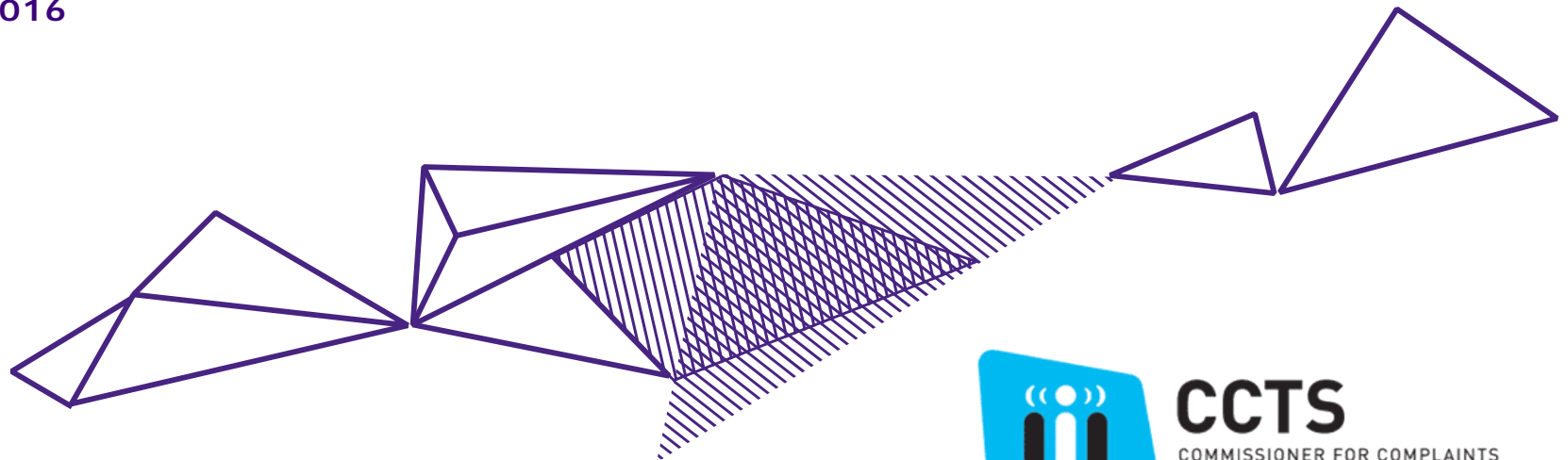


ENVIRONICS
RESEARCH

Commissioner for Complaints for Telecommunications Services Public Awareness Survey 2016

MAY 2016



CCTS
COMMISSIONER FOR COMPLAINTS
FOR TELECOMMUNICATIONS SERVICES

Let's talk solutions

OBJECTIVES AND METHODOLOGY

The Commissioner for Complaints for Telecommunications Services (CCTS) was created in 2007 with a mandate to resolve consumer complaints about their retail telecommunications services.

The extent of consumer awareness of CCTS has never been formally measured. CCTS therefore engaged Environics Research to conduct a survey of Canadian consumers with the following objectives:

- Estimating how many Canadians have unresolved telecommunications related complaints.
- Assessing the current level of awareness of CCTS and the method by which consumers have learned about it.

Environics Research conducted a mixed methodology survey of 2,011 Canadians aged 18 and over on their awareness and use of the CCTS; 1,006 surveys were conducted online and 1,005 were conducted by telephone.

The margin of error for a sample of 2,011 is +/- 2.2 percentage points, 19 times out of 20.

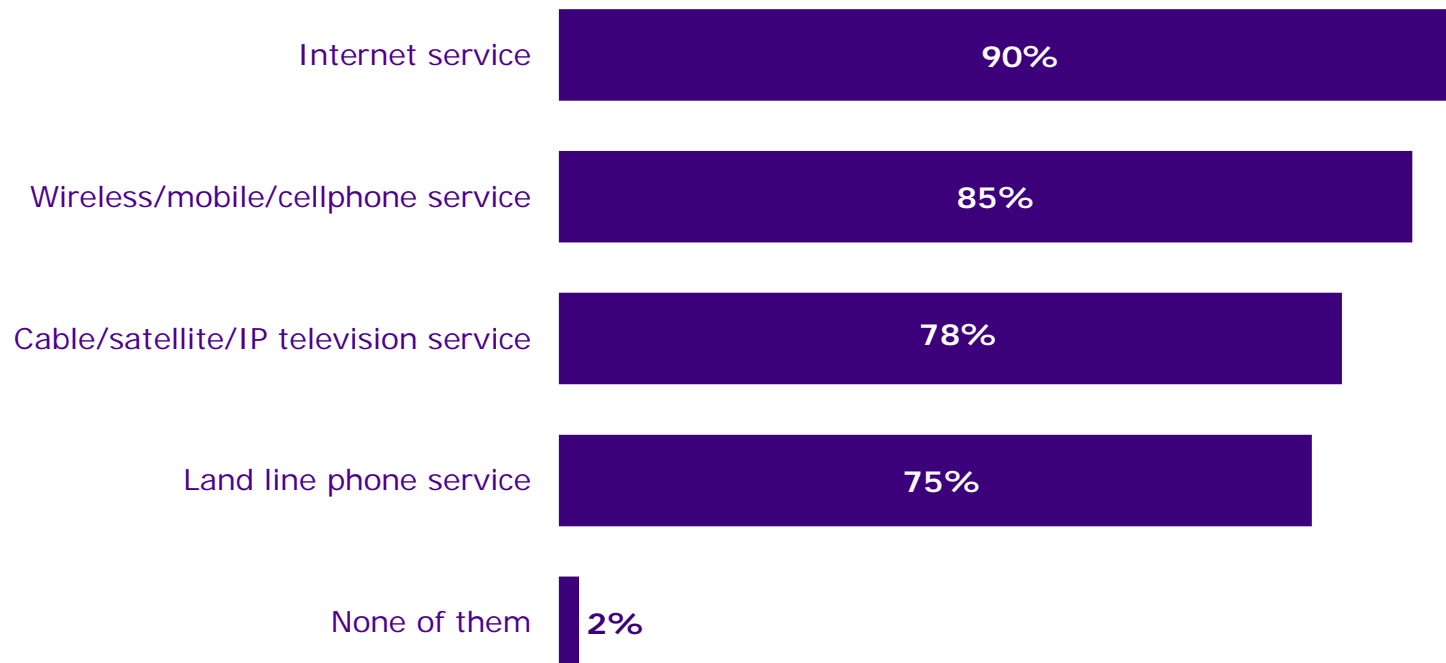
EXECUTIVE SUMMARY

- Overall awareness of the CCTS is 20% and much of that is “aided awareness”. To the extent that people have heard of the CCTS it is from news media reports or their own online searches. Very few people say they heard about CCTS from their telecommunications provider.
- One fifth of Canadians report that they have had an unresolved dispute or complaint with their telecommunications service provider.
- Less than half of people with an unresolved complaint believe that they have any recourse.
- Even among those who believe that consumers have recourse or are not sure if they do or not – there is little clarity on where they can go to get the dispute resolved. Some say they would appeal higher up in the company, go to court, contact the CRTC, the BBB etc...just two percent say they would contact the CCTS.
- Even among those with an unresolved dispute who are actually aware of CCTS, only 31% have ever contacted CCTS about their dispute. Most of those who have not contacted CCTS say they just didn’t think it was worth their time or were busy.

SUBSCRIPTION TO TELECOMMUNICATIONS SERVICES

Virtually all Canadians subscribe to some form of telecommunications services; internet service in particular has become almost universal

Q1 Which of the following telecommunications services do you or does anyone in your household subscribe to ...?

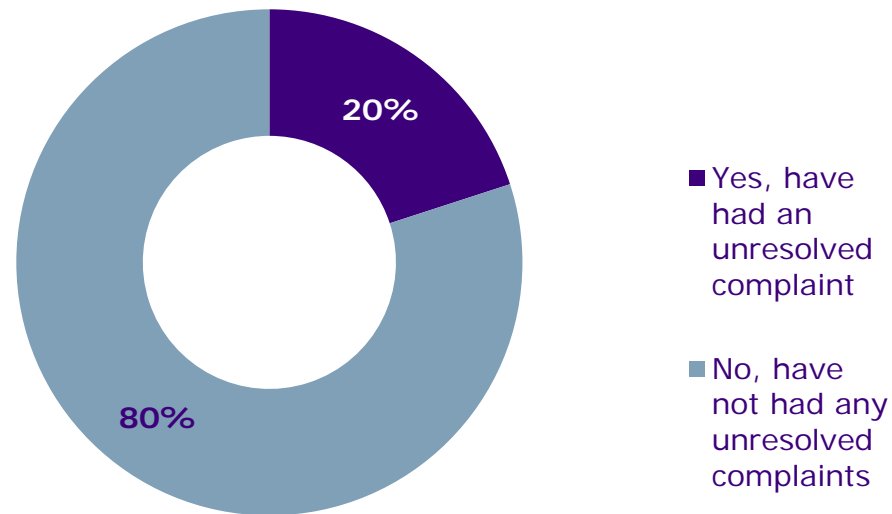


There are some modest age related patterns: 89% of those over 65 have a landline compared to 59% of 18-34 year olds. Those over 65 are less likely to subscribe to internet (81%) and wireless phone (68%) services.

UNRESOLVED TELECOM COMPLAINTS

Two in ten Canadians have had a complaint or dispute in the last few years with their telecommunications provider that was not resolved directly with the company.

Q2 In the last few years, have you ever had a complaint or dispute with the company that provides your telecommunications services (i.e., cellphone, landline phone, internet, cable TV), that you could not resolve by dealing directly with the company?

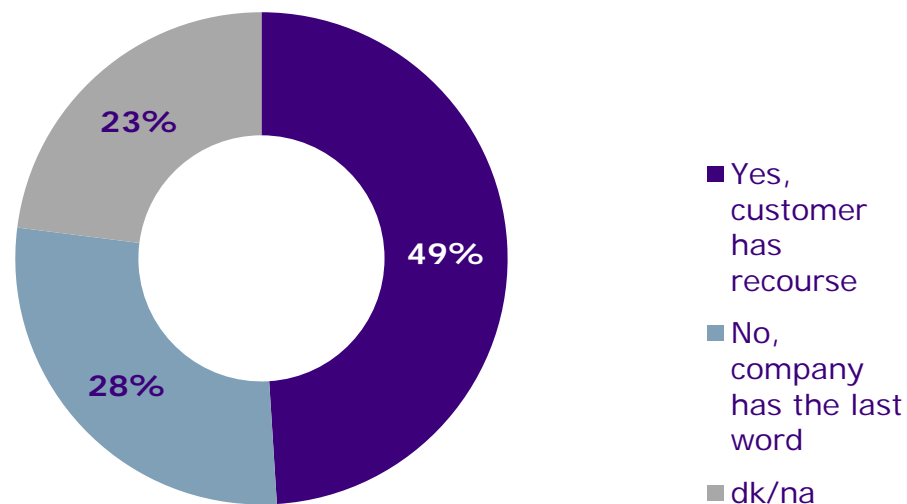


Unresolved complaints are more common among Ontarians (22%), university grads (23%), men (22%) and 18-49 year olds (24%). Just 10% of those over 65 have had any unresolved complaints.

DO CUSTOMERS HAVE ANY RECOURSE IN UNRESOLVED TELECOM DISPUTES?

Half of Canadians believe the customer does have recourse in an unresolved complaint/dispute with their telecom provider. Others either think the company has the last word or do not know.

Q3 As far as you know, if someone has a complaint or dispute with the company that provides their telecommunications services that cannot be resolved with the company, does the customer have any recourse or anywhere to appeal to, or does the company have the final word?

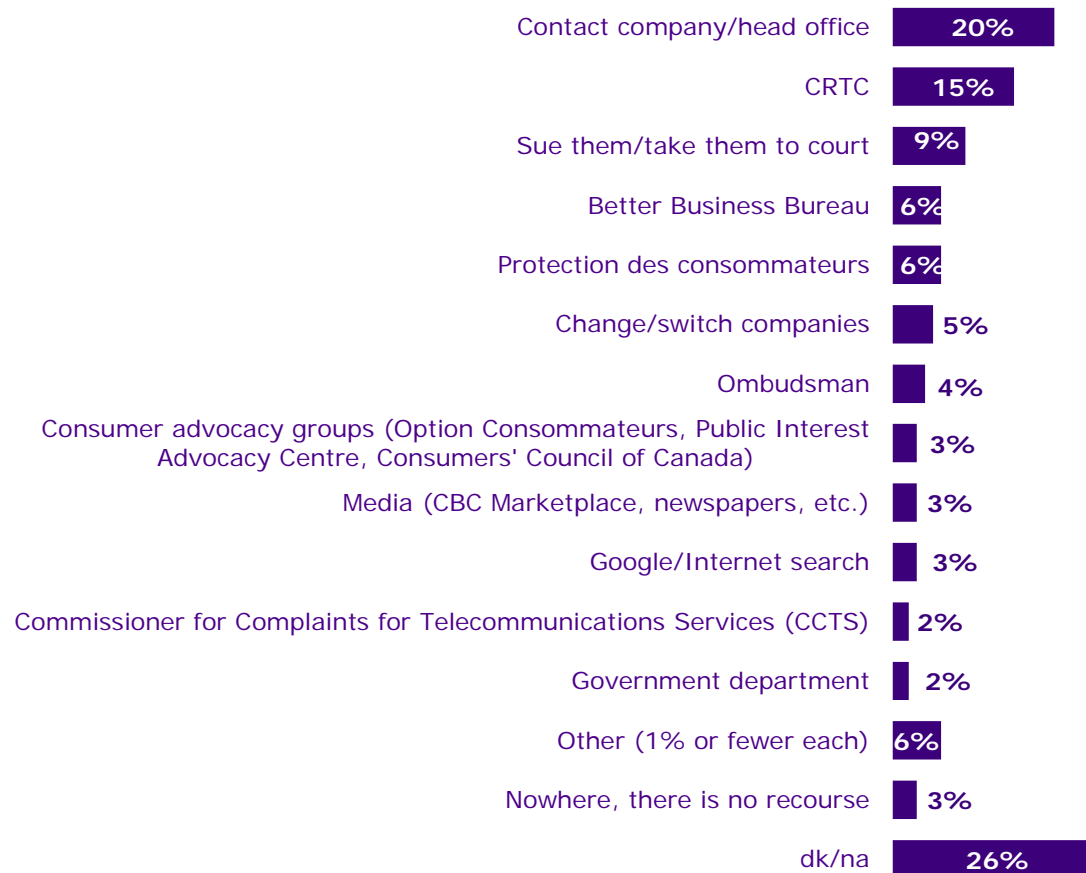


Quebecers (61%) are much more likely to believe they have recourse. Those with lower incomes and lower levels of education are less likely to think they have recourse. Among those with an unresolved complaint 44% believe they have recourse and 42% believe the company has the last word.

WHERE TO GO TO RESOLVE DISPUTE

Most who think they have recourse would contact the company head office or the CRTC if they had an unresolved complaint. Two percent spontaneously mention CCTS.

Q4 If you had an unresolved complaint or dispute with the company that provides your telecommunications services (i.e., wireless/mobile phone, landline phone, internet or cable/satellite TV), where could you go to get the dispute resolved? *Subgroup: Those aware or not sure that customer has recourse (n=1,460)*

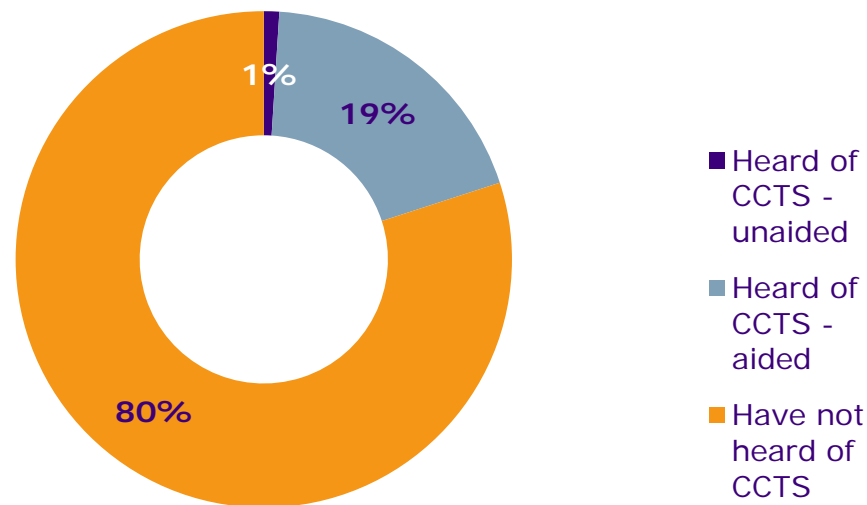


Quebecers are more likely to contact advocacy groups. Atlantic Canadians mention the BBB more often. Prairie residents are more likely to contact head office.

AIDED AND UNAIDED AWARENESS OF CCTS

Two in ten Canadians have heard of the CCTS (19% aided and 1% unaided).

Q5 Have you ever heard of the Commissioner for Complaints for Telecommunications Services (CCTS)?



Awareness of CCTS is somewhat higher among men (24%) and university grads (23%). It is also notable that 27% of those who have had an unresolved complaint have heard of CCTS. Awareness is lower among women, those with low incomes and low levels of education.

HOW CANADIANS HAVE HEARD OF THE CCTS

Most who are aware of the CCTS heard about it through news/media reports, followed by TV, online searches and word-of-mouth. Four percent mention telecom providers.

Q6 How did you hear about the Commissioner for Complaints for Telecommunications Services (CCTS)?

Subgroup: Those who are aware of the CCTS (n=401)



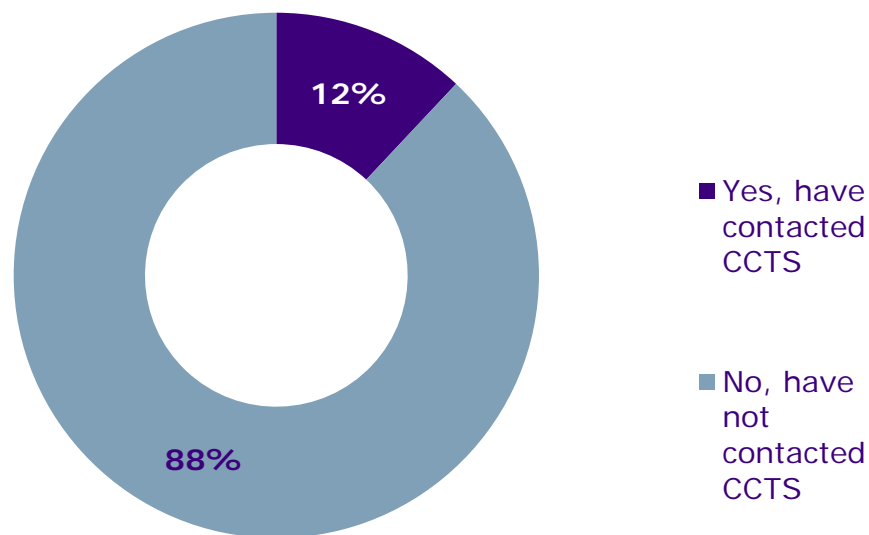
Those with an unresolved complaint are more likely to have heard of CCTS through an online search (22%) or from a forum of some sort (7%).

INCIDENCE OF CONTACTING THE CCTS ABOUT AN UNRESOLVED COMPLAINT

Twelve percent of those aware of the CCTS report ever having contacted it. This rises to 31% among those aware of CCTS who have also had an unresolved complaint.

Q7 Have you ever contacted the Commissioner for Complaints for Telecommunications Services (CCTS) about an unresolved complaint or dispute with your telecommunications provider or for any other reason?

Subgroup: Those who are aware of the CCTS (n=401)



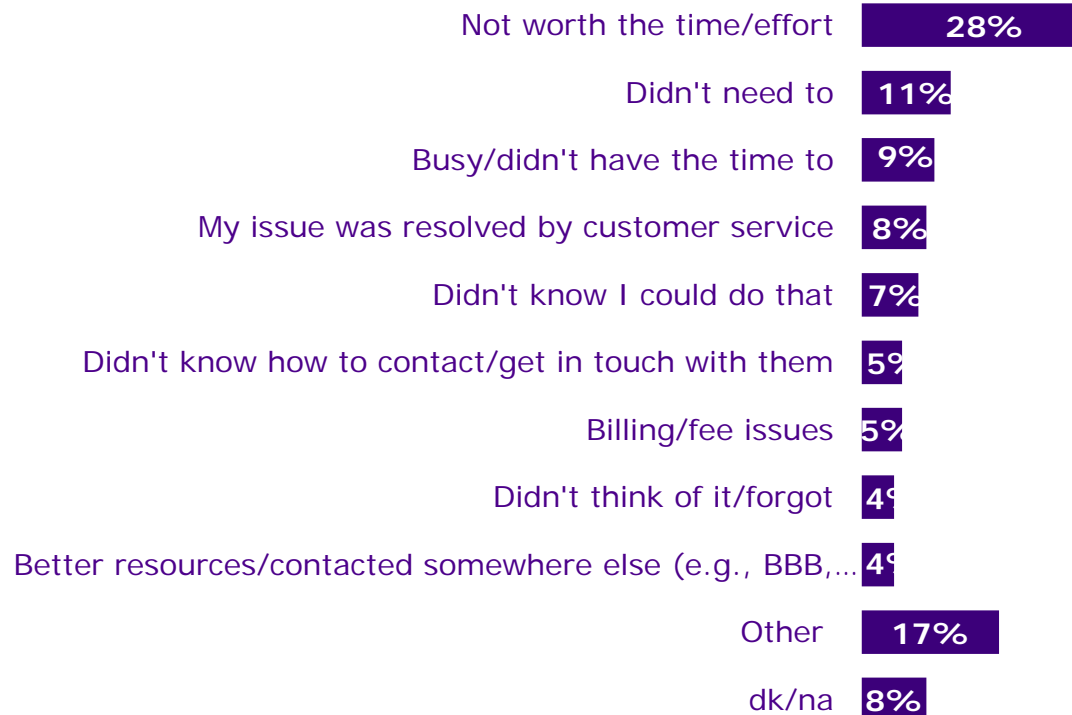
It is notable that fully 27% of those aged 18-34 who are aware of CCTS have ever contacted it. This compares to just 3% of those over 65. Men are also more likely than women to have contacted CCTS (15% vs. 8%).

MAIN REASON FOR NOT CONTACTING CCTS

There are many reasons why people don't contact the CCTS over an unresolved complaint; most common is a belief it wasn't worth the time/effort.

Q8 What was the main reason why you did NOT contact the Commissioner for Complaints for Telecommunications Services (CCTS) about your unresolved complaint or dispute?

Subgroup: Those who had an unresolved complaint and didn't contact CCTS (n=74) *



*Note: small sample size

FOR FURTHER INFORMATION OR QUESTIONS CONTACT:



Derek Leebosh

VICE PRESIDENT, PUBLIC AFFAIRS

Tel: 416-969-2817

Email: derek.leebosh@environics.ca