



# Public Opinion Research on the CRTC's Consumer Protection Codes 2024

## Executive Summary

Prepared for the Canadian Radio-television and Telecommunications Commission

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This public opinion research report presents the results of a 15-minute random digit dialing (RDD) telephone survey of 1,500 Canadians aged 18 years of age and older. The fieldwork was conducted from November 28 to December 21, 2023.

Cette publication est aussi disponible en français sous le titre: *Recherche sur l'opinion publique concernant les Codes de protection des consommateurs du CRTC 2024*

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## Executive Summary

The Canadian Radio-television and Telecommunications Commission (CRTC) commissioned Phoenix Strategic Perspectives (Phoenix SPI) to conduct quantitative public opinion research (POR) with Canadians on the consumer protection codes.

### 1. Research Purpose and Objectives

The purpose of this research was to track Canadians' awareness of and satisfaction with the Wireless Code, Television Service Provider (TVSP) Code, and Internet Code. The specific objectives of this POR were to obtain data regarding awareness of the three consumer protection codes; to better understand issues that affect Canadians the most as they relate to their wireless, TV and Internet services; to obtain data to assess whether the Wireless Code, TVSP Code, and Internet Code are continuing to meet their objectives; and to measure Canadians' perceptions of the CRTC and how it is changing over time.

### 2. Methodology

A 15-minute random digit dialling (RDD) telephone survey was administered to 1,500 Canadians<sup>1</sup>, 18 years of age or older, between November 28 and December 21, 2023. The sample frame was geographically disproportionate to improve the accuracy of specific regional results. Based on a sample of this size, the overall results can be considered accurate within  $\pm 2.8\%$ , 19 times out of 20 (adjusted to reflect the geographically disproportionate sampling). The margins of error are greater for results pertaining to subgroups of the total sample.

### 3. Key Findings

#### Consumer Protection Codes

Recall of the Wireless, Internet and TVSP Codes --- collectively referred to as consumer protection codes --- is unchanged year over year. In total, 18% of Canadians either clearly or vaguely recalled hearing or seeing something about these Codes compared to 17% in 2023 and 20% in 2022.

#### Wireless Code

##### Types of plans

Unchanged from 2023, 88% of Canadians reported owning a cell phone, smartphone, or another wireless device. Two-thirds (63%) of wireless users opt for an individual wireless plan, while one-third (35%) opt for a family or shared plan. The incidence of individual versus family or shared plans has been relatively stable since 2018. The choice of postpaid wireless service plans is unchanged year over year, with 89% of Canadians opting for this type of service plan. Relatively few (9%) wireless users choose a prepaid service plans.

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<sup>1</sup> Citizenship was not an eligibility requirement, which means that survey respondents may include Canadians citizens, landed immigrants or permanent residents as well as non-permanent residents. In this report, survey respondents are referred to as 'Canadians' and 'respondents' interchangeably for clarity and readability.

### Wireless data

The proportion of wireless plans that include data has increased slightly from 88% in 2022 and 2023 to 91% in 2024. Among those with data, limited data plans are still the main choice, with 6 in 10 (61%) reporting monthly data limits in their plans. While the incidence of “unlimited” data plans steadily increased between 2019 and 2022 (from 9% to 21%), there has been no significant year-over-year change in 2024, with 2 in 10 (20%) saying their wireless plan has unlimited data (compared to 18% in 2023).

### Managing data

Among Canadians with a wireless plan including data, approximately three-quarters (74%) use Wi-Fi when available to manage or limit their data usage. One-quarter (24%) reduce their data usage upon receiving a notification about nearing their limit, while 12% use tools to track their wireless data usage. Perhaps not surprisingly given the continued decline in the use of data management practices, almost 9 in 10 (87%) find it easy to manage their data and eight in 10 have *not* paid any data overage fees in the last 12 months (80%) nor experienced any unexpectedly high bills (commonly known as 'bill shock') (81%) during this period.

### Complaints

Most wireless service subscribers (84%) have not made a complaint about their wireless services in the past 12 months. The incidence of filing a complaint about wireless services has been relatively consistent over the past few years, ranging from 15% this year to 17% in 2020. The single largest proportion of respondents who filed a complaint about their wireless services over the last year pointed to incorrect charges on their bill (37%) as the reason for the complaint. Most (88%) of those who filed a complaint did so directly with their provider.

### Contracts

The proportion of Canadians finding their wireless contract clear and easy to understand has been increasing over time, from a low of 57% in 2020 to the current high of 66%. Half (52%) of wireless subscribers found the explanation of the trial period to be clear and only 15% have had their provider change their plan without expressly making them aware of how the terms and conditions had changed.

### Television Service Provider Code

Exactly 6 in 10 (60%) Canadians reported that their household subscribes to a cable, satellite, or IPTV TV service. Since 2019, the proportion of Canadians who subscribe to a TV service who found their contract to be clear and understandable has gradually increased, from 54% to 66% in 2024. More than one-third (37%) said they were informed about their provider's basic service package (up from 30% in 2021). Among Canadians who subscribe to a TV service, 20% reported filing a complaint about their TV services in the past 12 months (unchanged from 2023). The top reason for the complaint was inadequate service quality (58%).

### Internet Code

The vast majority (93%) of households in Canada subscribe to a home Internet service. Consistent with 2023, 68% of Canadians with a home Internet service find their contract clear and easy to understand. A little over 2 in 10 (21%) filed a complaint about their services in the last year. Among

these complaints, 39% reported early cancellation charges, 31% inadequate service quality, 17% incorrect billing charges, and 14% issues with service calls.

### View of the CRTC

Consistent with 2023, approximately one-third of Canadians feel well (27%) or very well (7%) informed about the mandate and role of the CRTC. Conversely, almost two-thirds (64%) do not feel well informed. Canadians' impressions of the CRTC are unchanged this year, with exactly one-quarter (25%) holding a somewhat or very favourable impression of the CRTC. As was the case in 2023, favourability continues to sit at a record low, with the previous low of 29% recorded in Fall 2016.

## 4. Intended Use of the Results

The results will be used to: 1) inform the actions the CRTC should take to ensure that Canadians have the tools they need to understand their wireless service contracts and related rights; 2) identify potential gaps in the Wireless Code; and 3) serve as a measure of Canadians' awareness and satisfaction with the Wireless Code, TVSP Code, and Internet Code over time.

## 5. Contract Value

The contract value was \$114,485.95 (including applicable taxes).

## 6. Statement of Political Neutrality

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



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