 12 Months

Incidence

The incidence of Canadians who report having made complaints about their wireless services has remained stable, in-line with 2016 to 2019 results (17% vs. 17-21%) and continues to remain lower than in 2014 (26%).

Exhibit 4.6.1.a. Wireless service complaint made in the past 12 months



QB11a/QB11/QB4 Have you made a complaint about your wireless services in the past 12 months?

Base: Respondents who own a cell phone, 2020 (n=1,306); 2019 (1,322), 2018 (n=1,111), Fall 2016 (n=1,277), Winter 2016 (n=925), 2015 (n=1,005), 2014 (n=1,016)

Compared to previous years, regional differences have dissipated. The rest of the country is now on par with Quebec, which had fewer complaints due to Bill 60.

Not unexpectedly, those who find managing data difficult are still more likely to have made a complaint over the past year (42% vs. 14%); see Table 4.6.1.b.

Table 4.6.1.b. Wireless service complaint made in the past 12 months by data management

Wireless Service Complaint Made	Total (A)	Manage Data Easy (F)	Manage Data Difficult (G)
Base = actual	**1306**	**839**	**107**
Yes	17	14	42
No	82	86	58
Don’t know	1	*	-

QB11a. Have you made a complaint about your wireless services in the past 12 months?

Note: Letters denote statistically significant difference. For example, if there is a B then the result is significantly higher than the corresponding result in column B.

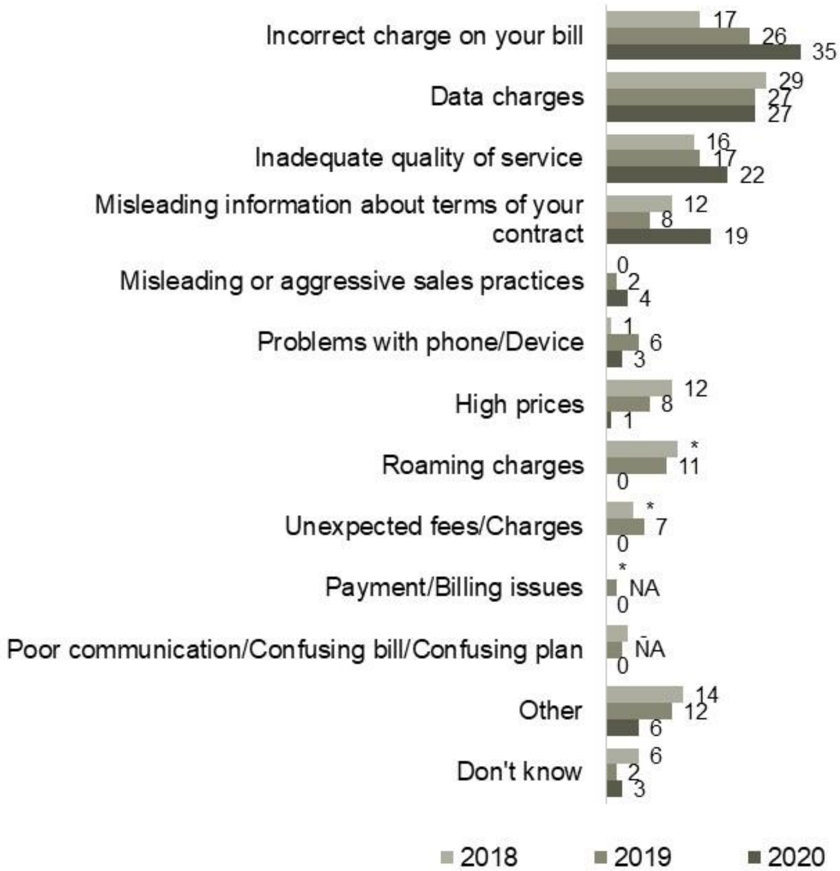
**Denotes less than 1%*

- Denotes 0

Reasons

There have been a number of shifts in the reasons behind complaints over the past year. Incorrect charges on bill is now the top stated reason behind complaints (35% in 2020 vs. 26% in 2019), while the number of Canadians citing misleading information about the terms of their contract has also increased over the past year (19% vs. 8%). Conversely, there has been a decrease in the number who state roaming charges (<0.5% in 2020 vs. 11% in 2019) or high prices (1% vs. 8%). Other reasons for complaints have remained steady and include data charges (27%) and inadequate quality of service (22%). Complete details can be found in Exhibit 4.6.1.c below.

Exhibit 4.6.1.c. Reason for complaints



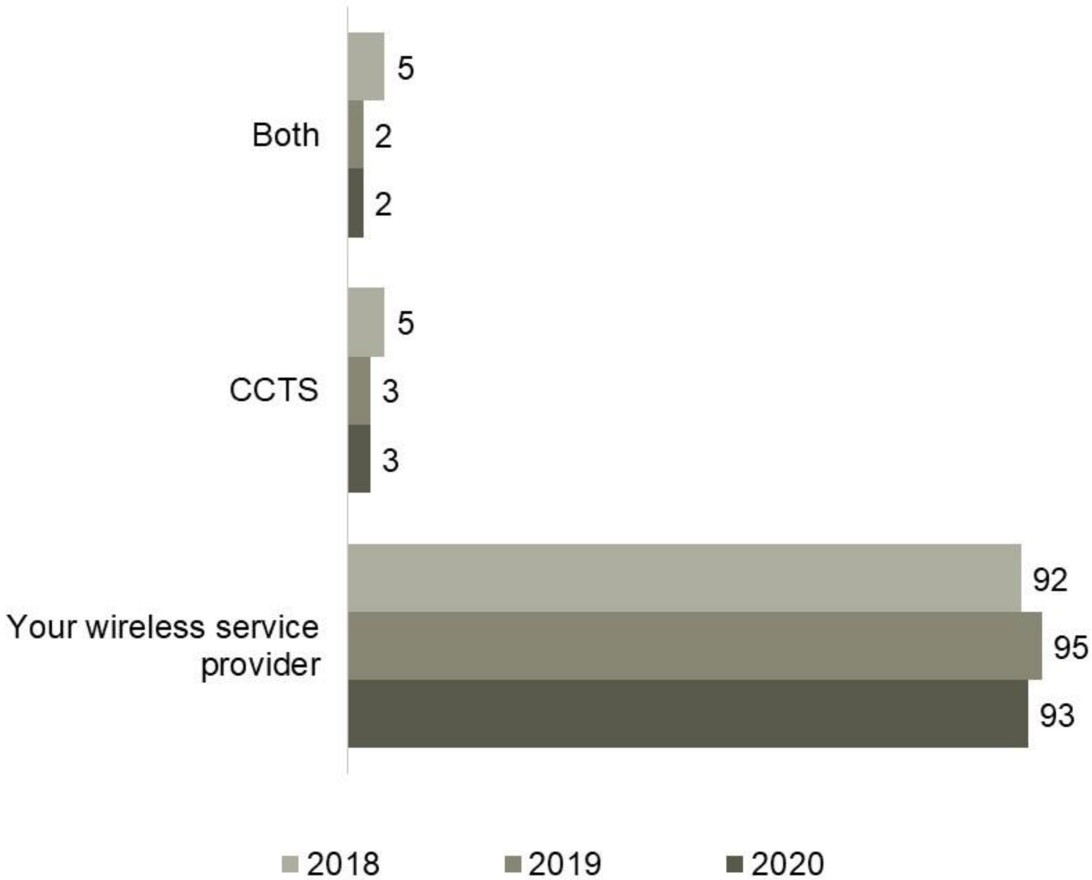
B11b. [ASK If answered "Yes" to B11a] What was your complaint about?

Base: Total respondents who made a complaint about the wireless services in the P12M, 2020 (n=222); 2019 (n=255), 2018 (n=183)

Complaint Issued to Service Provider

Consistent with previous findings, more than nine-in-ten Canadians who have made a complaint made it to their service provider (93%). Few complaints are escalated to the Commission for Complaints for Telecom-Television Services (CCTS) (3%), which is mandated to review complaints from customers who are unsatisfied with how their complaint was addressed by their service provider.

Exhibit 4.6.1.e. Complaints to wireless service provider



WC7. [ASK If answered "Yes" to B11a] Who did you complain to? Was it your service provider, the Commission for Complaints for Telecom-Television Services, also knowns as the CCTS, or both?

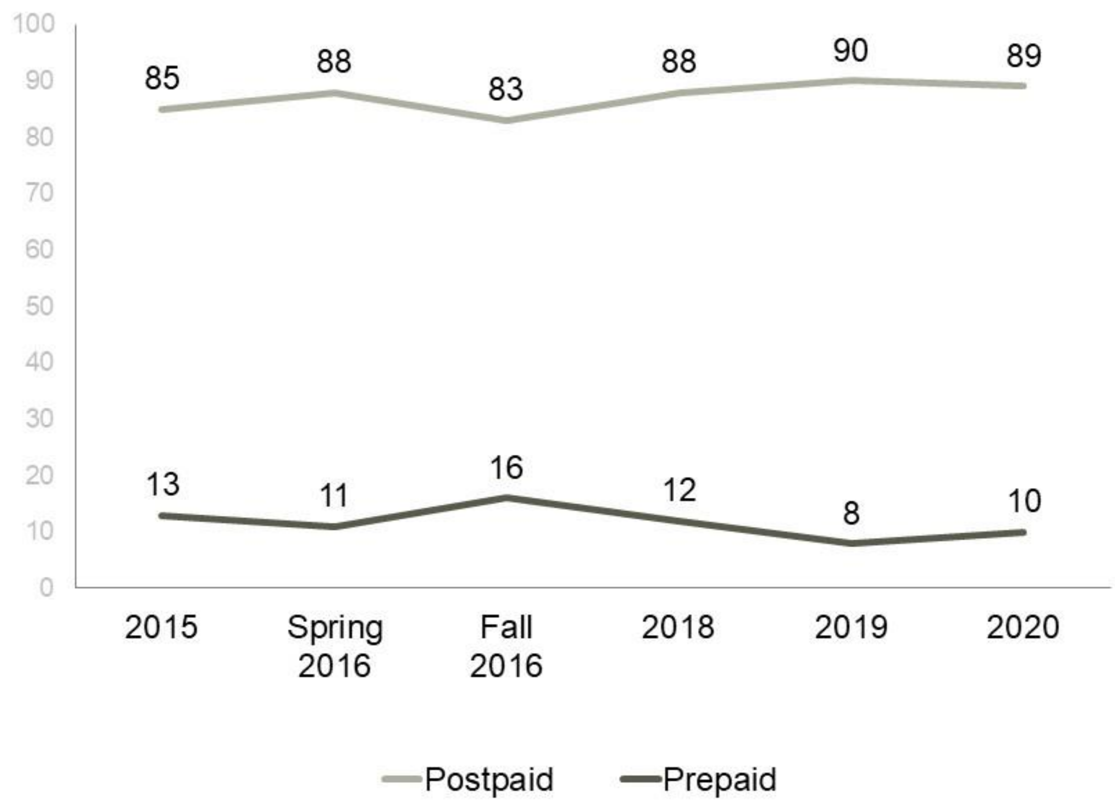
Base: Total respondents who made a complaint about the wireless services in the P12M, 2020 (n=222); 2019 (n=255), 2018 (n=183)

4.7 Canadian's Wireless Plans

4.7.1 Type of Plan

The majority of Canadians continue to purchase post-paid services in 2020 (89%). Pre-paid services are slightly above 2019 levels (10% vs 8%) but continue to be below 2015 levels (-3%). Complete details can be found Exhibit 4.7.1.a below.

Exhibit 4.7.1.a. Type of service plan

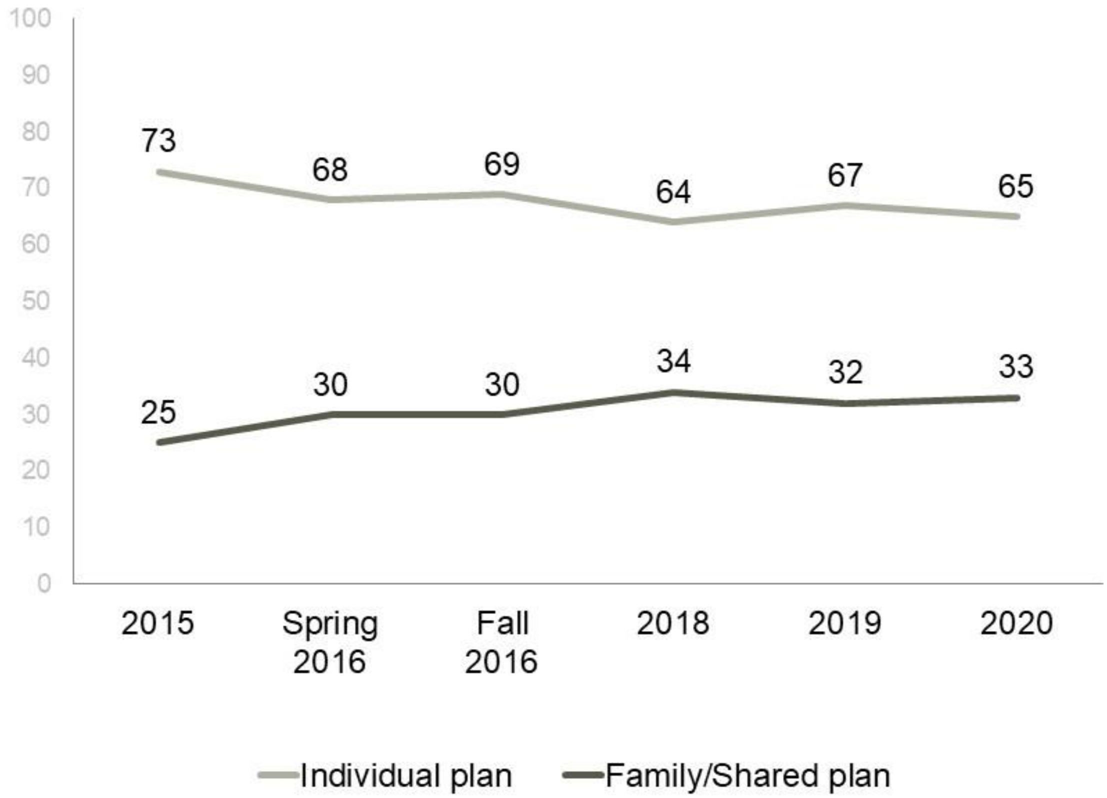


QB1c. And is it a monthly plan, or a prepaid or pay-as-you-go plan?

Base: Total respondents who own a cell phone, 2020 (n=1,306), 2019 (n=1,322), 2018 (n=1,111), fall 2016 (n=1,277)

While the majority of Canadians still use an individual plan (65%), family plans continue to see increased use over 2015 (33% vs. 25%) but have remained fairly stable since 2018 – yearly details can be found in Exhibit 4.7.1.b.

Exhibit 4.7.1.b. Individual or family/shared plan



Individual/Family Shared Plan

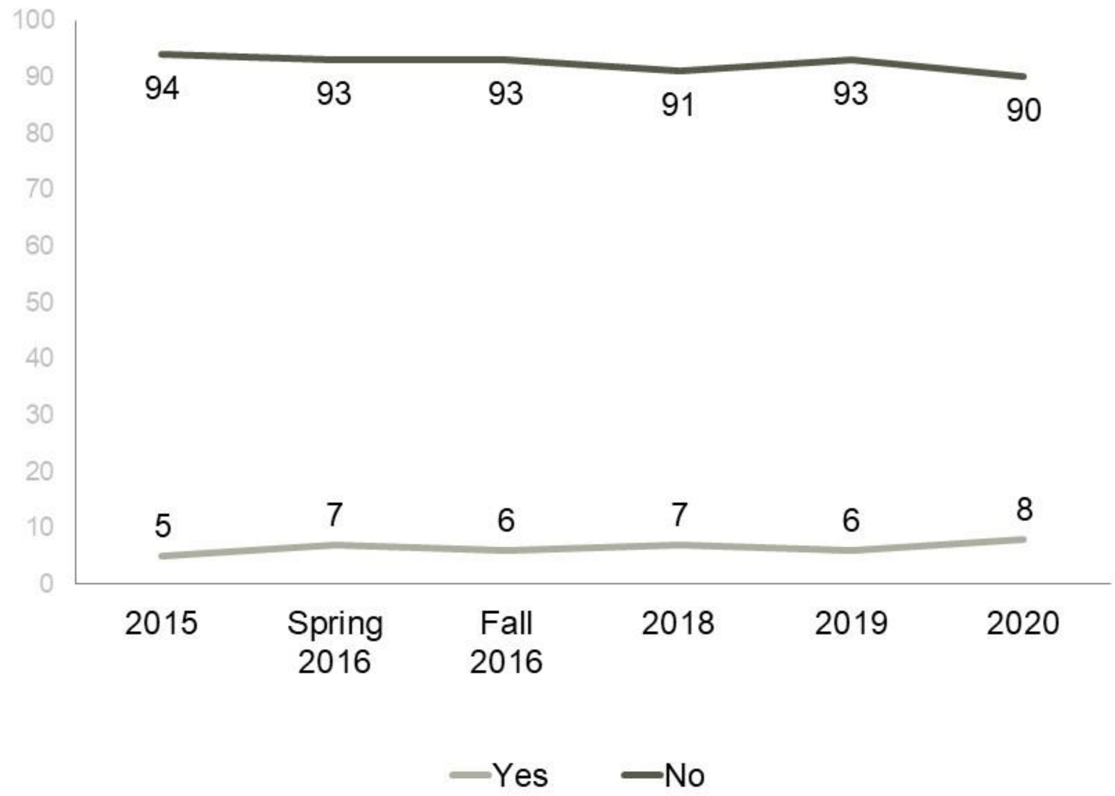
QB1a. Is it an individual plan or a family or shared plan?

Base: Respondents who own a cell phone, 2020 (n=1,306), 2019 (n=1,322), 2018 (n=1,111), fall 2016 (n=1,277)

Promotion through Employer or Association

Only a small number of Canadians (8%) have a wireless plan that is part of a promotion through their employer or an association they belong to. While this number has remained relatively stable from year to year there has been an overall increase in employer/associations promotions compared to 2015 (8% vs 5%). As in previous years, those aged 35-54 are more likely to have a promotion through an employer or association compared to older (55+) or younger (18-34) Canadians (11% vs. 5-8%) which is likely due to more Canadians in this age group being in the workforce and thus having access to an employee purchase plan. Men are also more likely than women to have these types of plans (11% vs. 5%), as are Quebeckers (12% vs. 3-9%). More details can be found in Table 4.7.1.e and 4.7.1.f below.

Exhibit 4.7.1.d. Promotion through employer or association



QB1d. Is your plan part of a promotion through your employer or an association you belong to, sometimes also called an employee purchase plan?

Base: Respondents who own a cell phone, 2020 (n=1,306), 2019 (n=1,322), 2018 (n=1,111), fall 2016 (n=1,277)

Table 4.7.1.e. Promotion through employer or association by gender and age

Promotion through employer or association		Gender		Age		
	Total (A)	Male (B)	Female (C)	18-34 (D)	35-54 (E)	55+ (F)
Base=actual	**1306**	**710**	**596**	**225**	**460**	**585**
Yes	8	11 C	5	8	11 F	5
No	90	88	93 B	89	88	94 DE

Don’t know	2	1	2	3	1	1

QB1d. Is your plan part of a promotion through your employer or an association you belong to, sometimes also called an employee purchase plan?

Note: Letters denote statistically significant difference. For example, if there is a B then the result is significantly higher than the corresponding result in column B.

Table 4.7.1.f. Promotion through employer or association by region

Type of new phone purchase	Total (A)	Region					
		Atlantic (G)	Quebec (H)	Ontario (I)	Prairies (J)	B.C. (K)	Territories (O)
Base=actual	**1306**	**127**	**251**	**350**	**378**	**150**	**50**
Yes	8	6	12 JK	9 J	4	5	3
No	90	94 H	85	90	94 H	94 H	94
Don’t know	2	-	2	1	3	1	3

QB1d. Is your plan part of a promotion through your employer or an association you belong to, sometimes also called an employee purchase plan?

Note: Letters denote statistically significant difference. For example, if there is a B then the result is significantly higher than the corresponding result in column B.

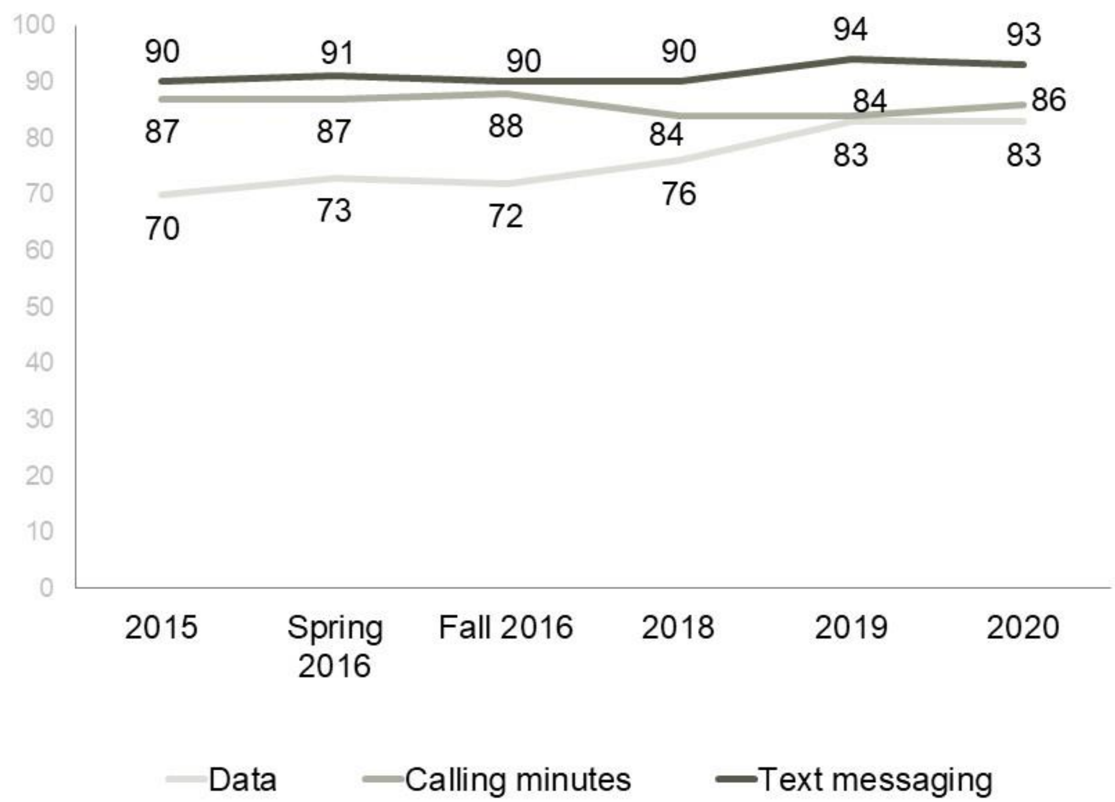
- Denotes 0

4.7.2 Plan Inclusions

Minutes, Texts and Data

The composition of service features on wireless plans has remained stable over the past year. While the majority of wireless plans continue to include text messaging (93%) and calling minutes (86%), the number of people with data has not increased and is starting to level out in 2020 with more than eight in ten (83%) having data included in their wireless plans.

Exhibit 4.7.2.a. Service features



QB2a. Which of the following are included in your wireless plan?

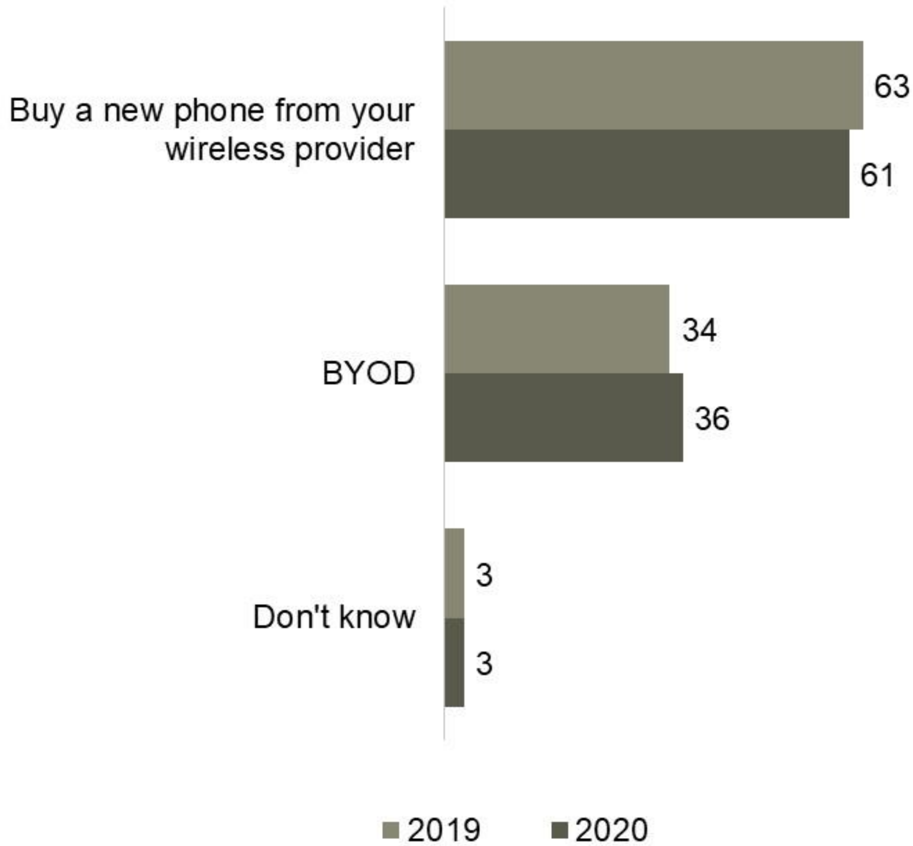
Base: Respondents who own a cell phone, 2020 (n=1,306), 2019 (n=1,322), 2018 (n=1,111), Fall 2016 (n=1,277), Spring 2016 (n=925), 2015 (n=1,005)

4.7.3 Devices

Phone included or Bring Your Own Device (BYOD)

BYOD rates remain similar to 2019, with just over one-third (36%) bringing their own device. In 2020, demographics do not play a role in relation to bringing your own device however, as noted in Table 4.7.3.a, Canadians who have individual and/or prepaid plans are more likely to BYOD (41% vs 28% and 60% vs 33% respectively).

__Exhibit 4.7.3.a. Phone included with contract__



WC4. And does your plan include a phone that was sold to you at a reduced price as part of your contract or did you bring your own device also known as a BYOD plan?

Base: Total respondents who own a cell phone, 2020 (n=1,306), 2019 (n=1,322)

Table 4.7.3.b. Phone included with contract by plan sharing and plan type

Phone included with contract		Plan Sharing		Wireless Plans	
	Total (A)	Family (J)	Individual (K)	Monthly (L)	Pre-paid (M)
Base=actual	**1306**	**435**	**847**	**1158**	**126**
Buy a new phone from your wireless provider	61	70 K	57	64 M	35
Bring your own device	36	28	41 J	33	60 L
Don’t know	3	2	3	2	5

WC4. When you signed up for your latest wireless plan, did you bring your own device, or did you buy a new phone from your wireless provider?

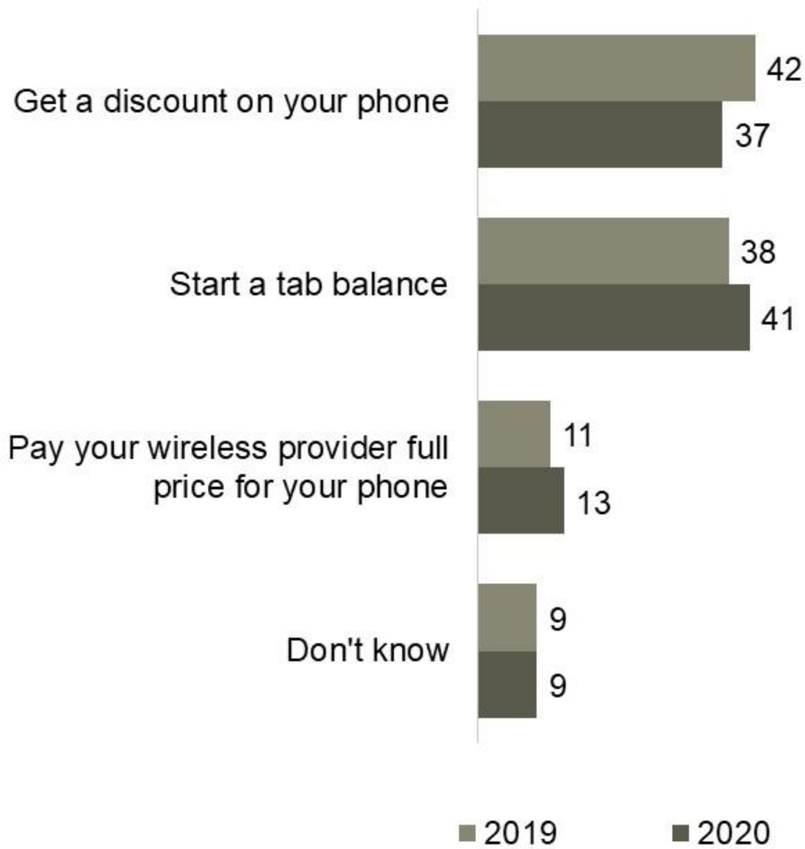
Note: Letters denote statistically significant difference. For example, if there is a B then the result is significantly higher than the corresponding result in column B.

Among those who purchased a new phone, few pay full price (13%), while many were given a discount on the device (37%) or choose a tab balance (41%). A tab balance involves the purchase of a phone at a reduced upfront cost, with the leftover cost added to an individual’s monthly bill to pay down this balance.

In 2020, slightly more are electing to pay full price (+2%) while fewer (-5%) are being given a discount and slightly more are starting a tab balance (+3%) compared to 2019.

As noted in Table 4.7.3.d, tab balances continue to be more prevalent among younger Canadians (18-54; 44-54%) than older Canadians (55+; 31%). While a discounted phone is much more prevalent in Saskatchewan (59% vs 25-33%) than the rest of Canada.

Exhibit 4.7.3.c. Type of new phone purchase



WC4a. [IF QWC4 is Buy a new phone from your wireless provider] Did you:

Base: Total respondents who own a cell phone, 2020 (n=801), 2019 (n=840)

Table 4.7.3.d. Type of new phone purchase by age and region

Type of new phone purchase	Total	Age			Region								
	(A)	18-34 (D)	35-54 (E)	55+ (F)	Atlantic (G)	Quebec (H)	Ontario (I)	Prairies (J)	B.C. (K)	Sask (L)	Alb (M)	Man (N)	Territories (O)
Base=actual	**801**	**139**	**291**	**354**	**82**	**151**	**205**	**249**	**94**	**88**	**79**	**82**	**20****
Get a discount on your phone	37	29	37	41 D	25	33	38	41 GN	45 G	59 GHIJMN	37	28	33
Start a tab balance	41	54 F	44 F	31	50 KL	38	46 L	40 L	32	29	49 L	42	37
Pay your wireless provider full price for our phone	13	12	12	14	14	18 I	9	12	13	8	11	16	11
Don’t know	9	5	7	15 DE	11	12	8	7	10	4	3	13	19

WC4a. [IF QWC4 is Buy a new phone from your wireless provider] Did you:

Note: Letters denote statistically significant difference. For example, if there is a B then the result is significantly higher than the corresponding result in column B.

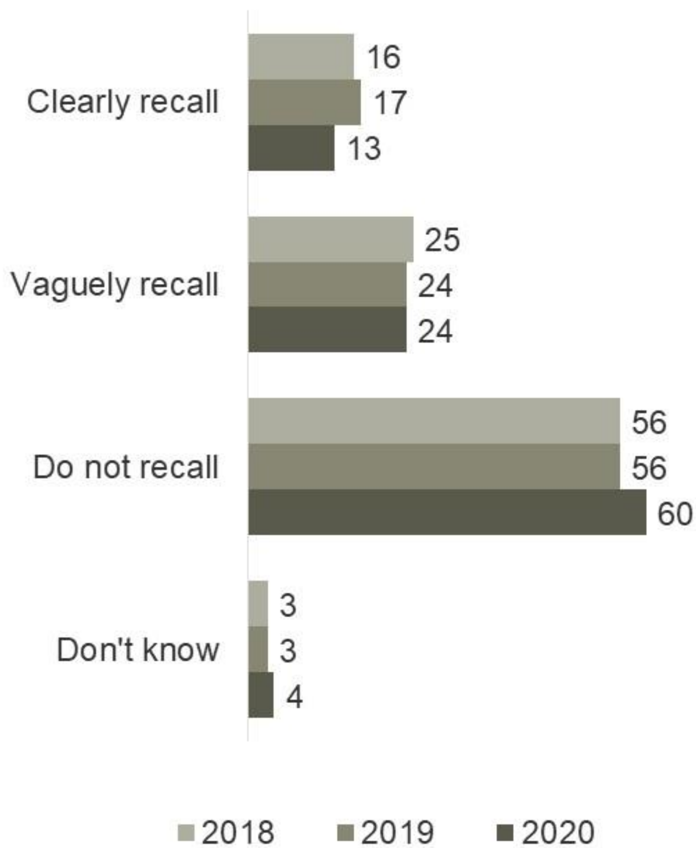
*** Very Low Base < 30*

4.8 Television Service Provider Code

4.8.1 Recall of Television Service Provider Code

In September 2017, the Television Service Provider (TVSP) Code came into effect establishing guidelines for television service providers. The TVSP Code ensures that television consumers are empowered to make informed decisions and that there is a more competitive television marketplace. Despite having been introduced more than two years ago, awareness remains low and has declined from previous years. In 2020, fewer (13% vs 17%) can recall the TV service provider code while more do not recall it at all (60% vs 56%). This is likely a function of the reduced media attention on the Code as time goes on.

<u>Exhibit 4.8.1.a. Recall of TV Service Provider Code</u>



TVSP1. In September 2017, a Television Service Provider Code came into effect establishing guidelines for television service providers. The Code ensures that television consumers are empowered to make informed decisions and that there is a more competitive wireless marketplace. To what extent, if any would you say you recall hearing or seeing anything about this Code? Would you say you clearly recall, vaguely recall or do not recall?

Base: Total respondents who subscribe to a TV service, 2020 (n=1,060), 2019 (n=1,107), 2018 (n=1,096)

As outlined in Table 4.8.1.b, demographics continue to play a role in recall of the TVSP Code, as Canadians aged 18-34 are still less likely to be aware of the TVSP Code (71% do not recall vs. 55-59%), as are those with no tertiary education (71% vs. 54-60%). Official language no longer plays a role in awareness in 2020 with those speaking English or French having similar TVSP awareness levels (57% vs. 58% do not recall).

Table 4.8.1.b. Recall of TV Service Provider Code by age, education and language

Recall of TV Service Provider Code by age, education and language	Total (A)	Age 18-34 (D)	Age 35-54 (E)	Age 55+ (F)	Education HS or less (P)	Education College (Q)	Education University or more (R)	Language English (B)	Language French (C)	Language Other (D)
Base=actual	**1060**	**102**	**338**	**585**	**268**	**263**	**483**	**703**	**219**	**117**
Do not recall	60	71 E	55	59	71 QR	60	54	57	58	69 B
Vaguely Recall	24	17	26	26	16	26 P	28 P	24	29	21
Clearly Recall	13	8	15	14	8	13	15 P	16 C	8	10
Don’t Know	4	5	4 F	1	5	2	2	3	5 D	-

TVSP1. In September 2017, a Television Service Provider Code came into effect establishing guidelines for television service providers. The Code ensures that television consumers are empowered to make informed decisions and that there is a more competitive wireless marketplace. To what extent, if any would you say you recall hearing or seeing anything about this Code? Would you say you clearly recall, vaguely recall or do not recall?

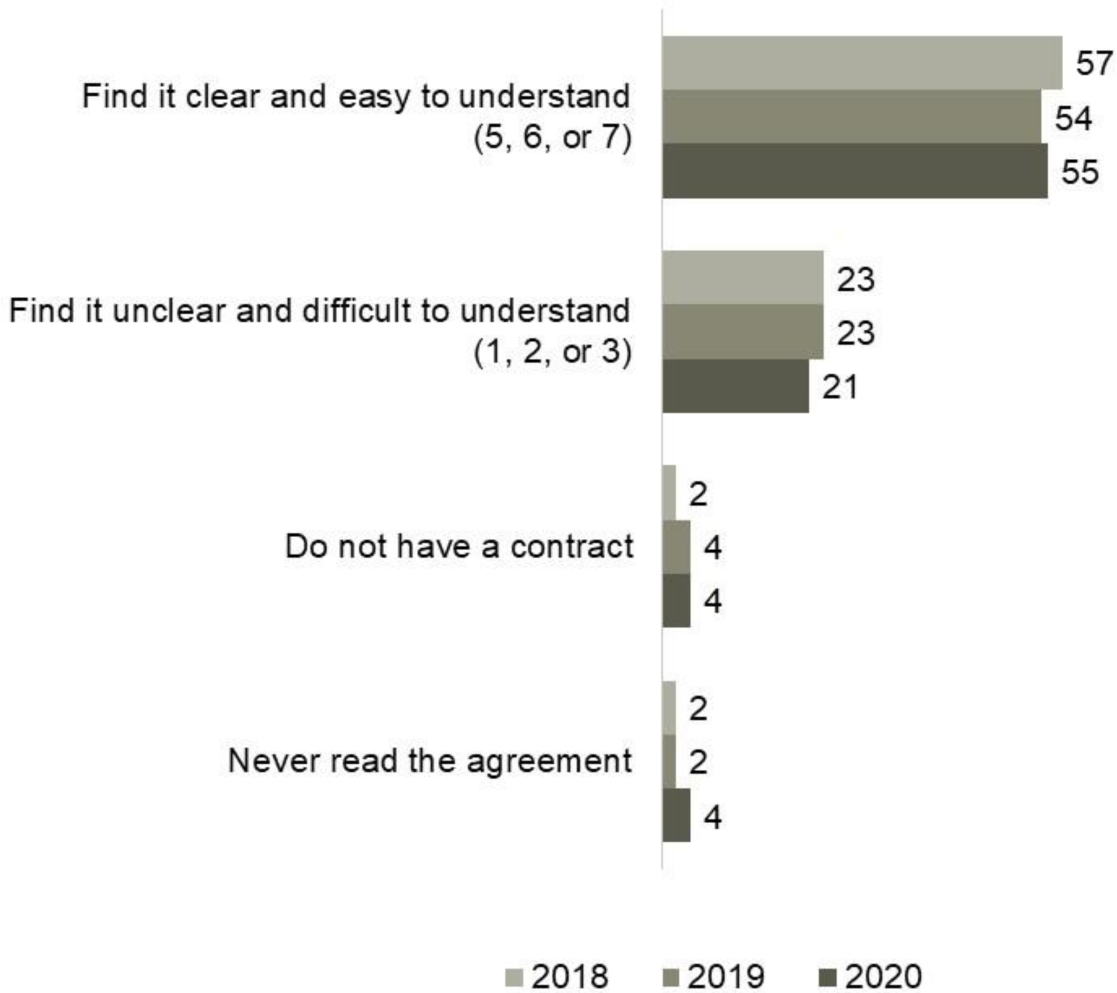
Note: Letters denote statistically significant difference. For example, if there is a B then the result is significantly higher than the corresponding result in column B.

- Denotes 0

4.8.2 Clarity of TV Contracts

Clarity of contracts has remained consistent over the last three years. With over half of Canadians continuing to report they find their TV contracts clear and easy to understand (54%; rated 5, 6 or 7 on a scale from 1-7) and only a small portion (21%; rated 1, 2 or 3 on a scale from 1-7) finding contracts difficult to understand. This is consistent with findings over the last two years however, in 2020 demographic disparities seem to exist. As noted in Table 4.8.2.a, those living in the Prairies (61% vs 43-58%) and those with lower household incomes (<40K) (66% vs 50-54%) are more likely to find their TV contracts clear and easy to understand. Further, those who recall the TVSP Code are also more likely to find their TV contacts clear and easy to understand (62-68% vs 49%).

<u>Exhibit 4.8.2.a. Clarity of TV contracts</u>



TVSP2. To what extent do you find your TV contract clear and easy to understand? Please use a 7-point scale where 1 means extremely unclear and difficult to understand and 7 means extremely clear and easy to understand.

Base: Total respondents who subscribe to a TV service, 2020 (n=1,060); 2019 (n=1,107), 2018 (n=1,096)

Table 4.8.2.b. Clarity of TV contracts by region and TVSP code recall

Clarity and ease to understand TV contract		Region						Recall TSP Code		
	Total (A)	Atlantic (G)	Quebec (H)	Ontario (I)	Prairies (J)	B.C. (K)	Territories (O)	Clearly (H)	Vaguely (I)	Do not (J)
Base=actual	**1060**	**104**	**222**	**277**	**308**	**120**	**29****	**149**	**270**	**608**
7 - Extremely clear and easy to understand	26	19	27	28	23	18	41	37 IJ	19	26
6	11	12	9	11	16 HK	5	15	13	16 J	8
5	18	18	14	19	22 H	20	7	17	27 J	15
4	12	19 I	14	9	10	19 I	7	10	15	12
3	8	10	6	9	7	9	10	12	8	8
2	5	4	3	6	6	3	2	2	4	5
1 - Extremely unclear and difficult to understand	8	7	9	7	5	14 J	-	5	6	9
Do not have a contract	4	2	7	3	4	3	-	3	2	4
Never read the agreement	4	3	7	5	2	3	-	-	1	6 I
Don't Know	5	6	5	3	4	5	19	1	1	6 I

TVSP2. To what extent do you find your TV contract clear and easy to understand? Please use a 7-point scale where 1 means extremely unclear and difficult to understand and 7 means extremely clear and easy to understand.

Note: Letters denote statistically significant difference. For example, if there is a B then the result is significantly higher than the corresponding result in column B.

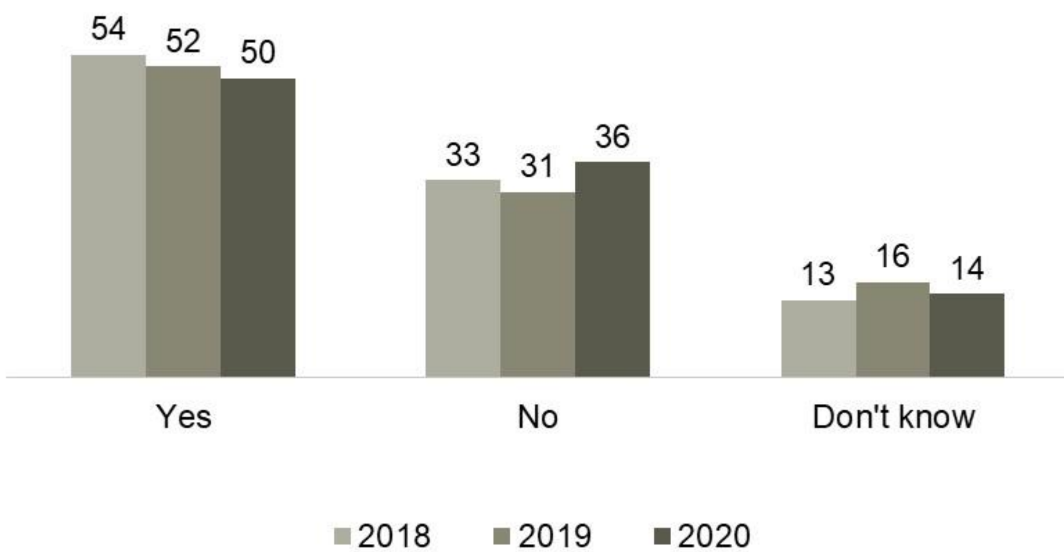
*** Very Low Base < 30*

- Denotes 0

4.8.3 Awareness of Basic Service Package

The TVSP Code requires television service providers to ensure that customers are aware of the availability, price and content of their entry-level service offering (i.e., basic service package). Reports of being aware of the basic service package have remained steady since 2017, with half of TV service subscribers reporting they were informed (50%) while slightly more than one-third (36%) do not believe they were informed of the basic service package. Service providers are required to inform new and old clients about the basic service, regardless of when their contracts were signed which suggests that consumer are still not being actively directed to the information on the basic service package.

Exhibit 4.8.3.a. Awareness of basic service package



TVSP4. The TVSP Code requires television service providers to ensure that customers are aware of the availability, price and content of their entry-level service offering, also known as the basic service package. Has your service provider informed you about their entry-level offering? This may have been by email, on the phone or via your monthly billing?

Base: Total respondents who subscribe to a TV service, 2020 (n=1,060), 2019 (n=1,107), 2018 (n=1,096)

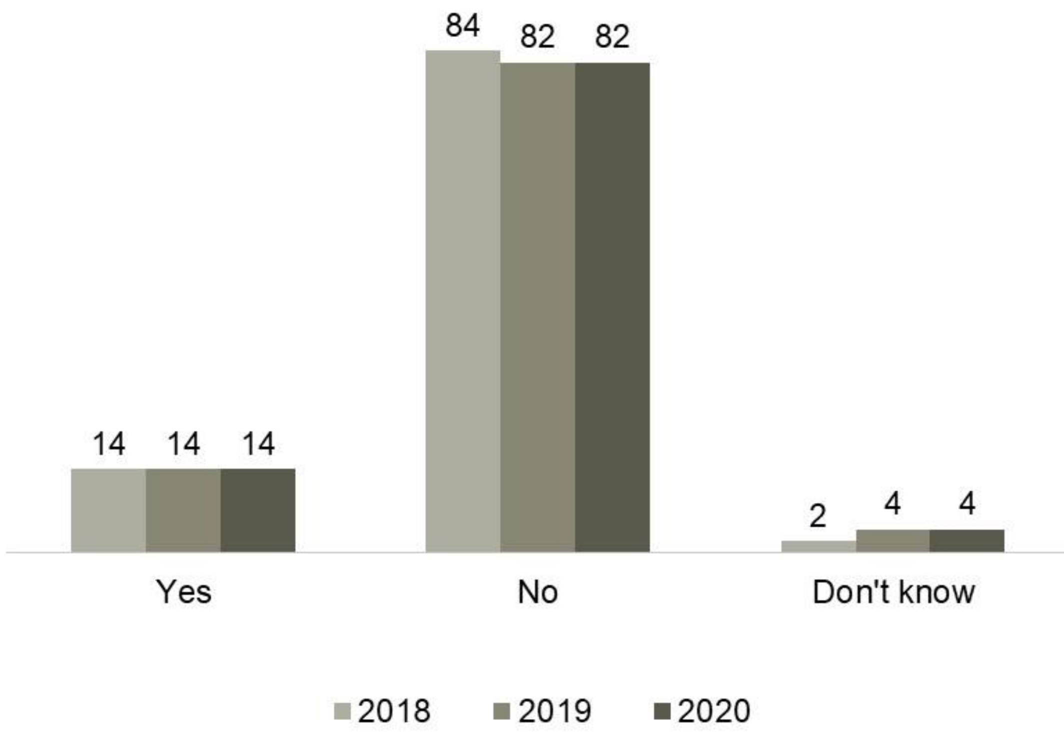
4.8.4 Service calls

The TVSP Code requires television service providers to provide customers with a timeframe for when a service call to a residence will begin, explain potential charges associated with the service call, and explain how they may cancel or reschedule the service call. This requirement continues to work well, as few Canadians report problems related to service calls (14%). Interestingly, some groups are more likely to experience service call related problems:

- Men are more likely than women to experience problems (17% vs 12%);
- Those living outside of the Prairies or Quebec (16-24% vs 9-10%); and
- Households making greater than 40K annually (15-20% vs 7%).

Complete details can be found in Table 4.8.4.b below.

Exhibit 4.8.4.a. Service calls



TVSP3. The TVSP Code requires television service providers to provide a customer with a timeframe for when a service call to a residence will begin, explain potential charges associated with the service call, and explain how you may cancel or reschedule the service call. Have you experienced problems related to service calls?

Base: Total respondents who subscribe to a TV service, 2020 (n=1,060), 2019 (n=1,107), 2018 (n=1,096)

Table 4.8.4.b. Service calls by gender, region and household income

Experienced issues related to service calls		Gender		Region						Income				
	Total (A)	Male (B)	Female (C)	Atlantic (G)	Quebec (H)	Ontario (I)	Prairies (J)	B.C. (K)	Territories (O)	Under $40K (E)	$40K to under $60K (F)	$60K to under $100K (G)	$100K to under $150K (H)	$150K + (I)
Base=actual	**1060**	**566**	**494**	**104**	**222**	**277**	**308**	**120**	**29****	**189**	**126**	**250**	**160**	**157**
Yes	14	17 C	12	16	9	17 H	10	24 HJ	14	7	20 E	17 E	16 E	15 E
No	82	80	83	83	84 K	80	86 K	73	86	89 GI	79	80	80	79
Don't Know	4	3	5	1	7	3	4	3	-	4	1	3	3	5

TVSP3. The TVSP Code requires television service providers to provide a customer with a timeframe for when a service call to a residence will begin, explain potential charges associated with the service call, and explain how you may cancel or reschedule the service call. Have you experienced problems related to service calls?

Note: Letters denote statistically significant difference. For example, if there is a B then the result is significantly higher than the corresponding result in column B.

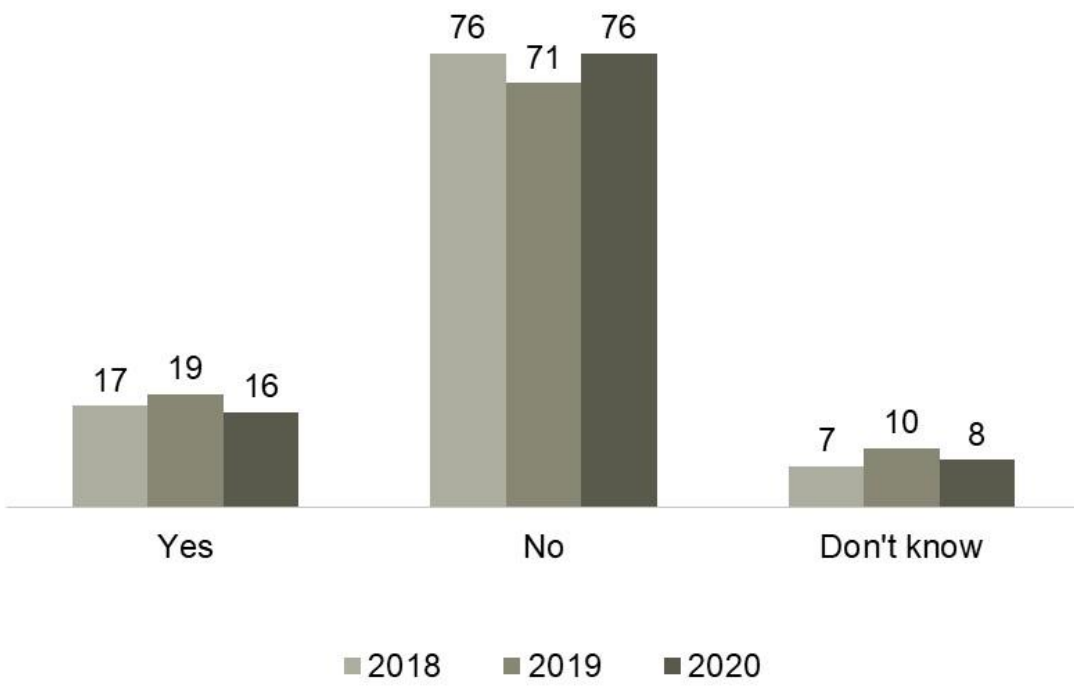
*** Very Low Base < 30*

- Denotes 0

4.8.5 Changes in Price

Service providers are not allowed to change the price of a TV channel or package of channels without informing their customers. When asked if their service provider had changed the price of their channels or packages without informing them, most Canadians continue to say they have not experienced an uninformed price change (76%). However, a small but significant minority (16%) continue to report uninformed price changes continue to occur.

<u>Exhibit 4.8.5.a. Changes in price</u>



TVSP5. In the past twelve months, has your TV service provider changed the price of a TV channel or package of channels without informing you in advance?

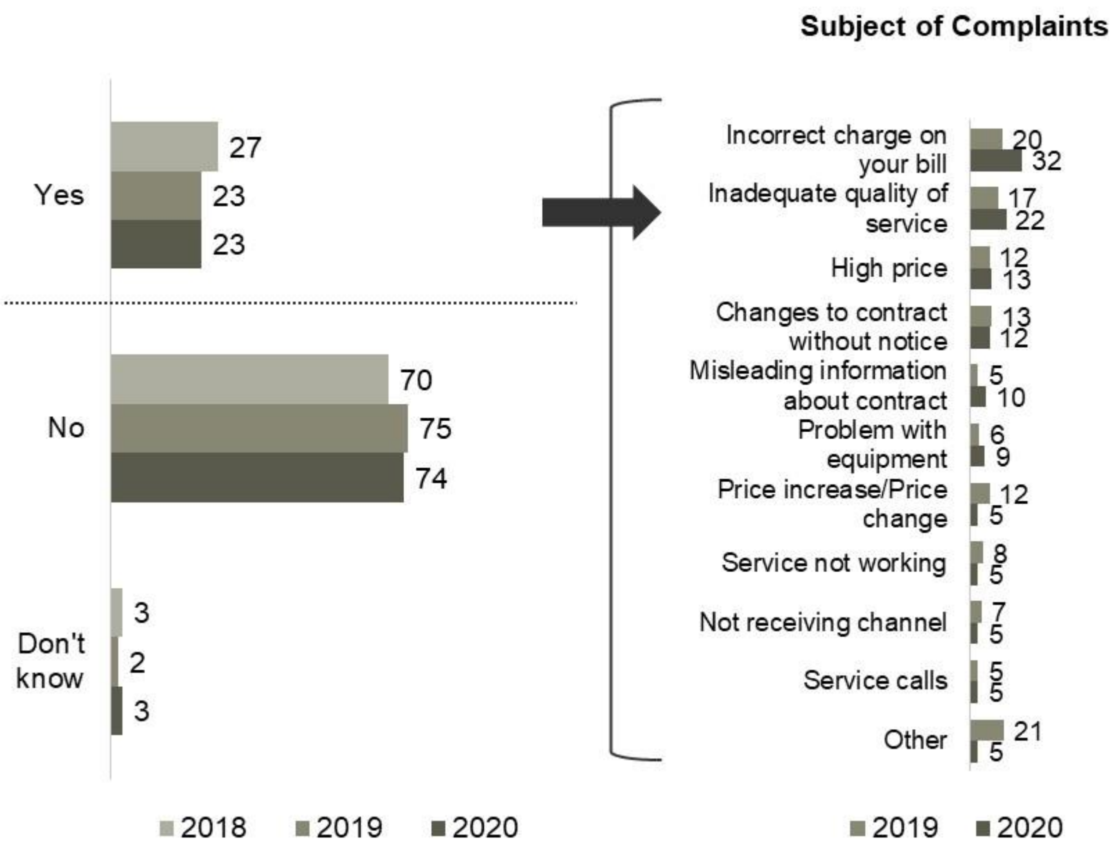
Base: Total respondents who subscribe to a TV service, 2020 (n=1,060), 2019 (n=1,107), 2018 (n=1,096)

4.8.6 Complaints

The number of Canadians who have made a complaint about their TV services in the past 12 months has remained steady since 2019 (23%). The nature of the complaints vary, but most continue to centre around incorrect charges (32%), inadequate quality of service (22%), price (18%), changes to their contract without notice (12%) or misleading terms (10%). There have been significant increases in complaints related to incorrect charges (+12%) compared to 2019 however all other complaints have remained statistically similar.

As with wireless services, and as noted in Table 4.8.6.b those in Quebec are less likely to have made a complaint than those in other regions of Canada (12% vs. 26-30%).

Exhibit 4.8.6.a. Complaints



TVSP6. Have you made a complaint about your TV services within the last 12 months?

Base: Total respondents who subscribe to a TV service, 2020 (n=1,060), 2019 (n=1,107), 2018 (n=1,096)

TVSP6b. [ASK If answered "Yes" to TVSP6] What was your complaint about?

Base: Total Respondents who made a complaint, 2020 (n=255) 2019 (n=303)

Exhibit 4.8.6.b. Complaints by region

Complaints	Total (A)	Regions Atlantic (G)	Quebec (H)	Ontario (I)	Prairies (J)	British Columbia (K)	Territories (O)
Base=actual	**1060**	**104**	**222**	**277**	**308**	**120**	**29****
Yes	23	30 H	12	29 H	23 H	29 H	15
No	74	66	83 GIK	70	75	68	85
Don't know	3	4	5 I	1	2	3	-

TVSP6. Have you made a complaint about your TV services within the last 12 months?

Note: Letters denote statistically significant difference. For example, if there is a B then the result is significantly higher than the corresponding result in column B.

*** Very Low Base < 30*

- Denotes 0

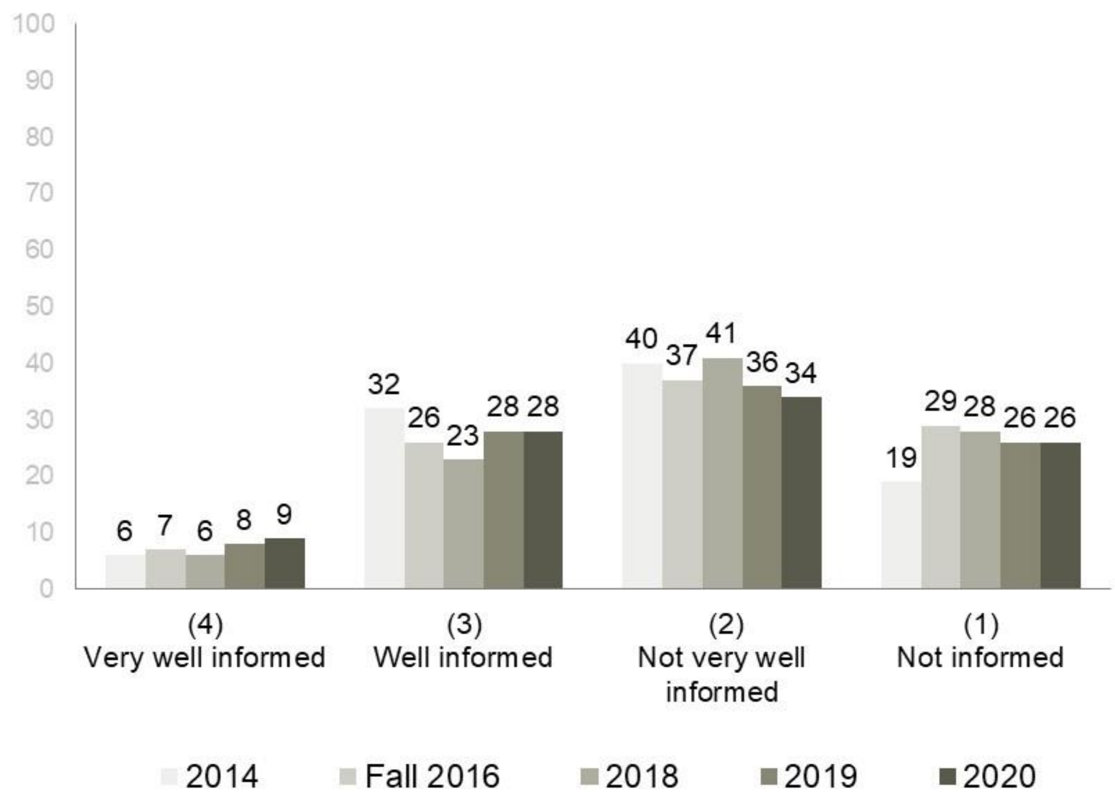
4.9 CRTC

4.9.1 Canadians' Understanding of the CRTC Mandate

Canadians' understanding of the mandate and role of the CRTC has remained stable compared to 2019 and is approaching 2014 levels. Thirty-six per cent now consider themselves very well/well informed about the CRTC, compared to 38 per cent in 2014.

In 2020, gender no longer plays a role in how informed one considers themselves to be about the CRTC however, Canadians aged 35+ continue to report being better informed about the CRTC's role than their younger counterparts (40% vs. 26%). Further, University educated Canadians as well as Canadians living in high income households ($100k+) also continue to be more likely to consider themselves informed (43% vs. 29-36% and 43-49% vs. 31-34%). Complete details can be found in Tables 4.9.1.b and 4.9.1.c below.

<u>Exhibit 4.9.1.a. Level of informed with the mandate and role of the CRTC</u>



Informed with the mandate and role of the CRTC

C1. Overall, how informed are you about the mandate and role of the CRTC?

Base: Total respondents, 2020 (n=1,510), 2019 (n=1,524), 2018 (n=1,345), fall 2016 (n=1,483), 2014 (n=1,289)

Table 4.9.1.b. Level of informed with the mandate and role of the CRTC by age

Level of informed with the mandate and role of the CRTC	Total (A)	Age 18-34 (D)	Age 35-54 (E)	Age 55+ (F)
Base=actual	**1510**	**233**	**513**	**716**
Informed (4 and 3)	36	26	40 D	40 D
Uninformed (2 and 1)	60	70 EF	56	58

QC1. Overall, how informed are you about the mandate and role of the CRTC?

Note: Letters denote statistically significant difference. For example, if there is a B then the result is significantly higher than the corresponding result in column B.

Table 4.9.1.c. Level of informed with the mandate and role of the CRTC by income and education

Level of informed with the mandate and role of the CRTC	Total (A)	Income <$40K (E)	Income $40K-<$60K (F)	Income $60K-<$100K (G)	Income $100K-<$150K (H)	Income <$150+K (I)	Education HS or less (P)	Education College (Q)	Education University or more (R)
Base=actual	**1510**	**297**	**188**	**352**	**221**	**203**	**398**	**363**	**685**
Informed (4 and 3)	36	33	31	34	49 EFG	43 F	29	36	43 P
Uninformed (2 and 1)	60	63 H	67 H	65 H	49	56	67 R	61	56

QC1. Overall, how informed are you about the mandate and role of the CRTC?

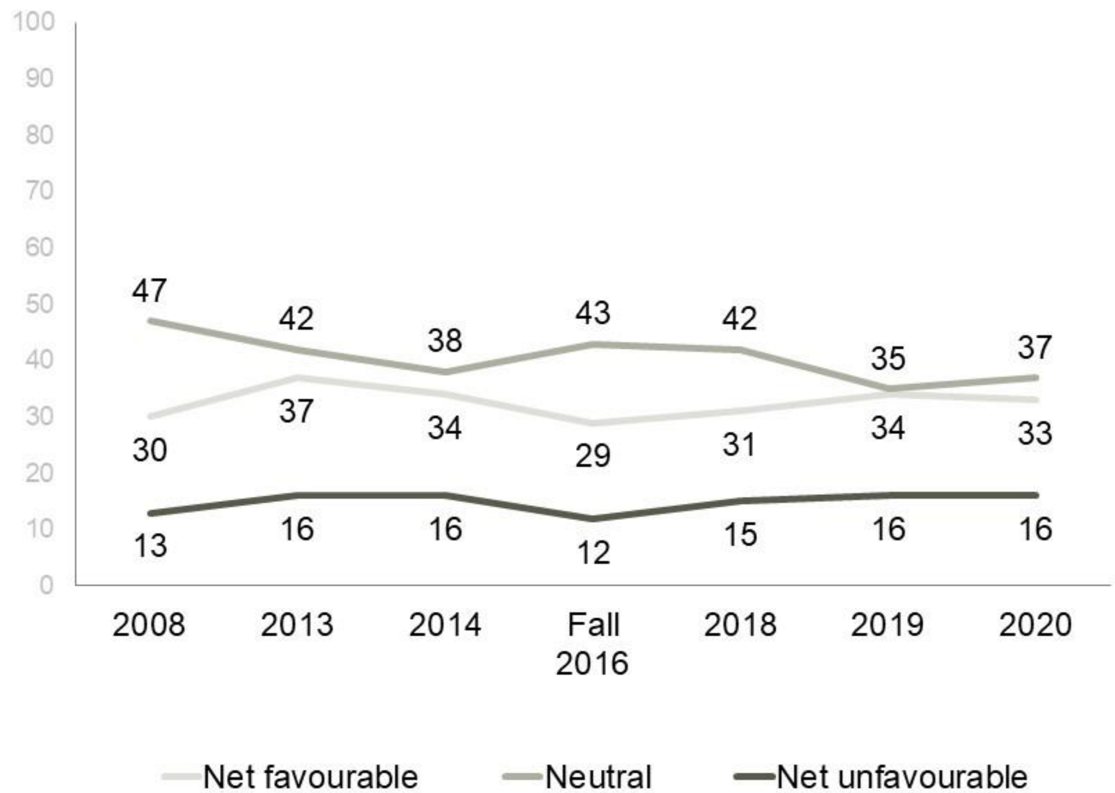
Note: Letters denote statistically significant difference. For example, if there is a B then the result is significantly higher than the corresponding result in column B.

4.9.2 Impression of the CRTC

Canadians' impressions of the CRTC are similar to 2019 and remain more positive than in Fall 2016 (33% vs. 29%; rated 4 or 5 on a 1-5 scale). Again, this may be reflecting the increase in Canadians who feel well informed about the role of the CRTC over the past two years. However, it is worth noting that 62% of Canadians say they are not well informed about the role of the CRTC, which implies that many consumers' impressions of the CRTC are based on little to no knowledge.

As noted in Table 4.9.2.b, demographics play a considerable role in perceptions of the CRTC. Older Canadians (35+) (34-37% vs. 29%) and Quebeckers (43% vs 30-35%) have more positive perceptions of the CRTC compared to their counterparts. Further, consistent with previous years, those who consider themselves very well or well informed about the CRTC's role are more positive about the organization (47-54% vs. 16-28%).

Exhibit 4.9.2.a. Impression of the CRTC



QC2. What is your impression of the CRTC?

Base: Total respondents, 2020 (n=1,510), 2019 (n=1,524), 2018 (n=1,345), Fall 2016 (n=1,483), 2014 (n=1,289)

Table 4.9.2.b. Impression of the CRTC by age and region and household income

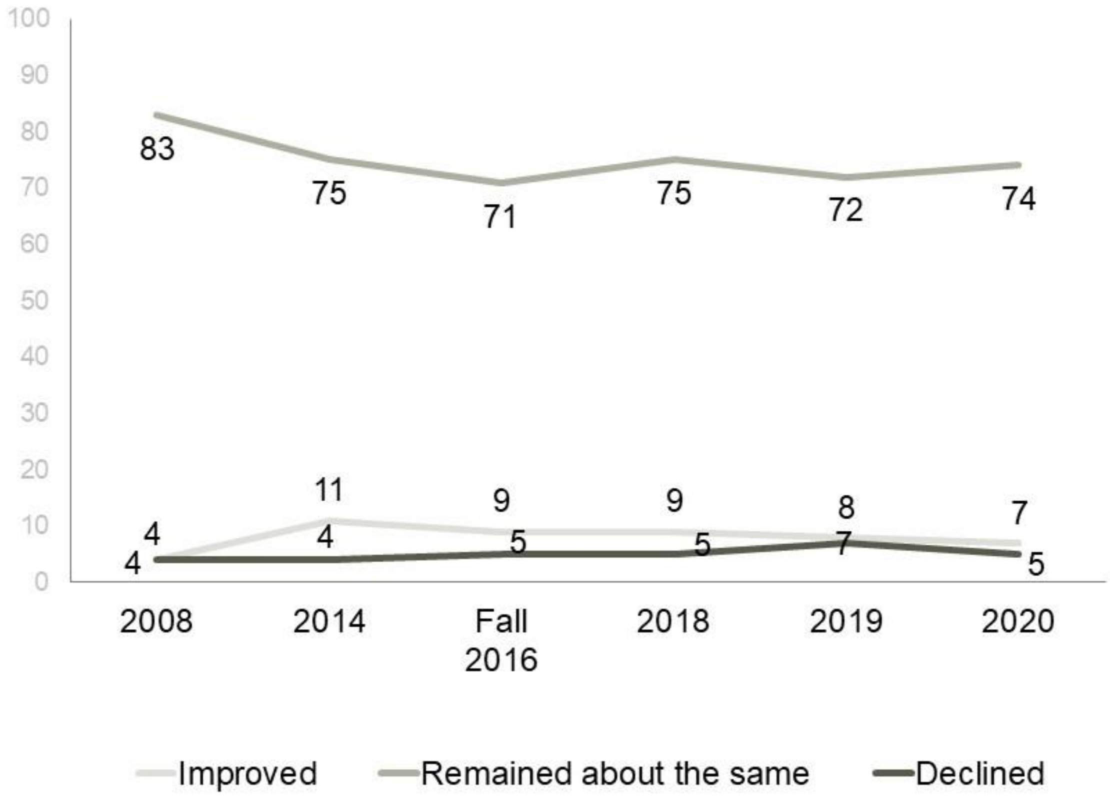
Impression of the CRTC	Total (A)	Age 18-34 (D)	35-54 (E)	55+ (F)	Region Atlantic (G)	Quebec (H)	Ontario (I)	Prairies (J)	B.C. (K)	Territories (O)	Income <$40K (E)	$40K-<$60K (F)	$60K-<$100K (G)	$100K-<$150K (H)	<$150+K (I)
Base=actual	**1510**	**233**	**513**	**716**	**149**	**291**	**400**	**439**	**181**	**50**	**297**	**188**	**352**	**221**	**203**
Favourable (4 and 5)	33	29	34	37 D	35 K	43 IJK	31	30	23	32	36	39	32	41	32
Neutral (3)	37	45 F	40 F	31	43 HO	28	39 HO	41 HO	49 HO	20	34	39	41	37	40
Unfavourable (1and 2)	16	12	17	18 D	16	13	19	15	16	12	14	11	18	18	19

QC2. What is your impression of the CRTC? Would you say it is:

Note: Letters denote statistically significant difference. For example, if there is a B then the result is significantly higher than the corresponding result in column B.

Despite an upward trend in impressions of the CRTC, Canadians are still no more likely to say their opinion of the CRTC has changed in 2020. Few report an improved (7%) or worsened (5%) opinion, with most remaining the same (74%). As stated previously, given that most Canadians continue to state that they are not well informed about the CRTC's role, this is unsurprising. In 2020, demographics play little role in overall opinions of the CRTC.

Exhibit 4.9.2.c. Impression of the CRTC over time



QC3. Over the past year, would you say your impression of the CRTC has:

Base: Total respondents, 2020 (n=1,510), 2019 (n=1,524), 2018 (n=1,345), Fall 2016 (n=1,483), 2014 (n=1,289)

Appendix A: Methodology

4.10 Methodological Overview

Survey Administration

A telephone survey was conducted among 1,510 Canadians aged 18 years and older; 1,322 with those who have their own wireless plan and 188 with those who do not have their own wireless plan. Included in this sample were Canadians who reside in cell phone only households (n=502). This sample also included Canadians that are under contract with TV service providers (n=1,060).

Interviews were conducted using a combination of random digit dialling (RDD) for the landline sample frame and pre-screened cell phone only households (CPO) sample. Since this survey included pre-screened sample it is considered a non-probability sample and as such margin of error does not apply and conclusions from these results cannot be generalized to any population.

A pre-test consisting of 10 completed English interviews and 10 completed French interviews was undertaken on January 10th, 2020. No changes were made after the pre-test and as such the data were included in the final data set. The survey was in field from January 16th – January 30th, 2020.

To allow for regional analyses, regional quotas were also set as follows:

Table 5.1.1.a: Survey Quotas

Region	Wireless	Quota	Completions
Territories	With wireless	50	50
	Without wireless	0	0
British Columbia	With wireless	150	150
	Without wireless	30	31
Alberta	With wireless	125	128
	Without wireless	20	20
Manitoba	With wireless	125	125
	Without wireless	20	20
Saskatchewan	With wireless	125	125
	Without wireless	20	21
Ontario	With wireless	350	350
	Without wireless	50	50
Quebec	With wireless	250	251
	Without wireless	40	40
Atlantic	With wireless	125	128
	Without wireless	20	20

Survey data were weighted using the 2016 Census statistics with regard to region, age, gender and language. Further details about the methodology follow.

Questionnaire

This is a tracking survey and the overall objectives have not changed, although some questions were removed or added to the survey since the fall 2016 wave. CRTC provided Kantar with both English and French versions of the survey. The survey took approximately 15 minutes to complete.

Pre-test

A pre-test was undertaken on January 10th, 2020 obtaining 10 English and 10 French completed interviews. The results were reviewed to ensure the survey was working as expected and that the questions were being interpreted as expected. Based on the results of the pre-test, minimal changes were required for the survey and as such the results of the 20 completes were included in the final data set.

Sample Design and Selection

A regionally stratified sample was drawn to achieve completions among Canadians who have a wireless plan that is not paid for by their employer and those who do not have any wireless plan. The sample was regionally stratified to ensure regional quotas were met.

A landline sample was provided by an internal random number generator that randomizes the last four digits of the phone number based on known area code/exchange combinations. Landline respondents were screened to ensure they qualified for the study. The person answering the phone was selected for the study if they were 18 years of age or older. Regional quotas were assigned by those with and without personal wireless plans.

Survey Administration

The telephone survey was conducted using computer assisted telephone interviewing (CATI) technology. CATI ensures the interview flows as it should with pre-programmed skip patterns. It also controls responses to ensure appropriate ranges and data validity. Sample is imported directly into the survey to ensure accurate recording of sample variables such as region. The system also controls automated scheduling and call-backs to ensure all appointments are adhered to.

Surveys were conducted in English or French as chosen by the respondent. Interviewing was conducted by fully trained interviewers and supervisors. A minimum of five per cent of all interviews were independently monitored and validated in real time.

All participants were informed of the general purpose of the research, they were informed of the sponsor and the supplier and that all of their responses would be confidential.

Margin of Errors

Since this survey included pre-screened sample it is considered a non-probability sample and as such margin of error does not apply and conclusions from these results cannot be generalized to any population.

Weighting

Data were weighted by region, age, gender and language using 2016 Census Data.

Table 5.1.1.b. 2016 Census Data by Region, Age, Gender

Region	Age	Gender	Population (N)	Population (%)
Atlantic	18-34	Male	222,130	0.79
		Female	223,220	0.79
	35-54	Male	307,195	1.09
		Female	328,985	1.17
	55+	Male	392,955	1.40
		Female	441,700	1.57
Quebec	18-34	Male	848,250	3.02
		Female	842,360	3.00
	35-54	Male	1,098,175	3.90
		Female	1,097,760	3.90
	55+	Male	1,259,920	4.48
		Female	1,434,415	5.10
Ontario	18-34	Male	1,488,215	5.29
		Female	1,483,160	5.27
	35-54	Male	1,791,645	6.37
		Female	1,916,435	6.81
	55+	Male	1,904,450	6.77
		Female	2,182,830	7.76
Prairies	18-34	Male	782,730	2.78
		Female	762,790	2.71
	35-54	Male	874,845	3.11
		Female	870,205	3.09
	55+	Male	803,335	2.86
		Female	877,060	3.12
BC & Territories	18-34	Male	524,675	1.87
		Female	517,040	1.84
	35-54	Male	627,710	2.23
		Female	668,600	2.38
	55+	Male	734,570	2.61
		Female	815,140	2.90
Total			**28,122,500**	**100.00**

Table 5.1.1.c. 2016 Census Data by Language

Language	Population (N)	Population (%)
English	16,032,637	57.01
French	5,908,537	21.01
Other	6,181,326	21.98
Total	**34,766,911**	**100.00**

Response Rate

A total of 116,827 Canadian phone numbers were dialed, of which n=1524 completed the survey. The overall response rate achieved for the study was 2.79%. The following table outlines the sample disposition and response rate as per the MRIA guidelines.

Table 5.1.1.d: Response Rate Calculation

	Total	Cell Phone Only (Prescreened)	Landline (Random Digit Dialing)
Total Numbers Attempted	**113535**	**949**	**112586**
Invalid	**37570**	**16**	**37554**
NIS	35079	16	35063
Fax/modem	1674	0	1674
Business/non-residential	817	0	817
Unresolved (U)	**67150**	**111**	**67039**
Busy	2985	2	2983
No answer	48016	88	47928
Answering machine	16149	21	16128
Unresolved (IS)	**6952**	**125**	**6827**
Language problem/illness, incapable	233	2	231
Selected respondent not available	2427	8	2419

Refusal	4076	43	4033
Qualified respondent break-off	216	72	144
In-scope - Responding units (R)	**1863**	**697**	**1166**
Quota Full	280	156	124
Other disqualify - No Device not paid by employer (NWT/NU/YK only)	8	0	8
Other disqualify - Occupation	69	39	30
Completed interviews	1506	502	1004
Response Rate = R/(U+IS+R)	**2.5%**	**74.7%**	**1.6%**

Non-response Bias

The response rate for this survey was 2.5%. In order to maximize response TNS undertakes the following:

– A minimum of 8 callbacks were made before retiring a number.

– Call backs are rescheduled at different times and days in order to maximize the possibility of an answer.

– Appointments and call backs are offered at flexible times so respondents may take the survey at the most convenient time.

Tabulated Data

Detailed tables are included under separate cover.

5. Appendix B: Survey Instrument

Background Information for the Interviewers

The Wireless Code came into effect in 2013 and was updated in 2017.

- ***Here are the main features of the Wireless Code (2013):*** *The Wireless Code makes it easier for individual and small business consumers to get information about their contracts with wireless service providers and about their associated rights and responsibilities, establish standards for industry behaviour, and contribute to a more dynamic marketplace. The Code significantly limits the early cancellation fees that are currently sought by retail wireless service providers, which will enable consumers to take advantage of competitive offers at least every two years. The Wireless Code requires service providers to unlock wireless devices, to offer a trial period for wireless contracts, and to set default caps on data overage charges and data roaming charges.*
- ***Here are the main updates to the Wireless Code (2017):*** *The Code now ensures that customers will be provided with unlocked devices, gives families more control over data overages, sets minimum usage limits for the trial period that correspond to at least half of the monthly usage limits of the customer's plan, and clarifies that data is a key contract term that cannot be changed during the commitment period without the customer's consent.*

The TV Service Provider Code came into effect in 2017.

- ***Here are the main features of the TV Service Provider (TVSP) Code (2017):*** *The Code makes it easier for Canadians to understand their television service agreements and empowers customers in their relationships with TVSPs (i.e. your cable, satellite or IPTV provider). Among other things, the Code requires TVSPs to ensure written agreements and offers are clear. It also sets out new rules for trial periods for persons with disabilities, changes to programming options, service calls, service outages and disconnections.*

Section A: Introduction and Screening

Hello/Bonjour. My name is _______________ and I am calling from Kantar on behalf of the Government of Canada. We are conducting a survey with Canadians 18+ to get their attitudes and opinions towards issues of importance to Canadians. Would you prefer that I continue in English or French? Préférez-vous continuer en français ou en anglais?

Your participation in this survey is voluntary. Please be assured that your responses are confidential and will not be reported individually nor attributed to you personally. The information will be used to develop communications related policy. The survey will take 15 minutes or less to complete.

Yes	CONTINUE
No, other time	SCHEDULE CALLBACK

No/Refused	THANK AND TERMINATE

[IF ASKED: Kantar is a professional research company hired by the Government of Canada to conduct this survey]

[ASK ALL] A1b. Do you have your own cell phone, smartphone or other wireless device? In other words, a phone that is not paid for by your employer?

YES	1
NO	2

HV1. Hidden Variable: CPO Household

RECORD FROM SAMPLE

YES - CPO Household

NO

A1d. Does your household subscribe to a cable, satellite or IPTV TV service?

Yes	1
No	2
DK/NR (VOLUNTEERED)	9

[IF ASKED: IPTV is a different way of getting traditional TV, similar to cable or satellite TV. IPTV is different from Netflix or other streaming services. (IPTV does not include Netflix)]

A2. Are you or is any member of your household or immediate family employed in any of the following businesses? [READ LIST]

Market Research	1 [THANK AND TERMINATE]
Public or media relations or advertising	2 [THANK AND TERMINATE]
Any media company such as print, radio, TV	3 [THANK AND TERMINATE]
Media monitoring	4 [THANK AND TERMINATE]
Any telecommunications company	5 [THANK AND TERMINATE]
No	6 [CONTINUE]

Section: Wireless Code

[ASK ALL]

I. RECALL OF WIRELESS CODE

WC1. In 2013 a Wireless Code was created to make wireless contracts clearer, limit early cancellation fees, and to contribute to a more competitive wireless marketplace. In 2017, the Code was updated to end unlocking fees. To what extent, if any would you say you recall hearing or seeing anything about this Code? Would you say you clearly recall, vaguely recall or do not recall?

Clearly Recall	1
Vaguely Recall	2
Do not recall	3
DK	99

PROGRAMMING INSTRUCTION:

IF NO AT A1B AND YES AT A1D SKIP TO SECTION TVSP Code

IF NO AT A1B AND NO AT A1D SKIP TO SECTION CRTC

II. TYPE OF WIRELESS CONTRACT

The next few questions are about your cell or wireless phone service contract or plan.

[Interviewer note: If say “I don’t have a plan/I have pay-as-you-go/month-to-month,” say: “this question is about your service agreement or plan, regardless of whether you have signed a contract for a specific time period, are month-to-month or use pre-paid cards.”]

INDIVIDUAL, FAMILY AND SHARED PLANS

B1a. Is it an individual plan or a family or shared plan?

[Interviewer note: If unsure about the difference, say “Do you pay only for one person (which is an individual plan) or do you share a plan with your family and pay together (which is a family plan)?”]

Individual plan	1
Family/shared plan	2
[DO NOT READ] Other [SPECIFY]	77
DK (DO NOT READ)	99

WC2. *[ASK If answered “family/shared plan” to B1a]*

How many members are on your shared plan?

2	1
3	2
4	3
5+	4
DK (DO NOT READ)	99

MONTHLY, PREPAID, AND PAY-AS-YOU-GO PLANS

B1c. And, is it a monthly plan, or a prepaid or pay-as-you-go plan?

[Interviewer note: If unsure about the difference, say “If you pay your bill *after* you use your wireless service, it’s a monthly or post-paid plan. If you pay *before* you use your wireless service, it’s a prepaid or pay-as-you-go plan.“]

Monthly/post-paid (paying after)	1
Prepaid/pay-as-you-go (paying before)	2
[DO NOT READ] Other [SPECIFY]	77
DK (DO NOT READ)	99

CORPORATE CONTRACTS (EMPLOYEE PURCHASE PLANS)

B1d. Is your plan part of a promotion through your employer or an association you belong to, sometimes also called an employee purchase plan?

Yes	1
No	2
DK (DO NOT READ)	99

III. SERVICES INCLUDED IN THE WIRELESS PLAN

(TEXT, VOICE, DATA)

DISPLAY: Now I would like to ask you a few questions about the services that are included in your wireless plan.

B2a. Which of the following are included in your wireless plan?

a) Calling minutes [Interviewer note: If unsure about the meaning, say “This is what you need to make or receive phone calls.”]
b) Text messages [Interviewer note: If unsure about the meaning, say “This can include both text messages and multimedia messages, like pictures or video sent via text.”]
c) Data [Interviewer note: If unsure about the meaning of data, say “This is what you need to browse the Internet, access applications or your emails with your wireless device.”]

PROGRAMMING NOTE: PLEASE ALLOW YES NO AND DON’T KNOW AS OPTIONS

IV. DEVICES

PHONE INCLUDED WITH CONTRACT (BYOD, TAB CONTRACTS, AND OTHER DEVICE SUBSIDIES)

WC4. When you signed up for your latest wireless plan, did you bring your own device, or did you buy a new phone from your wireless provider?

[Interviewer note: If unsure about the meaning of bring your own device, say “bring your own device is where you already own your mobile device and are simply purchasing the cellular service from a wireless company.”

Bring your own device	1
Buy a new phone from your wireless provider	2
DK (DO NOT READ)	99

PROGRAMMING INSTRUCTION: ONLY ASKQWC4A IF QWC4 is Buy a new phone from your wireless provider

QWC4A: Did you:

Pay your wireless provider full price for your phone	1
Get a discount on your phone	2
Start a tab balance	3

DK (DO NOT READ)	99

INTREVIEWER INSTRUCTION: If unsure about the meaning of a tab balance, say “Tab balances are when you buy a phone at a reduced upfront cost and the leftover cost of the phone goes onto your account, creating a tab balance. Each month, a percentage of your monthly bill is used to pay down your tab”]

V. DATA SERVICES

[ASK If answered “Data” to B2a]

Now, I would like to ask you a few questions about the data services that are included in your wireless plan.

DATA PLANS

B4. Some wireless plans have unlimited data and some have limited data. When a plan includes a monthly data limit, you may have to pay data overage fees if you use more data in a month than is included in your plan.

How much data is currently included in your plan each month?

[Interviewer note: If unsure about the meaning of data, say “This is what you need to browse the Internet, access applications or your emails with your wireless device when it is not connected to wifi.”]

[DO NOT READ LIST]

PROGRAMMING INSTRUCTION: PLEASE PROGRAM TO ALLOW NUMBERICAL ENTRY AS FOLLOWS

_____Mega Bytes (MB) – DO NOT ALLOW ENTRY UNDER 100

_____Giga Bytes (GB) – DO NOT ALLOW ENTRY OVER 100

Unlimited

None – no data in plan

Don’t Know

[Interviewer note: If respondent indicates a number under 100 MegaBytes please ask them if they mean MegaBytes or GigaBytes. If there is confusion, please code as Don’t Know”]

HOW TO MANAGE DATA USE

PROGRAMMING NOTE: PLEASE ALLOW YES NO AND DONT KNOW AS OPTIONS

B5a. *[ASK If do not answer "Unlimited or None" to B4]* Which of the following activities, if any, do you use to manage or limit your data use? Select all that apply.

Use tools to track your data use	1
Reduce your data use after you get a notification that you are nearing your limit	2
Use WIFI when available instead of data	3
Other (specify)	4
I do not limit my data use (DO NOT READ)*	5
DK (DO NOT READ)	99

EASE OF MANAGING DATA

WC6. *[ASK If answered "Data" to B2a and not code 3 (NO DATA) at B4]*

How easy do you find it to manage the data used by yourself and/or your family each month?

Please use a 7-point scale where 1 means extremely difficult and 7 means extremely easy.

[Interviewer note: If unsure about the meaning of data, say "This is what you need to browse the Internet, access applications or your emails with your wireless device."]

7 – Extremely easy	07
6	06
5	05
4	04
3	03
2	02
1 – Extremely difficult	01
I DON'T USE MY DATA (DO NOT READ)	09
DK (DO NOT READ)	99

DATA OVERAGE FEES

B8. *[ASK if answered “Data” to B2a and not code 3 (NO DATA) at B4.]* In the past 12 months, how often have you paid data overage fees?

READ LIST

[Interviewer note: If unsure about the meaning of data, say “This is what you need to browse the Internet, access applications or your emails with your wireless device.”]

Never	1
1-2 times	2
3-6 times	3
7-9 times	4
10-12 times	5
DK (DO NOT READ)	99

VI. BILL SHOCK

B10. During the last year, have you experienced ‘bill shock, meaning a surprisingly high bill?

READ LIST

Yes	1
No	2
DK (DO NOT READ)	99

REASON FOR BILL SHOCK

B10a. [If answered “Yes” to B10] What was the main reason for the ‘bill shock you experienced?

DO NOT READ LIST – SELECT ALL THAT APPLY

INTERVIEWER NOTE: IF RESPONDENT SAYS ‘ROAMING/ROAMING FEES, CLARIFY WHETHER THIS WAS WITHIN CANADA OR IN ANOTHER COUNTRY

Family/shared plans – difficulties managing use	01
International travel – roaming fees	02
Domestic travel – roaming fees	03

Data overage fees	04
Call minute overage fees	05
Long distance fees	06
Text overage fees	07
Billing issues/errors/mistakes	08
Unexpected set-up fee or service charge	09
Unexpected fees (Network access fee/911, etc.)	10
I was not given the plan/deal I was promised	11
Other (Specify)	77
DK (DO NOT READ)	99

AMOUNT OF BILL SHOCK

B10b. [If answered "Yes" to B10] What was the amount of the unexpected charges on your bill?

READ LIST

Less than $50 more than your usual monthly bill	01
$50 - $100	02
$101 - $250	03
$251 - $500	04
$501 - $1000	05
Greater than $1000	06
Don't Know DO NOT READ	99

ROAMING FEES WHILE TRAVELING

B9. If you use your plan while traveling, you may be charged roaming fees. How easy do you find it to manage your roaming charges when you are traveling?

Please use a 7-point scale where 1 means extremely difficult and 7 means extremely easy.

7 – Extremely easy	07
6	06

5	05
4	04
3	03
2	02
1 – Extremely difficult	01
I don’t travel with my phone (DO NOT READ)	08
DK (DO NOT READ)	99

VII. COMPLAINTS

B11a. Have you made a complaint about your wireless services in the past 12 months?

Yes	1
No	2
DK (DO NOT READ)	99

SUBJECT OF COMPLAINTS

B11b. [ASK If answered “Yes” to B11a] What was your complaint about? READ LIST IF NEEDED CHOOSE ALL THAT APPLY

Misleading information about the terms of your contract	1
Misleading or aggressive sales practices	13
Incorrect charge on your bill	2
Legitimacy or amount of early cancellation fee	3
Inadequate quality of service	4
Credit or refund not received	5
Data charges	6
Breach of contract	7
Change to contract without notice	8
30 day cancellation policy	9
Unlocking phone	10
Credit reporting	11
Unlimited data	
Other [specify]	77

DK(Do not read)	99

NOTES TO INTERVIEWER: PLEASE FAMILIARIZE YOURSELF WITH THE FOLLOWING BEFORE INTERVIEW - READ IF REQUIRED

- **Misleading information about terms**: Some examples are what is included in a contract or how the contract should be interpreted, or whether the providers conduct meets its contractual obligations, or misunderstandings about the particulars of a contract or term.
- **Misleading or aggressive sales practices**: Some examples include salespeople providing details of wireless products or services you are not interested in or which end up being false, promotional offers changing over the course of the term, rebate or discount offers where terms differ from the original information provided by the service provider, or technical support representatives trying to sell you products or services during the support call or interaction.
- **Incorrect charge**: Some examples include complaints about customers having agreed to one price and subsequently being charged more, being overcharged due to either a billing system error or a price that is different than advertised, or about being billed for per-use services which they claim they did not use.
- **Early cancellation fee**: This would be a complaint about the amount or the legitimacy of an early cancellation fee charged to the customer when they cancel their service.
- **Inadequate quality of service**: This can include the installation, repair or disconnection of service, including the quality of the service or unreasonable interruptions to service and transfers of service from one provider to another.
- **Credit or refund not received**: This is fairly straightforward – refunds would normally be due upon cancellation of a service.
- **Data charges**: Any complaints relating to a customer's data plan or data services, including disputes over data overage fees, the ability of multiple users on family or shared plans to consent to exceeding data overage caps.
- **Breach of contract**: This would include disputes about compliance with terms and conditions of a customer's contract.
- **Change to contract without notice**: This is when a service provider changes a material term in a customer's contract without providing notice.
- **Credit reporting:** This issue relates to a customer's credit score and/or debt collection. For example, a customer is overbilled in error and does not pay the outstanding amount, this may impact their credit or they may have to deal with debt collection agencies while the complaint is being addressed.
- **Unlimited data:** Any complaints related to the perceived definition of unlimited data or the way in which unlimited data is delivered.

WHO DID YOU COMPLAIN TO?

WC7. *[ASK If answered "Yes" to B11a]* Who did you complain to? Was it your service provider, the Commission for Complaints for Telecom-Television Services, also knowns as the CCTS, or both?

Service provider	1
CCTS	2
Both	3
DK (DO NOT READ)	99

VIII. CLARITY AND EXPLANATIONS

Now, I would like to ask you a few questions about how clear and easy you find your wireless contract to understand.

EXPLANATION OF TRIAL PERIOD

WC8. The Code requires service providers to include a trial period for new contracts that include a device. During the trial period, you can cancel your contract without penalty. This trial period now has to be half of a month of service and include half the service included in your monthly plan.

How clearly did your service provider explain the trial period to you?

Please use a 7-point scale where 1 means extremely unclear and 7 means extremely clear.

7 – Extremely clear	07
6	06
5	05
4	04
3	03
2	02
1 – Extremely unclear	01
DO NOT READ: Do not have a contract	08
DO NOT READ: Never read the agreement	09
DO NOT READ: Did not have a trial period	10
DO NOT READ: Don't Know	99

EXPLANATION OF CANCELLATION FEES

WC9. When you signed your contract or accepted your service agreement, how clearly did your service provider explain any fees that would apply if you cancel your contract or agreement early? Please use a 7-point scale where 1 means extremely unclear and 7 means extremely clear.

7 – Extremely clear	07
6	06
5	05
4	04

3	03
2	02
1 – Extremely unclear	01
DO NOT READ: Do not have a contract	08
DO NOT READ: Never read the agreement	09
DO NOT READ: Don't Know	99

WC10. Do you find your contract clear and easy to understand? Please use a 7-point scale where 1 means extremely unclear and difficult to understand and 7 means extremely clear and easy to understand.

7 – Extremely clear and easy to understand	07
6	06
5	05
4	04
3	03
2	02
1 – Extremely unclear and difficult to understand	01
DO NOT READ: Do not have a contract	08
DO NOT READ: Never read the agreement	09
DO NOT READ: Don't Know	99

IX. CHANGES

CHANGES TO YOUR CONTRACT

WC11. Have you ever become aware that your service provider changed your plan without expressly making you aware of how the terms and conditions had changed?

Yes	1
No	2
DK	99

[ASK ALL]

CHANGING SERVICE PROVIDERS

WC16. Have you changed wireless service providers in the last two years?

Yes	1
No	2
DK	99

REASONS FOR CHANGING SERVICE PROVIDER

WC12. [If answered "Yes" to WC16] Why did you change service provider? (DO NOT READ LIST - SELECT ALL THAT APPLY)

Your contract had ended	1
You were no longer satisfied with your service provider	2
Offered a better deal with a different provider	3
Needed a new phone / to upgrade phone	4
Other [open ended]	77
DK	99

EASE OF SWITCHING

WC13 [If answered "Yes" to WC16] How easy or difficult was it to switch service providers? Please use a 7-point scale where 1 means extremely difficult and 7 means extremely easy.

7 – Extremely easy	07
6	06
5	05
4	04
3	03
2	02
1 – Extremely difficult	01
DO NOT READ: Don't Know	99

REASONS SWITCHING WAS DIFFICULT

WC14. [If answered 1,2 OR 3 at WC13] Was there a reason why switching providers was difficult for you? (DO NOT READ LIST – SELECT ALL THAT APPLY)

Technical issues	01
Difficulty retaining phone number	02
High costs of ending contract	03
Could not get the phone you wanted	04
Other [open ended]	77
Don't Know	99

Section: TVSP Code

ASK TVSP CODE section if yes at A1d.

The next few questions are about your TV service provider. By this we mean your cable, satellite or IPTV provider. Please do not include streaming services such as Netflix.

INTERVIEWER INSTRUCTION: IF RESPONDENT INDICATES THEY DO NOT HAVE CABLE, SATELITE OR IPTV SERVICES SKIP THIS SECTION

TVSP1. In September 2017, a Television Service Provider Code came into effect establishing guidelines for television service providers. The Code ensures that television consumers are empowered to make informed decisions and that there is a more competitive wireless marketplace. To what extent, if any would you say you recall hearing or seeing anything about this Code? Would you say you clearly recall, vaguely recall or do not recall?

Clearly Recall	1
Vaguely Recall	2
Do not recall	3
DK(DO NOT READ)	99

TVSP2. To what extent do you find your TV contract clear and easy to understand? Please use a 7-point scale where 1 means extremely unclear and difficult to understand and 7 means extremely clear and easy to understand.

7 – Extremely clear and easy to understand	07
6	06
5	05
4	04
3	03
2	02
1 – Extremely unclear and difficult to understand	01
DO NOT READ: Do not have a contract	08
DO NOT READ: Never read the agreement	09
DO NOT READ: Don’t Know	99

TVSP3. The TVSP Code requires television service providers to provide a customer with a timeframe for when a service call to a residence will begin, explain potential charges associated with the service call, and explain how you may cancel or reschedule the service call. Have you experienced problems related to service calls?

Yes	1
No	2
DK	99

TVSP4. The TVSP Code requires television service providers to ensure that customers are aware of the availability, price and content of their entry-level service offering, also known as the basic service package. Has your service provider informed you about their entry-level offering? This may have been by email, on the phone or via your monthly billing?

Yes	1
No	2
DK	99

TVSP5. In the past twelve months, has your TV service provider changed the price of a TV channel or package of channels without informing you in advance?

Yes	1
No	2
DK	99

TVSP6. Have you made a complaint about your TV services within the last 12 months?

Yes	1
No	2
DK	99

SUBJECT OF COMPLAINTS

TVSP6b. [ASK If answered “Yes” to TVSP6] What was your complaint about? READ LIST IF NEEDED CHOOSE ALL THAT APPLY

Misleading information about the terms of your contract	1
Misleading or aggressive sales practices	2
Incorrect charge on your bill	3
Legitimacy or amount of early cancellation fee	4
Inadequate quality of service	5
Credit or refund not received	6
Breach of contract	7
Change to contract without notice	8

30 day cancellation policy	9
Credit reporting	10
Installation	11
Service calls	12
Other [specify]	77
DK(Do not read)	99

NOTES TO INTERVIEWER: PLEASE FAMILIARIZE YOURSELF WITH THE FOLLOWING BEFORE INTERVIEW - READ IF REQUIRED

- **Misleading information about terms**: Some examples are what is included in a contract or how the contract should be interpreted, or whether the providers conduct meets its contractual obligations, or misunderstandings about the particulars of a contract or term.
- **Misleading or aggressive sales practices**: Some examples include salespeople providing details of television products or services you are not interested in or which end up being false, promotional offers changing over the course of the term, rebate or discount offers where terms differ from the original information provided by the service provider, or technical support representatives trying to sell you products or services during the support call or interaction.
- **Incorrect charge**: Some examples include complaints about customers having agreed to one price and subsequently being charged more, being overcharged due to either a billing system error or a price that is different than advertised, or about being billed for per-use services which they claim they did not use.
- **Early cancellation fee**: This would be a complaint about the amount or the legitimacy of an early cancellation fee charged to the customer when they cancel their service.
- **Inadequate quality of service**: This can include the quality of the service, unreasonable interruptions to service, disconnections, and issues transferring service from one provider to another.
- **Credit or refund not received**: This is fairly straightforward – refunds would normally be due upon cancellation of a service.
- **Breach of contract**: This would include disputes about compliance with terms and conditions of a customer’s contract.
- **Change to contract without notice**: This is when a service provider changes a material term in a customer’s contract without providing notice, including changes to television programming options (e.g. channels provided or rate increases).
- **Credit reporting**: issues related to a customer’s credit score and/or debt collection. For example, a customer is overbilled in error and does not pay the outstanding amount, this may impact their credit or they may have to deal with debt collection agencies while the complaint is being addressed.
- **Installation**: issues related to the installation of services.
- **Service calls**: issues related to service calls, including repair services, such as failure to arrive within the promised timeframe or charges related to service calls.

Section CRTC: CRTC ASK ALL

The Canadian Radio-television and Telecommunications Commission or CRTC is an independent agency of government, responsible for regulating Canada's broadcasting and telecommunications systems.

C1. Overall, how informed are you about the mandate and role of the CRTC? (READ LIST)

Very well informed	1
Well informed	2
Not very well informed	3
Not informed	4
DK (do not read)	99

C2. What is your impression of the CRTC? Would you say it is: (READ LIST)

[Repeat CRTC definition, if necessary: The Canadian Radio-television and Telecommunications Commission or CRTC is an independent agency of government, responsible for regulating Canada's broadcasting and telecommunications systems.

Very favourable	1
Somewhat favourable	2
Neutral	3
Somewhat unfavourable	4
Very unfavourable	5
DK (Do not read)	99

C3. Over the past year, would you say your impression of the CRTC has: (READ LIST)

[Repeat CRTC definition, if necessary: The Canadian Radio-television and Telecommunications Commission or CRTC is an independent agency of government, responsible for regulating Canada's broadcasting and telecommunications systems].

Improved	1
Declined	2
Remained about the same	3
DK (Do not read)	99

Section: Demographics

Thank you, now we have a few questions for classifications purposes. Please be assured that your responses will remain confidential.

D1. Record gender [DO NOT ASK]

Male	1
Female	2

D2. Can you tell me, in what year were you born?

______________ [RECORD YEAR TO CALCULATE AGE] DK/refused ***D3 [IF D2 = DK/refused]*** For classification purposes, could you tell me whether your age is: [READ LIST]

Between 18 and 34	1
Between 35 and 49	2
Between 50 and 54	3
Between 55 and 64	4
Between 65-74	5
75 or older	6
REFUSED (DO NOT READ)	

[ASK ALL]

D4. In which province or territory do you live? [READ LIST]

Alberta	1
British Columbia	2
Manitoba	3
New Brunswick	4
Newfoundland	5
Nova Scotia	6
Ontario	7
Prince Edward Island	8
Quebec	9
Saskatchewan	10
Yukon	11
Nunavut	12
Northwest Territories	13

D5. What is the highest level of formal education that you have completed? **[READ IF NECESSARY - CODE ONE ONLY]**

Grade 8 or less	1
Some high school	2
High School diploma or equivalent	3
Registered Apprenticeship or other trades certificate or diploma	4
College, CEGEP or other non-university certificate or diploma	5
University certificate or diploma below bachelors level	6
Bachelor’s degree	7
Post graduate degree above bachelors level	8
[DO NOT READ] Prefer not to answer	99

D6. What is your mother tongue, that is, the language you first learned at home?

(DO NOT READ)

[CODE ONE ONLY]

English	1
French	2
Other (SPECIFY_____________)	8
DK/NR (VOLUNTEERED)	99

D7. 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 - CODE ONE ONLY]**

Under $20,000	1
$20,000 to just under $40,000	2
$40,000 to just under $60,000	3
$60,000 to just under $80,000	5
$80,000 to just under $100,000	6
$100,000 to just under $150,000	7
$150,000 and above	8
[DO NOT READ] Refused	99

D8. Which of the following categories best describes your current employment status? Are you…? **[READ - CODE ONE ONLY]**

Working full-time (35 or more hours per week)	1
Working part-time (less than 35 hours per week)	2
Self-employed	3
Unemployed, but looking for work	4
A student attending school full-time	5
Retired	6
Not in the workforce (Full-time homemaker or unemployed but not looking for work	7
Other employment status	8
[DO NOT READ] Refused	99

Those are all the questions I have for you today. Thank you for your time on this important study! The results, once compiled, can be found on the Library and Archives website. [IF ASKED: at https://www.bac-lac.gc.ca/].