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Telecommunications Commission

Conseil de la radiodiffusion et des
télécommunications canadiennes

Public Opinion Research on Why Customers Change Communication Service Providers and Barriers to Switching Service Providers

Final Report

Prepared for the Canadian Radio-television and Telecommunications Commission

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Canada 

Public Opinion Research on Why Customers Change Communication Service Providers and Barriers to Switching Service Providers

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Registration Number: POR 148-22

September 2023

The CRTC commissioned Sage Research Corporation to conduct qualitative public opinion research with users of wireless and home Internet services. Based on the CRTC's 2021 Communications Market Report (2021 CMR), it was clear that churn rates have been continually decreasing in both the wireless and Internet industries, which means Canadians are switching service providers less often than in the previous years. The decrease in churn rates could be an indication that the three Codes of Conduct the CRTC has put in place [Wireless Code (2013, reviewed in 2017), Television Service Provider Code (2016), and Internet Code (2019)] may not be completely achieving their desired results to minimize barriers to customers switching service providers, or there may be other factors or issues limiting customer churn. The purpose of the research was to obtain a deeper understanding of the reasons why some wireless and Internet customers choose not to switch providers.

The research consisted of: six online video focus groups with home Internet users who chose not to switch their service provider; six online video focus groups with wireless users who chose not to switch their service provider; three online video sessions with people who are deaf and use sign language; and four online audio sessions with people who are blind. The research was conducted between May 25 and July 17, 2023.

Cette publication est aussi disponible en français sous le titre : Recherche sur l'opinion publique concernant les raisons pour lesquelles les consommateurs changent de fournisseurs de services de communication et les obstacles rencontrés lors de changement de fournisseur de services

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Executive Summary

BACKGROUND AND OBJECTIVES

The Canadian Radio-television and Telecommunications Commission (CRTC) is an administrative tribunal that operates at arm’s length from the federal government and is dedicated to ensuring that Canadians have access to a world-class communication system that promotes innovation and

enriches their lives. The CRTC regulates and supervises broadcasting and telecommunications in the public interest.

To that end, the CRTC has put into place measures, including Consumer Protection Codes, two of which are the Wireless Code and the Internet Code, with an objective to minimize barriers to customers switching service providers.

However, based on the latest churn data published in the CRTC's 2021 Communications Market Report,¹ it was clear that churn rates have been continually decreasing in both the wireless and Internet industries, which means Canadians are switching service providers less often than in previous years. The decrease in churn rates could be an indication that the Codes may not be completely achieving their desired results, or there may be other factors or issues affecting customers' decision to switch providers.

The purpose of the research was to obtain a deeper understanding of the reasons why some wireless and Internet customers choose not to switch providers.

The results of the research will inform the development of future regulatory frameworks to ensure customers can make informed decisions when choosing service providers that best meet their needs, and to limit barriers faced by customers in making those decisions.

Specific research objectives included exploration of the following:

- Determine the different reasons why some customers choose not to switch providers.
- Determine the information needs of customers for selecting a service provider.
- Determine what barriers consumers face when selecting a service provider.

RESEARCH METHODOLOGY

To achieve these objectives, a qualitative approach was undertaken. Specifically, the research consisted of the following components:

- Type 1 participants – Chose not to switch: Six online video focus groups were conducted with home Internet users – one West (B.C., Alberta), one Manitoba/Ontario/East (Atlantic provinces), two Saskatchewan, two Quebec, and six with wireless users – two Manitoba/Ontario/East (Atlantic provinces), two Saskatchewan, two Quebec. In each group type, the target group was people who had chosen not to switch their service provider in the past year. To meet this criterion, a person had to meet at least one of the following three conditions: (1) less than satisfied with the service, (2) considered switching to a different service provider in the past year but did not switch, or (3) made a complaint about their service. As it turned out, almost all participants met condition #2 (considered switching), and most met at least one of the other two conditions as well.
- Type 2 participants – individuals who are deaf and who use sign language: Three online video sessions were conducted with six participants who are deaf and use sign language

¹ The CRTC Communications Marketing Report provides up-to-date data and trends in the Canadian broadcasting and telecommunications sectors. It is found at: <https://crtc.gc.ca/eng/publications/reports/PolicyMonitoring/>.

(four American Sign Language [ASL] users, two Quebec Sign Language [LSQ] users). Qualified participants subscribed to both Internet and wireless services, and both types of services were discussed in each session. Participants in this target group were not required to have either switched or chosen to switch their service providers in the past year.

- Type 3 participants – individuals who are blind: Four online audio sessions were conducted with five participants who are blind (three English-speaking, two French-speaking). Qualified participants subscribed to both Internet and wireless services, and both types of services were discussed in each session. Participants in this target group were not required to have either switched or chosen to switch their service providers in the past year.

The fieldwork was conducted between May 25 and July 17, 2023.

This research was qualitative in nature, not quantitative. As such, the results provide an indication of participants' views about the topics explored, but cannot be statistically generalized to represent the full population of users of home Internet services or cell phone services. Moreover, it may be that not all types of users of either of these services are represented in the research. Qualitative research does, however, produce a richness and depth of response not readily available through other methods of research. It is the insight and direction provided by qualitative research that makes it an appropriate tool for exploring participants' experiences and opinions with respect to home Internet service providers and cell phone service providers in preparation for a possible subsequent public proceeding.

Notes on terminology in the report:

- For purposes of describing the research design, the term "wireless" is used. However, in the qualitative sessions, the term "cell phone service" was used as this is the terminology people typically use. Therefore, the body of this report will refer to "cell phone service."
- Participants often referred to specific Internet Service Providers (ISPs) or Cellphone Service Providers (CSPs). Where these involve perceptions, opinions or experiences with a specific company, the report substitutes a capital letter for the company name. The letter "A" is used when the participant refers to their current service provider, and letters such as "X", "Y" or "Z" are used when referring to other companies. Note that each letter can refer to different companies, depending on the companies mentioned by any given participant.
- To identify verbatims from participants in Manitoba/Ontario/East, we have used the abbreviation "MOE".

SUMMARY OF KEY FINDINGS

Reasons for not being completely satisfied

All of the Type 1 participants (chose not to switch) were less than completely satisfied with their service in the past year (cell phone service in the case of the Wireless groups, Internet service in the case of the Internet groups), yet did not switch to a different provider in the past year. The reasons for not being completely satisfied are essentially reasons for being interested in switching. As such, these point to what the participants would be hoping to get by switching, and some of the types of

information that would be important in deciding whether to switch and to which company(ies) they might switch.

Internet service: The reasons for not being completely satisfied fell into four main categories. In descending order of frequency of mention, these were: Internet service performance, cost, billing and customer service. Internet service performance issues were widely cited (about four of five participants). Issues included connection speed slowdowns or outages, connection speed is lower than advertised, connection speed is too slow for how the Internet is used in the household, connectivity is better in some parts of the house than others.

With regard to accessibility, participants who are deaf emphasized the importance of high speed Internet because of the vital role of video for sign-language communication. Poor quality video – with freezing or lags – seriously disrupts communication.

Cell phone service: The reasons for not being completely satisfied fell into four main categories. The most common issue was the cost of cell phone service (about half of participants). The following were each mentioned by about one-third of participants: cell phone connectivity, billing, and customer service. With regard to cost, about half of the participants said they were less than completely satisfied with the cost of their cell phone service. It also tended to play out differently because participants were more likely to make comparisons to the cost of cell phone service in other countries, and perceived the cost to be much higher in Canada than in other countries. As a result, this led to a perception by some that cell phone service costs are too high overall – that is, it isn't only about "value for money", it's that the cost is too high in Canada.

With regard to accessibility, as with the Internet service, participants who are deaf said they use their cell phone for video communication using sign language. For this reason, they need both high speed and ideally unlimited data.

Barriers and difficulties related to getting information

Part of switching to a different service provider is gathering information on alternative providers. Barriers or difficulties in getting information add friction to the search process, and increase the difficulty and time required for this process. The perceived level of difficulty and time can discourage some people from switching:

- Some participants said they did not switch because it was "too much work" – and this was often because of the perceived time/difficulty of researching alternatives.
- Some participants did not explore alternatives, but instead settled for negotiating a better deal with their current service provider, because they felt this was easier than researching what alternative providers might offer.

Context – Where participants looked for information (Internet & cell phone): The information source used most often (except by participants who are blind) was provider websites. Some participants called providers for information. The latter tended to occur after first doing a web search for information, after which the person called to get more information or to learn about special deals that are not publicized on the provider's website. Information barriers common to both websites and calling providers included:

- Difficulty comparing packages and offers across providers
- Difficulty getting complete pricing information
- Particularly for Internet packages, difficulty understanding which package best fits one's needs

Another widely used source of information was word-of-mouth, that is, talking with people about their experiences with other providers, including some who looked on social media for comments on providers. Word-of-mouth was a particularly trusted source of information. Also, for participants who are deaf or blind, talking with other people in their respective communities was particularly important. This can be an easier way to find out about packages and discounts tailored to their needs compared to using other information sources.

Comparing provider offerings (Internet & cell phone): In both the Internet and cell phone focus groups, a bit under half the participants said one of the difficulties in researching service providers when considering switching is comparing what the different providers offer. Basically, difficulty in comparing the offerings of different providers adds time, complexity, and uncertainty to the process of exploring switching to a different provider.

There were two types of complaints:

- **Comparing Internet/cell phone offerings across providers:** The issue is that across providers, the packages have different parameters and features, such that it is difficult to find directly comparable packages.
- **Bundle-related complications to comparing offerings:** When the Internet or cell phone service is part of a bundle with other services, this adds even greater difficulty to comparing offerings across providers because of differences across providers in the features of the other components of the bundle.

There were three types of suggestions from participants to make it easier to compare offerings from different providers:

- **Third-party comparison website:** This was the most frequently mentioned suggestion of the three. The idea was to have a website where one can put the offerings of different companies side-by-side, rather than having to go to different websites and trying to keep track of/remember the different offerings. There was almost no awareness of any existing third-party websites comparing Internet or cell phone service providers. Several participants suggested that the CRTC should provide information on what different providers offer.
- **Standardized packages:** Some participants suggested that there be some standardized packages offered by all providers that could be used to compare prices more easily. These would not necessarily be the only packages offered by a provider, but they would at least provide a starting point for comparing providers. A few participants suggested the CRTC mandate some standardized packages.
- **"Build-your-own":** Several participants suggested that provider websites should allow a user to build their package, and moreover use the same options. In this way, a person could "build" the same package on different provider websites, and compare the prices.

Knowing the full monthly cost (Internet & cell phone): Some participants commented that it can be difficult to find out the actual monthly cost of an Internet or cell phone service package – and

this can be true both for information on provider websites and for information received when talking with a provider representative. Basically, the featured price ends up being less – and can be substantially less – than the monthly invoice amount. The perception is that the featured price does not include costs that may be in the “fine print”, and in the case of Internet service it may not include equipment costs (e.g. modem rental). The negative consequences of not knowing the actual full monthly cost were:

- Having to pay an unexpectedly high monthly amount.
- With respect to potentially switching to a different provider, not being able to make accurate comparisons of monthly cost across different providers.

Some participants suggested there should be clear and prominent disclosure of the total monthly billing amount. And, in this regard, some suggested the CRTC should mandate this.

Some participants also wanted clear disclosure upfront of what the monthly cost will be after any time-limited discounts expire. For them, this would be information that they would take into account when researching alternative providers as part of considering switching. They are essentially taking a long-term view of the cost of going with a particular provider, and therefore will not necessarily go with the provider with the best short-term deal. Several participants suggested the CRTC should mandate disclosure of the monthly cost after the expiry of any discounts.

Difficulty understanding how packages relate to needs (Internet): Some participants said they had difficulty knowing what Internet package to get because they did not know how to relate the descriptions of the plans to what they would need given how their household uses the Internet. This leads to doubt and uncertainty when considering switching to a different provider as to which Internet plan would be best. Doubt and uncertainty can delay making a decision to switch, or even lead to a decision not to switch.

Some suggested it would be helpful for providers to relate their different plans to how households use the Internet, such as how the Internet is used, and how many people/devices are using the Internet at any given time. Some participants suggested the CRTC should produce a guide or a self-assessment tool to help people figure out what level of Internet service they need. This would provide objective information from a single trusted source, rather than relying on what different providers say.

Terminology that can be misleading (cell phone): In the cell phone groups, two types of terminology were flagged as being potentially misleading:

- **“Unlimited data”:** Some participants said they did not initially understand that “unlimited data” plans typically come with a speed cap – that is, after a specified amount of data has been used, subsequent data is downloaded at a slower speed. It was suggested that the meaning of “unlimited data” needs to be more clearly communicated, including the specific speed cap, in order to help people better understand and compare cell phone plans.
- **“Free” or “\$0” phone:** A few participants said it is misleading to describe a phone one is getting as part of a cell phone package as “free” or costing “\$0”, because in fact one is paying for the phone. It can therefore come as a surprise when considering switching to a different provider that money would be owed on the phone.

Deals not always displayed on provider websites – Have to call (Internet & cell phone): Quite a few participants were aware that as a potential new customer one can call a provider (or go to a store) and that one might be offered a special deal or that one can try to negotiate a deal. In this context, some suggested that these deals should be posted on the provider's website. This would reduce the work involved in researching companies for switching purposes.

Accessibility-related information barriers and difficulties (Internet & cell phone): The following are accessibility-related issues with information access that can be an issue when someone is considering switching.

- **Getting information from provider websites**
 - **People who are blind:** Participants said the structural complexity and volume of information on provider websites can be difficult and time-consuming to navigate using a screen reader. It was suggested the CRTC should play a role in ensuring compliance with accessibility standards and in ensuring there is usability testing.
 - **People who are deaf:** Participants noted that some people who are deaf are not fully fluent in either English or French because it is not their first language. For this reason, some suggested that provider websites should offer access to information via sign language videos, including suggesting that the CRTC has a role to play to hold providers to do this.
- **Communication with customer service among people who are deaf:** Participants who are deaf described difficulties getting information about provider offerings from customer service representatives, including in-person, on the telephone, and via online chat on websites.
 - **In-person:** When dealing with a salesperson at a store, a person who is deaf often needs to resort to communicating with the salesperson in writing. Several participants said that sometimes the salesperson is impatient, leading to poor quality communication. Another difficulty is that some people who are deaf are not completely fluent in English or French because it is not their first language. As a result, a person who is deaf may have difficulty understanding some of what a salesperson is saying, or making themselves understood to the salesperson. Suggestions included that stores use video remote interpretation (VRI), and that they train salespeople on how to communicate effectively and respectfully with people who are deaf.
 - **Telephone/VRS:** Participants who are deaf said it is a common experience when calling a company using video relay service (VRS) that sometimes the call is refused. When the moderator asked if this was true specifically of telecommunications companies, they said yes. Several suggested the CRTC should do more to make the public aware of VRS, and a few suggested the CRTC should mandate that companies accept VRS calls.
 - **Online chat:** Using online chat can be problematic because of the English/French fluency issue noted above. A few participants who are deaf suggested that companies include the option of online chat using sign language.
- **Access to packages for people who are deaf or blind:** A few participants who are either deaf or blind said that finding information about packages/discounts specifically for people with their disability can be difficult: the information can be hard to find on a provider's website, and store staff may not offer – or be aware of – such packages/discounts. Several

participants said they were aware of only one provider offering an accessibility-related discount.

- **Availability of braille invoices:** A few participants said there can be problems getting invoices in braille. A few suggested it should be a requirement for all providers to offer the option of receiving braille invoices, because not providing braille invoices could be a reason not to choose a provider.

Reasons for not switching

The barriers and difficulties in getting information discussed in the preceding section add friction to the search process for someone exploring switching providers, and increase the difficulty and time required for this process. The perceived level of difficulty and time can discourage some people from switching. This section summarizes other reasons for not switching.

Cannot get a lower monthly cost (Internet & cell phone): Dissatisfaction with the monthly cost of service was one of the reasons participants were less than completely satisfied with their cell phone or Internet service. However, quite a few of these participants said the reason they did not switch was because they could not find a meaningfully lower cost plan. There were several dimensions to this reason for not switching:

- Some simply said that the alternatives all cost about the same.
- Some said while they could find a lower price, the magnitude of the savings was too small to make it worth the effort and risks to switch.
- Some said that instead of going through all the work and uncertainty of exploring alternative providers, they called their current provider and got a better deal.
- With regard to smaller service providers, some said these may offer lower prices, but they were concerned that this came with getting less of something, whether it be, for example, Internet service reliability or speed, cell phone connection coverage/reliability, or customer service.
- In the context of not being able to find a meaningfully lower price, some participants complained that there is not enough competition in their area, and that is why there are no meaningful price differences.
- Some participants said that as a new customer they could get a lower price for a period of time, but after the deal expires they will pay more, such that overall it is not worth it to switch.
- In the case of cell phone service, several participants said that one can only get a deal on price if one also buys a cell phone as part of a contract – meaning that if one is not interested in buying a cell phone, it is hard to find a lower monthly price.

Cannot get better Internet speed/reliability: The most common reason participants were not completely satisfied with their Internet service was problems with the speed and/or reliability of Internet service. Among these participants, a significant barrier to switching was not being able to identify an alternative provider that would be any better than their current provider in terms of service reliability. Some further commented that it would not be worth switching to end up experiencing the same sorts of reliability issues even if there is a small savings on cost, and

particularly given the amount of work that can be involved in setting up a new home Internet service.

For some participants, the barrier was that the other providers in their area only offered slower Internet speeds than they wanted. This typically was because they were with the only provider in their area with a fibre optic service, and the others could only offer slower connections.

With regard to smaller ISPs, most participants were reluctant to switch to a smaller ISP, primarily because of concerns over reliability of Internet service. The concern over reliability was expressed in two ways:

- Concern the Internet performance would be less reliable from smaller ISPs.
- Concern that customer technical support from smaller ISPs would be worse – which would result in a potentially less reliable service.

Bundle-related barriers to switching (Internet & cell phone): A majority of Internet participants said their Internet service was part of a bundle, and about a third of cell phone participants said their cell phone service was part of a bundle. There were several ways in which having Internet or cell phone service in bundle with other services could discourage switching:

- Some participants said they did not switch because that would break up the bundle, resulting in a higher overall cost when taking into account the other services.
- Some participants said that while they were not entirely satisfied with their Internet or cell phone service, they were satisfied with other components of the bundle and therefore decided not to switch.

Cost of breaking a cell phone purchase contract: Among the cell phone participants, about a third had not switched in the past year because they had purchased a cell phone on contract, and were waiting until the end of the contract period before switching in order not to have to pay the cancellation cost of the remaining amount owing on the phone. They felt that the cancellation cost would substantially exceed any savings they might get by switching to a different provider.

Cannot get better cell phone connectivity: Among cell phone participants, about a third were not completely satisfied because of connectivity issues such as dropped calls or poor signal strength in rural areas. In this regard, some participants did not switch because they did not believe there was any other provider with better connectivity. With regard to cell phone connectivity in rural areas, several participants commented that in their experience, the coverage maps available from providers are inaccurate, and therefore they do not feel they can trust these to identify a provider with better coverage.

Loss of ISP email address: Some participants (about a quarter of the Internet participants) did not want to switch because they used an email address linked to their ISP. Typically, they had been using this email address for quite a few years, and the email address was associated with a variety of services. They said switching to a different email would therefore be a lot of work, involving identifying all the services that use the ISP email address and then changing them to a different email address.

Switching is “too much work” (Internet & cell phone): Some participants said they have not switched, despite being less than completely satisfied, because of the amount of work involved. This was more of an issue among Internet participants because of the added step of getting and installing equipment, but it was also a reason cited by some cell phone participants. This led some to focus instead on contacting their current provider and negotiating a better deal. The “too much work” rationale should be viewed in the context of the other barriers to switching described previously: it’s possible if it was easier to switch on the various dimensions above, then the issue of “too much work” would likely be less of a factor.

Cell phone number portability: Almost all participants were aware of number portability, so for them this was not a barrier to switching. However, there was a small number who were not aware of this, and for whom it was a barrier to switching. This indicates there is still some work to do to make sure people are aware of number portability.

Participant suggestions for the CRTC

The most common types of suggestions related to the price of Internet or cell phone service:

- Some participants suggested the CRTC needs to do more to increase competition in the Internet and cell phone sectors. This includes several participants each who suggested (a) foreign-based providers should be allowed to enter the Canadian market; (b) large companies should be blocked from taking over smaller companies. The primary rationale for these suggestions was to lower prices.
- Some participants suggested the CRTC should somehow regulate prices for Internet and cell phone services, with the goal of lowering prices. In the case of cell phone service, this suggestion was particularly motivated by the perception that cell phone service costs in Canada are among the highest in the world.

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Political neutrality certification

I hereby certify as Senior Officer of Sage Research Corporation 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, and standings with the electorate or ratings of the performance of a political party or its leaders.



Anita Pollak
President
Sage Research Corporation

MAIN FINDINGS

Reasons for not being completely satisfied

All of the Type 1 participants (chose not to switch) were less than completely satisfied with their service in the past year (cell phone service in the case of the Wireless groups, Internet service in the case of the Internet groups), yet did not switch to a different provider in the past year. The reasons for not being completely satisfied are essentially reasons for being interested in switching. As such, these point to what the participants would be hoping to get by switching, and some of the types of information that would be important in deciding whether to switch and to which company(ies) they might switch.

Internet service

The reasons for not being completely satisfied fell into four main categories. In descending order of frequency of mention, these were:

- Internet service performance
- Cost
- Billing
- Customer service

Internet service performance: Most participants (about four out of five) cited issues with Internet service performance as a reason for being less than completely satisfied. There were several different types of complaints about performance. In descending order of frequency of mention, these were:

- Occasionally, the speed of the Internet connection slows down. Sometimes, there was no apparent reason for this, while some noted that it was likely to occur when there are multiple people/devices using the Internet at the same time.
- Internet service goes out completely from time to time.
- The connection speed is lower than advertised.
- The connection speed of their current package is too slow.
- The connection speed is better in some parts of the house but worse – or nonexistent – in other parts. Some participants mentioned installing range extenders – either by renting equipment from the ISP or purchasing equipment – but this did not always fix the problem.

These results indicate that a very important type of information that people considering switching would want is information about the connection speeds offered and the reliability of the Internet connection. They want a speed that matches their Internet usage needs, and a reliable connection with no outages or slowdowns.

Cost: About a third of participants cited cost when asked why they were less than completely satisfied. This was expressed in a few ways:

- The cost is too high given issues with Internet service performance.

- The cost had increased because a previous discount expired.
- The cost is too high given how they use the Internet – e.g. they have a higher speed service than they really need.

While only about a third of participants cited cost when asked why they were less than completely satisfied, getting information about cost was important to most participants when looking at provider options:

- In most cases, what participants would be interested in is getting the best value for their money – not simply the lowest cost Internet service. For virtually all participants, home Internet service is very important to their daily lives, and they need reliable service and a connection speed appropriate for how their household uses the Internet. Cost comes into play only in the context of meeting these connection requirements. For most, this means the least expensive Internet package is not necessarily appropriate for their needs.
- There was widespread awareness that new customers can often get a deal. So, once a suitable package is identified from an ISP, getting or negotiating some sort of deal on cost as a new customer is a likely step.

The participants who are deaf or blind emphasized the importance of the availability of discounts for people with disabilities.

Billing: Some participants were unhappy with their Internet service because of billing issues. There were two types of complaints:

- There were billing errors.
- There were charges that were not expected based on the Internet package for which the person had signed up.

The issue of unexpected charges, which some other participants had also experienced, led some to suggest that ISPs should more clearly state the “all-in” monthly cost of a given Internet package.

Customer service: Some participants cited problems and frustration with customer service. This was almost always in the context of dealing with the above-noted problems with Internet service or billing. Types of problems cited included:

- It was difficult or it took a long time to talk to a person, and chatbots could not solve the problem.
- The process was lengthy due to being transferred to different agents.
- Different agents give different answers.

Accessibility-related Internet service needs: Participants who are deaf emphasized the importance of high speed Internet because of the vital role of video for sign-language communication. Poor quality video – with freezing or lags – seriously disrupts communication.

I’m looking for which provider has the highest upload and download speeds for the video that I require. That’s key for deaf community consumers of Internet. In terms of other features, not necessarily important, but we need to have high upload and download speed, because that is our way of communicating. If it’s too slow through VRS, or for other video platforms, it impedes our communication.

La communauté des personnes sourdes a vraiment besoin d'Internet parce que pour nous, c'est prioritaire pour la communauté. On communique avec nos mains avec la vidéo, on se comprend comme ça. C'est pas comme les entendants. Vous avez accès au téléphone depuis longtemps. Vous n'êtes pas obligé d'avoir le cote visuel. Nous, on ne peut pas se parler sans la vidéo. Tu sais comment qu'on communique fait que l'Internet, pour nous, c'est notre téléphone. [The deaf community really needs Internet because for us it's a priority. We communicate with our hands with the video, we understand each other like that. It's not like hearing people. You've had access to the phone for a long time. You don't need the visual component. We can't talk to each other without video. Given how we communicate, the Internet is our phone.]

A few also noted that because of the extensive use of video for communication, unlimited data would also be important.

Cell phone service

The reasons for not being completely satisfied fell into four main categories. The most common issue was cost of cell phone service (about half of participants). The following were each mentioned by about one-third of participants: cell phone connectivity, billing, and customer service.

Cost: About half of the participants said they were less than completely satisfied with the cost of their cell phone service in the past year. This complaint was more common for cell phone service than for Internet service. It also tended to play out differently because participants were more likely to make comparisons to the cost of cell phone service in other countries, and perceived the cost of the service to be much higher in Canada than in other countries. As a result, this led to a perception by some that cell phone service costs are too high overall – that is, it isn't only about “value for money”, it's that the cost overall is too high in Canada.

For me, it's price. It's comparing it to other countries. I know Canada is one of the worst when it comes to that. It's not really justified in my opinion. There's just like zero competition. Like you basically have two or three choices. So, I just think it's a very, very unfair system that we have in Canada. (MOE)

It's too expensive, especially when you compare it elsewhere in the world. I believe we have some of the highest mobility bills in the world, if I'm not mistaken. (MOE)

Il est reconnu au Canada qu'on paie à peu près le plus cher à travers le monde pour nos communications cellulaires, parce qu'on n'a pas assez de compétition. Quand y aura plus de compétition je fouillerai un peu plus. [It is recognized in Canada that we pay almost the most in the world for our cellular communications, because we do not have enough competition. When there is more competition I will dig a little more.] (Participant who is deaf)

The participants who are deaf or blind emphasized the importance of the availability of discounts for people with disabilities.

Cell phone connectivity: About one-third of participants had issues with cell phone connectivity. Two types of issues were mentioned:

- Dropped calls – i.e. a call is initially connected, but then cuts off unexpectedly.
- Lack of service in rural areas: This issue came up more often among participants living in rural areas and among the Saskatchewan participants.

Coverage issues, yes because I live in a rural area, I don't live in the city I live outside, so it's like, sometimes I'll get a call, sometimes I'll miss it. It's because, oh we don't have towers out there, so sometimes I'll get it, sometimes it won't work. (MOE rural)

I know there's a few Saskatchewan people on the call and I would say probably the spotty service is a reason to consider another provider. There's always hope that maybe another provider will have better connections, especially in rural areas. When you're travelling, you may lose a call. It doesn't matter if it's in the country or in town, it's just generally an unreliable signal at times [Company A]. (Sask., rural)

When I travel, usually within the province, I like to catch up with people and make some calls and you know, quite often it's patchy, not very often are they dropped completely but you know, there's periods of, I can't hear you. Are you there? (Sask., large city)

Associated with this issue, some participants would want information about coverage and cell phone connectivity when considering an alternative cell phone service provider.

Billing: About one-third of participants were unhappy with their cell phone service because of billing issues. There were two types of complaints:

- The most common complaint involved charges that were not expected based on the cell phone service contract the person had signed. The unexpected charges were of two types: (1) unexpected charges that showed up right away after starting with a cell phone service provider or that seemed to show up randomly, or (2) unexpected ongoing price increases during the life of a contract – i.e. contrary to their understanding of the contract they had signed, the monthly price was not a fixed amount for the term of the contract, but rather increased over the life of the contract.
- Some complained about billing errors.

The issue of unexpected charges, which some other participants had also experienced, led some to suggest that cell phone service providers should more clearly state the “all-in” monthly price of a given cell phone package, and in particular should commit to not raising the price during the life of the contract.

Customer service: About one-third of participants said they were less than completely satisfied with their cell phone service provider because of customer service issues. Some of the types of problems were the same as those noted earlier with respect to Internet customer service:

- It was difficult or it took a long time to talk to a person, and chatbots could not solve the problem.
- The process was lengthy due to being transferred to different agents.
- Different agents give different answers.

Another issue mentioned by some participants in Quebec was two types of language issues with customer service: (1) customer service agents who did not seem fluent in Quebec French, resulting in difficulties with both parties understanding each other, (2) long wait times to speak with a French-speaking agent compared to an English-speaking agent.

Donc, j'ai voulu passer par le service à la clientèle pour avoir de l'aide. J'ai rien contre le service mais je trouve qu'on a des difficultés de se comprendre. On essaye d'expliquer le problème et la personne à l'autre bout du fil n'arrive pas à comprendre notre langue. Je me suis déjà fait dire qu'on ne comprenait pas « mon dialecte ». [So I wanted to go through customer service for help. I have nothing against the service but I find that we have difficulty understanding each other. We try to explain the problem and the person on the other end of the line cannot understand our language. I've been told before that they don't understand "my dialect".] (Quebec)

La personne parle français mais pas forcément québécois, donc c'est plus difficile la compréhension de leur côté. [The person speaks French but not necessarily Québécois, so it is more difficult for them to understand.] (Quebec)

Moi j'ai déjà appelé à la compagnie de cellulaire, pis c'était tellement long de parler à quelqu'un en français, j'ai raccroché et j'ai rappelé pour parler à quelqu'un en anglais et j'ai eu la ligne plus facilement. [Once, I called the cell phone company and it was so long waiting to talk to someone in French, I ended up hanging up and speaking to the English customer service so I can get the line more easily.] (Quebec)

This issue did not really come up in the Internet focus groups in Quebec, but this could be due to differences between the Internet versus cell phone focus groups in the service providers used. In the Internet groups a large majority of the participants were with one particular provider, but that provider was used for cell phone service by only one participant in the cell phone focus groups – so, it appears that provider is better at providing service in Quebec French.

Accessibility-related cell phone service needs: As with the Internet, the participants who are deaf said they use their cell phone for video communication using sign language. For this reason, they need both high speed and ideally unlimited data.

Video quality as well on the phone it has to be smooth. The video can freeze so we need to make sure there is full access to video streaming for our video calls.

Pis moi une chose pour laquelle je m'inquiète avec les téléphones cellulaires c'est la vidéo – parce que nous on a besoin d'utiliser le SRV; on a besoin d'utiliser la vidéo pour passer des appels. Nous les appels téléphoniques c'est des appels vidéos. Ma famille ou mes amis sourds on communique toujours en vidéo. C'est notre téléphone! Pis je dois toujours me limiter ou aller au Tim Horton [sur WiFi] pour utiliser le téléphone et ça me stresse. Les entendants sont là « Bla-bla-bla! » des heures illimitées mais moi je ne peux pas. [Well, one thing I worry about with cell phones is video – because we need to use VRS; one needs to use video to make calls. For us phone calls are video calls. My family or my deaf friends always communicate by video. It's our phone! And I always have to limit myself or go to the Tim Horton to use the phone [on WiFi] and that stresses me out. The hearing people are there “Bla-bla-bla!” with unlimited hours but I can't.]

Barriers and difficulties related to getting information

Part of switching to a different service provider is gathering information on alternative providers. Barriers or difficulties in getting information add friction to the search process, and increase the difficulty and time required for this process. The perceived level of difficulty and time can discourage some people from switching. As will be discussed further later in the report, this showed up in some of the reasons for not switching:

- Some participants said they did not switch because it was “too much work” – and this was often because of the perceived time/difficulty of researching alternatives.
- Some participants did not explore alternatives, but instead settled for negotiating a better deal with their current service provider, because they felt this was easier than researching what alternative providers might offer.

Note that for the sake of efficiency in what follows, when an issue applies to both Internet and cell phone service, it is discussed in the same section.

Context – Where participants looked for information (Internet & cell phone)

Almost all the participants dissatisfied with their Internet or cell phone service had looked for information about what other providers have to offer.

The information source used most often (except by participants who are blind) was provider websites. Information barriers associated with this source that are discussed in later sections include:

- Difficulty comparing packages and offers across providers
- Difficulty getting complete pricing information
- No description of special deals that one can get by calling the provider
- For Internet, difficulty understanding which package best fits one's needs

Another widely used source of information was word-of-mouth, that is, talking with people about their experiences with other providers, including some who looked on social media for comments on providers. Word-of-mouth was a particularly trusted source of information. Also, for the participants who are deaf or blind, talking with other people in their respective community was particularly important. This can be an easier way to find out about packages and discounts tailored to their needs compared to using other information sources.

As a deaf community as a whole, for me, I feel there's a lot of communication, and a lot of comparison, especially when it comes to rate plans and who are you with. What's the speed like? What's the quality like? So there's a lot of good discussion that happens that way. And that's kind of how our quote unquote research is conducted. (Participant who is deaf)

Moi ma façon d'opérer – puisque j'ai un handicap visuel – c'est toujours de communiquer avec d'autres personnes qui ont le même handicap. Si quelqu'un a le même handicap que moi et y est satisfait, y a des grosses chances que moi je sois satisfait. C'est ma source d'information : communiquer avec d'autres personnes qui ont le service et quels genres de services ils ont, comment c'est accessible. [My way of operating – since I have a visual impairment – is always to communicate with other people who have the same impairment. If someone has the same disability as me and is satisfied with it, chances are that I will be satisfied. That's my source of information: communicating with other people who have the service and what kinds of services they have, how it's accessible.] (Participant who is blind)

Some participants called providers for information. This tended to occur after first looking online. The person would then call to get more information or to learn about special deals that are not publicized on the provider's website. Information barriers associated with this source overlap with those for provider websites, and are discussed in later sections:

- Difficulty comparing packages and offers across providers
- Difficulty getting complete pricing information
- For Internet, difficulty understanding which package best fits one's needs
- Companies do not always accept VRS calls

A relatively small number of participants had talked in-person with a provider representative – typically at a store, and some via door-to-door sales representatives. These could be helpful in

terms of ease of asking questions and getting information, but otherwise had the same sorts of issues as the provider websites and customer service agents. Also, as discussed later, participants who are deaf had experienced significant difficulties trying to communicate with in-store representatives.

Comparing provider offerings (Internet & cell phone)

In both the Internet and cell phone focus groups, a bit under half the participants said one of the difficulties in researching service providers when considering switching is comparing what the different providers offer. This issue played out somewhat differently in the Internet versus cell phone focus groups – for example, complications related to bundling were more often mentioned by Internet focus group participants. Nonetheless, taking into account both complaints about comparing providers and suggestions to improve ease of comparison, the issue was raised by about the same proportion of participants in the Internet and cell phone focus groups.

Basically, difficulty in comparing the offerings of different providers adds time, complexity, and uncertainty to the process of exploring switching to a different provider.

There were two types of complaints: difficulty directly comparing Internet packages with each other or cell phone packages with each other, and the extra difficulty of comparing offers that bundle in other services:

- **Comparing Internet/cell phone offerings across providers:** The issue is that across providers, the packages have different parameters and features, such that it is difficult to find directly comparable packages.

It's apples and oranges. One service provider will say, okay, we've got 150 MB per second download, and then you have the one that says, well, we have a gig, or we have this. It's hard to compare the different speeds and the different prices, and the different...some will have data limits on how much you can download, and some won't. So yeah, it's like comparing apples to oranges. (Participant who is blind, Internet)

Pour moi c'est compliqué : ils nous expliquent les forfaits et ils vont nous dire les vitesses mais y a tellement de choix et de prix que moi je me perds là-dedans. Y a trop de possibilités. [For me it's complicated: they explain the packages to us and they'll tell us the speeds, but there are so many choices and prices that I get lost in it. There are too many options.] (Quebec, Internet)

It's clear online, but it's sort of like comparing apples and oranges. So, you might look at two different companies' websites and you know the first one's got, oh, wow, that seems like a really good deal. It's got everything I need. Then you look at other companies and you think, oh, that's even a better deal. But then you realize, you know, that you can't really compare them because each one is so different or missing something. (Sask., Cell phone)

- **Bundle-related complications to comparing offerings:** When the Internet or cell phone service is part of a bundle with other services, this adds even greater difficulty to comparing offerings across providers because of differences across providers in the features of the other components of the bundle.

I think the biggest problem for me is that there's no standard. You look at it, the phone service might be a little bit better, but then the Internet's worse and if you go for the better Internet, then your TV package isn't as good. Nothing's the same. It's not like a set standard of Internet speed or a set volume of data, or

anything. So, it's really hard to do a comparison between providers, because how you compare when all of the components are different? (West, Internet)

What was difficult was trying to compare services that you have now versus another company's offerings, to make sure that you're comparing apples to apples. Because of all the different bundlings and packages and different speeds that are available. They make it fairly difficult, at least at first glance; to be able to compare the services you have now versus what you might be paying for. (Sask., Internet)

Trying to compare your packages and everything was kind of all over the place. I want these kinds of channels, but that bundle doesn't have that channel or those channels or these different things. That's what I found to be frustrating. I think on both counts because it seems that there are so many different speeds with the Internet and are you comparing the same type of product with one company versus the other? So I found that a bit confusing. The TV was even more so because there are so many different options out there and different prices for different things and companies charge different prices for add-ons. (Sask., Internet)

There were three types of suggestions from participants to make it easier to compare offerings from different providers, and each type was mentioned both with respect to Internet service and cell phone service. These were: a third-party site comparison website, standardized packages, and a "build-your-own" functionality on providers' websites.

Participant suggestion – Third-party comparison website: This was the most frequently mentioned suggestion of the three. The idea was to have a website where one can put the offerings of different companies side-by-side, rather than having to go to different websites and trying to keep track of/remember the different offerings. A few participants also suggested other types of comparative data that would be helpful, including number of customer complaints, or customer satisfaction ratings. A few participants suggested it could be something similar to travel-related websites that compare travel packages or provide ratings of different travel-related providers.

If there is going to be you know, objective websites, information that can basically give a breakdown of all service providers for the reliability issues, and also the cost issues as well, that will be like a wonder for everybody. (West, Internet)

There's a lot of information on the packages. Like, you know, the speed, what you're going to get for hours of calling, extra costs or if you're calling inside Canada and outside Canada, you know, the different pieces of the package and what each little piece of the package costs. My memory is pretty good but once I started going through, I don't have the memory to be able to remember [Company X] was X dollars for, you know, 20 gigs. And, you know, I can't remember all that. So that's why it would be nice to have a comparison website. (Participant who is blind, Cell phone)

Kayak ou Expedia qui vont faire des comparatifs pour des voyages et des vols d'avions. Ben ça pourrait être quelque chose qui pourrait être intéressant de pouvoir comparer mon besoin (Ex. : nombre de gig et fonctionnalités). [Kayak or Expedia allow you to compare the various travel packages or flights. They could offer something like that so you can compare the various options based on your needs, like the amount of GB or features.] (Quebec, Cell phone)

A participant who is blind suggested that a well-designed comparison website in terms of accessibility would be of great help to people who are blind. As discussed later, the accessibility of provider websites is variable, and the sites can be too complex for easily reading the information using a screen reader.

I think that would be an excellent idea if there could be some unbiased third party comparison of the different Internet services offered by the Internet service providers in terms of how much the package cost and what the package consists of. ... All [company] websites are not created equally. Some are more or less accessible for blind persons using screen readers. Using a website is not the same thing as reading an

email or a Word document because there are so many headings, links and tabs and so on. A website is a very complex document to navigate with a screen reader. And so if there was a third party analysis comparison of these different plans from the different Internet service providers, it could facilitate what choice you make.

There was almost no awareness of any existing third-party websites comparing Internet or cell phone service providers. In Quebec, a few mentioned a site called *Protégez-Vous*, which others had heard of but did not think to look at for cell phone service or Internet service. A few participants mentioned *PlanHub.ca* (which has both English and French sites).

Several participants suggested that the CRTC should provide information on what different providers offer:

I want to see more information provided by the CRTC. They're the regulator, right? So, hopefully, they can provide a platform for us to look into. Like, if they can provide the information from different providers so that as a consumer, we have a place to go to if we need information about this service and this is the price that we're looking at. The costs of these different services provided by the different service providers, the bandwidth. Then what kind of technology is being provided. At least some basic information on the different services of the Internet that are being offered by the different companies. (West, Internet)

Une liste que le CRTC pourrait faire avec toutes les compagnies de fournisseurs et tout ce qui se compare (Ex. : modem fourni ou acheté/telle vitesse etc.) que tout soit indiqué au complet. Une liste ou un document. [CRTC could provide us with a list of the various providers and clearly state what's included, like if the modem is rented or you need to purchase, the speed, so everything is gathered and clearly listed in one single document.] (Quebec, Internet)

Je ne sais pas si le CRTC a un site web. Y devrait y avoir une page comparative des fournisseurs. [I don't know if the CRTC has a website. There should be a vendor comparison page.] (Quebec, Cell phone)

Participant suggestion – Standardized packages: Some participants suggested that there be some standardized packages offered by all providers that could be used to compare prices more easily. These would not necessarily be the only packages offered by a provider, but they would at least provide a starting point for comparing providers.

So I think if they were interested in providing good service and being transparent, they would look at what they're offering and just make the exact same package. Then do what they want with it, whether they throw it into a bundle, this, that or the other, but just that there's some way to compare exactly. (Sask., Internet)

It would be nice if all of those providers had a comparative product, you know, that is a base price so that you can do a side-by-side comparison. (Sask., Cell phone)

A few participants suggested the CRTC mandate some standardized packages.

It would be nice if there were a regulatory body who says, okay, you have to offer these particular things. You know, there can be additions, there can be other things that you offer, but it would be nice if we could actually do that comparison without everything constantly being on a slider. So, if there were some sort of regulatory board that said, okay, these basic services you have to offer and you have to give a price point, and that's where everybody starts. That would be nice, because then I feel like at least we'd have somewhere to start. (Sask., Cell phone)

Participant suggestion – “Build-your-own”: Several participants suggested that provider websites should allow a user to build their package, and moreover use the same options. In this way, a person could “build” the same package on different provider websites, and compare the prices.

Have a drop-down menu on a site where they all want to use the same menu across all the service providers, and then you would identify what you wanted, whatever box you ticked off in one service provider, you could do it in the other, and then you could at least generate an approximate financial value to what you need and what you want. (MOE, Internet)

Knowing the full monthly cost (Internet & cell phone)

Some participants commented that it can be difficult to find out the actual monthly cost of an Internet or cell phone service package – and this can be true both for information on provider websites and for information received when talking with a representative. Basically, the featured price ends up being less – and can be substantially less – than the monthly invoice amount. The perception is that the featured price does not include costs that may be in the “fine print”, and in the case of Internet service it may not include equipment costs (e.g. modem rental).

In terms of the issue at hand, I think it's the transparency. They will tell you that \$59.99 is the cost but there's so many underlying charges, like for example, additional jacks, modem rentals, speed – maybe they put a cap on it, and things like that. You know what, those costs add up. I mean, at the end of the day, possibly the cost is not \$59.99, it could be \$100 or \$120. (West, Internet)

Oftentimes there are those surprise costs on the billing. Maybe there's an activation fee of \$50, a one-time fee. So there's all of those kinds of things as well that aren't being shown from the forefront. And I think that they often aren't being told to their customers that if you buy this, there will be these additional costs, there will be these additional fees. (Participant who is deaf, Internet)

Lorsqu'on parle d'Internet pour les prix, ils vont chercher des forfaits. Mettons à 80 \$ par mois c'est un bon prix, les personnes sourdes sont : « Oui-oui-oui! — Mais as-tu regardé les règlements ? As-tu vu qu'il fallait louer la borne! ? — Ah mais c'est pas ça qu'on m'a dit! ». C'est parce qu'ils n'arrivent pas à lire, ils n'ont pas regardé les petits détails. [When we talk about the Internet for prices, one looks for packages. Let's say \$80 a month is a good price, deaf people are: “Yes-yes-yes! But have you looked at the rules? Did you see that you had to rent the terminal!?” Ah, but that's not what I was told!. It's because they haven't looked at the little details.] (Participant who is deaf, Internet)

And often, usually they say, if you get this new cell phone from us, you're only going to be paying \$55 a month. But they don't come out and say it's \$55 a month, plus this tax, plus that, plus that fee. (Participant who is blind, Cell phone)

The negative consequences of not knowing the actual full monthly cost were:

- Having to pay an unexpectedly high monthly amount.
- With respect to potentially switching to a different provider, not being able to make accurate comparisons of monthly cost across different providers.

Some participants suggested there should be clear and prominent disclosure of the total monthly billing amount. And, in this regard, some suggested the CRTC should mandate this.

You think, oh, this is the fee, and then you get your bill and it's exorbitant. It's more than you anticipated. So making sure that that fine print is fully explained in detail. So the first time I pay it's going to be this much, and then from that month on, it's going to be however much. So making sure that people are fully educated and knowing what their monthly bill is going to look like. I still think that that is an area of confusion for a lot of people. So I really want to make sure all of those hidden costs are really made to be clear. (Participant who is deaf, Internet)

D'exiger plus de transparence et qu'il n'y ait aucuns frais cachés. Je pense que c'est une chose possible si on exige la même chose à toutes les compagnies. Ils vont être obligés de suivre toute la même démarche. Je pense que ce serait bon pour pas mal de monde. Ça nous éclairerait beaucoup plus. [Ensure more

transparency and no hidden fees. I think this is something CRTC could impose on all providers. If they all need to follow the same approach, it would be better for most people and it would be easier for us to compare.] (Quebec, Internet)

Some participants also wanted clear disclosure upfront of what the monthly cost will be after any time-limited discounts expire. For them, this would be information that they would take into account when researching alternative providers as part of considering switching. They are essentially taking a long-term view of the cost of going with a particular provider, and therefore will not necessarily go with the provider with the best short-term deal.

I was not happy with the cost, so I was hoping to get a lower cost. A couple of reasons held me back [from switching], because I think that at the beginning, when you first sign, you know, they give you a special cost, and then you go back to either what you were paying before or even higher, and I didn't want to have that regret. (West, Internet)

L'autre chose quand tu regardes [Entreprise X], oui vous venez avec moi et on va vous faire un bon prix, mais pour un an. Pis dans un an vous changerez le prix. Si dans un an tu me charges plus cher que [Entreprise A] présentement. [When you look at [Company X], yes you come with me and we will give you a good price, but for one year. Worse, in a year you will change the price. If in a year you will charge me more than [Company A] does now.] (Quebec, Internet)

Calling for information is] pretty straightforward. But I'll put a "but" in there. And that is getting down to the bottom line after the party's over, getting the cell phone rep to say what the monthly charges are going to be with everything added in, including the taxes and administration fees, all that miscellaneous stuff after the introductory costs. They want to tell you all about the introductory offer. But they need a little poking or prodding to get them to say what's my bill going to be nine months from now. I have never found any cell phone company that I have called to be straight forward and telling you what your cost is now, and giving you a clear breakdown of what those items in your bill are, and what your cost is going to be when your two year contract is up, if you're going with a two year contract. (Participant who is blind, Cell phone)

Several participants suggested the CRTC should mandate disclosure of the monthly cost after the expiry of any discounts.

Difficulty understanding how packages relate to needs (Internet)

Some participants said they had difficulty knowing what Internet package to get because they did not know how to relate the descriptions of the plans to what they would need given how their household uses the Internet. This leads to doubt and uncertainty when considering switching to a different provider as to which Internet plan would be best. People want to get an Internet package that is good enough to meet their needs, but also not to overpay for one that is more powerful than they need. Doubt and uncertainty can delay making a decision to switch, or even lead to a decision not to switch.

When I started to look into it, it was how would I get better Internet, what's going to give me better Internet? And to be honest, I'm not educated about like, say, fibre optics, or what would strengthen my connection or what I need to do. So the education is not there for me. So even to switch, I don't know if I'm making the right choice. (Sask.)

I find for myself on the website, but it's also even when you talk to someone, like it's a lot of talking and unless you understand all of that lingo, I don't know. I felt like I'm not sure if I'm really understanding all of this or not. So, it was just easier to stay with what I had. (West)

Some suggested it would be helpful for providers to relate their different plans to how households use the Internet, such as how the Internet is used, and how many people/devices are using the Internet at any given time.

The differences between the different types of speeds – because there were different speeds but I don’t have a visual. I don’t fully get what those differences mean in terms of are they fine for email but not fine for streaming? Are they fine for email and streaming, but not fine for gaming? At what point will this speed die or glitch compared to another one? They don’t really explain that. (Sask.)

So, somebody giving examples of things that people typically use definitely, for me, would make a difference in understanding. If two of us are going to be on Zoom, and we’re going to be streaming and we’re going to be on other stuff, well, then we need a higher upload/download speed. (MOE)

Okay, you have this package, you should be able to use maybe six computers or six laptops or the gadgets that you could use with it that would ensure that you have stability and good connection. Sometimes I don’t understand five megabytes per second. What does that mean? But having the number of gadgets you use, we recommend this for you to use. (Sask.)

A few participants said they have sometimes seen this sort of information from a provider, but not consistently:

It’s really inconsistent between different service providers. Some service providers, they do actually give examples as to, okay, we have this many people in the house and if that’s what they’re doing, then you need this level of Internet service. But sometimes, in most cases, you actually have to call in the rep and you tell them that okay, so this is what I need for my daily use, and they will tell you, okay, so this is the level of Internet service that you need. (West)

Some participants suggested the CRTC should produce a guide or a self-assessment tool to help people figure out what level of Internet service they need. This would provide objective information from a single trusted source, rather than relying on what different providers say.

I don’t know enough about it to know what I have to look for to make a decision. If CRTC put out a guide on Internet purchases for dummies and it tells you exactly what you needed to look for and what the key things are, because I don’t know. (Sask.)

Ce serait cool si le CRTC pouvait faire une espèce de boussole complètement neutre et ils te posent des questions selon tes besoins pis ça te dirige vers les options selon tes besoins, tes besoins de vitesse de téléchargement et d’utilisation, de data. Ça te mettrait les options selon où tu t’es dirigé dans leur questionnaire. [It would be cool if the CRTC could offer a neutral compass that asks you questions about your needs and points you towards the options that answer your needs, such as the download speed needed and how much data you should look for. This would present you with all the options you have based on what you’ve answered in their questionnaire.] (Quebec)

Un questionnaire neutre du CRTC. Là je pourrais appeler la compagnie et leur dire : « J’ai fait le questionnaire du CRTC et on m’a dit de prendre ça ». Là si tu commences à vouloir me vendre le double pis le triple de ce que j’ai besoin, je vais aller voir ailleurs. [A neutral CRTC questionnaire. With this neutral questionnaire I could call up different providers and tell them “I’ve completed the CRTC questionnaire and they told me that I need this...” So this way, if they are trying to upsell me and doubling, or tripling the price, I will go look elsewhere.] (Quebec)

Terminology that can be misleading (cell phone)

In the cell phone groups, two types of terminology were flagged as being potentially misleading:

- **“Unlimited data”:** Some participants said they did not initially understand that “unlimited data” plans typically come with a speed cap – that is, after a specified amount of data has

been used, subsequent data is downloaded at a slower speed. It was suggested that the meaning of “unlimited data” needs to be more clearly communicated, including the specific speed cap, in order to help people better understand and compare cell phone plans.

- **“Free” or “\$0” phone:** A few participants said it is misleading to describe a phone one is getting as part of a cell phone package as “free” or costing “\$0”, because in fact one is paying for the phone. One participant said they were looking to switch to a different provider and only realized that their phone was not “free” when they tried to switch and found out they still owed money on the phone – and as a result did not switch.

Puis j’ai voulu changer et je me suis rendu compte qu’un téléphone gratuit n’était pas tout à fait gratuit. Il me reste 185 \$ à payer dessus jusqu’au mois de novembre. Mais alors que moi quand je suis allée chez [Magasin] et que j’ai acheté le contrat avec [Entreprise A], on me disait « téléphone gratuit », mais là je suis obligée d’attendre la fin de mon contrat pour pouvoir dire : « OK je vais ailleurs ». [I wanted to switch but I realized that my phone was not really a free phone. I still have \$185 to pay on it until the end of November. So when I went to [Store] and got this contract with [Company A] with a supposedly free phone, I’m now stuck and forced to wait until the end of my contract before I can go elsewhere.] (Quebec)

Deals not always displayed on provider websites – have to call (Internet & cell phone)

Quite a few participants were aware that as a potential new customer one can call a provider (or go to a store) and that one might be offered a special deal or that one can try to negotiate a deal. In this context, some suggested that these deals should be posted on the provider’s website. This would reduce the work involved in researching companies for switching purposes.

The issue that I had with it is that my trust in the information that the website is giving me is not accurate. I don't trust that in fact it is. If you do follow up with a call, and it's been my experience, they'll offer you more or they'll offer you other things or they'll try to incentivize you in other ways. (MOE, Cell phone)

A lot of people told me to phone in to negotiate. I really don't want to do that. I want to go to a website, find out what a service costs and pay for that service at a fair price. I don't want to have to renegotiate every six months with somebody on the phone. (West, Internet)

Accessibility-related information barriers and difficulties (Internet & cell phone)

Getting Information from Provider Websites

Among participants considering switching, it was very common to go to provider websites to get information about what different providers have to offer – more common than calling the providers or going to their stores. However, for people who are blind or deaf, there can be challenges with the accessibility of the information on these websites.

Accessibility for people who are blind: Participants said the structural complexity and volume of information on provider websites can be difficult and time-consuming to navigate using a screen reader. They commented that while some parts of the websites may have accessible design, other parts do not – which led a participant to suggest the CRTC should require compliance with accessibility standards. Because of these difficulties, participants said they would usually have to call providers to get information.

I find it very hard to maneuver around big, large websites because there's so many links and so many tabs, I get lost in it. So generally I call. I'll end up trying to get the basic information that I can get, and then I'll call customer service and speak to them, and go through getting somebody to answer the question.

If I were to go shopping for a new Internet provider, and I call them, they would refer me probably to their webpage with all the different plans and options, and then some of those would probably be difficult to read because all websites are not created equal. Some are more or less accessible for blind persons using screen readers. Using a website is not the same thing as reading an email or a Word document because there are so many headings, links and tabs and so on. A website is a very complex document to navigate with a screen reader.

One participant said the difficulty of getting information was such that they felt it was easier to stay with their current provider than to switch.

Ça devient tellement confus qu'on se tance et on se dit : « Non, j'ai pas de temps à perdre et à niaiser avec ça, je vais prendre ce que j'ai ». [It gets so confusing that you get bored and say to yourself: "No, I don't have time to waste and fool around with this, I'll take what I have".]

One participant added that “accessibility is not usability”: that is, just because a site or webpage has been designed to be compliant with accessibility standards, does not necessarily mean it is usable. Several participants suggested there should be usability testing in addition to applying accessibility standards, and the CRTC should play a role in ensuring this happens.

A lot of companies meet WCAG 2.1. That doesn't mean that you're accessible and usable. That's like saying, I'm the Titanic and I had enough life rafts on the Titanic. There was, but when the ship went down, lots of people died. And it's the same thing with people going well, we're WCAG compliant. Yeah, it doesn't mean as a blind person I can use it because you as an organization haven't taken the next step to make sure that I can get into the life boat and use it.

Accessibility for people who are deaf: People who are deaf do not have the navigational challenges that people who are blind face. Where there can be an issue is with fluency in English or French. Participants noted that some people who are deaf are not fully fluent in either English or French because it is not their first language. For this reason, some participants suggested that provider websites should offer access to information via sign language videos, including suggesting that the CRTC has a role to play to hold providers to do this.

I think they [telecom companies], they feel like, oh, we have English, that's good enough. But having an ASL would actually make it clear for the deaf community. And using ASL as their primary language would be the optimal way to actually get information across. But it seems like we're just not a priority for them.

Instead of having giant swaths of text with numbers galore, I mean, that's easy to get confused. Having videos of that information that actually explain it in a clear accessible format would be more accessible. It's certainly in our language, so to speak, in ASL and would cause more deaf people to pay attention.

Une solution pour le CRTC pour que les sourds puissent mieux communiquer ce serait ... qu'on ait accès à de l'information en langue des signes. Y a beaucoup d'information cachée et quand tu ne peux pas bien lire le français c'est encore plus d'information cachée. [One solution for the CRTC so that the deaf can communicate better would be ... to have access to information in sign language. There is a lot of hidden information and when you can't read French well it's even more hidden information.]

Communication with customer service among people who are deaf

Participants who are deaf described difficulties getting information about provider offerings from customer service representatives, including in-person, on the telephone, and via online chat on websites.

In-person: When dealing with a salesperson at a store, a person who is deaf needs to communicate with the salesperson in writing. Several participants said that sometimes the salesperson is impatient, leading to poor quality communication. Another difficulty with written communication is that some people who are deaf are not completely fluent in English or French because it is not their first language. As a result, a person who is deaf may have difficulty understanding some of what a salesperson is saying, or making themselves understood to the salesperson.

I went through the Internet doing research online and asking friends about it. I couldn't really approach someone in person in a store because there were barriers to communication. So trying to figure out what that means when they're [the salesperson] trying to speak English and I'm sitting there saying, like, I don't understand what's going on, that doesn't really work. So service people have no patience with deaf people. And they'll just sit there, "oh, I have to write everything down, I can't believe I have to do this. There's a big line of people. I don't want to spend all this time, I'm really impatient. I'm in a rush. I have to sell things." It's very stressful, and really not a wonderful communication experience at all, in any way, shape, or form. The attitude is never friendly. And it's never deaf friendly.

They try to call them [on VRS], they hang up, fine, so they decide they'll go into the store. They'll go in in-person and write back and forth, and they get met with this huge attitudinal barrier. So they [salesperson] don't want to, they don't have the patience, they don't have the time to actually write back and forth or to answer their questions. Of course, for most members of the community we would rather call through VRS because we can express ourselves in our primary language. And our first mode of communication is to be able to sign, and that's how we feel 100% comfortable. Not all of us feel comfortable writing back and forth in in English, because it's not our primary language.

Chaque fois que je vais à un kiosque le problème numéro un c'est « l'attitude », l'attitude des employés. L'attitude envers les personnes sourdes, moi je n'ai plus de patience envers ces attitudes-là. Fais ta job, respecte-moi, je viens pour payer! C'est l'attitude qui m'horripile, pour moi c'est vraiment ça, l'attitude des employés. Y a d'autres personnes sourdes qui ont moins de capacités de lecture et d'écriture et qui vont vivre ça encore des questions d'attitude, pis elles sont encore plus limitées et elles se font encore plus rejeter. C'est vraiment ça : l'attitude. [Every time I go to a kiosk the number one problem is "the attitude", the attitude of the employees. The attitude towards deaf people, I no longer have patience with these attitudes. Do your job, respect me, I'm coming to pay! It's the attitude that horrifies me, for me that's really the attitude of the employees. There are other deaf people who have less reading and writing skills and who will still experience this with questions of attitude, and they are even more limited and they are even more rejected. That's what it really is: attitude.]

Participants made a few suggestions to address the issue:

- Stores should provide video remote interpretation (VRI) so that a person who is deaf can communicate with the salesperson using sign language.

There's a lot of miscommunication that goes on in those environments because there's no interpreter present. So if we could have that, if we have someone available on VRI, to say, wait a second, hold on, what does this word mean? What does this mean? Because English isn't everyone's first language. I would say most people don't understand what's being presented to them in written English in terms of those plans.

- Store staff should be trained in how to communicate effectively and respectfully with people who are deaf.

Telephone/VRS: Participants who are deaf said it is a common experience when calling a company using VRS that sometimes the call is refused. When the moderator asked if this was true specifically of telecommunications companies, they said yes. Several suggested the CRTC should do more to make the public aware of VRS, and a few suggested the CRTC should mandate that companies accept VRS calls.

Companies typically pick up the phone and then hang right up because they have no idea what's going on, and think that it's some kind of a robocaller. There's been no education about what VRS is. And so I think that going through the phone in terms of getting services, at least for me, is not really a viable option.

When we try to make a call through VRS, say you're going to call the telecommunications [companies], and they're saying no, it's coming through a third party. They're not always super educated on a call coming through VRS. I would love for the CRTC to start being able to promote this and saying please don't hang up if you're getting a call through VRS. Deaf people have the right to call through VRS, so please don't hang up. We get cut off in this way so often.

Online chat: With respect to using online chat on a provider's website, this can be problematic because of the English/French fluency issue noted above. A few participants who are deaf suggested that companies include the option of online chat using sign language.

There's chat boxes that come up online to help you. There's no option to put in an [ASL] interpreter, the only option is to put everything in in English and to read it and try to figure out what exactly that means, which is immensely frustrating. That's definitely not my preference. I would prefer to have access to that in ASL. That would actually help me understand clearly, because they're two different languages. And so in terms of communication, not having that option is a real struggle, it's a definite barrier.

Access to packages for people who are deaf or blind

A few participants who are either deaf or blind said that finding information about packages/discounts specifically for people with their disability can be difficult: the information can be hard to find on a provider's website, and store staff may not offer – or be aware of – such packages/discounts.

So with [Company A], in my opinion I think that in terms of accessibility it's not in the forefront of their packages. So I think you have to dig deep down to the bottom within the accessibility tab. It's not forefront on the website. So you need to click accessibility. And it's in that tab where you can see the different accessibility plans for everyone. So it's not widely promoted. So it would be nice if that accessibility could be more visible to everyone that touches upon the website. Because again, if the information is there, but it's hidden, and if you don't have the understanding on where to look, then those opportunities are missed for other individuals. So it should be more publicly known and available and out there. And again, this is not only for [Company A], but for all service providers as well. (Participant who is deaf)

There is a discounted rate for the accessibility plan. So if a deaf person goes in [to a store], they can say, I'm using my phone only for these certain things, I would like this accessibility discount. Some people will say, no, we don't have that, we don't offer an accessibility discount, and you'll get into this huge debate with them. That's unacceptable. There is a discount, there is an accessibility plan that's offered and if they refuse to get into it, then we're left with no other choice but to call head office or to call someone higher up to get into it with them. But it needs to start with that, with the frontline staff and making sure that people are trained and well versed in knowing that yes, this plan is offered, there is an accessibility plan. (Participant who is deaf)

Note that several participants said they were aware of only one provider offering an accessibility-related discount.

So far [Company A] is the only one that I found. Other people think you know, policy is deaf people getting a discount, no, that doesn't exist. No, not at all. And trying to argue with them back and forth was just beyond frustrating anywhere I went, they refused to provide any kind of discounts for deaf people. (Participant who is deaf)

C'est comme l'association canadienne des sourds. On m'avait informé de cette information là et écoute. C'était quand même vingt dollars partout. Donc [Entreprise A] avait accepté cette clause. [Entreprise X] Ouf ! Ils ont une tête dure aux autres et on a essayé là. Puis il n'y a rien à faire. [Entreprise Y] ne le veut

pas, les autres aussi. Ils ont la tête dure, ça y ah puis les handicap, les personnes, peu importe le handicap, non, ils ne veulent rien savoir. [The Canadian Association for the Deaf told me about this rebate, it's an extra \$20 off with [Company A], but [Company X] is stubborn, we tried to get it from them and they refused, nothing we can do. Same with [Company Y]. I feel like regardless the disability, they don't want to deal with us.] (Participant who is deaf)

Several participants noted that the features offered in Internet or cell phone packages do not always work for people who are blind or deaf:

- A few participants who are blind commented some plans offer “unlimited photos”, which they said is something people who are blind should not have to pay for.
- Several participants who are deaf said that cell phone plans may offer “unlimited voice calling”, which people who are deaf should not have to pay for. They suggested that a plan tailored to the needs of people who are deaf should instead offer unlimited data because people who are deaf use video calls with sign language rather than voice calls.

A few participants who are deaf raised questions about access to Text with 911 (T9-1-1) in some cell phone plans. They linked access to T9-1-1 to having sufficient data, such that if a person has run out of data, the perception was that the person would not be able to use T9-1-1. They said a cell phone plan for people who are deaf should include access to T9-1-1 regardless of data limits. One of these participants also linked access to public alerts on cell phones to having sufficient data, although it should be noted that this perception may not be correct.

It's important to understand that many of the individuals in the deaf community are on a fixed income. So being able to afford these types of plans is incredibly difficult. Most of the time, they have prepaid plans. And prepaid plans are not sufficient for the deaf-blind community. They cannot text 911, they experience issues with video calling and video freezing through VRS. Very, very quickly they run out of their prepaid allotted amount when making video calls. So if an emergency happens, but a person has run out of their prepaid amount, are they able to text 911? I don't think that they are. So it would be really great to see if these phone companies could figure something out that there could be a special package for deaf individuals. ... And also for public alerts, you know, if there's a fire or a tornado or an earthquake or something like that, they won't receive those public alerts when they have run out of their prepaid amount. So, there's a segment of our community that is lacking communication on events that are very important.

Other comments by one or a few participants about T9-1-1 included:

- It was suggested that once a person has registered for T9-1-1, and the person gets a new phone with the same number, registration should transfer to the new phone along with the phone number.
- Some in the deaf community are not aware of T9-1-1, and so this needs to be better publicized.

Availability of braille invoices

A few participants who are blind commented that it is important to them to receive a braille invoice:

I still like to have it [braille invoice] because if something goes wonky, and they forget to not charge me for a directory assistance call, it's much easier to figure it out if I have the braille bill, than to try and figure it out on a computer bill, because it's much easier for me to read numbers in braille than it (a computer bill). Braille is my first communication language. And although I can understand the numbers on a computer screen, like

audio reading numbers, no. Braille is much safer. Much easier to find what, you know, if there is a problem, I can find it.

One participant said they have had problems getting braille invoices from providers, and said that one provider refused to send a braille invoice. Another participant said they were not sure if smaller providers will provide braille invoices. A few suggested it should be a requirement for all providers to offer the option of receiving braille invoices, and that this option should be clearly communicated because not providing braille invoices could be a reason not to choose a provider.

Reasons for not switching

The barriers and difficulties in getting information discussed in the preceding section add friction to the search process for someone exploring switching providers, and increase the difficulty and time required for this process. The perceived level of difficulty and time can discourage some people from switching. This section describes other reasons for not switching.

Cannot get a lower monthly cost (Internet & cell phone)

Dissatisfaction with the monthly cost of service was one of the reasons participants were less than completely satisfied with their cell phone service (about half the Type 1 participants) or Internet service (about one third). However, quite a few of these participants said the reason they did not switch was because they could not find a meaningfully lower cost plan. There were several dimensions to this reason for not switching:

- Some simply said that the alternatives all cost about the same.

J'ai l'impression d'être dans un cul-de-sac; toutes les options devant moi sont les mêmes. J'ai l'impression qu'il y a juste 4 géants des télécommunications qui s'arrangent entre eux pour déterminer les prix, pis peu importe tu vas vers qui ça revient au même. [I feel like I'm in a dead-end, all the options are the same. I feel like there are only 4 telcom giants and they determine the prices together, so regardless of where you go, it's all the same.] (Quebec, Internet)

I couldn't find a better package in the limited research I did. I looked online. I talked to people at work. Nobody at work seemed to have any better of a deal. (West, Internet)

I went to all of them, all their websites and like for their basic plan for bring your own device was like \$70 for all of them. There was nothing of difference between the major providers. (MOE, Cell phone)

- Some said that while they could find a lower price, the magnitude of the savings was too small to make it worth the effort and risks to switch. This was particularly the case for Internet service, where there is more involved in installing a new system.

I was literally looking at saving, I think, \$5 a month, and just the hassle of having to sit on the phone to try and cancel, with [Company A] for hours, and then make sure someone's home when the new person comes in with the new software or the new bundled stuff, it just wasn't worth it to me. (West, Internet)

I looked at different (cell phone) providers but the reason why I stayed back is, you know, there's not much difference in fees between the providers. It's almost the same. So, I don't think it's worth the hassle of changing providers and your billing information. (MOE, Cell phone)

Coming in as a new person, as a new customer, definitely will give me that discount. But at the same time, is it worth it if I can't be guaranteed that everything is going to work properly even after going through the hassles of switching things, changing password, everything? Is it worth it? (Sask., Internet)

- Some said that instead of going through all the work and uncertainty of exploring alternative providers, they called their current provider and got a better deal, and so lowered the monthly cost that way.
- With regard to smaller service providers, some said these may offer lower prices, but they were concerned that this came with getting less of something, whether it be, for example, Internet service reliability or speed, cell phone connection coverage/reliability, or customer service. Essentially, these participants were saying they could not get a meaningfully lower price for the level of service they wanted.

I considered one of the smaller providers like [Company X] but then I heard bad reviews in terms of losing connection and all that thing. But at the end of the day, it saves 15 bucks and not to actually be able to use your phone the way you'd like it. (MOE, Cell phone)

Y a tellement de petites compagnies pas populaires qui ne font pas beaucoup de pub. Le réseau n'est pas top, les appareils non plus. Des fois c'est des vieux modèles. Vu que ce sont des petites compagnies, ils peuvent offrir des bons forfaits, mais je pense que vu qu'ils ne sont pas connus, les gens sont réticents d'aller vers eux. [There are so many small, unknown companies that don't advertise a lot. Their network isn't great, neither are the devices. Sometimes it's old models. Since they are small companies, they can offer good packages, but I think that since they are not known, people are reluctant to go to them.] (Quebec, Cell phone)

- In the context of not being able to find a meaningfully lower price, some participants complained that there is not enough competition in their area, and that is why there are no meaningful price differences.

If we had more carriers, the prices would come down, because it'd be more competitive. So the more competition you have, they're going to really sharpen their pencils. Instead, right now, we have these few carriers, and they're just playing loosey-goosey all the time and manipulating us all over the place and they don't care really about the customer. (MOE, Cell phone)

- Some participants said that as a new customer they could get a lower price for a period of time, but after the deal expires they will pay more, such that overall it is not worth it to switch. This was why some participants wanted clear disclosure up front from providers of the monthly cost after any time-limited discounts expire.
- In the case of cell phone service, several participants said that one can only get a deal on price if one also buys a cell phone as part of a contract – meaning that if one is not interested in buying a cell phone, it is hard to find a lower monthly price.

So if you buy a phone and get a plan, you get a pretty good deal on a plan, but if you're not ready to buy a phone at that particular point in time, it's tougher to get just a deal on a plan. (MOE, Cell phone)

Cannot get better internet speed/reliability (Internet)

The most common reason participants were not completely satisfied with their Internet service was problems with the speed and/or reliability of Internet service. Among these participants, a significant barrier to switching was not being able to identify an alternative provider that would be any better than their current provider in terms of service reliability. This impression was typically

based on talking with people using other providers, and hearing that they too have Internet service issues.

In this context, some further commented that it would not be worth switching to end up experiencing the same sorts of reliability issues even if there is a small savings on cost, and particularly given the amount of work that can be involved in setting up a new home Internet service.

I talked to friends. You know, we don't have a lot of options with the Internet of different providers and everybody seemed to be complaining about their providers. So, it seemed no one was better. (West)

I'll talk to other people who have [Company X] and ask what their experiences are. Typically I don't get a response that makes me confident enough that it's worth changing. It seems like often times they have a lot of the same issues. My concern is I'll go through all of this, and the service isn't going to be any better. I could go to [Company X] and probably as a new customer pay less for two years. But I don't think my service would be any better. Then it's not worth it. So you might as well just save yourself a day in returning equipment and doing all those things unless you're really committed just to saving whatever. (Sask.)

Ma mère vit à deux minutes de chez nous et elle faisait affaire avec [Société A] et elle est allée avec [Société X], et le service n'est pas meilleur. Elle a les mêmes problèmes avec l'Internet qui plante. J'ai pas cherché à aller plus loin. Je suis resté avec la même compagnie. Si je suis pour avoir le même service je ne vais pas déranger les choses pour rien. [My mom who lives 2 minutes away from me was with [Company A] before and she switched to [Company X] but the service is not any better, she is having the same issues with the Internet dropping as before, so I didn't look any further – I'd rather stay with the same company. If I'm going to have the same level of service, I'd rather not put in the effort to switch]. (Quebec)

For some participants, the barrier was that the other providers in their area only offered slower Internet speeds than they wanted. This typically was because they were with the only provider in their area with a fibre optic service, and the others could only offer slower connections.

I was hoping to get better performance more than anything because I know that if I moved, I could get a better price. But unfortunately, I guess I feel trapped, paying more for the service that I do have, because I think if I go anywhere else, the performance will be even worse than what I've seen. We're on fibre optic, so I know that although I'm not always happy with the service that we have, it is I think far better than anything that we would move to because we would have to go back to whatever the non-fibre optic option is. So, that's one of the reasons we haven't moved. It's been horrific but I don't know that there's a better alternative. (West)

Nous on a considéré changer mais on n'a pas changé parce que le seul Internet potable et rapide qui se rend jusqu'à chez moi dans [notre quartier] à Montréal c'est [Entreprise A avec fibre optique]. Sinon je suis restreinte à [Entreprise X] 25 Mo comme deuxième choix et ce n'est vraiment pas assez rapide. Avec mon train de vie y a un seul fournisseur disponible. [We considered switching but we didn't since the only acceptable high speed Internet in [our neighbourhood] in Montreal is [Company A with fibre optic]. Otherwise, my second choice is [Company X] at 25mb, which is really not fast enough. With my lifestyle, I only have one provider available.] (Quebec)

There was some discussion about the possibility of switching to a smaller ISP. It should be noted that most of the participants used one of the major ISPs (defined here as Bell, Cogeco, Rogers, SaskTel, Shaw, TELUS, or Videotron; note also that the secondary brands of the major ISPs are treated here as “smaller” ISPs given that not everyone is aware who owns these companies). Most

participants were reluctant to switch to a smaller ISP, primarily because of concerns over reliability of Internet service. The concern over reliability was expressed in two ways:

- There is concern that the Internet performance would be less reliable from smaller ISPs.

I live in the province of Nova Scotia, and there's two major companies and a bunch of small ones. And then with the two major ones, they have a tendency to strike at a low price and jack the price up gradually. And then small guys, keep the prices small, but their reliability is not good. So, that's the dilemma. (MOE)

I would love to deal with the smaller company just because I see them as going to the bat for the little guy, so to speak. On the other hand, I hear rumblings that because, let's face it, they are reseller services, and you always hear these rumblings that the resellers are not treated fairly. They're not prioritized. Their customers don't get equal treatment on the same networks. So, that has me concerned about reliability. (MOE)

I'm not aware of any [small ISPs] off the top of my head right now but I would definitely be suspicious about them just because I rely on the Internet to work. So the reliability -- will they be reliable? Will there be issues? Am I going to have super slow Internet? Is it going to cut out? I think when you're using a smaller company like that, there's just more issues like that, or maybe not even issues, you're just more fearful of that happening than if you're with a bigger provider, like [major Company X] or [major Company Y] in the area, where you know that they've got the majority of the marketplace as it is. (West)

J'ai pas fait de recherches parce que j'aurais peur d'aller dans des plus petites compagnies. [Grande Entreprise X, grande Entreprise Y] plus connu et plus commun, tandis que les autres petites compagnies (Ex. : petite Entreprise Z) je ne connais pas personne qui a ça. Je ne peux pas interagir pour savoir si c'est fiable. [I didn't look into it because I would be afraid to go with smaller companies. [Major Company X, major Company Y], better known and more common, while the other small companies (Ex.: small Company Z) I don't know anyone who has that. I cannot ask people to know if it is reliable.] (Quebec)

- There is concern that customer technical support from smaller ISPs would be worse – which would result in a potentially less reliable service.

A company that is much smaller and doesn't have the same sort of resources in terms of customer service, or can't provide the same sort of technical support. I think that that would be problematic. If I need to get in touch with someone from technical support, it has to be from a company that actually has the resources to do that. So that would be the concern with going to something else. (Participant who is deaf)

C'est juste de trouver celui avec le meilleur prix, mais en même temps celui avec le meilleur prix a un moins bon service à la clientèle. Pour moi le service à la clientèle c'est quelque chose d'important. Les autres petites compagnies (Ex. : petite Entreprise X, petite Entreprise Y) y a aucun numéro où tu peux appeler. [It's just finding the one with the best price, but at the same time the one with the best price has worse customer service. For me, customer service is important. The other small companies (Ex.: small Company X, small Company Y) have no number where you can call.] (Quebec)

The following concerns about switching to a small ISP were each mentioned by several participants:

- Smaller ISPs may only offer slower Internet speeds.
- Some of the smaller ISPs are owned by a major ISP, and would therefore experience the same Internet reliability issues as the major ISP.

Bundle-related barriers to switching (Internet & cell phone)

A majority of Internet participants said their Internet service was part of a bundle, and about a third of cell phone participants said their cell phone service was part of a bundle. Note that there are two other bundle-related barriers that are discussed in other sections of the report:

- Impact of a cell phone contract, which is a part of some bundles.
- Impact of bundles on comparing the service offerings of different service providers.

The value of buying services in a bundle is paying a lower total price compared to buying each service separately. There were several ways in which having Internet or cell phone service in bundle with other services could discourage switching:

- Some participants said they did not switch because that would break up the bundle, resulting in a higher overall cost when taking into account the other services.

My cell phone bill is a little bit cheaper because of having it bundled together, so then if I remove that my cell phone bill is going to go up a bit. So you know, factoring in all those costs, is it really worth it? (West)

We bundled and have TV and PVR with them. So, whenever I talk to them about splitting it off, it just becomes a ridiculous price and I get kind of overwhelmed with trying to figure out how to split it up. (MOE)

If I switch my cell phones then I lose that bundle discount for the Internet. So, it definitely is an issue. (MOE)

Probably, the reason that I've not moved is, well, a couple of things. One is we looked at dropping our landline because we don't use it, and by unbundling I would actually have to pay more per month than I was paying. So, we just keep the phone, type of phone number, but nobody uses it. (West)

So, I'm happy with let's say, my landline service, which I need and it's bundled with incentives. If I sever that bundle, I'll be paying more for that landline service. So, it wouldn't be cost-effective to change just for one of the services, I'd have to change everything. The investment in time there just sometimes makes it not worth it. (MOE)

- Some participants said that while they were not entirely satisfied with their Internet or cell phone service, they were satisfied with other components of the bundle and therefore decided not to switch. In this case, it appeared satisfaction with a TV component of the bundle was key, in two respects: (1) satisfaction with the current channel options, whereas other providers may offer somewhat different channel options; (2) it may be somewhat difficult to learn a new system of navigating the channel system.

My mom lives with me. I have a bundle with [Company A] right now - Internet and telephone. And she's already familiar with the channel system that [Company A] is providing. If I'll have to switch a service provider, she would have to relearn it, basically reprogram all the new channel systems, which will be a huge inconvenience for her. (West)

My TV is bundled with my Internet. So, we're on [Company A], and I didn't want to have to learn the new channels. Also with [Company A], I can talk to my remote and it'll go to whatever channel I tell it to. And, when I inquired with [Company X] they didn't have that. So, I was literally looking at saving, I think \$5 a month, and just the hassle of having to sit on the phone to try and cancel... it just wasn't worth it to me. (West)

- Several participants said it can be hard to find a bundle from another provider that on balance is as good as or better than what they have now. One participant commented, for example, that some smaller providers, while offering lower prices, do not offer complete

bundles so one would end up paying more overall for the various services in the current bundle.

You know, you look at it, the phone service might be a little bit better, but then the Internet's worse and if you go for the better Internet, then your TV package isn't as good. (West)

Cost of breaking a cell phone purchase contract

Among the cell phone participants, about a third had not switched in the past year because they had purchased a cell phone on contract, and were waiting until the end of the contract period before switching in order not to have to pay the cancellation cost of the remaining amount owing on the phone. They felt that the cancellation cost would substantially exceed any savings they might get by switching to a different provider. In this context:

- Some commented that they needed to buy a cell phone in this way, because it was the only way they could afford to buy the type of cell phone they wanted.
- Several suggested the CRTC somehow “get rid of” contracts or reduce contract obligations, but did not explain how this might be done.
- A few participants commented they would switch if a new provider would offer to buy out their contract, but they did not know of a provider that would do this.

It will be next February when my phone's paid off. And at which point I probably will go in and get my lower bill, switch my plan, do all the things. So the cost to get out of it would be the remaining balance on my phone. [Probe – a barrier?] Yeah. And I can't afford “bring your own device” because I don't have \$1,400 lying around. (MOE)

My contract is ending in the middle of August, so that's my turnaround time. So it's almost like I started doing research, but then I was like, it's kind of pointless, because things change all the time, and so you've got to do that research right at the last moment, and just hope that you're going to get the best deal possible with the most recent phone or whatever you can get. (Sask.)

Tu peux avoir le meilleur téléphone du monde mais tu vas le payer ton meilleur téléphone du monde. Si à moitié parcouru t'es tannée, tu vas te retrouver avec une grosse facture. [You can have the best phone in the world but you will pay for your best phone in the world. If you're fed up halfway through, you'll end up with a huge bill.] (Quebec)

Cannot get better cell phone connectivity

Among cell phone participants, about a third were not completely satisfied because of connectivity issues such as dropped calls or poor signal strength in rural areas. In this regard, some participants did not switch because they did not believe there was any other provider with better connectivity. This was particularly the case with some Saskatchewan participants, who felt there was only one company available to them that met their needs.

I'm currently with [Company A] a Saskatchewan-based company and they typically have most of the towers. They've monopolized that and they contract those out to [Company X], [Company Y], whoever else in our area. I know that [Company A] has the coverage. I know that the other companies use the same towers. But what I don't know is if those other companies have actually put up towers in rural areas of Saskatchewan. So I would probably end up getting some coverage, but to actually look at their coverage map and go, okay, I'm here. How accurate is that really? I don't want to take that chance. (Sask.)

If you want the best coverage you can get in Saskatchewan, [Company A] is the one to go because [Company X] and [Company Y] and [Company Z] aren't providing coverage to smaller areas. The further away you go from the major urban areas, the less coverage you get with the big three. (Sask.)

The quality of the network is really important. How many dropped calls? How poor the call quality is? All of that. I think it's so much more important. I mean, now everybody uses their phones for everything. And so for me, the network, [Company A], like, even when I had those dead zones, I still would not change. There is no reason for me to think that the other networks would be any better. (MOE)

With regard to cell phone connectivity in rural areas, several participants commented that in their experience, the coverage maps available from providers are inaccurate, and therefore they do not feel they can trust these to identify a provider with better coverage.

Yeah, I have seen maps and it's just tricky when they say that I'm in the green zone and you're just obviously clearly not getting a signal. So, I'd say I would rather trust word-of-mouth in terms of getting that information. (Sask.)

There's a tower two kilometres from us and I have spots in my house. I've had to go for a drive to be able to use my phone. So, I don't necessarily trust the map. And also the lakes that we go to says it's in the green zone too. We went to a lake and] my friend's phone went off with a tornado warning, a take shelter warning, and mine didn't. That would have been information that's useful. After that, I didn't look at a map again. (Sask.)

Loss of ISP email address

Some participants (about a quarter of the Internet participants) did not want to switch because they used an email address linked to their ISP. Typically they had been using this email address for quite a few years, and the email address was associated with a variety of services. They said switching to a different email would therefore be a lot of work, involving identifying all the services that use the ISP email address and then changing them to a different email address.

My wife and I use an [ISP] email address as our primary email. I've got Gmail and all the rest of it. I learned a lesson – when I eventually switch, I will never use a company-provided email, because Google's perfectly fine or Yahoo or whatever. So, we didn't switch because we didn't want the hassle of switching everything. (MOE)

My husband and I actually share our [ISP] email address, because that has to do with our kids. It's connected to the kids' school, kids' sports, all of our banking, everything that's shared is all connected to that email address. I was like no, I'm not willing to go and spend the next year in my life trying to change over everything to a new email address. (MOE)

Some volunteered that they also had non-ISP email addresses that would not be affected by a switch to a different ISP, but the fact remained that these were secondary addresses. A few participants said they were in the process of moving their various services to a non-ISP email in preparation for switching at some later date.

A few participants suggested that ISPs should offer a very low cost option to maintain an email address for customers who switch to a different ISP. They said they actually asked their ISP about this, but were told no such option exists.

Ça fait une dizaine d'années que je suis pogné avec mon adresse [avec l'entreprise A]. J'ai demandé si on pouvait avoir un service de transfert de courriel (Ex. : comme on fait avec le service postal pendant un an), mais y ne font pas ça ; y faut que tu prennes un forfait minimum Internet autour de 30 \$ par mois pour garder ton adresse active sur leur serveur. [It's been over 10 years that I've been stuck with my email address [with Company A]. I inquired to see if they offered a service to transfer your email, something similar to what Canada Post offers when you move and they relay your mail, but I was told that it doesn't exist. I would need to pay for the minimum Internet plan at \$30 per month so they could host my email server.] (Quebec)

When I left [Company A] a while ago, what I asked them if there was any way for me to spend like five bucks a month or something to keep it active. I think that if companies did that, if they would just charge someone a nominal fee to keep an email address active, it's no skin off their nose really. It's not going through their servers anymore in terms of Internet bandwidth, they're just hosting it. And I think that's a barrier, is having to change your email address. If they could leave that email address active, even if it were just for six months, or whatever. (Participant who is blind)

Switching is “too much work” (Internet & cell Phone)

Some participants said they have not switched, despite being less than completely satisfied, because of the amount of work involved. This was more of an issue among Internet participants because of the added step of getting and installing equipment, but it was also a reason cited by some cell phone participants. This led some to focus instead on contacting their current provider and negotiating a better deal.

The “too much work” rationale should be viewed in the context of the other barriers to switching. The impression from everything participants had to say is that it can be “too much work” in the context of:

- It can be hard/take a lot of time to research and compare alternative providers.
- Getting the best price may require calling and negotiating with providers.
- In the end, one may not get a meaningfully lower monthly cost.
- In the case of Internet reliability issues, it may not be clear if other providers are better.
- In the case of issues with cell phone signal strength/coverage, it may not be clear if other providers are better.
- Cancelling with the current provider can be a hassle because they try to convince you to stay.

The point here is that if it was easier to switch on the various dimensions above, then the issue of “too much work” would likely be less of a factor.

So, I was literally looking at saving, I think, \$5 a month, and just the hassle of having to sit on the phone to try and cancel, with [Company A] for hours, and then make sure someone's home when the new person comes in with the new software or the new bundled stuff, it just wasn't worth it to me. (West, Internet)

It just seems so complicated and overwhelming when I tried to do the research on it. We did switch once ... it was a lot of hassle and now every time I think about changing, I'm like, do I really want to do this again and how do I make a decision? This was between the two major ones. I think there are some other companies but I'm finding it a little bit overwhelming on the Internet to try and figure it all out. (Sask., Internet)

You just don't want to give up that time for something you're going to find annoying or a hindrance to do. I think everybody can agree with that you would rather spend your time doing something else. If you don't have a certainty of what you're going to get in return — like I said, everybody's going to have issues with the Internet. So you want to go through all that for something you're not certain about? (Sask., Internet)

It just became too overwhelming to try and figure out which plan is better. You can't compare. Then, you know, if you're on a contract, you're signing something for two years. It's not like, well, I'm just going to use this for 24 hours, what does it matter? So that's a big commitment, right? You don't want to discover that they really sucked me in and now I'm stuck for two years. So, in my head, it's something that you really need to look into. And, it takes too much brain power and too much energy, because you can't compare companies and prices. (Sask., Cell phone)

On a aucune garantie que les choses s'amélioreront. Ça va prendre une demi journée d'appeler le fournisseur pour lui demander ce qu'il offre, quel est le prix, ensuite de choisir un autre, pis là ensuite on ouvre le dossier. On pose les multiples questions de base. Ensuite, certains vont faire une recherche de crédit et on peut passer de longues heures au téléphone avant que tout soit complètement réglé et fonctionnel avec notre téléphone. [There is no guarantee that things will improve. It will take half a day to call the provider to ask them what they offer, what is the price, then to choose another, and then they open the file. Many basic questions are asked. Then, some will do a credit search and we can spend long hours on the phone before everything is completely settled and functional with our phone.] (Quebec, Cell phone)

Cell phone number portability

When switching to a different cell phone service provider, one can keep one's cell phone number and transfer it to the new provider – this is called “number portability.” When asked about this, almost all participants were aware of this, so for them this was not a barrier to switching. However, there was a small number who were not aware of this, and for whom it was a barrier to switching. This indicates there is still some work to do to make sure people are aware of number portability.

Y faut prendre en compte la complexité de changer de fournisseur. J'ai le même numéro de téléphone depuis 18 ans; c'est important que mon numéro de téléphone reste le même. Je pense que ça joue dans la balance. [You have to take into account the complexity of changing providers. I have had the same phone number for 18 years; it is important that my phone number remains the same. I think that plays into the balance.] (Quebec)

Other reasons for not switching

Quality tech support (Internet & cell phone): A few Type 1 participants were particularly interested in getting good technical support, but did not think there was any alternative provider that offered better technical support.

Accessibility-related – Access to tech support (Internet & cell phone): For some participants who are deaf or blind, the availability of tech support adapted to their needs would be a consideration in switching.

- One participant who is blind noted that their current company (Internet and cell phone service) has an accessibility help line, but believes no other company does. They said being able to talk with someone who understands the needs of a person who is blind is very helpful, and this would be a factor in whether to switch to another provider.

One of the reasons I stick with [Company A] is they have an accessibility helpline. None of the others have one. If they do, it's not easy to find on their website. But I've had some issues with my cell phone and billing and different things, and every now and then something doesn't go right, or the bill isn't right. And instead of calling customer service, I call the accessibility help line and they've helped because they understand what's going on, and they've been trained. And just that alone, that little help piece alone, makes it really hard for me to determine if I'm going to change. Especially cell service, or Internet. So the service, and just being able to get somebody that understands how to deal with a blind person is important.

- With regard to installation and in-home servicing of Internet equipment, having suitable tech support can be important. Two participants who are blind noted that it is important to be able to have someone come and do the installation or repairs, and noted that they believe many providers do not make this type of support available to people who are blind.

A participant who is deaf said they knew of a person who is deaf who switched to a different ISP because the company was not sensitive to the person's needs as a person who is deaf (the repair person was supposed to text when they arrived, but instead knocked – which the person didn't hear, and this happened twice in a row).

Some of the questions I've asked is, is there somebody there that's going to come and install this stuff, that knows how to set up the system so that a blind person can use it? And nine times out of 10, the answer is no. No, they don't have anybody there that's trained in accessibility, or how to set up the remote control or the set top box so that a blind person could use it. (Participant who is blind)

J'ai eu un service un peu particulier qui n'existait pas ailleurs; quand j'ai eu à faire des installations à la maison – normalement on vous envoie le modem par la poste et c'est à vous de le brancher et de faire la configuration – pis quand moi j'ai dit à [Entreprise A] que j'étais aveugle pis que ça allait être ben compliqué, on m'a dit : « On vous envoie un technicien, quand êtes- vous disponible? » Ils m'ont envoyé un technicien qui m'a fait la configuration; y a tout fait ça. Ça n'existe pas dans toutes les compagnies ça. C'était surtout par rapport à mon handicap et c'est pas général. [I received a somewhat special service that did not exist elsewhere. When I needed in-home installations - normally they send you the modem by post and it's up to you to plug it in and configure it - and when I told [Company A] that I was blind and it was going to be very complicated, I was told: "We're sending you a technician, when are you available?" They sent me a technician who configured it for me. That doesn't exist in all companies. It was mainly in relation to my disability and it is not general. (Participant who is blind)]

Waiting for a sale (cell phone): Several participants said they planned to switch cell phone provider, but were waiting for one of the times when there are typically sales – for example, Black Friday or Boxing Day sales.

Participant Suggestions for the CRTC

At the end of each discussion session, participants were asked if they had any suggestions for the CRTC. Some of these suggestions were noted earlier in the report. Briefly, the CRTC should:

- Provide comparative information on what different Internet and cell phone service providers offer.
- Mandate some standardized packages for Internet and cell phone service in order to help consumers compare providers on price.
- Mandate prominent disclosure of the total monthly billing amount for Internet and cell phone plans, and disclosure of the monthly cost after the expiry of any discounts.
- Produce a guide or self-assessment tool to help people figure out what level of Internet service they need.
- Require compliance with accessibility standards for Internet and cell phone service providers' websites, and play a role in ensuring there is usability testing of these websites for people who are blind.
- Do more to make the public aware of VRS calls so that these calls are not refused, and require telecommunications companies to accept VRS calls.
- Encourage Internet and cell phone service providers to provide information on their websites using sign language videos.

The most common types of suggestions related to the price of Internet or cell phone service:

- Some participants suggested the CRTC needs to do more increase competition in the Internet and cell phone sectors. This includes several participants each who suggested (a) foreign-based providers should be allowed to enter the Canadian market; or (b) large companies should be blocked from taking over smaller companies. The primary rationale for these suggestions was to lower prices.

More competition would be nice. Maybe the prices would go down. I don't know if there is some kind of a lock or a block on how many companies there can be. When I read on the news that Canada has the highest cell phone prices in the world and the highest Internet prices in the world, I'm sort of like why? Is it because of lack of competition? I know the product isn't any better probably than other places. So why are my prices the highest? (Sask., Internet)

Les petites compagnies se servent des réseaux. Dans le futur on va se retrouver un peu comme avec les marques de laveuses où y a juste deux grosses compagnies qui font toutes les appareils. C'est ça que j'espère que le CRTC va réglementer pour permettre aux petits joueurs de ne pas se faire avaler par les gros et de pouvoir prendre leur place. [Smaller companies are using the same network as the big ones. In the future, we will be faced with the same reality as with appliances, where it's only two huge companies that builds all the various appliances. That's why I hope that the CRTC will allow the smaller players to take their share and not be swallowed by the larger ones.] (Quebec, Internet)

I think that they need to set things up so that there is way more competition. I know that the CRTC has been talking about this for years. I'm convinced that the big carriers have way too much influence at the government level and nothing moves forward like they need to. They [CRTC] need to do something. There's always just talk about making changes, but it just doesn't seem to happen. So, competition, creating an environment where there's more competition to me is what needs to happen. (MOE, Cell phone)

Permettre l'introduction de nouvelles cibles internationale et nouveaux compétiteurs et limiter les achats actuels qui vient réduire l'offre. [Allow the introduction of new international companies and new competitors and limit current take-overs which reduces supply.] (Quebec, Cell phone)

- Some participants suggested the CRTC somehow regulate prices for Internet and cell phone services, with the goal of lowering prices. In the case of cell phone service, this suggestion was particularly motivated by the perception that cell phone service costs in Canada are among the highest in the world.

I just think they should break the monopoly on the pricing for all these companies. I really think they need to address the increasing pricing for people that has become less and less affordable for a regular Canadian. The cost of living, it's just gone skyrocketing, and so has the Internet. It's just become unbearable for a lot of people to pay those Internet bills each month. So, there's something wrong there. I don't think the price for the Internet currently represents the actual value of the service, I really don't think it's worth what we're paying. They need to break the pricing of all these major players of Internet companies within Canada. Get them all together at a roundtable and discuss together what they can do to make it more affordable for the normal Canadians struggling to pay their bills right now. (MOE, Internet)

J'ai l'impression qu'on traite encore la notion d'Internet/haute vitesse comme un « luxe », alors que nous, on ne peut pas travailler sans ça. D'avoir une réglementation au niveau des prix parce que l'Internet est devenu de nos jours presque un besoin primaire. Ce n'est plus un luxe. [I have the impression that we still treat the notion of Internet/high speed as a "luxury", whereas we can't work without it. To have price regulation because the Internet has become almost a primary need these days. It is no longer a luxury.] (Quebec, Internet)

Compare some cell phone rates from US providers and other providers around the world, and regulate how much they can actually charge. So, as Canadians, we're not faced with the highest cell phone charges

in the world because there's no competition. So, facilitate ceilings based on what other countries have to pay, with more competition. (MOE, Cell phone)

Lower the cost in Canada, we're the highest in the world, lower the cost. It's ridiculous. (Sask., Cell phone)

- Several participants suggested the CRTC explain why cell phone and Internet service prices are so high in Canada compared to the rest of the world, or explain what factors affect the cost of these services.

Related to the general suggestion to increase competition, several participants suggested the CRTC should ensure that there is more than one Internet service provider in smaller communities and rural areas, and that high speed service should be available in these areas.

With regard to cell phone service, several participants suggested the CRTC should ensure providers have good geographic coverage. This included one participant who suggested the CRTC should validate the accuracy of coverage maps on provider websites. A few made the point that cell phones have become an essential service, and therefore good geographic coverage is essential.

But also the coverage problems. I go to other countries, you don't have the coverage problems. Yes, Canada's a large country, we get it, but it's always been a large country. So, I definitely think there needs to be a little bit more regulation around coverage. It is a basic right that if you're providing a service, then actually provide the service and make sure that coverage is actually accessible. (MOE)

I think we need more towers, we need service. It's 2023, we cannot go camping with kids and not have cellular service. We're in a digital world, and if we can't get Internet, we have to be able to get a mobile connection. So, we rely on cell phones and probably all of us on this call don't even have a landline. (Sask.)

Why would a [coverage] map be published if they haven't okayed it? If there's something being published that they haven't approved, then they don't have the influence that they need to have. (Sask.)

Several suggestions related to contracts, each mentioned by one or a few participants:

- Do not allow providers to raise prices during the term of a contract.
- The invoice for a contracted service should show how much is still owing if the subscriber were to cancel. This would be useful information for someone considering switching to a different provider.
- Somehow reduce the use of cell phone contracts or make it easier/less costly to get out of a contract.

Everybody seems to be having the same issue with two-year contracts that we were having with three-year contracts. We're still roped into them. You still have to pay an exorbitant amount of money to get out of this contract. So I get that the money is what it is, but you're still trapping people into a contract that they clearly are unhappy with, with very little way out. (Sask., Cell phone)

- Contracts should have an "out" clause such that if a person is not satisfied with the service they can cancel the contract without any penalty.

I want a flexibility clause included, if I'm not pleased with your service, maybe for a certain number of months, then I have the right to cancel that contract without penalty. If I'm not satisfied with a service, I can call your attention to it twice or three times, make a call to your customer service. I'm not pleased, you've done all you could, but yet I'm not satisfied, then I have the right to cancel that contract without paying any penalty for the remaining number of months. (Sask., Cell phone)

Other participant suggestions, each mentioned by one or a few participants, included:

- Standardize the terminology and layout of invoices to make it easier for people interested in switching to compare their invoice to other people's invoices.
- Require that Internet equipment be interoperable across ISPs, so that if a person owns their equipment, they do not have to pay for new equipment when switching to a different ISP.
- Have standards for speed claims that state a service provides speeds "up to" a certain speed. Specifically, the standard should state a lower bound on what speed range a person can expect.
- Provide lists of the service providers available in each area – for example, one participant suggested an online tool where one could enter one's postal code and get a list of service providers in that area.
- Provide a way for consumers to lodge complaints about service providers with the CRTC; these participants were not aware that this is already possible.
- State the rights that consumers have in the event of disputes with a service provider, and if applicable, how the CRTC can help in disputes.
- Do surveys on customer satisfaction with service providers and publish an annual ranking of performance.
- Check the quality of customer service provided to potential new customers, for example by doing mystery shopping.

The following were additional accessibility-related suggestions for the CRTC. Each was mentioned by one or a few participants.

Participants who are deaf:

- Require cell phone and Internet service providers to offer plans specifically for people who are deaf. Such plans would exclude features not relevant to a person who is deaf (e.g. unlimited voice calling), include unlimited data because of the importance of video calls for the deaf community, and have a discounted price in order for the package to be affordable for lower income members of the deaf community.

Ca coute cher parce qu'il y a les forfaits ça inclut « voix illimitée » mais nous on aimerait ça avoir des forfaits pas de voix pis ça nous coûterait pas mal moins cher. Mais nous ce serait pas « voix illimitée » ce serait « données illimitées pour toutes les personnes sourdes » ça nous prend ça parce que c'est l'équivalent des entendants. [It's expensive because there are packages that include "unlimited voice" but we would like to have no voice packages and it would cost us a lot less. But for us it wouldn't be "unlimited voice" it would be "unlimited data for all deaf people" we take that because it's the equivalent of hearing people.]

Si je peux donner un exemple; un 60 dollars par mois par exemple pour une forfait Internet illimité, je pense que ce serait un tarif qui serait relativement raisonnable, parce que là on aurait accès à tout : SRV, on pourrait jaser avec nos amis. Ce serait l'équivalent de « voix illimitée », mais c'est « vidéo illimité ». [If I can give an example; \$60 per month for example for an unlimited Internet plan, I think that would be a rate that would be relatively reasonable, because there we would have access to everything: VRS, we could chat with our friends. It would be the equivalent of "unlimited voice", but it is "unlimited video".]

- Set up a committee including people from the deaf community to advise on accessibility.

Participants who are blind:

- Require service providers to make documentation and invoices available in an accessible format, such as braille.

Methodology

Number, location and composition of discussions

The research consisted of the following components:

- Type 1 participants – Chose not to switch: Six online video focus groups were conducted with home Internet users (one West, one Manitoba/Ontario/East, two Saskatchewan, two Quebec), and six with wireless users (two Manitoba/Ontario/East, two Saskatchewan, two Quebec). A total of 103 individuals participated in the research, 51 home Internet users and 52 wireless users. The sessions lasted two hours.
- Type 2 participants – deaf and use sign language: Three online video sessions were conducted with six participants who are deaf and use sign language (four ASL users, two LSQ users). The sessions lasted between 90 minutes and two hours. There were two sign-language interpreters for each session.
- Type 3 participants – blind: Four online audio sessions were conducted with five participants who are blind (three English-speaking, two French-speaking). The sessions lasted between 60 minutes and two hours.

The fieldwork was conducted between May 25 and July 17, 2023.

The following summarizes the number of participants by type along several dimensions, including demographic characteristics and information collected during the screening process about participants' satisfaction level with service providers and their interaction with service providers.

Demographics: Type 1 *Chose not to switch*

	Total number of participants	Wireless number of participants	Home Internet number of participants
<i>Region</i>			
Manitoba/Ontario/Atlantic Canada	27	17	10
Manitoba	6	4	2
Ontario	14	9	5
Atlantic	7	4	3
Saskatchewan	31	16	15
West	9	0	9
Alberta	4	0	4
British Columbia	5	0	5

Quebec	36	18	18
Community Size			
Large city/suburb near a large city	71	36	35
Small city/town/village not near a large city	21	7	14
Rural area	11	8	3
Gender			
Male	41	21	20
Female	61	29	32
Other	1	1	0
Age			
18-34 years	25	14	11
35-64 years	51	25	26
65 years and over	27	12	15

Note: For Type 1 participants, we aimed for a mix by province, community size, gender and age:

- Manitoba/Ontario/East: At least one recruit out of 10 from Manitoba, at least three recruits from Ontario, and at least two recruits from Atlantic Canada. West: At least three recruits out of 10 from British Columbia and at least three from Alberta.
- A mix on community size, with at least three recruits out of 10 total who live outside major urban centres.
- A mix on gender, including at least three women and three men.
- A mix on age, including at least two recruits out of 10 total who are 65 years of age or older.

Type 1 Chose not to switch

	Total number of participants	Wireless number of participants	Home Internet number of participants
<i>Satisfaction with service provider</i>			
Very satisfied	0	0	0
Satisfied	8	3	5
Somewhat dissatisfied	83	41	42
Very dissatisfied	12	7	5
<i>Considered switching</i>			
Yes	102	51	51
No	1	0	1
<i>Actions taken (multiple actions were taken by participants)</i>			
Talked to other people about their experiences/suggestions	91	47	44
Looked online for what other service providers offer	85	39	46
Contacted other service providers for information	48	23	25
<i>Made a complaint to service provider, or to a government</i>			

<i>regulator, or to another organization</i>			
Yes	41	13	28
No	62	38	24

Demographics: Type 2 (deaf and use sign-language) and Type 3 (blind) participants

	Total number of Type 2 and 3 participants	Number of Type 2 participants	Number of Type 3 participants
<i>Region</i>			
Manitoba/Ontario/Atlantic Canada	3	2	1
Manitoba	0	0	0
Ontario	2	1	1
Atlantic	1	1	0
Saskatchewan	1	0	1
West	2	2	0
Alberta	1	1	0
British Columbia	1	1	0
Quebec	5	2	3
<i>Community size</i>			
Large city/suburb near a large city	9	5	4
Small city/town/village not near a large city	1	0	1
Rural area	1	1	0
<i>Gender</i>			
Male	7	4	3
Female	4	2	2
Other	0	0	0
<i>Age</i>			
18-34 years	0	0	0
35-64 years	8	6	2
65 years and over	3	0	3

Type 2 (deaf and use sign-language) and Type 3 (blind) Participants

	Total number of Type 2 and 3 participants	Number of Type 2 participants	Number of Type 3 participants
<i>Switched home Internet service provider in past year</i>			
Yes	0-	0	0
No	11	6	5
<i>Satisfaction with home Internet service provider</i>			
Very satisfied	5	1	4
Satisfied	2	1	1
Somewhat dissatisfied	4	4	0
Very dissatisfied	0	0	0

Considered switching home Internet service provider			
Yes	3	3	0
No	1	1	0
Not applicable, that is, either switched service provider in the past year or was very satisfied or satisfied with their current service provider	7	2	5
Made a complaint to home Internet service provider, or to a government regulator, or to another organization			
Yes	2	2	0
No	9	4	5
Switched wireless service provider in past year			
Yes	2	2	0
No	9	4	5
Satisfaction with wireless service provider			
Very satisfied	4	1	3
Satisfied	2	1	1
Somewhat dissatisfied	4	3	1
Very dissatisfied	1	1	0
Considered switching wireless service provider			
Yes	3	2	1
No	1	1	0
Not applicable, that is, either switched service provider in the past year or was very satisfied or satisfied with their current service provider	7	3	4
Made a complaint to wireless service provider, or to a government regulator, or to another organization			
Yes	3	2	1
No	8	4	4

Qualified participants

The following details the qualifications for each type of participant.

Type 1 Chose not to switch

In each group type (home Internet or wireless), a qualified participant met the following criteria:

- 18 years of age and over

- Has a cell phone or home Internet service in their own name, or if not the subscriber would be involved in any decision to switch to another wireless or home Internet service provider.
- Had chosen not to switch their service provider in the past year. To meet this criterion, a person had to meet at least one of the following three conditions: (1) less than satisfied with the service, (2) considered switching to a different service provider in the past year but did not switch, or (3) made a complaint about their service.

The following were additional requirements:

- Must be able to participate in an online session
- Had not participated in a qualitative session in the past six months, and has not attended five or more qualitative sessions in the past five years
- Occupation: Did not work in: a business that provides telephone, cell phone or Internet products or services, government department, advertising/web or graphic design, public relations, marketing research, media.

Type 2 (deaf and use sign-language) and Type 3 (blind) participants

For each Type (deaf and use sign language or blind), a qualified participant met the following criteria:

- 18 years of age and over
- Has a cell phone and home Internet service in their own name, or if not the subscriber would be involved in any decision to switch to another service provider.
- Occupation: Did not work in: a business that provides telephone, cell phone or Internet products or services, a radio or television service.

Other criteria by type of participant included:

Type 2 (deaf and use sign language)

- Must be able to participate in either ASL or LSQ
- Must be able to participate in an online session

Type 3 (blind)

- Must be able to participate in an online session
- Have access to a screen reader

With regard to people who are deaf and use sign language or who are blind, the incidence of switching or choosing not to switch service providers was unknown. Because of this, and in combination with the low incidence overall of the target groups, there was not any requirement that an individual have switched or chosen not to switch in the past year.

Study procedure

The following details the recruiting process and methodology for each of the three types of participants.

Type 1 Chose not to switch

- **Recruiting process:** Synchro Research and INOWE Canada Marketing were responsible for all recruiting for all sessions. The sample source was Synchro's/Inowe's opt-in databases of people who have indicated an interest and willingness to be contacted for possible inclusion in a research study. Administration of the screener was done by telephone.

Once a participant was confirmed, an email was sent confirming their participation in the focus group and providing details for how to log in to the online session.

- **Online Interviewing Methodology:** The sessions were conducted using the Zoom videoconferencing service.

Type 2 (deaf and use sign-language) and Type 3 (blind) participants

- **Recruiting process:** The CRTC directly contacted individuals in relevant organizations to request their assistance in identifying potential participants. Two organizations agreed to provide assistance – one representing those who are deaf and one representing those who are blind. The following steps were followed with each organization:

Step 1 – Sage Research contacted each organization to provide more details on the study and the qualifications for participants. For those who are deaf and use sign-language interpreters, a sign-language video was developed explaining the purpose of the research and what participation in the research would involve.

Step 2 – Once the organizations provided names of individuals who were interested in participating in the research, Sage sent an email to each individual to obtain consent to participate and to arrange for follow-up screening.

Step 3 – Individuals were contacted by telephone to administer the screening questionnaire (VRS call in the case of Type 2 individuals).

Step 4 – Once a participant was confirmed, an email was sent confirming their participation in the session and providing details for how to log in to the online session.

- **Online Interviewing Methodology:** The sessions with Type 2 participants were conducted using the Zoom videoconferencing service. Two sign-language interpreters from Asign Inc. participated in each session. The sessions with Type 3 participants were also conducted on Zoom with audio only.

Participant Honoraria

The honorarium for all participants was \$125.

Moderators

Rick Robson conducted the Type 1 English language sessions, the Type 2 ASL sessions and the Type 3 English sessions. Pascal Patenaude conducted the Type 1 French sessions and the Type 2 LSQ session. Nadia Papineau-Couture conducted the Type 3 French session.

Appendix A – Screening Questionnaires

Type 1 Screener

CRTC Switching Study Screener

Record province/territory from database:

Alberta	1
B.C.	2
Manitoba	3
New Brunswick	4
Newfoundland & Labrador	5
Northwest Territories	6
Nova Scotia	7
Nunavut	8
Ontario	9
PEI	10
Quebec	11
Saskatchewan	12
Yukon	13

Monitor quotas (10 recruits per group):

Group type	
Wireless – Saskatchewan #1	All from Saskatchewan
Wireless – Saskatchewan #2	All from Saskatchewan
Wireless – Quebec #1	Quebec; at most one OLMC
Wireless – Quebec #2	Quebec; at most one OLMC
Wireless – Manitoba/Ontario/East #1	At least 1 Manitoba, at least 3 Ontario, at least 2 Atlantic Canada, at most one OLMC
Wireless – Manitoba/Ontario/East #2	At least 1 Manitoba, at least 3 Ontario, at least 2 Atlantic Canada, at most one OLMC
Internet – Saskatchewan #1	All from Saskatchewan
Internet – Saskatchewan #2	All from Saskatchewan
Internet – Quebec #1	Quebec; at most one OLMC
Internet – Quebec #1	Quebec; at most one OLMC

Internet – Manitoba/Ontario/East	At least 1 Manitoba, at least 3 Ontario, at least 2 Atlantic Canada, at most one OLMC
Internet – West	At least 3 British Columbia, at least 3 Alberta

Hello/Bonjour, I'm name of recruiter from Synchro Research/Inowe Canada Marketing, a public opinion and marketing research company. First off, let me assure you that we are not trying to sell you anything. We are organizing a research project on behalf of the Government of Canada. I'd like to ask you some questions to see if you would be interested in possibly taking part in this study. This will take about 8 minutes.

May I continue?

- Yes 1
- No 2 **Thank and end the interview**

Would you prefer that I continue in English or in French? Préférez-vous continuer en français ou en anglais? **[If prefers French, either switch to the French screener and continue, or say the following and then hang up and arrange French-language call-back]** Nous vous rappellerons pour mener cette entrevue de recherche en français. Merci. Au revoir.

[Determination of preferred language and whether or not belongs to an OLMC (Official Language Minority Community)]

- **If in Quebec and has chosen to continue in English:**
 - 1) qualifies as English OLMC, and
 - 2) for an English group session
- **If outside Quebec and has chosen to continue in French:**
 - 1) qualifies as French OLMC, and
 - 2) for a French group session

This research project is specifically for the Canadian Radio-television and Telecommunications Commission (CRTC). The CRTC is the federal government organization that regulates telecommunications and broadcasting in Canada.

The purpose of this research project is to understand the reasons why customers switch home Internet service providers or cell phone service providers, and why they do not. I'd like to ask you some questions to see if you would be interested in possibly taking part in this study. May I continue?

- Yes 1
- No 2 **Thank and end the interview**

In this research project, six to nine individuals like yourself meet online for a two-hour discussion session. You would be paid an honorarium for your participation in the online group discussion.

[If qualifies as English OLMC, ask:] The discussion will be held entirely in English. Would you be comfortable with this?

- Yes 1
- No 2 **Thank and terminate**

[If qualifies as French OLMC, ask:] La discussion se déroulera entièrement en français. Seriez-vous à l'aise avec cela?

- Oui 1
- Non 2 **Remerciez et terminez l'entrevue**

Your participation is voluntary and confidential. All information collected, used and/or disclosed will be used for research purposes only and administered per the requirements of the *Privacy Act*. The full names of participants will not be provided to the government. Your decision to take part will not affect any dealings you may have with the Government of Canada. May I continue?

- Yes 1
- No 2 **Thank and terminate**

I need to ask you some questions to see if you fit the profile of the type of people we are looking for in this research.

Note to recruiter: When terminating a call because of their profile say: Thank you for your cooperation. We already have enough participants who have a similar profile to yours, so we are unable to invite you to participate at this time.

1a) Does your household subscribe to a home internet service?

- Yes 1
- No 2 ***At Internet Group Qualification, record as "Does not qualify for internet group"***

1b) Do you have a personal cell phone?

- Yes 1
- No 2 ***At Wireless Group Qualification, record as "Does not qualify for wireless group"***

If "no" to both Q.1a and Q.1b, thank and terminate

Thank you. I need to ask you some more questions.

2) What is your gender? **(Do not read list, Accept one answer only)**

- Man 1
- Woman 2
- Non-binary, agender, other gender 3
- diverse identity

Quota: at least 3 men and at least 3 women per group

3) Do you, or does anyone in your household, work for ... ? **(Read list)**

A marketing research firm	No	Yes
An advertising agency, web or graphic design firm	No	Yes
A magazine or newspaper	No	Yes
A government department or agency	No	Yes
A marketing company	No	Yes
A radio or television service	No	Yes
A business that provides telephone, cell phone or internet products or services	No	Yes
A public relations company	No	Yes

If “yes” to any, thank and terminate

Home Internet Service

- If “no” to Home Internet Service in Q.1a, go to Cell Phone Service
- If “yes” to Home Internet Service in Q.1a, ask Q.4

4) You mentioned earlier that you have home internet service. What company are you with?
(write in name; if doesn’t know then go to Cell Phone Service)

5) Have you switched to a different home internet service provider in the past year?

- | | | |
|-----|---|---------------------------------|
| Yes | 1 | Go to Cell Phone Service |
| No | 2 | |

6a) Is the home internet service in your name, or in somebody else’s name?

- | | | |
|---------------------|---|------------------|
| My name | 1 | Go to Q.7 |
| Someone else’s name | 2 | Ask Q.6b |

6b) If your household were to think about switching to a different internet service provider, how much input or influence do you think you would have on the decision to switch to another service provider? Would you say you would have... **(read list)**

- | | | |
|----------------------------|---|---------------------------------|
| A lot of influence | 1 | Go to Q.7 |
| A fair amount of influence | 2 | Go to Q.7 |
| A little bit of influence | 3 | Go to Cell Phone Service |
| Or not much influence | 4 | Go to Cell Phone Service |

7) I’d like to ask you some more questions about your experience with your home internet service in the past year.

Overall, how satisfied have you been with your home internet service in the past year? Would you say... **(read list)**

- | | | |
|----------------|---|---------------------------------|
| Very satisfied | 1 | Go to Cell Phone Service |
| Satisfied | 2 | Not qualify at Q.7 |

Somewhat dissatisfied 3 **Qualifies**
or Very dissatisfied 4 **Qualifies**

- 8) You mentioned earlier that you have not switched to a different internet service provider in the past year. However, during the past year, did you consider switching to a different internet service provider?

Yes 1 **Ask Q.9**
No 2 **Go to Q.10**

- 9) As part of considering switching to a different internet service provider, did you do any of the following? (**read list**)

Qualifies if 'yes' to at least one of the next three choices

Talk to other people about their experiences or suggestions Yes No

Look online at what other internet service providers offer Yes No

Contact another internet service provider for information Yes No

(Do not read) If none of the above, does not qualify at Q.9 Yes No

- 10) In the past year, did you make a complaint about your home internet service either to your service provider, or to a government regulator, or to another organization?

(Note to recruiter: if participant asks for examples, say: For example, this could be a complaint made to the Commissioner for complaints for Telecom-Television Services (CCTS), the CRTC, the Better Business Bureau or a provincial consumer protection agency?

Yes 1 **Qualifies**
No 2 **Not qualify at Q.10**

Internet Group Qualification: Record whether or not qualifies for Internet focus group. To qualify, must be *Qualifies* at any of Q.7, Q.9 or Q.10.

Qualifies for Internet group 1
Does not qualify for Internet group 2

Cell Phone Service: If "no" to personal cell phone in Q.1b, go to *Group Allocation*

- 11) You mentioned earlier that you have a personal cell phone. What cell phone service provider are you with? (**write in name; if doesn't know then go to *Group Allocation***)

- 12) Have you switched to a different cell phone service provider in the past year?

- | | | |
|-----|---|--|
| Yes | 1 | At Wireless Group Qualification, record as “does not qualify for wireless group” and go to Group Allocation |
| No | 2 | |

13a) Is the cell phone plan for your cell phone in your name, or in somebody else’s name?

- | | | |
|---------------------|---|-------------------|
| My name | 1 | Go to Q.14 |
| Someone else’s name | 2 | Ask Q.13b |

13b) If you were to think about switching to a different cell phone service provider, how much input or influence do you think you would have on the decision to switch to another service provider? Would you say you would have... (read list)

- | | | |
|----------------------------|---|--|
| A lot of influence | 1 | Go to Q.14 |
| A fair amount of influence | 2 | Go to Q.14 |
| A little bit of influence | 3 | At Wireless Group Qualification, record as “Does not qualify for wireless group” and go to Group Allocation |
| Or not much influence | 4 | At Wireless Group Qualification, record as “Does not qualify for wireless group” and go to Group Allocation |

14) I’d like to ask you some more questions about your experience with your cell phone service provider in the past year.

Overall, how satisfied have you been with your cell phone service provider in the past year? Would you say... (read list)

- | | | |
|-----------------------|---|--|
| Very satisfied | 1 | At Wireless Group Qualification, record as “Does not qualify for wireless group” and go to Group Allocation |
| Satisfied | 2 | Not qualify at Q.14 |
| Somewhat dissatisfied | 3 | Qualifies |
| or Very dissatisfied | 4 | Qualifies |

15) You mentioned earlier that you have not switched to a different cell phone service provider in the past year. However, during the past year, did you consider switching to a different cell phone service provider?

- | | | |
|-----|---|-------------------|
| Yes | 1 | Ask Q.16 |
| No | 2 | Go to Q.17 |

16) As part of considering switching to a different cell phone service provider, did you do any of the following? (read list)

Qualifies if ‘yes’ to at least one of the next three choices

- | | | |
|---|-----|----|
| Talk to other people about their experiences or suggestions | Yes | No |
|---|-----|----|

Look online at what other cell phone service providers offer	Yes	No
Contact another cell phone service provider for information	Yes	No
(Do not read) If none of the above, does not qualify at Q.16	Yes	No

- 17) In the past year, did you make a complaint about your cell phone service either to your service provider, or to a government regulator, or to another organization?

(Note to recruiter: if participant asks for examples, say: For example, this could be a complaint made to the Commissioner for complaints for Telecom-Television Services (CCTS), the CRTC, the Better Business Bureau or a provincial consumer protection agency?

Yes	1	Qualifies
No	2	Not qualify at Q.17

Wireless Group Qualification: Record whether or not qualifies for Wireless focus group. To qualify, must be *Qualifies* at any of Q.14, Q.16 or Q.17.

Qualifies for Wireless group	1
Does not qualify for Wireless group	2

Group Allocation

Refer to outcomes recorded at *Internet Group Qualification* and *Wireless Group Qualification*

Internet - does not qualify	Wireless - does not qualify	Allocation - thank and terminate
Internet - qualifies	Wireless - qualifies	Allocate to Internet focus group; if quota full for Internet, allocate to Wireless group
Internet - qualifies	Wireless - does not qualify	Allocation - Internet
Internet - does not qualify	Wireless - qualifies	Allocation - wireless

Thank you. I have some more questions to ask you to see if you fit the profile of the types of people we are looking for in this research.

- 18) We would like to talk to people in different age groups. Into which **one** of the following groups should I place you? **(Read list)**

Under 18	1	Thank and terminate
18 to 34	2	Mix on age
35 to 64	3	Mix on age
65 or older	4	Quota: at least 2 recruits per group

- 19) We would like to include people in this research from different types of communities across Canada. Which one of the following best describes the community you live in? **(Accept one answer only)**

- | | |
|---|---|
| A large city or a suburb near a large city | 1 |
| A small city, town or village not near a large city | 2 |
| A rural area | 3 |

Quota: at least 3 recruits per group who are code 2 or 3

- 20a) Do you consider yourself a person with disability and/or have accessibility needs?

- | | | |
|-----|---|--------------------|
| Yes | 1 | Ask Q.20b |
| No | 2 | Go to Q.21a |

- 20b) Which type of disability do you have? **(Do not read list; Select all that apply; If seeing or hearing mentioned then ask Q. 21a even if other types are selected)**

- | | | |
|-----------------------|----|-------------------|
| Seeing | 1 | Ask Q.21a |
| Hearing | 2 | Ask Q.21a |
| Mobility | 3 | Go to Q.22 |
| Flexibility | 4 | Go to Q.22 |
| Dexterity | 5 | Go to Q.22 |
| Pain-related | 6 | Go to Q.22 |
| Learning | 7 | Go to Q.22 |
| Developmental | 8 | Go to Q.22 |
| Mental health-related | 9 | Go to Q.22 |
| Memory | 10 | Go to Q.22 |
| Other | 11 | Go to Q.22 |

- 21a) As I mentioned earlier, the research involves participating in an online group video call. We are also doing separate sessions with people who need to use a sign language interpreter, or who are functionally blind and unable to see other participants on a video call. Do either of these circumstances apply to you?

- | | | |
|-----|---|-------------------|
| Yes | 1 | Ask Q.21b |
| No | 2 | Go to Q.22 |

- 21b) Which one applies to you, that is, needing to use a sign language interpreter, or being functionally blind?

- | | |
|---------------------------------------|---|
| Need to use sign language interpreter | 1 |
| Functionally blind | 2 |

21c) Thank you. We have not started recruiting yet for these sessions. When we do start the recruiting, would you like us to contact you to see if you would be interested in participating in a session?

- | | | |
|-----|---|-----------------------------------|
| Yes | 1 | Record contact information |
| No | 2 | |

Thank and end interview

22) The discussion session for this project will be conducted online using a webcam, and it will require the use of a laptop, desktop computer or computer tablet connected to high speed internet. Note that you cannot use a smartphone to participate in the online session.

a) Do you have access to reliable high speed internet that you can use for the online discussion session?

- | | | |
|-----|---|--------------------------------|
| Yes | 1 | |
| No | 2 | Thank and end interview |

b) Do you have access to a laptop, desktop computer or computer tablet to take part in the online discussion session?

- | | | |
|------------------------|---|--------------------------------|
| Yes, laptop or desktop | 1 | Go to Q.22d |
| Yes, computer tablet | 2 | Ask Q.22c |
| No | 3 | Thank and end interview |

c) What is the screen size of the computer tablet you will be using to take part in the online discussion session?

- | | | |
|----------------------------------|---|--------------------------------|
| Up to 4 inches/small | 1 | Thank and end interview |
| 5 to 9 inches/medium | 2 | |
| At least 10 inches or more/large | 3 | |

d) You will need to be in a place that is quiet and free of distractions for the duration of the online session. Would you be able to participate in this type of location?

- | | | |
|-----|---|--------------------------------|
| Yes | 1 | |
| No | 2 | Thank and end interview |

Instructions for Q.22a-d "Thank and end interview": Based on your answers, we are unable to invite you to take part in an online discussion session, as you do not meet the technical requirements. Thank you for your interest in this research.

23a) Have you ever participated in an in-depth research interview or a focus group involving a small group of people where people were asked to discuss different topics?

- | | | |
|-----|---|-------------------|
| Yes | 1 | |
| No | 2 | Go to Q.24 |

23b) And when was the last time you attended an interview or discussion group?

6 months ago or less 1 **Thank and end interview**
OR more than 6 months ago 2

23c) In the past 5 years, how many in-depth research interviews or discussion groups have you attended? Would you say less than 5 in total, or would you say 5 or more?

Less than 5 1
5 or more 2 **Thank and end interview**

24) Thank you. Let me tell you some more about this study to see if you would like to take part.

a) There may be some people from the Government of Canada who have been involved in this project observing the session. However, they will not take part in the discussion in any way, and they will not be given your full name. Is this acceptable to you?

Yes 1
No 2 **Thank and end interview**

b) The session will be audio and video recorded. These recordings are used to help with analyzing the findings and writing the report. Your name will not appear in the research report, and the recording will not be given to the Government of Canada. Is this acceptable to you?

Yes 1
No 2 **Thank and end interview**

Invitation

If in Quebec and qualifies as English OLMC, offer English session if quota of maximum of one English OLMC per group has not already been filled.

If outside Quebec and qualifies as French OLMC, offer French session if quota of maximum of one French OLMC per group has not already been filled.

The session will be held on **[insert date]**, at **[insert participant's local time]**. Would you be available to attend?

Yes 1
No 2 **Thank and end interview**

Thank you. We would like to invite you to participate in one of our online group discussions. The session will last two hours, and after you have completed the session you will be paid \$125 to thank you for your participation.

For the group discussion we will be using Zoom which is an online platform that allows the moderator and the participants to discuss and share their opinions in real time. A few days before the session we will send you a link to the Zoom meeting.

The person leading the discussion will be an employee Sage Research, which is a public opinion research company.

Would you be willing to attend?

Yes 1

No 2 **Thank and end interview**

Group Type	Date	Group Time	Local Start Time
Wireless: Manitoba/Ontario/East	Thursday, May 25	6:00-8:00 pm	Manitoba 5:00 pm, Ontario 6:00 pm, Nova Scotia, New Brunswick and PEI 7:00 pm, Newfoundland 7:30 pm
Wireless: Saskatchewan	Tuesday, May 30	6:30-8:30 pm	Saskatchewan 4:30 pm
Wireless: Manitoba/Ontario/East	Wednesday, May 31	6:00-8:00 pm	Manitoba 5:00 pm, Ontario 6:00 pm, Nova Scotia, New Brunswick and PEI 7:00 pm, Newfoundland 7:30 pm
Wireless: Saskatchewan	Tuesday, June 6	7:30-9:30 pm	Saskatchewan 5:30 pm
Wireless: Quebec	Wednesday, June 7	5:30-7:30 pm	Quebec: 5:30 pm
Wireless: Quebec	Wednesday, June 7	8:00-10:00 pm	Quebec: 8:00 pm
Internet: Saskatchewan	Thursday, June 8	7:30-9:30 pm	Saskatchewan 5:30 pm
Internet: Manitoba/Ontario/East	Tuesday, June 13	6:00-8:00 pm	Manitoba 5:00 pm, Ontario 6:00 pm, Nova Scotia, New Brunswick and PEI 7:00 pm, Newfoundland 7:30 pm
Internet: Saskatchewan	Wednesday, June 14	7:30-9:30 pm	Saskatchewan 5:30 pm
Internet: West	Thursday, June 15	8:30-10:30 pm	Alberta 6:30 pm, British Columbia 5:30 pm
Internet: Quebec	Thursday, June 22	5:30-7:30 pm	Quebec: 5:30 pm
Internet: Quebec	Thursday, June 22	8:00-10:00 pm	Quebec: 8:00 pm

As I mentioned, you will be paid \$125 after you have finished participating. We can send this to you by Interac e-transfer or by cheque, whichever you prefer. Would you prefer to receive payment by Interac e-transfer or by cheque?

- | | |
|--------------------|---|
| Interac e-transfer | 1 |
| Cheque | 2 |

Payment details

Refer to preferred payment method

If prefer Interac e-transfer

What email address would you like the Interac e-transfer sent after you have finished participating in the session?

And please confirm the spelling of your name.

If prefer cheque

What mailing address should we use to send you the cheque after you have finished participating in the session?

Street

City

Province

Postal code

And please confirm the spelling of your name as it should appear on the cheque

Closing

Someone from our office will be calling you back to confirm these arrangements. May I please have your contact information where we can reach you during the evening and during the day?

Name

Evening phone

Day time phone

Email address

Thank you very much!

Recruited by

Confirmed by

Note to recruiter: Should a participant require validation that this is a legitimate research project, tell them to send their question to the following email address for the CRTC, and tell them to put in the subject line, "CRTC Switching Study": rop-por@crtc.gc.ca

Types 2 & 3 Screener Templates

Type 2 Screening Templates

Type 2: Email invite template

Subject: CRTC Internet and cell phone service provider research

To: name

We understand that you have expressed interest in possibly participating in a research study sponsored by the CRTC on what people think about the possibility of switching their cell phone or home internet service provider.

The Canadian Radio-television and Telecommunications Commission (CRTC) is the federal government organization that regulates telecommunications and broadcasting in Canada.

Synchro/INOWE, a public opinion research company, has been hired by the CRTC to invite people to an online discussion on what reasons people might have for wanting to switch service providers or for staying with their current providers, and any problems people might have if they want to switch to a different service provider.

The discussion would be done using Zoom and sign language interpreters would be present. The discussion would be about 90 minutes.

We would like to contact you using VRS in the coming week to give you more information about this study, and to ask you some questions to see if you fit the participant profile we're looking for in this research. This will take about 15 minutes.

The VRS number we were given for you is XXXXX.

Would you please reply to this email with several different dates and times that would be convenient for us to call you.

Thank you,

Name
Synchro/INOWE

Type 2: Screener

Note: Any questions already answered during previous interactions will not be repeated, in order to avoid redundancy but will be transferred.

Transfer information from previous interactions:

First and Last Name

Gender (from observation)

City/Province

Preferred Sign Language: ASL or LSQ

VRS Number

Email address

Hello, I'm name of recruiter from Synchro Research/INOWE Canada Marketing. We recently sent you an email about a research study we are doing on behalf of the CRTC.

The purpose of this research study is to understand what factors people consider in choosing service providers for their cell phone and home internet, and any problems people might have if they want to switch to a different service provider.

We are contacting you because you indicated you might be interested in participating in this research study.

The discussion would be done using Zoom and sign language interpreters would be present. It would last about 90 minutes.

Your participation is voluntary and confidential. All information collected, used and/or disclosed will be used for research purposes only and administered per the requirements of the *Privacy Act*. The full names of participants will not be provided to the government. Your decision to take part will not affect any dealings you may have with the Government of Canada. May I continue?

- | | | |
|-----|---|----------------------------|
| Yes | 1 | |
| No | 2 | Thank and terminate |

I need to ask you some questions to see if you fit the participant profile we are looking for in this research. This will take about 10 minutes.

Note to recruiter: When terminating a call because of their profile say: Thank you for your cooperation. We already have enough participants who have a similar profile to yours, so we are unable to invite you to participate at this time.

1a) Do you have both home internet service and a personal cell phone?

- | | | |
|-----|---|--|
| Yes | 1 | |
| No | 2 | "Thank you, but for this project we are talking to people who have both home internet and a personal cell phone. Thank you for your interest in the study." [End interview] |

- 1b) Thinking of your home internet service, if your household were to think about switching to a different internet service provider, do you think you would have a say on any decision to switch to another provider?

Yes 1

No 2 **“Thank you, but for this project we are talking to people who would have a say in any decision to switch their internet service provider.” [End interview]**

- 1c) Thinking of your personal cell phone, if your household were to think about switching to a different cell phone service provider, do you think you would have a say on any decision to switch to another provider?

Yes 1

No 2 **“Thank you, but for this project we are talking to people who would have a say in any decision to switch their cell phone service provider.” [End interview]**

- 2) Do you, or does anyone in your household, work for ... ? **(Read list)**

A radio or television service No Yes

A business that provides telephone, cell phone or internet products or services No Yes

If “yes” to either, thank and terminate

Home Internet Service

- 3a) I would like to ask you some questions about your home internet service. Have you switched to a different home internet service provider in the past year?

Yes 1 **Ask Q.3b**

No 2 **Go to Q.4**

- 3b) What were your reasons for switching?

Go to Cell Phone Service

- 4) Overall, how satisfied have you been with your home internet service in the past year? Would you say... **(read list)**

Very satisfied 1

Satisfied 2

Somewhat dissatisfied 3

or Very dissatisfied 4

- 5) You mentioned that you have not switched to a different internet service provider in the past year. However, during the past year, did you consider switching to a different internet service provider?

- | | |
|-----|---|
| Yes | 1 |
| No | 2 |

- 6) In the past year, did you make a complaint about your home internet service either to your service provider, or to a government regulator, or to another organization?

- | | |
|-----|---|
| Yes | 1 |
| No | 2 |

Cell Phone Service

- 7a) I would like to ask you some questions about your cell phone service. Have you switched to a different cell phone service provider in the past year?

- | | | |
|-----|---|------------------|
| Yes | 1 | Ask Q.7b |
| No | 2 | Go to Q.8 |

- 7b) What were your reasons for switching?

Go to Profiling

- 8) Overall, how satisfied have you been with your cell phone service in the past year? Would you say... **(read list)**

- | | |
|-----------------------|---|
| Very satisfied | 1 |
| Satisfied | 2 |
| Somewhat dissatisfied | 3 |
| or Very dissatisfied | 4 |

- 9) You mentioned that you have not switched to a different cell phone service provider in the past year. However, during the past year, did you consider switching to a different cell phone service provider?

- | | |
|-----|---|
| Yes | 1 |
| No | 2 |

- 10) In the past year, did you make a complaint about your cell phone service either to your service provider, or to a government regulator, or to another organization?

- | | |
|-----|---|
| Yes | 1 |
| No | 2 |

Profiling

- 11) We would like to talk to people in different age groups. Into which **one** of the following groups should I place you? **(Read list)**

Under 18	1	Thank and terminate
18 to 34	2	Continue
35 to 64	3	Continue
65 or older	4	Continue

- 12) We would like to include people in this research from different types of communities across Canada. Which one of the following best describes the community you live in? **(Accept one answer only)**

A large city or a suburb near a large city	1
A small city, town or village not near a large city	2
A rural area	3

- 13) The discussion session for this project will be conducted online using a webcam. There will be two sign language interpreters, the interviewer, and possibly a few other participants. It will require the use of a laptop, desktop computer or computer tablet connected to high speed internet. Note that you cannot use a smartphone to participate in the online session because of its small screen size.

- a) Do you have access to reliable high speed internet that you can use for the online discussion session?

Yes	1	
No	2	Thank and end interview

- b) Do you have access to a laptop, desktop computer or computer tablet to take part in the online discussion session?

Yes, laptop or desktop	1	
Yes, computer tablet	2	
No	3	Thank and end interview

Instructions for Q.13 a-b “Thank and end interview”: Based on your answers, we are unable to invite you to take part in an online discussion session, as you do not meet the technical requirements. Thank you for your interest in this research.

- 14) Thank you. Let me tell you some more about this study to see if you would like to take part.

- a) There may be some people from the Government of Canada who have been involved in this project observing the session. However, they will not take part in the discussion in any way, and they will not be given your full name. Is this acceptable to you?

Yes	1	
No	2	Thank and end interview

- b) The session will be audio and video recorded. These recordings are used to help with analyzing the findings and writing the report. Your name will not appear in the research report, and the recording will not be given to the Government of Canada. Is this acceptable to you?

Yes	1	
No	2	Thank and end interview

Invitation

Thank you. We would like to invite you to participate in one of our online group discussions. The session will last 90 minutes, and after you have completed the session you will be paid \$125 to thank you for your participation.

For the group discussion we will be using Zoom which is an online platform that allows the moderator and the participants to discuss and share their opinions in real time. There will be two sign language interpreters present. A few days before the session we will send you a link to the Zoom meeting.

The person leading the discussion will be an employee of Sage Research, which is a public opinion research company.

Would you be willing to attend?

Yes	1	
No	2	Thank and end interview

NOTE: The possible dates/times to offer recruits will be determined at a later date

As I mentioned, you will be paid \$125 after you have finished participating. We can send this to you by Interac e-transfer or by cheque, whichever you prefer. Would you prefer to receive payment by Interac e-transfer or by cheque?

Interac e-transfer	1
Cheque	2

Payment details

Refer to preferred payment method

If prefer Interac e-transfer

What email address would you like the Interac e-transfer sent after you have finished participating in the session?

And please confirm the spelling of your name.

If prefer cheque

What mailing address should we use to send you the cheque after you have finished participating in the session?

Street

City

Province

Postal code

And please confirm the spelling of your name as it should appear on the cheque

Closing

Someone from our office will be contacting you to confirm these arrangements. Thanks again for your help on this research study.

Note to recruiter: Should a participant require validation that this is a legitimate research project, tell them to send their question to the following email address for the CRTC, and tell them to put in the subject line, "CRTC Switching Study": rop-por@crtc.gc.ca

Type 3 Screening Templates

Type 3: Email invite template

Subject: CRTC Internet and Cell PhoneService Provider Research

To: name

We understand that you have expressed interest in possibly participating in a research study sponsored by the CRTC on what people think about the possibility of switching their cell phone or home internet service provider.

The Canadian Radio-television and Telecommunications Commission (CRTC) is the federal government organization that regulates telecommunications and broadcasting in Canada.

Synchro/INOWE, a public opinion research company, has been hired by the CRTC to invite people to a telephone discussion on what reasons people might have for wanting to switch service providers or for staying with their current providers, and any problems people might have if they want to switch to a different service provider.

The discussion would be done online using Zoom. The discussion would be about 90 minutes.

We would like to send you an email in the coming week to give you more information about this study, and to ask you some questions to see if you fit the participant profile we're looking for in this research. This would take about 10 minutes.

Would you please reply to this email with several different dates and times that would be convenient for us to call you.

Thank you,

Name

Synchro/INOWE

Type 3: Screener

Note: Any questions already answered during previous interactions will not be repeated, in order to avoid redundancy but will be transferred.

Transfer information from previous interactions:

First and Last Name

Gender (from observation)

City/Province

Preferred Sign Language: ASL or LSQ

VRS Number

Email address

Hello, I'm name of recruiter from Synchro Research/INOWE Canada Marketing. We recently sent you an email about a research study we are doing on behalf of the CRTC.

The purpose of this research study is to understand what factors people consider in choosing service providers for their cell phone and home internet, and any problems people might have if they want to switch to a different service provider.

We are contacting you because you indicated you might be interested in participating in this research study.

The discussion would be done online using Zoom. The discussion would be about 90 minutes.

Your participation is voluntary and confidential. All information collected, used and/or disclosed will be used for research purposes only and administered per the requirements of the *Privacy Act*. The full names of participants will not be provided to the government. Your decision to take part will not affect any dealings you may have with the Government of Canada. May I continue?

Yes	1	
No	2	Thank and terminate

I need to ask you some questions to see if you fit the participant profile we are looking for in this research. This will take about 10 minutes.

Note to recruiter: When terminating a call because of their profile say: *Thank you for your cooperation. We already have enough participants who have a similar profile to yours, so we are unable to invite you to participate at this time.*

1a) Do you have both home internet service and a personal cell phone?

Yes	1
-----	---

or Very dissatisfied	4
----------------------	---

- 5) You mentioned that you have not switched to a different internet service provider in the past year. However, during the past year, did you consider switching to a different internet service provider?

Yes	1
No	2

- 6) In the past year, did you make a complaint about your home internet service either to your service provider, or to a government regulator, or to another organization?

Yes	1
No	2

Cell Phone Service

- 7a) I would like to ask you some questions about your cell phone service. Have you switched to a different cell phone service provider in the past year?

Yes	1	Ask Q.7b
No	2	Go to Q.8

- 7b) What were your reasons for switching?

Go to Profiling

- 8) Overall, how satisfied have you been with your cell phone service in the past year? Would you say... **(read list)**

Very satisfied	1
Satisfied	2
Somewhat dissatisfied	3
or Very dissatisfied	4

- 9) You mentioned that you have not switched to a different cell phone service provider in the past year. However, during the past year, did you consider switching to a different cell phone service provider?

Yes	1
No	2

- 10) In the past year, did you make a complaint about your cell phone service either to your service provider, or to a government regulator, or to another organization?

Yes	1
No	2

Profiling

- 11) We would like to talk to people in different age groups. Into which **one** of the following groups should I place you? **(Read list)**

Under 18	1	Thank and terminate
18 to 34	2	Continue
35 to 64	3	Continue
65 or older	4	Continue

- 12) We would like to include people in this research from different types of communities across Canada. Which one of the following best describes the community you live in? **(Accept one answer only)**

A large city or a suburb near a large city	1
A small city, town or village not near a large city	2
A rural area	3

- 13) Thank you. Let me tell you some more about this study to see if you would like to take part.

- a) There may be some people from the Government of Canada who have been involved in this project listening in on the session. However, they will not take part in the discussion in any way, and they will not be given your full name. Is this acceptable to you?

Yes 1

No 2 **Thank and end interview**

- b) The session will be recorded. These recordings are used to help with analyzing the findings and writing the report. Your name will not appear in the research report, and the recording will not be given to the Government of Canada. Is this acceptable to you?

Yes 1

No 2 **Thank and end interview**

Invitation

Thank you. We would like to invite you to participate in one of our online sessions. The session will last 90 minutes, and after you have completed the session you will be paid \$125 to thank you for your participation.

For the online session we will be using Zoom. A few days before the session we will send you a link to the Zoom meeting.

The person leading the discussion will be an employee of Sage Research, which is a public opinion research company.

Would you be willing to attend?

Yes 1

No 2 **Thank and end interview**

NOTE: The possible dates/times to offer recruits will be determined at a later date

As I mentioned, you will be paid \$125 after you have finished participating. We can send this to you by Interac e-transfer or by cheque, whichever you prefer. Would you prefer to receive payment by Interac e-transfer or by cheque?

Interac e-transfer	1
Cheque	2

Payment details

Refer to preferred payment method

If prefer Interac e-transfer

What email address would you like the Interac e-transfer sent after you have finished participating in the session?

And please confirm the spelling of your name

If prefer cheque

What mailing address should we use to send you the cheque after you have finished participating in the session?

Street

City

Province

Postal code

And please confirm the spelling of your name as it should appear on the cheque

Closing

Someone from our office will be contacting you to confirm these arrangements. Thanks again for your help on this research study.

Note to recruiter: Should a participant require validation that this is a legitimate research project, tell them to send their question to the following email address for the CRTC, and tell them to put in the subject line, "CRTC Switching Study": rop-por@crtc.gc.ca

Appendix B – Discussion Guides

Type 1 – Internet Discussion Guide

1) Introduction (15 minutes)

- a) **Introduce self (name & company), and explain purpose of research:** We are conducting this research project on behalf of the CRTC (the Canadian Radio-television and Telecommunications Commission). As you may know, the CRTC is an agency of the Government of Canada that creates rules and regulations for telecommunications companies in Canada to promote competition and innovation, and enhance affordability and consumer protections.

This research is about home internet service, which you all have. We're interested in what you think about the possibility of switching to a different provider.

The reason the CRTC is interested in this is that the CRTC wants to ensure that people can easily switch to a different internet service provider if and when they want to.

Having the ability to switch raises some questions, and these are questions we're going to talk about in this session. For example:

- Why might someone want to switch to a different internet service provider?
- Why might someone decide not to switch to a different provider?
- Are there barriers to switching? That is, is there something about your home internet service or the internet service providers in your area that could make it difficult or unappealing to switch?
- In your area, are there actually any other internet service providers that you could switch to?

A few other things that you all have in common are:

- Firstly, none of you have actually switched your internet service provider in the past year
- However, and secondly, all of you have been less than 100% happy with your internet service in the past year. Maybe you've been a bit dissatisfied for some reason or another, or maybe you've considered switching but haven't done so, or maybe you've even made a complaint about your internet service. In this context, I'm interested in finding out what are the reasons for not switching, even though you've been less than 100% happy with your internet service in the past year.

- b) **Review group discussion procedures:**

- Role of moderator
- Role of participants: there are no right or wrong answers; just want everyone to participate and offer your own views, and to feel free to agree or disagree with others in the group
- Confidentiality: Your name will not appear in the report
- Recording: The session is being recorded. The recording is for my use only to help in preparing the report on this research, and will not be provided to the CRTC or anyone else
- Presence of observers from the CRTC online – they are not given your full name; they are here to observe the moderator and to increase their general understanding of the topics we are discussing tonight
- Discussion to last 2 hours

c) **Any questions?**

d) **Participant self-introductions:** First name only, what you are doing these days – are you employed or self-employed, raising a family or attending school? And just briefly, for what do you mainly use your home internet?

2) **Reasons less than 100% satisfied with internet service in the past year (15 minutes)**

As I mentioned, all of you have been less than 100% happy with your internet service in the past year. Maybe you've been a bit dissatisfied for some reason or another, or maybe you've considered switching but haven't done so, or maybe you've even made a complaint about your internet service.

What were your reasons for being less than 100% satisfied with your internet service in the past year?

[Note to moderator: This is for warm-up purposes, and to set a context for discussion of reasons for not switching. However, keep this brief]

3) **Reasons for not switching (65 minutes)**

a) How many actually considered switching to a different internet service provider in the past year? **[Use this to sort participants into those who did not consider switching (ask Part b) versus did consider switching (ask Part c)]**

b) **Ask of those who did not consider switching:**

i) What were your reasons for not considering switching? I'm not saying you should have, but given you were less than 100% satisfied with your internet service, I'm curious as to your reasons for not considering switching. **[As each participant gives reasons, probe for their most important reason, and why it's most important; Probe for suggestions on what could be done to address a barrier]**

Some reasons to listen for, and probe as appropriate:

- Brand loyalty (Probe: reasons for being loyal to the brand)
- Have a contract with early cancellation fees, and the cost is too high
- Internet is part of a bundle of other services (e.g. TV, phone), and don't want to lose the bundle (**Probe** – What is in the bundle? Do you think a similar bundle might be available from another service provider? if yes, reasons for not considering that alternative)
- Losing email address tied to the current provider (**Probe:** Why is that an issue? Aware of any way to keep access to that email address? What do you think of using an email address that is not linked to your current provider (e.g. gmail, outlook.com, etc.)? What might be issues with changing to a different email address?)
- Insufficient options in terms of other internet service providers in your area
 - Are there any at all? If so, about how many?
 - If insufficient, insufficient in what way?
- Perception or belief that other service providers "are all the same" – i.e. not meaningfully different in cost, services or quality of service (**Probe:** In what way

are they all the same? What gives you that impression? What differences would you like to see?)

- Perception that other service providers would be more expensive (**Probe:** What gives you that impression?)
- Perceived difficulty of canceling with the existing service provider
- Not worth the effort/Too much work (**Probe:** Why not? What would be involved?)
- Too difficult to figure out/compare what other providers offer (**Probe:** Confusing? Difficult to compare across different providers?)

- ii) I know that you did not consider switching to a different internet service provider in the past year, but if you were to consider switching, what might make it feel worth it to you to switch?

Some reasons to listen for, and probe as appropriate:

- Lower price
- Better bundle of services
- Internet service quality/speed
- Internet service features
- Better customer service

c) **Ask of those who did consider switching:**

- i) I know that you did not end up switching to a different internet service provider in the past year, but what did you hope you might get by switching?

Some reasons to listen for, and probe as appropriate:

- Lower price
- Better bundle of services
- Internet service quality/speed
- Internet service features
- Better customer service

- ii) Did you end up looking for information about other internet service providers, or did you decide not to do that?

If did not look for information about other internet service providers: What were your reasons for deciding not to look for information about other internet service providers?

If did look for information about other internet service providers:

- How did you go about looking for information on other internet service providers, where, and what was the experience like?
- What types of information were you looking for?
- How easy or difficult was it to get the information you were looking for?

- iii) You considered switching internet service providers in the past year, but ended up not making a switch. What were the reasons for not making a switch? **[As each participant gives reasons, probe for their most important reason, and why it's most important; Probe for suggestions on what could be done to address a barrier]**

Some reasons to listen for, and probe as appropriate:

- Brand loyalty (**Probe:** reasons for being loyal to the brand)
- Have a contract with early cancellation fees, and the cost is too high
- Other fees you would have to pay as part of switching (e.g. an activation fee, installation fee, or equipment-related fees)
- Internet is part of a bundle of other services (e.g. TV, phone), and don't want to lose the bundle (**Probe** – What is in the bundle? Do you think a similar bundle might be available from another service provider? if yes, reasons for not considering that alternative)
- Losing email address tied to the current provider (**Probe:** Why is that an issue? Aware of any way to keep access to that email address? What are the issues with changing to a different email address?)
- Insufficient options in terms of other internet service providers in your area
 - If insufficient, insufficient in what way?
- Perception that other service providers “are all the same” – i.e. not meaningfully different in cost, services or quality of service
- Perception that other service providers would be more expensive (**Probe:** What gives you that impression?)
- Perceived difficulty of canceling with the existing service provider
- Not worth the effort/Too much work (**Probe:** Why not? What would be involved?)
- Too difficult to figure out/compare what other providers offer (**Probe:** Confusing? Difficult to compare across different providers?)

4) Information needs (20 minutes)

[Note to moderator: to some extent this will have been addressed above; the focus here is on ensuring all have addressed the questions, and getting some additional input]

- a) Switching to a different internet service provider means getting information about other possible suppliers and what they have to offer. What information sources would you use (e.g. friends, specific websites, consumer organizations, government websites, etc.)? What do you think would be the most useful sources of information?
- b) What types of information would be most useful in choosing a service provider and plan?
Probe: Are there terms or features of internet service plans that need to be better/more clearly explained?
- c) Do you have any suggestions for how to make it easier or better to compare the offerings of different internet service providers?

5) Closing (5 minutes)

- a) The CRTC wants to ensure there is a competitive market, so that people have choices of what company to use for their home internet, and can switch to a different provider if they want to. We have talked a lot about what barriers there are to switching and ideas for addressing those barriers. Do you have any other suggestions for what the CRTC or others

could do to make sure that it is relatively easy for a person to switch internet provider if they want to?

- b) The final report for this project will be available to the public and will be posted on the Library and Archives Canada website.

Thank you for coming today and giving us your opinions!

Type 1 – Wireless Discussion Guide

1) Introduction (15 minutes)

- a) **Introduce self (name & company), and explain purpose of research:** We are conducting this research project on behalf of the CRTC (the Canadian Radio-television and Telecommunications Commission). As you may know, the CRTC is an agency of the Government of Canada that creates rules and regulations for telecommunications companies in Canada to promote competition and innovation, and enhance affordability and consumer protections.

This research is about cell phone service, which you all have. We're interested in what you think about the possibility of switching to a different provider.

The reason the CRTC is interested in this is that the CRTC wants to ensure that people can easily switch to a different cell phone service provider if and when they want to.

Having the ability to switch raises some questions, and these are questions we're going to talk about in this session. For example:

- Why might someone want to switch to a different cell phone service provider?
- Why might someone decide not to switch to a different provider?
- Are there barriers to switching? That is, is there something about your cell phone service or the cell phone service providers in your area that could make it difficult or unappealing to switch?
- In your area, are there actually any other cell phone service providers that you could switch to?

A few other things that you all have in common are:

- Firstly, none of you have actually switched your cell phone service provider in the past year
- However, and secondly, all of you have been less than 100% happy with your cell phone service in the past year. Maybe you've been a bit dissatisfied for some reason or another, or maybe you've considered switching but haven't done so, or maybe you've even made a complaint about your cell phone service. In this context, I'm interested in finding out what are the reasons for not switching, even though you've been less than 100% happy with your cell phone service in the past year.

- b) **Review group discussion procedures:**

- Role of moderator

- Role of participants: there are no right or wrong answers; just want everyone to participate and offer your own views, and to feel free to agree or disagree with others in the group
- Confidentiality: Your name will not appear in the report
- Recording: The session is being recorded. The recording is for my use only to help in preparing the report on this research, and will not be provided to the CRTC or anyone else
- Presence of observers from the CRTC online – they are not given your full name; they are here to observe the moderator and to increase their general understanding of the topics we are discussing tonight
- Discussion to last 2 hours

c) **Any questions?**

- d) **Participant self-introductions:** First name only, what you are doing these days – are you employed or self-employed, raising a family or attending school

2) Reasons less than 100% satisfied with cell phone service in the past year (15 minutes)

As I mentioned, all of you have been less than 100% happy with your cell phone service in the past year. Maybe you've been a bit dissatisfied for some reason or another, or maybe you've considered switching but haven't done so, or maybe you've even made a complaint about your cell phone service.

What were your reasons for being less than 100% satisfied with your cell phone service in the past year?

[Note to moderator: This is for warm-up purposes, and to set a context for discussion of reasons for not switching. However, keep this brief]

3) Reasons for not switching (65 minutes)

- a) How many actually considered switching to a different cell phone service provider in the past year? **[Use this to sort participants into those who did not consider switching (ask Part b) versus did consider switching (ask Part c)]**

b) **Ask of those who did not consider switching:**

- i) What were your reasons for not considering switching? I'm not saying you should have, but given you were less than 100% satisfied with your cell phone service, I'm curious as to your reasons for not considering switching. **[As each participant gives reasons, probe for their most important reason, and why it's most important; Probe for suggestions on what could be done to address a barrier]**

Some reasons to listen for, and probe as appropriate:

- Brand loyalty (Probe: reasons for being loyal to the brand)
- Have a contract for the phone, and the cost of leaving is too high
- Cell phone service is part of a bundle of other services (e.g. internet, TV), and don't want to lose the bundle (**Probe** – What is in the bundle? Do you think a

similar bundle might be available from another service provider? if yes, reasons for not considering that alternative)

- Concerned could lose current phone number (**Probe:** Awareness of cell phone number portability across service providers)
- Insufficient options in terms of other cell phone service providers in your area
 - Are there any at all? If so, about how many?
 - If insufficient, insufficient in what way? (could include cellphone network coverage issues)
- Perception or belief that other service providers “are all the same” – i.e. not meaningfully different in cost, services or quality of service (**Probe:** In what way are they all the same? What gives you that impression? What differences would you like to see?)
- Perception that other service providers would be more expensive (**Probe:** What gives you that impression?)
- Perceived difficulty of canceling with the existing service provider
- Not worth the effort/Too much work (**Probe:** Why not? What would be involved?)
- Too difficult to figure out/compare what other providers offer (**Probe:** Confusing? Difficult to compare across different providers?)

- ii) I know that you did not consider switching to a different cell phone service provider in the past year, but if you were to consider switching, what might make it feel worth it to you to switch?

Some reasons to listen for, and probe as appropriate:

- Lower price
- Better bundle of services
- Cell phone service quality/speed/reliability
- Cell phone plan features
- Better cellular coverage
- Better customer service

c) Ask of those who did consider switching:

- i) I know that you did not end up switching to a different cell phone service provider in the past year, but what did you hope you might get by switching?

Some reasons to listen for, and probe as appropriate:

- Lower price
- Better bundle of services
- Cell phone service quality/speed/reliability/coverage area
- Cell phone plan features
- Better customer service

- ii) Did you end up looking for information about other cell phone service providers, or did you decide not to do that?

If did not look for information about other cell phone service providers: What were your reasons for deciding not to look for information about other cell phone service providers?

If did look for information about other cell phone service providers:

- How did you go about looking for information on other cell phone service providers, where, and what was the experience like?
- What types of information were you looking for?
- How easy or difficult was it to get the information you were looking for?

iii) You considered switching cell phone service providers in the past year, but ended up not making a switch. What were the reasons for not making a switch? **[As each participant gives reasons, probe for their most important reason, and why it's most important; Probe for suggestions on what could be done to address a barrier]**

Some reasons to listen for, and probe as appropriate:

- Brand loyalty (**Probe:** reasons for being loyal to the brand)
- Have a contract for the phone, and the cost of leaving is too high
- Other fees you would have to pay as part of switching (e.g. an activation fee)
- Cell phone service is part of a bundle of other services (e.g. internet, TV), and don't want to lose the bundle (**Probe** – What is in the bundle? Do you think a similar bundle might be available from another service provider? if yes, reasons for not considering that alternative)
- Concerned could lose current phone number (**Probe:** Awareness of cell phone number portability across service providers)
- Insufficient options in terms of other cell phone service providers in your area
 - If insufficient, insufficient in what way? (could include cellphone network coverage issues)
- Perception that other service providers “are all the same” – i.e. not meaningfully different in cost, services or quality of service
- Perception that other service providers would be more expensive (**Probe:** What gives you that impression?)
- Perceived difficulty of canceling with the existing service provider
- Not worth the effort/Too much work (**Probe:** Why not? What would be involved?)
- Too difficult to figure out/compare what other providers offer (**Probe:** Confusing? Difficult to compare across different providers?)

4) Information needs (20 minutes)

[Note to moderator: to some extent this will have been addressed above; the focus here is on ensuring all have addressed the questions, and getting some additional input]

a) Switching to a different cell phone service provider means getting information about other possible suppliers and what they have to offer. What information sources would you use

(e.g. friends, specific websites, consumer organizations, government websites, etc.)? What do you think would be the most useful sources of information?

- b) What types of information would be most useful in choosing a service provider and plan?

Probe: Are there terms or features of cell phone service plans that need to be better/more clearly explained?

- c) Do you have any suggestions for how to make it easier or better to compare the offerings of different cell phone service providers?

5) Closing (5 minutes)

- a) The CRTC wants to ensure there is a competitive market, so that people have choices of what company to use for their cell phone service, and can switch to a different provider if they want to. We have talked a lot about what barriers there are to switching and ideas for addressing those barriers. Do you have any other suggestions for what the CRTC or others could do to make sure that it is relatively easy for a person to switch their cell phone service provider if they want to?
- b) The final report for this project will be available to the public and will be posted on the Library and Archives Canada website.

Thank you for coming today and giving us your opinions!

Type 2 & 3 Discussion Guide

1) Introduction (10 minutes)

- a) **Introduce self (name & company), and explain purpose of research:** We are conducting this research project on behalf of the CRTC (the Canadian Radio-television and Telecommunications Commission). As you may know, the CRTC is an agency of the Government of Canada that creates rules and regulations for telecommunications companies in Canada to promote competition and innovation, and enhance affordability and consumer protections.

This research is about home internet service and about cell phone service, both of which you have. We're interested in what you think about the possibility of switching to different providers for each of these two types of services.

The reason the CRTC is interested in this is that the CRTC wants to ensure that people can easily switch to a different service provider if and when they want to.

Having the ability to switch raises some questions, and these are questions we're going to talk about in this session. For example:

- What types of information might you need for selecting an internet or cell phone service provider?
- Are there barriers that you might face when selecting a service provider?
- Why might someone want to switch to a different service provider for internet or cell phone?

- Why might someone decide not to switch to a different provider?

b) Review group discussion procedures:

- Role of moderator
- Role of participants: there are no right or wrong answers; just want everyone to participate and offer your own views, and to feel free to agree or disagree with others in the group
- Confidentiality: Your name will not appear in the report
- Recording: The session is being recorded. The recording is for my use only to help in preparing the report on this research, and will not be provided to the CRTC or anyone else
- Presence of observers from the CRTC – they are not given your full name; they are here to observe the moderator and to increase their general understanding of the topics we are discussing tonight
- Discussion to last 90 minutes

c) Any questions?

- d) Participant self-introductions:** First name only, what you are doing these days – are you employed or self-employed, raising a family or attending school? And just briefly, for what do you mainly use your home internet?

Home Internet (40 minutes)

Let's start by talking about home internet. We'll talk about cell phone service providers later on.

- 2) Suppose you were thinking about selecting a new service provider for your home internet. What information sources would you use (e.g. friends, specific websites, consumer organizations, government websites, etc.)? What sources of information do you think would be the most useful?
- 3) What types of information would be most useful in choosing a service provider? What features would be important to you, and why?

Some factors to listen for, and probe as appropriate:

- Price
 - Bundle of services
 - Internet service quality/speed
 - Internet service features
 - Customer service
- 4) In the past few years, have you looked for information about different internet service providers and what they have to offer?

If "no" to looking for information:

Suppose you were to look for information about what different internet service providers have to offer. How easy or difficult do you think it would be to get the information that would be important to you in choosing a service provider?

What if any problems or barriers do you think you might face in getting the information you would be looking for?

Probe: Are there terms or features of internet service plans that need to be better/more clearly explained?

You mentioned that you haven't looked for information about different internet service providers in the past few years. I'm not saying you should have, but is there a reason you haven't looked for this information?

Some reasons for not looking for information/switching to listen for, and probe as appropriate:

- Satisfied with the service provider and plan
- Brand loyalty (**Probe:** reasons for being loyal to the brand)
- Have a contract with early cancellation fees, and the cost of leaving is too high
- Internet is part of a bundle of other services (e.g. TV, phone), and don't want to lose the bundle (**Probe** – What is in the bundle? Do you think a similar bundle might be available from another service provider? if yes, reasons for not considering that alternative)
- Losing email address tied to the current provider (**Probe:** Why is that an issue? Aware of any way to keep access to that email address? What do you think of using an email address that is not linked to your current provider (e.g. gmail, outlook.com, etc.)? What might be issues with changing to a different email address?)
- Insufficient options in terms of other internet service providers in your area
 - Are there any at all? If so, about how many?
 - If insufficient, insufficient in what way?
- Perception or belief that other service providers "are all the same" – i.e. not meaningfully different in cost, services or quality of service (**Probe:** In what way are they all the same? What gives you that impression? What differences would you like to see?)
- Perception that other service providers would be more expensive (**Probe:** What gives you that impression?)
- Perceived difficulty of canceling with the existing service provider
- Not worth the effort/Too much work (**Probe:** Why not? What would be involved?)
- Too difficult to figure out/compare what other providers offer (**Probe:** Confusing? Difficult to compare across different providers?)

If "yes" to looking for information:

What led you to look for information about different internet service providers have to offer?

How easy or difficult was it to get the information you were looking for?

What if any problems or barriers did you face in getting the information you were looking for?

Probe: Are there terms or features of internet service plans that need to be better/more clearly explained?

Did you end up switching to a new internet service provider?

If yes:

- What was it about the new provider that led you to switch?
- How easy or difficult was it to make the switch?
- Do you have any suggestions for making it easier to switch?

If no:

- Why did you decide not to switch to a new internet service provider?
 - Brand loyalty (**Probe:** reasons for being loyal to the brand)
 - Have a contract with early cancellation fees, and the cost of leaving is too high
 - Internet is part of a bundle of other services (e.g. TV, phone), and don't want to lose the bundle (**Probe:** What is in the bundle? Was a similar bundle available from another service provider? if yes, reasons for not considering that alternative)
 - Losing email address tied to the current provider (**Probe:** Why is that an issue? Aware of any way to keep access to that email address? What do you think of using an email address that is not linked to your current provider (e.g. gmail, outlook.com, etc.)? What might be issues with changing to a different email address?)
 - Insufficient options in terms of other internet service providers in your area
 - Were there any at all? If so, about how many?
 - If insufficient, insufficient in what way?
 - Perception or belief that other service providers "are all the same" – i.e. not meaningfully different in cost, services or quality of service (**Probe:** In what way are they all the same? What gives you that impression? What differences did you see?)
 - Were other service providers more expensive (**Probe:** What gives you that impression?)
 - Perceived difficulty of canceling with the existing service provider
 - Not worth the effort/Too much work (**Probe:** Why not? What would be involved?)
 - Too difficult to figure out/compare what other providers offer (**Probe:** Confusing? Difficult to compare across different providers?)

5) Ask everyone:

Do you have any suggestions for how to make it easier or better to compare the offerings of different internet service providers?

Cell Phone (35 minutes)

I'd now like to talk with you about cell phone service providers.

- 6) Suppose you were thinking about selecting a new service provider for your cell phone. What information sources would you use (e.g. friends, specific websites, consumer organizations, government websites, etc.)? What sources of information do you think would be the most useful?
- 7) What types of information would be most useful in choosing a service provider? What features would be important to you, and why?

Some factors to listen for, and probe as appropriate:

- Price
 - Bundle of services
 - Cell phone service quality/speed/reliability
 - Cell phone plan features
 - Better coverage area
 - Customer service
- 8) In the past few years, have you looked for information about different cell phone service providers and what they have to offer?

If “no” to looking for information:

Suppose you were to look for information about what different cell phone service providers have to offer. How easy or difficult do you think it would be to get the information that would be important to you in choosing a service provider?

What if any problems or barriers do you think you might face in getting the information you would be looking for?

Probe: Are there terms or features of cell phone service plans that need to be better/more clearly explained?

You mentioned that you haven't looked for information about different cell phone service providers in the past few years. I'm not saying you should have, but is there a reason you haven't looked for this information?

Some reasons for not looking for information/switching to listen for, and probe as appropriate:

- Satisfied with the service provider and plan
- Brand loyalty (Probe: reasons for being loyal to the brand)
- Have a contract for the phone, and the cost of leaving is too high
- Other fees you would have to pay as part of switching (e.g. an activation fee)
- Cell phone service is part of a bundle of other services (e.g. internet, TV), and don't want to lose the bundle (**Probe:** What is in the bundle? Do you think a similar bundle might be available from another service provider? if yes, reasons for not considering that alternative)

- Concerned could lose current phone number (Probe: Awareness of cell phone number portability across service providers)
- Insufficient options in terms of other cell phone service providers in your area
 - If insufficient, insufficient in what way? (could include cellphone network coverage issues)
- Perception or belief that other service providers “are all the same” – i.e. not meaningfully different in cost, services or quality of service (**Probe:** In what way are they all the same? What gives you that impression? What differences would you like to see?)
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- Not worth the effort/Too much work (**Probe:** Why not? What would be involved?)
- Too difficult to figure out/compare what other providers offer (**Probe:** Confusing? Difficult to compare across different providers?)

If “yes” to looking for information:

What led you to look for information about different cell phone service providers have to offer?

How easy or difficult was it to get the information you were looking for?

What if any problems or barriers did you face in getting the information you were looking for?

Probe: Are there terms or features of cell phone service plans that need to be better/more clearly explained?

Did you end up switching to a new cell phone service provider?

If yes:

- What was it about the new provider that led you to switch?
- How easy or difficult was it to make the switch?
- Do you have any suggestions for making it easier to switch?

If no:

- Why did you decide not to switch to a new cell phone service provider?
 - Brand loyalty (Probe: reasons for being loyal to the brand)
 - Have a contract for the phone, and the cost of leaving is too high
 - Other fees you would have to pay as part of switching (e.g. an activation fee)
 - Cell phone service is part of a bundle of other services (e.g. Internet, TV), and don’t want to lose the bundle (**Probe** – What is in the bundle? Was a similar bundle available from another service provider? if yes, reasons for not considering that alternative)
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- Insufficient options in terms of other cell phone service providers in your area
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- Not worth the effort/Too much work (**Probe:** Why not? What would be involved?)
- Too difficult to figure out/compare what other providers offer (**Probe:** Confusing? Difficult to compare across different providers?)

9) Ask everyone:

Do you have any suggestions for how to make it easier or better to compare the offerings of different cell phone service providers?

10) **Closing (5 minutes)**

- a) The CRTC wants to ensure there is a competitive market, so that people have choices of what company to use for their home internet and their cell phone, and so that they can switch to a different provider if they want to. We have talked a lot about what barriers there are to switching and ideas for addressing those barriers. Do you have any other suggestions for what the CRTC or others could do to make sure that it is relatively easy for a person to switch if they want to?
- b) The final report for this project will be available to the public and will be posted on the Library and Archives Canada website.

Thank you for coming today and giving us your opinions!