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

Public opinion research tracker: Baseline survey

Executive Summary

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Ce rapport est aussi disponible en français

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This public opinion research report presents the results of an online survey conducted by Ipsos Limited Partnership on behalf of the Canadian Radio-television and Telecommunications Commission (CRTC). The research study was conducted with 2,561 Canadians between June 8 to August 4, 2023.

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Executive Summary

Introduction

Ipsos was commissioned by the Canadian Radio-television and Telecommunications Commission (CRTC) to conduct a baseline wave of public opinion research on Canadians views with respect to their broadcasting, online and telecommunications services.

Background

The CRTC regulates the communications industry in the public interest in a time of significant socio-cultural, economic and technological change and is looking to increase its capacity to measure and track Canadian public opinion. The importance of this grows when considering that the CRTC is implanting new legislation (*Online Streaming Act*) and policy directions (Telecom and Broadcasting) that will require the CRTC to develop new regulatory approaches that consider the views of all Canadians to ensure the system includes and reflects fully the diversity of Canada. In light of these developments, the public opinion research is intended to support the CRTC's efforts to gather the views of all Canadians.

In 2021, the CRTC commissioned Ipsos to develop strategic options for Public Opinion Research (POR). After considering the recommendations and resulting strategy that was presented in September 2022, the CRTC decided to implement a pilot project of the POR strategy and conduct a baseline wave of research. Moving forward, the study will evolve into a bi-annual tracking study.

Research Objectives

The primary objective of the POR is to gain a better understanding of the views of Canadians with respect to their broadcasting, online and telecommunications services and other matters of strategic importance for the CRTC. An essential component of the POR is to ensure the inclusion and representation of all Canadians. Specific focus is placed on ensuring sufficient participation from Anglophones, Francophones, Indigenous Peoples, Official Minority Language Communities (OLMC), Racialized Canadians, TSLGBTQ+ and those living in the North.

In developing the questionnaire, Ipsos worked with CRTC staff to synthesize and incorporate input from all relevant sectors. This included conducting a series of meetings with staff in the Broadcasting, Telecommunications, Compliance and Enforcement (C&E), and Consumer, Research and Communications (CRC) units.

The questionnaire included a core section of key tracking measures and sections to address more topical information needs that would be custom to each wave of research or rotated in future waves.

The baseline POR survey addressed the following areas:

- Consumers' satisfaction with their telecommunications and/or broadcasting services;
- Primary source(s) of media content and satisfaction with the quality of content;
- Broader attitudes, including affordability, quality of service, satisfaction, importance of local media, trust in media and cybersecurity;
- Classification questions to ensure the inclusion of diverse groups regarding Indigenous peoples, ethnicity, people born in or outside Canada, language spoken, sexual orientation, gender identity, household income, and persons with a disability; and
- Ad-hoc issues- perceptions of international roaming.

Methodology

The POR was conducted through a quantitative survey executed through a mixed methodology approach including online and telephone interviews among a national sample of 2,561 Canadians aged 18 years and older (1,561 online, 1,000 telephone). Fieldwork was conducted from June 8 to August 4, 2023. Average survey length was 18 minutes (15 minutes online, 22 minutes by telephone).

Quotas and weighting were employed by gender, age and region to reflect the composition of the Canadian general population based on the latest Census. Results were accurate to within + 2.2 percentage points of what the results would have been had every Canadian been polled.

Minimum sample sizes (of at least 100) were achieved among key audiences including Anglophones (n=1842), Francophones (n=529), Indigenous peoples (n=121), OLMCs (n=142), racialized Canadians (n=323), and 2SLGBTQI+ (n=214). Oversamples of TSLGBTQ+ Canadians and those residing in the North were required and notably, fieldwork in the North proved more challenging than anticipated and the target of n=100 could not be achieved in the fieldwork period (n=82 was achieved).

Notes to Readers

- All results in the report are expressed as a percentage, unless otherwise noted.
- Throughout the report, percentages may not always add to 100 due to rounding.
- When reporting sub-group variations, only differences that are significant at the 95% confidence level, indicative of a pattern and pertaining to a sub-group sample size of more than n=30 are discussed.
- For open-ended measures, results have been coded into thematic category and expressed as individual codes that align most closely to respondents answers and broader themes (NETs) for comparison purposes.

Expenditure

The contract value for the POR survey was $114,713.98 (including HST)

Key Findings

Virtually all adult Canadians report they currently receive one or more telecommunications, broadcast, or audio or video streaming services for personal use, and a strong majority of those who receive each type of service are satisfied with their provider.

- More than ninety percent report they have internet service at home (93%) or cellphone service (91%), three-quarters subscribe or have access to at least one video streaming service (74%) and roughly half at least one audio streaming service (52%) or cable TV service (51%). Relatively few in comparison have satellite TV service (14%) or use free television services (10%).
- Satisfaction is highest for audio streaming services (73%), followed by internet (65%), video streaming (64%), or cellphone service (64%), and cable TV (61%) or satellite TV service (59%).
- Reliability is the most common factor driving satisfaction with internet service in particular, and to a lesser extent cellphone and cable TV service, and is mentioned more often as a positive reason than as a negative. Broader impressions of reliability are reasonably strong and the majority of Canadians feel that they count on reliable high-speed internet (60%) and mobile networks (57%) where they live.
- Affordability, while mentioned less often as a reason for satisfaction with the service in general, is cited more often among cellphone or cable TV customers as a reason for lower satisfaction. Most Canadians feel that

telecommunications (51%), television (49%), and streaming video services (47%) have become less affordable in the past year, and only one-third that agree they have enough choice of telecommunications providers (34%).
- Quality and variety of content is by far the biggest reason for satisfaction with audio and video streaming services. Notably, nearly half of French-speakers (47%) feel that the content on these types of platforms should be regulated like traditional broadcasting compared to three in ten English-speakers (29%).

The majority of Canadians (66%) are confident in their ability to pay for the telecommunications, broadcast or streaming services they receive in the immediate future, however roughly one-quarter (27%) report they have had to make changes to their services recently to improve affordability.

- Two in ten (19%) made changes to make their services more affordable in the past month, while one in ten planned on cancelling their service but were convinced to stay with a better price (10%), cancelled and switched providers (9%) or cancelled entirely their services (8%).
- Those who made changes to improve affordability are most likely to have adjusted the services they receive or changed providers for their cellphone service, followed by home internet or video streaming services.

Canadians' use of international calling or text products or services is limited and relatively few have a strong understanding of the rate plans or options available. Affordability is the primary factor driving usage, however impressions of the reasonableness of the rates or cost of purchase are relatively weak.

- A sizeable minority of Canadians (34% to 44%) report they have never used each type of international calling or text product or service. Canadians are most likely to report having used international roaming through a flat-rate-per-day option before (31%), followed by domestic SIM/eSIM (25%), international roaming through a pay-per-text/call/MB option (24%) and international SIM/eSIM (21%). Few report using any product or service on a frequent basis with the largest proportion having used each once or twice a year (7% to 14%).
- The most common reason for using the product or service they did is because it was the most cost-effective option (45%), followed by the one they were most familiar with (39%), and the easiest, most convenient option to set up (26%).
- Nearly four in ten who used a domestic SIM/eSIM found the cost reasonable (36%), followed by international SIM/eSIM (32%), international roaming through a flat-rate-per-day option (21%) and international roaming through a pay-per-text/call/MB option (19%).
- Around one in ten (14%) of all Canadians agree that the rates they pay to use their cellphone while travelling outside of the country are reasonable and one third (32%) of those with a cellphone for personal use feel they have a good understanding of the rate plans/ options for using their cellphone outside of the country.

When asked about their primary sources for 'news and information' and 'entertainment', the vast majority of Canadians rely on video content for 'entertainment' and to a lesser extent for 'news and information', half use audio sources for either, while online media and print and are more common for 'news and information'. Nearly two-thirds (62%) are satisfied with the quality of the 'entertainment' content and just over half (54%) for 'news and information'.

- The most common sources of media content for 'news and information' are regular television (46%), followed by online media (36%), AM/FM radio (34%), online social media (25%) and print media (20%). For 'entertainment', the primary sources are online video streaming (45%) and regular television (43%), followed by online social media (34%).

- Satisfaction with ‘entertainment’ is highest for audio podcasts (70%) and generally consistent for all other sources (ranging from 61% to 65%), while satisfaction with ‘news and info’ is more varied and is highest for TV (60%) and print (59%), and lower for online social media (48%), social networking sites (51%), and online music streaming (50%).

Attitudes towards Canadian content specifically are generally positive but soft. While most feel it is at least somewhat important to have access to Canadian-made programming and that they rely on Canadian news media to understand the world, Canadian’s impressions of the quality, variety and depth of content as well as trust in media are relatively weak and most do not feel reflected in the types of programming available or that it is relevant to their lives.

- Roughly four in ten agree that it is important for them to have access to Canadian-made television programs (41%) and music (38%), and are satisfied with the quality and variety of Canadian music available today (39% each). Closer to one-third are satisfied with the quality (35%) and variety (34%) of Canadian television programs, agree that the types of news, music, and television programming are relevant to their lives (36%) or that they see themselves reflected in the programming available (32%).
- Nearly half rely on Canadian news media to help them understand what’s going on in the world (45%), and that news programming covers a diverse range of topics and issues (41%). Fewer agree that they trust the information provided by news media in Canada (36%), that the types of news programming offers a variety of perspectives (36%), and that they are satisfied the quality of information and analysis offered by Canadian news media (37%).

Differences by Demographics

Age cohort: Older Canadians (in particular 65 or older) are more likely to report they receive cellphone and cable TV service and to a lesser extent home internet than younger Canadians. They are more likely than younger Canadians to feel confident in their ability to pay for all their services in the immediate future and are less likely to have had to make changes in the past month to improve affordability.

Older Canadians are more likely than younger Canadians to rely on regular television as their primary source of ‘news and information’ and ‘entertainment’ and AM/FM radio or print media sources for ‘news and information’. They are more likely to be satisfied with the ‘news and information’ content they receive, to rely on and trust Canadians news media, and to be satisfied with the variety of opinions, quality, and depth of coverage. They are also more likely to feel it is important for them to have access to Canadian-made TV programs and music and to agree that the content of online streaming platforms should be regulated like traditional broadcasting.

Older Canadians are more likely than younger Canadians to report that they often receive unsolicited phone calls or emails trying to trick them into sharing personal information or clicking a malicious link and to feel that the amount has increased in the past year.

Younger Canadians are more likely than older Canadians to rely on online social media, online video streaming services, audio podcasts, and social networking sites for ‘news and information’ or ‘entertainment’ content, as well as online music streaming services for ‘entertainment’ content.

Region of residence: Residents of Quebec are more likely than those from other regions to rely on regular television as their primary source of ‘news and information’ and to be satisfied with both the ‘entertainment’ and ‘news and information’ content they receive. They are more likely to agree it is important for them to have access to Canadian-made TV programs and music, to be satisfied with the quality and variety of Canadian television programs and music available today, and to see themselves reflected in the programming available. They are also more likely to rely on Canadian news media and to be satisfied with the variety of opinions, quality, and depth of coverage.

They are also more likely to agree that they can count on reliable high-speed internet and mobile networks where they live and that they have enough choice of telecommunications providers.

Official Language: Differences by official language are virtually identical to those observed among residents of Quebec compared to those from other regions. French-speakers are more likely to report that their primary source of 'news and information' or 'entertainment' content is regular television, while English-speakers are more likely to rely on online video streaming services, online music streaming services, audio podcasts and social networking sites for both types of content. French-speakers are also more likely than English-speakers to be satisfied with both the 'entertainment' and 'news and information' content they receive.

They are more likely to agree it is important for them to have access to Canadian-made TV programs and music, to be satisfied with the quality and variety of Canadian television programs and music available today, and to see themselves reflected in the programming available, and that content available through online video or streaming platforms should be regulated similar to traditional broadcasting. They are also more likely to rely on Canadian news media, trust the information provided by news media in Canada to be accurate and impartial, and to be satisfied with the variety of opinions, quality, and depth of coverage.

French-speakers are also more likely than English-speakers to agree that they can count on reliable high-speed internet and mobile networks where they live and that they have enough choice of telecommunications providers.

English-speakers are more likely than French-speakers to agree that they or someone they know has experienced a scam attempt in the past month.

Household income: Lower income households (in particular with annual incomes of $40k or less) are less likely than higher income households to report they currently have cellphone or internet service. They are less likely to feel confident in their ability to pay for the services they have and are more likely to have had to make changes recently to improve affordability or to have cancelled a service entirely.

Higher income households are more likely than lower income households to rely on online video streaming services as their primary source of 'entertainment' content. They are also more likely to agree that they often receive unsolicited emails trying to trick them into clicking malicious links, and that they or someone they know have experienced a scam attempt.

Indigenous status: Those who identify as Indigenous are less likely than those who do not identify as Indigenous to report they receive internet or cable TV service and are more likely to report they currently have satellite TV service. They are less likely to feel confident in their ability to pay for the services they have and are more likely to have had to make changes recently to improve affordability, switched to a different provider or to have cancelled a service entirely. They are also less likely to agree that they can count on reliable high-speed internet or mobile networks where they live, and that they have enough choice of telecommunications providers.

Ethnicity: Racialized Canadians are more likely than those who are not racialized to report they currently receive cellphone service and less likely to report they receive internet or cable TV service. They are more likely to have had to make changes to their services recently to improve affordability, switched to a different provider, were convinced to stay with a better price or to have cancelled a service entirely. They are also less likely to agree that they can count on reliable high-speed internet where they live.

Racialized Canadians are more likely than those who are not racialized to rely on online video streaming services and online social media as their primary sources of ‘news and information’ and ‘entertainment’ content and are also more likely to rely on online music streaming services for ‘entertainment’.

Political Neutrality Statement

I hereby certify as Senior Officer of Ipsos that the deliverables fully comply with the Government of Canada's 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.

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