



Canadians' views on mobile data

Results from a survey commissioned by the
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Contents

Highlights	1
I. Purpose of the research	1
II. Analysis of survey results	1
A. Use of mobile phones to access the Internet (Q1)	2
B. Data in mobile phone plans	4
1. <i>Data included in mobile phone plans? (Q3)</i>	4
2. <i>Amount of data included in mobile phone plans? (Q4)</i>	5
3. <i>Use of data in a typical month (Q8)</i>	5
4. <i>Good value for the money that users pay? (Q5)</i>	6
C. The cost of data	8
1. <i>Incidence of overage fees for data (Q6)</i>	8
2. <i>Do users limit use due to fears of data overage fees? (Q7)</i>	10
D. Views on a lower-cost data-only plan (Q9)	13
1. <i>General demographics</i>	13
2. <i>High-use users</i>	15
3. <i>Users who don't think they get value for money</i>	15
4. <i>Uses who've experienced overage fees</i>	16
III. Research method	16
A. Survey	16
B. Survey questionnaires	20

Tables

Survey result 1	Frequency of access to Internet using mobile phone (Q1)	3
Survey result 2	Choice of plan and use of Internet (Q2)	4
Survey result 3	Does mobile phone plan include data? (Q3)	5
Survey result 4	Amount of data included in monthly mobile phone plan? (Q4)	5
Survey result 5	Amount of data used in a typical month (Q8)	6
Survey result 6	Do mobile phone plans give good value for money paid? (Q5)	7
Survey result 7	Value for money paid, and use of data (Q5)	8
Survey result 8	Frequency at which data overage charges are paid in Canada (Q6)	8
Survey result 9	Frequency at which data overage charges are paid, by age group (Q6)	8
Survey result 10	Frequency at which data overage charges are paid, by level of education (Q6)	9
Survey result 11	Frequency at which data overage charges are paid, by level of data used (Q6)	10
Survey result 12	Whether had to pay for data overage in previous year, compared with self-limits on use of mobile phone due to worries about data-overage fees	10
Survey result 13	Limiting use because of worry that overage fees might be incurred, by region (Q7)	11
Survey result 14	Limiting use because of worry that overage fees might be incurred, by region (Q7)	11
Survey result 15	Users' views on lower-cost data-only plan, across Canada and by age (Q9)	13
Survey result 16	Users' views on lower-cost data-only plan, by income (Q9)	14
Survey result 17	Interest in a lower-cost data-only plan, by region	14
Survey result 18	Interest in a lower-cost data-only plan, by use of data in a typical month	15
Survey result 19	Use of data in a typical month by interest in a lower-cost data-only plan	15
Survey result 20	Interest in lower-cost data-only plans by opinion on value for money of mobile phone plan	16
Survey result 21	Payment of data overage fees in past year, compared with interest in switching to lower-cost, data-only plan	16

Figures

Survey figure 1	Relationship between typical monthly data use and users' self-limitations on use of data	12
Survey figure 2	Relationship between users' age and self-limitations on use of data	12
Survey figure 3	Relationship between users' income and self-limitations on use of data	13

Highlights

A national, bilingual interactive voice response survey of 1,294 adults (18 years or over) who have their own mobile phones, was conducted by Access Research on behalf of the Forum for Research and Policy in Communications (FRPC) across Canada's provinces and territories on the 8th, 9th and 10th of June 2018. The results have a margin of error of plus or minus +/-2.83%, 19 times out of 20.

The purpose of the survey was to learn about Canadians' experience with respect to mobile phone data and data overage charges and their views on data-only mobile phone plans. These issues have arisen in the context of [Call for comments - Lower-cost data-only plans for mobile wireless services, Telecommunications Notice of Consultation CRTC 2018-98 \(Ottawa, 22 March 2018\)](#).

The survey found that

- Canadians use their mobile phones to access the Internet, “nearly all the time” (47%) or several times a day (31.4%); and that just 7.2% of Canadians do not use their mobile phone to access the Internet (Survey result 2)
- More than two-thirds (70.1%) of those living in cities with more than 100,000 residents say their mobile phone plans offer them more than a gigabyte of data; this figure decreases to 57.4% in communities with fewer than 500 people (Survey result 4)
- Just over half of men (53.7%) and somewhat fewer women (41.5%) use a gigabyte of data or more in a typical month (Survey result 5)
- More than two-thirds (68.6%) of Canadians thought they did not receive good value for the money they paid for their mobile phone plans, with more men (71.9%) than women (64.3%) holding this view (Survey result 6)
 - Just under three-quarters (73.0% to 74.9%) of those between 25 and 54 years of age thought their mobile phone plans did not provide good value for money
 - More than three-quarters (77.4%) of people whose before-tax household income was higher than Canada's median income thought their plans did not provide good value for money
 - 84.8% of people in the North did not think their mobile phone plans provided good value for money, compared to 52.0% of those in Saskatchewan and Manitoba (who shared the same view)
 - Dissatisfaction with the value of their monthly phone plans increased with the amount of data people used in a typical month, rising from 59.1% when they used fewer than 100 megabytes of data, to 78.3% when they used 3 or more gigabytes of data (Survey result 7)
- More than half (53.2) of Canadians say they have had to pay additional amounts to use their mobile phone service because they used more data than included in their monthly plans (Survey result 8)
- 64% of those who paid data-overage fees in the previous year used 1 gigabyte or more in a typical month (Survey result 11)
- 57.3% of those who have had to pay a data-overage fee in the previous year said they limited use of their mobile phone due to worries they might incur overage fees (Survey result 12)

- Efforts to limit use due to worries about the cost of data overage charges were highest in the North (65.2%), and in British Columbia and Alberta (64.6%) (Survey result 13)
- More than half of Canadians limited their data use at least once in the previous year, regardless of the level of data they use in a typical month (Survey result 14); the more data that people used, however, the more likely they were to limit their data usage (Survey figure 1)
- In terms of data-only plans, very few Canadians (1.1%) said they have such a plan (Survey result 15), while 23.2% said they would switch to a lower-cost data-only plan that permitted them to make calls and send messages (by downloading an application or service from the Internet) (Survey result 18)
 - 29.3% of people living in Saskatchewan or Manitoba, and 26.9% of people in Atlantic Canada said they would switch to a lower-cost data-only plan (Survey result 17))
 - 28% of people who use between 50 and 100 MB of data in a typical month, and 28% of those who use between 2 and 3 GB of data in a typical month, said they would switch to a lower-cost data-only plan (Survey result 18)
 - Propensity to switch to a lower-cost data-only plan was highest for those using more than 3 GB of data in a typical month (Survey result 19)
 - People's desire for more information about lower-cost data-only plans increases with the number of times they have had to pay data-overage charges in the previous year (Survey result 21)

I. Purpose of the research

The Forum for Research and Policy in Communications (FRPC) is a non-profit and non-partisan organization established to undertake research and policy analysis about communications, including broadcasting telecommunications. The Forum supports a strong Canadian communications system that serves the public interest.

This report summarizes results from a national, bilingual survey undertaken on behalf of the Forum in June 2018 about adult Canadians' experiences with data available from their mobile phones, the frequency with which they have experienced data-overflow charges, and their interest in data-only mobile phone plans. The survey was undertaken as part of the Forum's research with respect to [Call for comments - Lower-cost data-only plans for mobile wireless services, Telecommunications Notice of Consultation CRTC 2018-98 \(Ottawa, 22 March 2018\)](#), and was submitted to the CRTC on 13 June 2018 as part of the Forum's comments in that proceeding.

The survey results described in this report focus on three issues raised by TNoC 2018-98: mobile phone users' satisfaction with mobile phone plans, the frequency with which mobile phone users experience data-overflow charges, and users' interest in data-only mobile phone plans.

Part II, which follows, briefly describes the survey results in the following order:

- a. Users' mobile phone plans' inclusion of data
- b. Level of mobile phone plan data
- c. Users' views on their current mobile phone plan's value for money
- d. Users' experience with paying additional amounts due to data use
- e. Users' experience with limiting their mobile phone use due to fears of additional data fees
- f. Amount of data used in a typical month, and
- g. Users' interest in data-only plans.

We analyze the results in Part III, while the survey method and questionnaires are set out in Part IV.

II. Analysis of survey results

Access Research conducted an interactive-voice-response survey of 1,294 people over 18 years of age in Canada, on the second Friday and weekend of June 2018, using an English-language and French-language questionnaire designed by the Forum. Access Research weighted the survey responses by age, gender, and region, using data from Statistics Canada.¹ The survey's results have a margin of error of plus or minus +/-2.83%, 19 times out of 20.

The survey asked respondents

- About the frequency of their access to the Internet using their mobile phones (Q1)
- Whether they have a pre-paid or post-paid mobile phone plan (Q2)

¹ The Forum notes, however, that only one (1) response was received from the territories.

- Whether their mobile phone plan includes data (Q3)
- If their mobile phone plan includes data, how much data is included (Q4)
- Whether their current mobile phone plan gives them good value for the money they pay (Q5)
- Whether respondents have had to pay additional amounts because of using more data than included in their phone plans (Q6)
- Whether respondents have limited their mobile phone use because they were worried they might be charged additional fees for data (Q7)
- The amount of mobile phone data respondents use in a typical month (Q8), and
- Interest in data-only plans (Q9).

The Forum analyzed these concepts in terms of demographics: language, gender, age, region (in which respondents live), education and income. Responses suggesting uncertainty (“Not sure”) were generally included in the analysis.

Tests of statistical significance measure were used to measure the probability that a specific association between variables was or was not likely to have occurred by chance.² Results were considered statistically significant when their probability of occurring by chance – using the Pearson’s chi-square test³– was equal to or lower than five times out of a hundred (*i.e.*, the 5%, or .05 level that is generally used in the social sciences). Statistically significant results can be generalized to the population being described,⁴ whom we describe in the remainder of this report as ‘Canadians’.⁵

Associations between concepts that were not statistically significant may have occurred by chance, and for that reason are not reported. Results that are not statistically significant also convey meaning, however: results showing no statistically significant differences by gender establish that men, women and others (who chose not to identify as male or female) held the same general views.

A. Use of mobile phones to access the Internet (Q1)

Survey result 1 shows that in June 2018 close to half (47.0%) of Canadians said they used their mobile phones to access the Internet ‘nearly all the time’, with almost a third more (31.4%) saying they used their mobile phones for this reason ‘several times a day’ (**Error! Reference source not found.**). There were no statistically significant differences between genders ($p=.226$), and the regions ($p=.428$).

More than half of people up to the age of 44 used their mobile phones to access the Internet nearly all the time, while people older than 65 tended to use their mobile phones less frequently to access the Internet. A higher percentage of people living in smaller communities of fewer than a thousand people said they used their mobile phones to access the Internet infrequently (once or twice a month) or not at

² In other words, a statistically significant result from these tests does not imply that the results are important (a significant finding), but that the results were unlikely to have occurred by chance.

³ Two-sided asymptotic significance levels.

⁴ Results that are not statistically significant may have occurred by chance.

⁵ As the survey did not ask respondents about their citizenship or nationality, non-Canadians resident in Canada with Canadian telephone numbers may also be included in the results.

all. In 2016 the median income for households in Canada was \$70,332;⁶ nearly three-quarters (73.1%) of those who did not use their mobile phones to access the Internet reported incomes below this level.

Survey result 1 Frequency of access to Internet using mobile phone (Q1)

1. First of all, how often do you access the Internet using your mobile phone?	Nearly all the time	Do this several times a day	Do this a few times a week	Once or twice a month	Do not use phone to access Internet	Total
TOTAL (N=1294)	47.0%	31.4%	11.3%	3.1%	7.2%	100.0%
	78.4%		11.3%	10.5%		100%
Location (Pearson Chi-Square 0.000)						
In a city with 100,000 or more residents	46.7%	32.8%	12.3%	1.7%	6.5%	100.0%
In a city with between 30,00 and 99,999 residents	50.2%	29.5%	8.8%	2.3%	9.2%	100.0%
In a town or city with a population of between 1,000 and 29,999 residents	45.3%	35.3%	12.3%	2.5%	4.5%	100.0%
In a community with 500 to 999 residents	50.0%	21.8%	10.3%	7.7%	10.3%	100.05
In a community with fewer than 500 residents	43.9%	18.35	8.5%	13.4%	15.9%	100.0%
Age (p=.000)						
18 – 24 years of age	56.0%	39.0%	1.0%	0.0%	3.5%	100.0%
25 – 34	69.2%	24.3%	5.6%	0.0%	0.9%	100.0%
35 – 44	58.8%	31.3%	5.2%	0.9%	3.8%	100.0%
45 – 54	44.5%	35.2%	12.8%	3.5%	4.0%	100.0%
55 – 64	38.8%	33.9%	18.8%	4.5%	4.0%	100.0%
65 – 74	22.5%	37.1%	15.2%	6.0%	19.2%	100.0%
75 years of age or older	24.8%	16.8%	23.9%	9.7%	24.8%	100.0%
Prefer not to answer	50.0%	16.7%	8.3%	0.0%	3.2%	100.0%
Income (p=.000)						
Under \$20,000	43.0%	30.4%	8.2%	7.0%	11.4%	100.0%
\$20,000 to just under \$40,000	42.7%	25.6%	14.2%	3.8%	13.7%	100.0%
\$40,000 to just under \$60,000	44.1%	27.7%	14.4%	3.1%	10.8%	100.0%
\$60,000 to just under \$80,000	48.1%	35.6%	10.0%	1.9%	4.4%	100.0%
\$80,000 or just under \$100,000	51.0%	33.3%	11.8%	0.7%	3.3%	100.0%
\$100,000 to just under \$150,000	54.1%	34.4%	6.6%	3.8%	1.1%	100.0%
\$150,00 and above	55.6%	32.35	10.1%	0.0%	2.0%	100.0%
Prefer not to answer	40.7%	34.8%	14.8%	3.0%	6.7%	100.0%
Median income (Chi-Square, p=.000)						

⁶ Statistics Canada, “Census indicator profile, based on the 2016 Census long-form questionnaire, Canada, provinces and territories, and health regions (2017 boundaries)” Table 17-10-0123-01 (formerly CANSIM 109-0501), <https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=1710012301>.

1. First of all, how often do you access the Internet using your mobile phone?	Nearly all the time	Do this several times a day	Do this a few times a week	Once or twice a month	Do not use phone to access Internet	Total
Below median income (< \$59K)	40.1%	38.7%	48.3%	62.5%	73.1%	43.7%
Near median income (\$70.3K)	12.7%	14.0%	10.9%	7.5%	7.5%	12.4%
Above median income (> \$80K)	38.2%	35.7%	27.2%	20.0%	9.7%	33.5%
Prefer not to answer	9.0%	11.6%	13.6%	10.0%	9.7%	10.4%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Education (Chi-Square, p=.024)						
Secondary school or less	48.0%	28.2%	8.1%	3.9%	11.7%	100.0%
College or BA	46.8%	32.2%	12.3%	2.9%	5.8%	100.0%
Graduate studies	45.1%	34.0%	14.4%	2.0%	4.6%	100.0%
No answer	54.2%	33.3%	4.2%	0.0%	8.3%	100.0%

Survey result 2 shows that more than two-thirds (68.7%) of Canadians said they had a post-paid plan for their mobile phones, with a quarter (25.9%) saying they had pre-paid plans, and another 5.5% saying they did not know.

Survey result 2 Choice of plan and use of Internet (Q2)

1. First of all, how often do you access the Internet using your mobile phone?	Nearly all the time	Do this several times a day	Do this a few times a week	Once or twice a month	Do not use phone to access internet	Total
TOTAL (N=1294)	46.9%	31.4%	11.4%	3.2%	7.2%	100.0%
	78.3%		11.4%	10.5%		100%
Mobile phone plan (p= .000)						
Pre-paid (N=335)	40.9%	33.4%	13.1%	5.1%	7.5%	100.0%
Post-paid (N=888)	50.6%	30.9%	9.9%	2.1%	6.5%	100.0%
Don't know (N=71)	29.6%	28.2%	21.1%	5.6%	15.5%	100.0%

B. Data in mobile phone plans

1. Data included in mobile phone plans? (Q3)

Survey result 3 shows that most (86.5%) Canadians say that data is included in their mobile phone plans, with 11.4% saying data was not included, and another 2.1% saying they did not know.

No statistically significant differences exist in whether people do or do not have data in their mobile phone plans, in terms of gender (p=.331) and region (p=.428).

Income is associated with access to data on mobile phones: a higher percentage of people (54.4%) with incomes below the 2016 median income in Canada reported that data was not included in their mobile phone plans.

Survey result 3 Does mobile phone plan include data? (Q3)

		Data included in plan	Data not included in plan	Don't Know	Total
Canada		86.5%	11.4%	2.1%	100.0%
Median	Under median (\$70.3K)	41.5%	54.4%	75.0%	43.7%
	Median (\$60-79K)	12.8%	10.2%	7.1%	12.4%
	Above median (\$80K +)	36.5%	17.0%	3.6%	33.5%
	Prefer not to answer	9.3%	18.4%	14.3%	10.4%
Total		100.0%	100.0%	100.0%	100.0%

2. Amount of data included in mobile phone plans? (Q4)

Survey result 4 shows that more than two-thirds (67.8%) of Canadians said their monthly mobile phone plan included a gigabyte (GB) or more of data, with proportionately more men (52%) reporting this level of data, than women (44.1%).

Survey result 4 Amount of data included in monthly mobile phone plan? (Q4)

	Fewer than 500 MB	500-999 MB	1 GB or more	DK	Total
Canada	22.4%	3.0%	67.8%	6.9%	100%
Gender (p=.000)					
Male	41.4%	45.5%	52.0%	24.7%	47.6%
Female	55.8%	54.5%	44.1%	70.1%	48.8%
Other	0.8%		1.3%		1.1%
Prefer not to say	2.0%		2.5%	5.2%	2.5%
Total	100.0%	100.0%	100.0%	100.0%	100.0%
City size (p=.024)					
Large city: 100,000 +	18.4%	2.4%	70.1%	9.1%	100.0%
Medium city: 30-99K	26.6%	1.6%	67.6%	4.3%	100.0%
Small city: 1K-29K	24.0%	4.5%	65.5%	5.9%	100.0%
Town: 500-999	16.7%	5.0%	73.3%	5.0%	100.0%
Community: < 500	33.8%	1.5%	57.4%	7.4%	100.0%
Income (p=.003)					
Less than \$20K	30.3%	3.0%	60.6%	6.1%	100.0%
\$20-39K	26.7%	1.8%	62.4%	9.1%	100.0%
\$40-59K	18.5%	7.1%	64.3%	10.1%	100.0%
\$60-79K	21.7%	1.4%	74.1%	2.8%	100.0%
\$80-99K	26.8%	3.5%	64.1%	5.6%	100.0%
\$100-149K	22.9%	1.7%	70.9%	4.6%	100.0%
\$150K or more	15.4%	3.3%	73.6%	7.7%	100.0%
Prefer not to answer	11.5%	1.9%	76.9%	9.6%	100.0%

3. Use of data in a typical month (Q8)

Survey result 5 shows that more than half of all men (53.7%) said they use a gigabyte or more of data in a typical month, while somewhat fewer women (41.5%) reported this level of data usage. Just over half (52.4%) of people in large cities use a gigabyte or more of data in a typical month, with somewhat fewer

reporting this level of data usage in smaller cities. Data usage is associated with income; fewer than half of those below Canada's median income (45.9%) reported using a gigabyte or more of data in a typical month, compared with 56% of those above the median income.

Survey result 5 Amount of data used in a typical month (Q8)

		Less than 500 MB	500-999 MB	1 GB or more	DK	Total
Gender P=.000	Male	39.1%	45.7%	53.7%	37.5%	46.8%
	Female	58.3%	52.1%	41.5%	58.8%	49.4%
	Other	0.5%		2.1%		1.2%
	Prefer not to say	2.1%	2.1%	2.6%	3.8%	2.6%
Total		100.0%	100.0%	100.0%	100.0%	100.0%
City =p=.033	Large city: 100,000 +	27.8%	6.5%	52.4%	13.2%	100.0%
	Medium city: 30-99K	25.9%	12.0%	48.1%	13.9%	100.0%
	Small city: 1K-29K	30.5%	7.6%	51.6%	10.3%	100.0%
	Town: 500-999	37.2%	6.4%	43.6%	12.8%	100.0%
	Community: < 500	39.5%		48.1%	12.3%	100.0%
Total		29.6%	7.3%	50.7%	12.4%	100.0%
Income P=.000	Less than \$20K	32.7%	6.3%	51.6%	9.4%	100.0%
	\$20-39K	34.9%	9.0%	39.6%	16.5%	100.0%
	\$40-59K	37.4%	5.1%	48.2%	9.2%	100.0%
	\$60-79K	24.4%	9.4%	55.6%	10.6%	100.0%
	\$80-99K	30.3%	9.2%	50.7%	9.9%	100.0%
	\$100-149K	27.3%	6.0%	57.4%	9.3%	100.0%
	\$150K or more	17.3%	8.2%	62.2%	12.2%	100.0%
	Prefer not to answer	24.6%	6.0%	47.0%	22.4%	100.0%
Total		29.7%	7.3%	50.7%	12.3%	100.0%
Median Income P=.000	Under median (\$70.3K)	35.1%	6.9%	45.9%	12.1%	100.0%
	Median (\$60-79K)	24.4%	9.4%	55.6%	10.6%	100.0%
	Above median (\$80K +)	26.1%	7.6%	56.0%	10.3%	100.0%
	Prefer not to answer	24.6%	6.0%	47.0%	22.4%	100.0%
Total		29.7%	7.3%	50.6%	12.4%	100.0%
Edu- cation P=.021	Secondary school or less	34.4%	6.6%	43.4%	15.6%	100.0%
	College or BA	29.7%	7.0%	52.1%	11.1%	100.0%
	MA or Doctorate	19.7%	9.9%	59.2%	11.2%	100.0%
	No answer	24.0%	8.0%	56.0%	12.0%	100.0%
Total		29.6%	7.3%	50.8%	12.3%	100.0%

4. Good value for the money that users pay? (Q5)

The survey asked people if they thought they received good value for the money they paid for their mobile phone plans: two out of three Canadians (68.6%) say they did not. Survey result 6 shows that proportionately more men (71.9%) – who tend to use more data than women (see Survey result 5) – said they did not receive good value for money. Proportionately more (between 73% and 74.9%) younger people between 25 and 54 years of age said they did not receive good value for money.

Survey result 6 Do mobile phone plans give good value for money paid? (Q5)

		Yes, good value for money	No, not good value for money	Total
Canada		31.4%	68.6%	
Gender P=.002	Male	28.1%	71.9%	100.0%
	Female	35.7%	64.3%	100.0%
	Other	18.8%	81.3%	100.0%
	Prefer not to say	12.1%	87.9%	100.0%
Total		31.3%	68.7%	100.0%
Age P=.000	18-24	42.9%	57.1%	100.0%
	25-34	25.2%	74.8%	100.0%
	35-44	25.1%	74.9%	100.0%
	45-54	27.0%	73.0%	100.0%
	55-64	30.9%	69.1%	100.0%
	65-74	34.9%	65.1%	100.0%
	75+	47.0%	53.0%	100.0%
	Prefer not to answer	8.3%	91.7%	100.0%
Total		31.3%	68.7%	100.0%
Median P=.000	Under median (\$70.3K)	36.0%	64.0%	100.0%
	Median (\$60-79K)	36.9%	63.1%	100.0%
	Above median (\$80K +)	22.6%	77.4%	100.0%
	Prefer not to answer	33.3%	66.7%	100.0%
Total		31.3%	68.7%	100.0%
City P=.002	Large city: 100,000 +	36.3%	63.7%	100.0%
	Medium city: 30-99K	34.6%	65.4%	100.0%
	Small city: 1K-29K	24.2%	75.8%	100.0%
	Town: 500-999	26.9%	73.1%	100.0%
	Community: < 500	30.9%	69.1%	100.0%
Total		31.4%	68.6%	100.0%
Region P=.000	BC & AL	29.6%	70.4%	100.0%
	Sask & Man	48.0%	52.0%	100.0%
	Ont	37.9%	62.1%	100.0%
	Que	42.1%	57.9%	100.0%
	Atlantic	27.7%	72.3%	100.0%
	North	15.2%	84.8%	100.0%
Total		31.4%	68.6%	100.0%

Dissatisfaction with the value of monthly phone plans increased with the amount of data people used in a typical month, rising from 59.1% when they used fewer than 100 megabytes of data, to 78.3% when they used 3 or more gigabytes of data (Survey result 7).

Survey result 7 Value for money paid, and use of data (Q5)

		Yes, good value for money	No, not good value for money	
Use of data in typical month P=.000	50-100 MB	40.9%	59.1%	100.0%
	100-250 MB	29.5%	70.5%	100.0%
	250-500 MB	29.6%	70.4%	100.0%
	500-999 MB	33.7%	66.3%	100.0%
	1-2 GB	30.6%	69.4%	100.0%
	2-3 GB	25.8%	74.2%	100.0%
	3+ GB	21.7%	78.3%	100.0%
	DK	46.9%	53.1%	100.0%
Broadly grouped data use in typical month P=.000	Less than 500 MB	32.8%	28.2%	29.7%
	500-999 MB	7.9%	7.1%	7.3%
	1 GB or more	40.7%	55.1%	50.6%
	DK	18.5%	9.6%	12.4%
Total		31.4%	68.6%	100.0%

C. The cost of data

1. Incidence of overage fees for data (Q6)

The survey asked people if they have paid additional amounts for their mobile phone service, because they used more data than included in their mobile phone plans. Just over half (53.2%) said they had paid such fees at least a few times or more in the past year (Survey result 8).

Survey result 8 Frequency at which data overage charges are paid in Canada (Q6)

6. In the past year, have you had to pay additional amounts for your mobile phone service because you have used more data than is included in your phone plan?	Have never had to pay for additional data	Have had to pay for additional data a few times in the past year	Have had to pay for additional data four or five times in the past year	Have had to pay for additional data nearly every month in the past year	Have always had to pay for additional data in the past year	Don't know
TOTAL (N=1294)	45.5%	43.8%	5.8%	2.6%	1.0%	1.3%
	45.5%	53.2%				1.3%

Payment of overage fees for data was highest among those 25 to 34 years of age, with 60.2% reporting that they had paid such fees at least a few times in the previous year (Survey result 9).

Survey result 9 Frequency at which data overage charges are paid, by age group (Q6)

Age	Never had to pay for additional data	Paid for data a few times in past year	Paid for data 4-5 times in past year'	Paid for data nearly every month in past year	Always had to pay in past year	Didn't know	Total
18-24	47.1%	37.1%	7.9%	5.0%		2.9%	100.0%
	47.1%	50.0%				2.9%	100.0%

25-34	39.3%	47.2%	7.9%	3.7%	1.4%	0.5%	100.0%
	39.3%	60.2%				0.5%	100.0%
35-44	40.6%	46.2%	7.1%	2.8%	0.9%	2.4%	100.0%
	40.6%	57.0%				2.4%	100.0%
45-54	48.2%	42.9%	6.2%	1.8%		0.9%	100.0%
	48.2%	50.9%				0.9%	100.0%
55-64	49.8%	41.7%	4.9%	2.7%		0.9%	100.0%
	49.8%	49.3%				0.9%	100.0%
65-74	50.3%	45.0%	3.3%		0.7%	0.7%	100.0%
		49.0%				0.7%	100.0%
75+	46.1%	41.7%	2.6%	1.7%	6.1%	1.7%	100.0%
		52.1%				1.7%	100.0%
Prefer not to answer	33.3%	66.7%					100.0%
	33.3%	66.7%					100.0%
Total	45.6%	43.7%	5.9%	2.6%	1.0%	1.3%	100.0%
	45.6%	53.2%				1.3%	100.0%

Payment of overage fees for data was also higher among those with higher levels of education: 49.3% of those with up to secondary school had paid overage fees at least a few times or more in the previous year, compared with 53.9% of those with a college degree, and 58.6% of those with graduate degrees (Survey result 10).

Survey result 10 Frequency at which data overage charges are paid, by level of education (Q6)

Educational level P=.010	Never had to pay for additional data	Paid for data a few times in past year	Paid for data 4-5 times in past year ¹	Paid for data nearly every month in past year	Always had to pay in past year	DK	Total
Secondary school or less	48.4%	37.9%	5.4%	3.3%	2.7%	2.4%	100.0%
College or BA	45.3%	45.3%	5.6%	2.7%	0.3%	0.8%	100.0%
MA or Doctorate	40.0%	47.7%	8.4%	1.9%	0.6%	1.3%	100.0%
No answer	41.7%	50.0%	4.2%		4.2%		100.0%
Total	45.4%	43.8%	5.9%	2.7%	1.0%	1.2%	100.0%
Median income (p=.020)							
Under median (Less than \$59K)	48.0%	40.2%	5.3%	2.3%	1.8%	2.3%	100.0%
Median (\$60-79K)	46.6%	44.7%	3.7%	3.7%	0.6%	0.6%	100.0%
Above median (\$80K +)	41.4%	48.3%	7.1%	3.0%	0.2%		100.0%
Prefer not to answer	46.7%	43.0%	6.7%	1.5%	0.7%	1.5%	100.0%
Total	45.5%	43.8%	5.9%	2.6%	1.0%	1.2%	100.0%
Region P=.012							
BC & AL	42.9%	44.9%	6.3%	2.3%	2.5%	1.0%	100.0%
Sask & Man	48.6%	47.3%	2.7%	1.4%			100.0%
Ont	44.5%	42.7%	6.4%	4.1%	0.9%	1.4%	100.0%
Que	55.4%	35.4%	5.1%	1.5%		2.6%	100.0%
Atlantic	50.0%	41.0%	5.7%	1.9%		1.4%	100.0%
North	35.9%	52.5%	6.6%	4.0%	0.5%	0.5%	100.0%
Total	45.5%	43.8%	5.9%	2.6%	1.0%	1.2%	100.0%

The highest incidence (64.2%) of people paying overage fees 4 or more times per year, occurred among those with the highest data usage (using a gigabyte or more in a typical month) (Survey result 11). Perhaps unsurprisingly, the level of dissatisfaction (value for money) was highest (89.3%) among those paying data overage fees 4 or more times in the previous year.

Survey result 11 Frequency at which data overage charges are paid, by level of data used (Q6)

Data used in typical month (p=.000)	Overage fees paid in previous year				Total
	Never	A few times	4 or more times	DK	
Less than 500 MB	33.0%	29.2%	18.7%	11.8%	29.7%
500-999 MB	8.8%	6.2%	4.1%	17.6%	7.3%
1 GB or more	44.2%	55.1%	64.2%	23.5%	50.6%
DK	13.9%	9.5%	13.0%	47.1%	12.4%
Total	100.0%	100.0%	100.0%	100.0%	100.0%
Value (p=.000)					
Yes, good value for money	40.4%	26.5%	10.7%	31.3%	31.4%
No, not good value for money	59.6%	73.5%	89.3%	68.8%	68.6%
Total	100.0%	100.0%	100.0%	100.0%	100.0%

2. Do users limit use due to fears of data overage fees? (Q7)

The survey asked people if they limited their data use because they worried they might be charged data overage fees. More than half (60.9%) said they did limit their use for this reason, and this result did not change when considered by gender (p=.393), broad educational categories (secondary, college, graduate; p=.112); income that was above or below median income (p=.109) or size of city (p=.293).

Survey result 12 shows that limits on mobile phone use are related to users' previous experience with data-overage charges. More than two-thirds (69.4%) of those who never limited their cellphone use in the previous year, also did not have to pay data-overage charges in the same period. That said, a third (32.9%) of those who limited their use once or twice in the previous year, and a fifth of those who limited their use a few times or more every week (21.8%) said they had never had to pay data overage fees at all in the previous year – suggesting that fear of data overage fees alone, rather than direct experience with such fees, is modifying mobile phone users' behaviour in Canada.

Survey result 12 Whether had to pay for data overage in previous year, compared with self-limits on use of mobile phone due to worries about data-overage fees

Limited mobile phone use in past year because of worries that might be charged additional fees for data used (Q7)				
Q6 Had to pay for data overage in previous year P=.000	Never limited use	Limited use once or twice	Limited use a few times every week or more	Total
Never had to pay	69.4%	32.9%	21.8%	45.6%
Had to pay a few times	26.7%	57.3%	47.3%	43.9%
Had to pay 4 or more times	2.2%	9.0%	29.8%	9.4%

Don't know	1.8%	0.8%	1.1%	1.2%
Total	100.0%	100.0%	100.0%	100.0%

As Survey result 13 shows, efforts to limit use due to worries about the cost of data overage charges was highest in the North (65.2%) and British Columbia and Alberta (64.6%).

Survey result 13 Limiting use because of worry that overage fees might be incurred, by region (Q7)

		Never limited	Once or twice	A few times every week or more	Total	More than once
Canada		39.1%	46.3%	14.6%	100.0%	60.90%
Region (p=.010)	BC & AL	35.4%	45.1%	19.5%	64.60%	64.60%
	Sask & Man	44.0%	41.3%	14.7%	56.00%	56.00%
	Ont	39.9%	44.5%	15.6%	60.10%	60.10%
	Que	46.2%	46.2%	7.7%	53.90%	53.90%
	Atlantic	40.6%	49.5%	9.9%	59.40%	59.40%
	North	34.8%	49.5%	15.7%	65.20%	65.20%
Total		39.1%	46.3%	14.6%	100.0%	60.90%

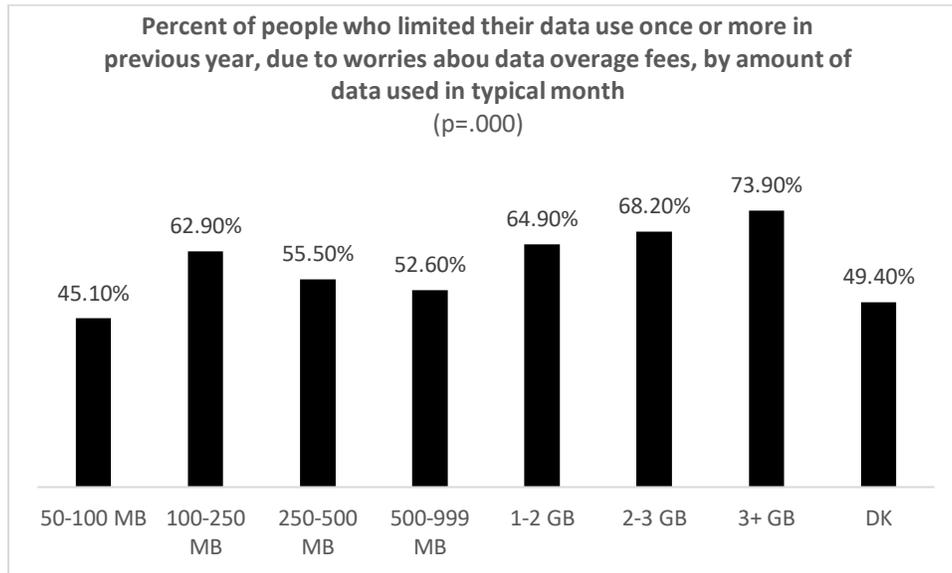
Overall, people's propensity to limit their data use due to concerns about overage charges grew, the more data they used in a typical month, from 52.4% limiting use once or more in the previous year when they used less than 500 megabytes in a typical month, to 69.9% limiting use when they used a gigabyte or more of data (Survey result 14).

Survey result 14 Limiting use because of worry that overage fees might be incurred, by region (Q7)

Data use in typical month (grouped) (p=.000)	Have limited use in previous year			Total	Once or more
	Never limited	Once or twice	A few times every week or more		
Less than 500 MB	47.7%	43.5%	8.9%	100.0%	52.4%
500-999 MB	47.4%	38.9%	13.7%	100.0%	52.6%
1 GB or more	30.1%	52.8%	17.1%	100.0%	69.9%
DK	50.6%	30.6%	18.8%	100.0%	49.4%
Total	39.1%	46.3%	14.6%	100.0%	60.9%

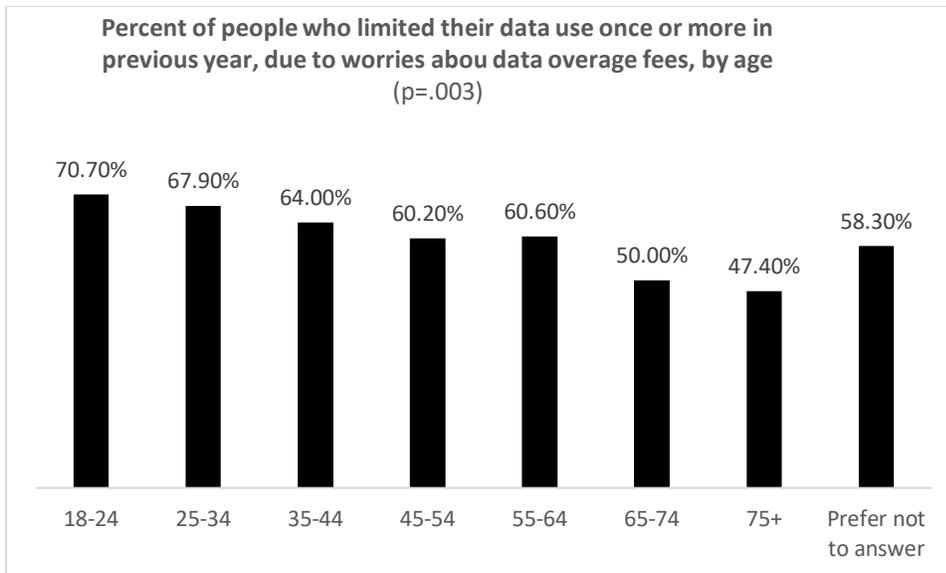
The greater the amount of data used in a typical month, the greater the propensity to limit data usage (Survey figure 1).

Survey figure 1 Relationship between typical monthly data use and users' self-limitations on use of data



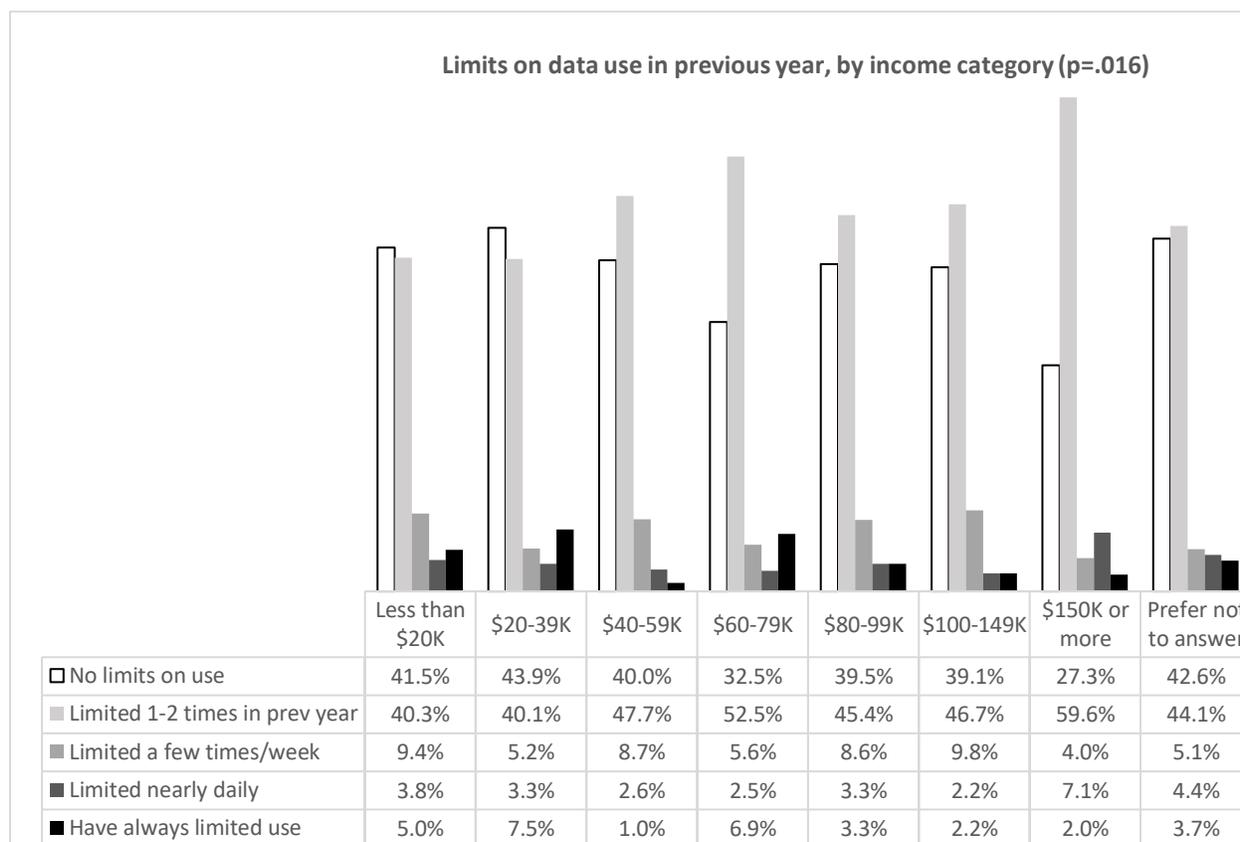
The younger the mobile phone users, the more likely they were to limit their data use (Survey figure 2).

Survey figure 2 Relationship between users' age and self-limitations on use of data



Mobile phone users limited their use of data, regardless of income (see Survey figure 3).

Survey figure 3 Relationship between users' income and self-limitations on use of data



D. Views on a lower-cost data-only plan (Q9)

The last substantive question of the survey (question 9) asked Canadians whether they would switch to a data-only plan if it cost less than their current plan: “Many mobile plans include voice and data, but some only include data. Users with data-only plans can still use the Internet and they can make calls and send messages if the download and use Internet applications or services. Would you switch to a data-only plan if it cost less than your current plan?”

1. General demographics

Very few (1.1%) of Canadians said they already have a data-only plan (Survey result 15).

A little more than one in five Canadians (23.2%) said they would switch to a data-only plan if it were less expensive than their current plan (Survey result 15). No statistically significant differences occurred with respect to gender (p=.756) and city (p=.905). Interest in switching to a less-expensive data-only plan was highest among those under 34 years of age and lowest among those over 65.

Survey result 15 Users' views on lower-cost data-only plan, across Canada and by age (Q9)

	Would switch	Would not switch	Already have data-only plan	Need more information	DK	Total
Canada	23.2%	60.2%	1.1%	6.8%	8.7%	100.0%

Age	18-24	24.1%	55.3%	2.1%	6.4%	12.1%	100.0%
P=.003	25-34	26.6%	62.6%	0.5%	6.5%	3.7%	100.0%
	35-44	22.2%	62.3%	1.4%	4.7%	9.4%	100.0%
	45-54	20.8%	62.8%	0.9%	6.6%	8.8%	100.0%
	55-64	28.1%	54.0%	1.3%	6.3%	10.3%	100.0%
	65-74	19.2%	66.2%	1.3%	3.3%	9.9%	100.0%
	75+	18.3%	56.5%		17.4%	7.8%	100.0%
	Prefer not to answer	8.3%	66.7%	8.3%	8.3%	8.3%	100.0%

When considered in terms of income, more than a quarter (27.8%) of those with a pre-tax household income of less than \$20,000 or of over \$100,000 per year said they would switch to a data-only plan (Survey result 16)

Survey result 16 Users' views on lower-cost data-only plan, by income (Q9)

Income	Would switch	Would not switch	Already have data-only plan	Need more information	DK	Total
P=.001						
Less than \$20K	27.8%	48.7%	2.5%	7.6%	13.3%	100.0%
\$20-39K	22.7%	55.0%	0.9%	10.0%	11.4%	100.0%
\$40-59K	24.7%	57.7%	1.5%	9.8%	6.2%	100.0%
\$60-79K	20.6%	67.5%	1.3%	4.4%	6.3%	100.0%
\$80-99K	23.7%	59.9%	0.7%	7.9%	7.9%	100.0%
\$100-149K	26.8%	63.9%		3.8%	5.5%	100.0%
\$150K or more	25.3%	66.7%		4.0%	4.0%	100.0%
Prefer not to answer	11.2%	67.9%	2.2%	4.5%	14.2%	100.0%
Total	23.1%	60.3%	1.2%	6.8%	8.7%	100.0%

Survey result 17 found the highest level of interest (29.3%) in switching to a lower-cost data-only plan came from Saskatchewan and Manitoba, while the highest desire for more information came from people in Quebec (9.7%) and the North (10.1%).

Survey result 17 Interest in a lower-cost data-only plan, by region

Region	Would switch	Would not switch	Already have data-only plan	Need more information	Don't know	Total
=p.044						
BC & AL	23.1%	60.9%	2.0%	7.1%	6.9%	100.0%
Sask & Man	29.3%	57.3%	2.7%	2.7%	8.0%	100.0%
Ont	20.2%	65.1%	0.5%	5.0%	9.2%	100.0%
Que	23.1%	53.8%	2.1%	9.7%	11.3%	100.0%
Atlantic	26.9%	60.8%		4.2%	8.0%	100.0%
North	19.7%	60.1%		10.1%	10.1%	100.0%
Total	23.1%	60.2%	1.2%	6.9%	8.7%	100.0%

2. High-use users

The Forum was interested to know whether mobile phone users who used higher levels of data, would be more interested in switching to a data-only plan, than those using lower levels of data. The highest levels of interest in data-only plans came from those who use comparatively low amounts of data (50 to 100 MB) in a typical month (28%), and from those using between 2 and 3 gigabytes of data (28.0%): see Survey result 18.

Survey result 18 Interest in a lower-cost data-only plan, by use of data in a typical month

Use of data in typical month P=.000	Would switch	Would not switch	Already have data-only plan	Need more information	DK	Total
50-100 MB (N=182)	28.0%	59.9%	1.1%	2.2%	8.8%	100.0%
100-250 MB (N=106)	25.5%	61.3%	1.9%	8.5%	2.8%	100.0%
250-500 MB (N=97)	20.6%	55.7%	2.1%	12.4%	9.3%	100.0%
500-999 MB (N=94)	20.2%	70.2%		4.3%	5.3%	100.0%
1-2 GB (N=205)	16.6%	66.8%	1.0%	6.8%	8.8%	100.0%
2-3 GB (N=132)	28.0%	58.3%	0.8%	6.1%	6.8%	100.0%
3+ GB (N=317)	24.3%	61.5%	1.3%	6.6%	6.3%	100.0%
DK (N=161)	21.7%	47.2%	0.6%	10.6%	19.9%	100.0%
Total	23.2%	60.2%	1.1%	6.9%	8.7%	100.0%

When considering the (roughly) one in four people who said they would switch to a lower-cost data-only plan, interest was lowest among those now using between 500 megabytes and 1 gigabyte of data in a typical month (6.3%), and highest (25.7%) among those using more than 1 gigabyte per month: see Survey result 19.

Survey result 19 Use of data in a typical month by interest in a lower-cost data-only plan

Use of data in typical month (p=.000)	Would switch	Would not switch	Already have data-only plan	Need more information	DK	Canada
50-100 MB	17.0%	14.0%	14.3%	4.5%	14.3%	14.1%
100-250 MB	9.0%	8.3%	14.3%	10.1%	2.7%	8.2%
250-500 MB	6.7%	6.9%	14.3%	13.5%	8.0%	7.5%
500-999 MB	6.3%	8.5%		4.5%	4.5%	7.3%
1-2 GB	11.3%	17.6%	14.3%	15.7%	16.1%	15.8%
2-3 GB	12.3%	9.9%	7.1%	9.0%	8.0%	10.2%
3+ GB	25.7%	25.0%	28.6%	23.6%	17.9%	24.5%
DK	11.7%	9.8%	7.1%	19.1%	28.6%	12.4%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
N	300	779	14	89	112	1294

3. Users who don't think they get value for money

Survey result 20 Interest in switching to a lower-cost data-only plan was higher among those who did not think they were getting value for money (25.2%), than among those who thought they were getting good value for money (18.7%).

Survey result 20 Interest in lower-cost data-only plans by opinion on value for money of mobile phone plan

Good value for money (Q5) P=.003	Would switch	Would not switch	Already have data-only plan	Need more information	DK	Total
Yes, good value for money	18.7%	66.3%	1.7%	4.4%	8.8%	100.0%
No, not good value for money	25.2%	57.3%	0.9%	8.0%	8.7%	100.0%
Total	23.1%	60.1%	1.2%	6.9%	8.7%	100.0%

4. Uses who've experienced overage fees

Survey result 21 shows that when people's past experience with data-overage fees is compared to their interest in switching to a lower-cost data-only plan, interest in switching ranges between 18.2% and 25.0%. It also shows that, as people's level of experience with data overage fees increases, their need for more information about data-only plans grows – to the point that more than half (57.1%) of those who have “always” had to pay data-overage fees say they need more information about data-only plans.

Survey result 21 Payment of data overage fees in past year, compared with interest in switching to lower-cost, data-only plan

Data overage fees in past year P=.000	Would switch	Would not switch	Already have data-only plan	Need more information	DK	Total
Never had to pay for additional data	23.4%	63.0%	0.8%	4.6%	8.1%	100.0%
Paid for data a few times in past year	23.3%	61.6%	1.4%	6.2%	7.6%	100.0%
Paid for data 4-5 times in past year ¹	25.0%	50.0%	1.3%	10.5%	13.2%	100.0%
Paid for data nearly every month in past year	18.2%	51.5%		18.2%	12.1%	100.0%
Always had to pay in past year	21.4%	7.1%		57.1%	14.3%	100.0%
DK	6.3%	18.8%		31.3%	43.8%	100.0%
Total	23.1%	60.2%	1.1%	6.9%	8.8%	100.0%

III. Research method

A. Survey

A national, bilingual survey of 1,294 adults (18 years or over) across the provinces and territories (yielding results with a margin of error of plus or minus 2.83%, 19 times out of 20) who have their own mobile phones, was conducted in English and in French by Access Research using interactive voice response technology by Access Research, on behalf of the Forum for Research and Policy in Communications (FRPC), on the 8th, 9th and 10th of June 2018. The survey's results have a margin of error of plus or minus +/-2.83%, 19 times out of 20.

The survey was undertaken as part of the Forum's work with respect to [Call for comments - Lower-cost data-only plans for mobile wireless services, Telecommunications Notice of Consultation CRTC 2018-98 \(Ottawa, 22 March 2018\)](#), and was submitted to the CRTC on 13 June 2018 as part of the Forum's comments in that proceeding.

The survey results described in this report focus on three issues raised by TNoC 2018-98: mobile phone users' satisfaction with mobile phone plans, the frequency with which mobile phone users experience data-overflow charges, and users' interest in data-only mobile phone plans.

Copies of the English-language and French-language surveys are attached. The survey was discontinued if respondents worked for a telecommunications company, or if they did not have their own mobile phone. Respondents who did not know whether data is⁷ included in their mobile phone plans, were not asked how much data they used.

At the Forum's request, Access Research sampled to ensure a response rate from the Yukon, Nunavut and the Northwest Territories of sufficient size to permit separate analysis of the data for the North; altogether 199 responses from the territories were obtained. Rather than analyze the data using the original values for the residence variable, we collapsed these into four larger categories: West (and the single northern response); Ontario; Quebec and the Atlantic provinces.

Q13 In which province or territory do you live?

		Frequency	Recoding	Percent	Valid Percent	Cumulative Percent
Valid	British Columbia or Alberta	395	395			
	Saskatchewan or Manitoba	75	75			
	Ontario	219	219			
	Quebec	195	195			
	Newfoundland or New Brunswick	78	212			
	Nova Scotia or Prince Edward Island	134				
	Northwest Territories	84	199			
	Nunavut	13				
	Yukon	102				
	Total					

Next, we asked respondents about their completed levels of education. Although nearly all (97.6%) answered the questions, low response levels were received with respect to grade school (25 cases), high school (40 cases) and the doctorate level (24 cases). We therefore collapsed the original education values into three categories: up to and including high school; college or bachelor's degree, and MA or doctorate.

11 What is the highest level of education that you have completed?

⁷ In this report 'data' are referred to as a noun in the singular case.

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Grade 8 or less	25	3.0	3.1	3.1
	Some high school	40	4.8	4.9	8.0
	High school diploma or equivalent	131	15.8	16.2	24.2
	College or CEGEP	275	33.2	34.0	58.2
	Bachelor's degree	223	26.9	27.6	85.8
	Master's degree	91	11.0	11.2	97.0
	Doctorate	24	2.9	3.0	100.0
	Total	809	97.6	100.0	
Missing	Prefer not to answer	20	2.4		
Total		829	100.0		

We also asked respondents about their household income and 86.5% of respondents provided answers. We decided to analyze the results in terms of income quintiles, and regrouped the responses into five categories: under \$20,000; \$20,000 to \$39,000, \$40,000 to \$59,000, \$60,000 to \$79,000 and \$80,000 or higher.

12 Which of the following categories best describes your total household income, before taxes?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Under \$20,000	93	11.2	13.0	13.0
	\$20,000 to just under \$40,000	140	16.9	19.5	32.5
	\$40,000 to just under \$60,000	142	17.1	19.8	52.3
	\$60,000 to just under \$80,000	81	9.8	11.3	63.6
	\$80,000 to just under \$100,000	95	11.5	13.2	76.8
	\$100,000 to just under \$150,000	97	11.7	13.5	90.4
	\$150,000 and above	69	8.3	9.6	100.0
	Total	717	86.5	100.0	
Missing	Prefer not to answer	112	13.5		
Total		829	100.0		

Finally, we asked respondents about their age, using 10-year categories to the age of 75. We decided to regroup these categories to reflect generational experience with technology, and used the following categories: 18-24 years of age (born from 1994 or after, and having lived almost all their lives with the Internet); 25 to 44 years of age (born between 1974 to 1993, and having lived most of their lives with personal computers); 45 to 64 years of age (born between 1954 to 1973, and having lived most of their lives with mainframe or personal computers), and 65 years of age or over (born before 1953, and having experienced introduction of mainframe computers, personal computers and the Internet).

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	18-24 yrs (born 1994 or after)	49	5.9	6.0	6.0
	25--44 yrs (born 1974 to 1993)	220	26.5	27.2	33.2
	45-64 yrs (born 1954 to 1973)	316	38.1	39.0	72.2
	65 yrs + (born before 1953)	225	27.1	27.8	100.0

	Frequency	Percent	Valid Percent	Cumulative Percent
Total	810	97.7	100.0	
Missing No answer	19	2.3		
Total	829	100.0		

B. Survey questionnaires

FRP3

**Forum for Research and Policy in Communications
Mobile Data Plans Survey**

Forum Research Inc.

6 June 2018

n=1,200

n=1,000 NATIONAL (n=200 per region i.e. Atlantic; QC; ON; Prairies + NT + NW; BC + YK)
+ n=200 ADDITIONAL OVERSAMPLE FOR TERRITORIES

Part A – Introduction & Screener

Hello. This is Access Research calling on behalf of the Forum for Research and Policy in Communications. We would like to ask you some questions about the cost of mobile telephone and wireless data service. The survey will take about 5 minutes of your time. Just use the touchpad on your phone to select the correct answer when prompted. If you have any questions about this call, you can reach our firm, Access Research, at 1-855-561-3603 or at inquiry@access-research.com.

A. First of all, are you at least 18 years of age or older?

- a. Press 1 if Yes → **CONTINUE**
- b. Press 2 if No → **TERMINATE**

B. Do you work for a telecommunications company?

- a. Press 1 if Yes → **TERMINATE**
- b. Press 2 if No → **CONTINUE**

C. Do you have your own cell phone, smartphone or mobile phone? That is, do you have a mobile phone that is not paid for by your employer?

- a. Press 1 if Yes → **CONTINUE**
- b. Press 2 if No → **TERMINATE**
- c. Press 3 if You Don't Know → **TERMINATE**

IF HAS A MOBILE PHONE, SAY:

D. The CRTC, the federal agency that regulates telecommunications in Canada, is considering the cost of data for people who use mobile phones. Could you answer a few questions about this issue? They should take no more than five minutes of your time.

- a. Press 1 to continue → **CONTINUE**
- b. Press 2 to if you do not wish to continue → **TERMINATE**

Part B – Main Survey

1. **First of all, how often do you access the Internet using your mobile phone?**
 - a. Press 1 if you access the Internet using your mobile phone nearly all the time
 - b. Press 2 if you do this several times a day
 - c. Press 3 if you do this a few times a week
 - d. Press 4 if you do this once or twice a month
 - e. Press 5 if you do not use your mobile phone to access the internet

2. **Do you have a pre-paid or post-paid plan for your mobile phone?**
 - a. Press 1 if you have a pre-paid plan, where you pay for your phone before you obtain service
 - b. Press 2 if you have a post-paid plan, where you pay for your phone after you have used it
 - c. Press 3 if you do not know how you pay for your phone

3. **Does your mobile phone plan include data?**
 - a. Press 1 if data is included in your mobile phone plan → **CONTINUE**
 - b. Press 2 if data is not included in your mobile phone plan → **SKIP TO Q5**
 - c. Press 3 if you don't know → **SKIP TO Q5**

4. **How much data is included in your monthly mobile phone plan?**
 - a. Press 1 if it includes 50 to 100 megabytes
 - b. Press 2 if it includes 100-250 megabytes
 - c. Press 3 if it includes 250-500 megabytes
 - d. Press 4 if it includes 500-999 megabytes
 - e. Press 5 if it includes 1 to 2 gigabytes of data per month
 - f. Press 6 if it includes 2 to 3 gigabytes of data per month
 - g. Press 7 if it includes 3 or more gigabytes of data per month
 - h. Press 8 if you don't know

5. **Does your current monthly mobile phone plan give you good value for the money you are paying?**
 - a. Press 1 for Yes
 - b. Press 2 for No

6. **In the past year, have you had to pay additional amounts for your mobile phone service because you have used more data than is included in your phone plan?**
 - a. Press 1 if you have never had to pay for additional data
 - b. Press 2 if you have had to pay for additional data a few times in the past year
 - c. Press 3 if you have had to pay for additional data four or five times in the past year
 - d. Press 4 if you have had to pay for additional data nearly every month in the past year
 - e. Press 5 if you have always had to pay for additional data in the past year
 - f. Press 6 if you don't know

- 7. Have you limited your cellphone use in the last year because you worried that you might be charged additional fees for the data you use?**
- Press 1 if you have not limited your cellphone data use in the past year due to the cost of data
 - Press 2 if you have limited your cellphone data use once or twice in in the past year due to the cost of data
 - Press 3 if you have limited your cellphone data use a few times each week in the past year due to the cost of data
 - Press 4 if you have limited your cellphone data use nearly daily in the past year due to the cost of data
 - Press 5 if you have always limited your cellphone data use in the past year due to the cost of data
- 8. How much data do you use on your cellphone in a typical month?**
- Press 1 if you use from 50 to 100 megabytes in a typical month
 - Press 2 if you use from 100-250 MB
 - Press 3 if you use from 250-500 MB
 - Press 4 if you use from 500-999 MB
 - Press 5 if you use 1 to 2 gigabytes of data per month
 - Press 6 if you use from 2 to 3 gigabytes of data per month
 - Press 7 if you use 3 or more gigabytes of data per month
 - Press 8 if you don't know
- 9. Many mobile plans include voice and data, but some only include data. Users with data-only plans can still use the Internet and they can make calls and send messages if they download and use Internet applications or services. Would you switch to a data-only plan if it cost less than your current plan?**
- Press 1 if you would switch to a data-only plan
 - Press 2 if you would not switch to a data-only plan
 - Press 3 if you already have a data-only plan
 - Press 4 if you need more information
 - Press 5 if you don't know

Part C – Demographics

- 10. The next few questions are about yourself. Your answers will be kept confidential and anonymous. Please indicate your gender.**
- Press 1 for Male
 - Press 2 for Female
 - Press 3 for Other
 - Press 4 if you prefer not to say
- 11. Where do you live?**
- Press 1 if you live in a city with 100,000 or more residents
 - Press 2 if you live in a city with between 30,000 and 99,999 residents?

- c. Press 3 if you live in a town or city with a population of between 1,000 and 29,999 residents
- d. Press 4 if you live in a community with 500 to 999 residents
- e. Press 5 if you live in a community with fewer than 500 residents

12. How old are you?

- a. Press 1 if between 18 and 24 years of age
- b. Press 2 if between 25 and 34
- c. Press 3 if between 35 and 44
- d. Press 4 if between 45 and 54
- e. Press 5 if between 55 and 64
- f. Press 6 if between 65 and 74
- g. Press 7 if 75 years of age or older
- h. Press 8 if you prefer not to answer

13. In which province or territory do you live?

- a. Press 1 if British Columbia or Alberta
- b. Press 2 if Saskatchewan or Manitoba
- c. Press 3 if Ontario
- d. Press 4 if Quebec
- e. Press 5 if Newfoundland or New Brunswick
- f. Press 6 if Nova Scotia or Prince Edward Island
- g. Press 7 if Northwest Territories
- h. Press 8 if Nunavut
- i. Press 9 if Yukon

14. What is the highest level of education that you have completed?

- a. Press 1 if Grade 8 or less
- b. Press 2 if Some high school
- c. Press 3 if High school diploma or equivalent
- d. Press 4 if College or CEGEP
- e. Press 5 if Bachelor's degree
- f. Press 6 if Master's degree
- g. Press 7 if Doctorate
- h. Press 8 if you prefer not to answer

15. Which of the following categories best describes your total household income, before taxes?

- a. Press 1 if under \$20,000
- b. Press 2 if \$20,000 to just under \$40,000
- c. Press 3 if \$40,000 to just under \$60,000
- d. Press 4 if \$60,000 to just under \$80,000
- e. Press 5 if \$80,000 to just under \$100,000
- f. Press 6 if \$100,000 to just under \$150,000
- g. Press 7 if \$150,000 and above
- h. Press 8 if you prefer not to answer

Thank you, that's all the questions I have. If you have any questions about this call, you can reach our firm, Access Research, at 1-855-561-3603 or at inquiry@access-research.com.
Have a great day.

FRP3
Forum pour la recherche et la politique en communication
Enquête sur les données mobiles

Forum Research Inc. 6 juin 2018

n = 1 200

n = 1 000 NATIONAL (n = 200 par région, ex. Atlantique, QC, ON, Prairies + NT + NW, BC + YK)
+ n = 200 SUPERVISION SUPPLEMENTAIRE POUR LES TERRITOIRES

Partie A - Introduction et Éligibilité

Bonjour. C'est Access Research qui appelle au nom du Forum pour la recherche et la politique dans les communications. Nous aimerions vous poser quelques questions sur le coût du téléphone mobile et de données d'internet sans fil. L'enquête prendra environ 5 minutes de votre temps. Utilisez simplement le pavé tactile de votre téléphone pour sélectionner la bonne réponse lorsque vous y êtes invité. Si vous avez des questions à propos de cet appel, vous pouvez joindre notre cabinet, Access Research, au 1-855-561-3603 ou à inquiry@access-research.com.

R. Tout d'abord, avez-vous 18 ans ou plus?

- a. Appuyez sur 1 si Oui → CONTINUER
- b. Appuyez sur 2 si Non → TERMINER

B. Travaillez-vous pour une entreprise de télécommunications?

- a. Appuyez sur 1 si Oui → TERMINER
- b. Appuyez sur 2 si Non → CONTINUER

C. Avez-vous votre propre téléphone portable, smartphone ou téléphone mobile? Autrement dit, avez-vous un téléphone mobile qui n'est pas payé par votre employeur?

- a. Appuyez sur 1 si Oui → CONTINUER
- b. Appuyez sur 2 si Non → TERMINER
- c. Appuyez sur 3 si vous ne le savez pas → TERMINER

SI A UN TÉLÉPHONE MOBILE, DITES:

D. Le CRTC, l'organisme fédéral qui réglemente les télécommunications au Canada, tient compte du coût des données d'internet pour les utilisateurs de téléphones mobiles. Pourriez-vous répondre à quelques questions sur ce problème? Ils ne devraient pas prendre plus de cinq minutes de votre temps.

- a. Appuyez sur 1 pour continuer → CONTINUER
- b. Appuyez sur 3 pour si vous ne souhaitez pas continuer → TERMINER

Partie B - Enquête principale

1. Tout d'abord, à quelle fréquence accédez-vous à l'Internet avec votre téléphone portable?

- a. Appuyez sur 1 si vous accédez à Internet à l'aide de votre téléphone mobile presque tout le temps
- b. Appuyez sur 2 si vous faites cela plusieurs fois par jour
- c. Appuyez sur 3 si vous le faites quelques fois par semaine
- d. Appuyez sur 4 si vous le faites une ou deux fois par mois
- e. Appuyez sur 5 si vous n'utilisez pas votre téléphone portable pour accéder à l'Internet

2. Avez-vous un forfait prépayé ou post-payé pour votre téléphone portable?

- a. Appuyez sur 1 si vous avez un forfait prépayé, où vous payez pour votre téléphone avant d'obtenir le service
- b. Appuyez sur 2 si vous avez un forfait post-payé, où vous payez pour votre téléphone après l'avoir utilisé
- c. Appuyez sur 3 si vous ne savez pas comment vous payez pour votre téléphone

3. Votre plan de téléphonie mobile inclut-il des données?

- a. Appuyez sur 1 si les données sont incluses dans votre plan de téléphonie mobile → **CONTINUER**
- b. Appuyez sur 2 si les données ne sont pas incluses dans votre plan de téléphonie mobile → **PASSEZ À Q5**
- c. Appuyez sur 3 si vous ne savez pas → **PASSEZ À Q5**

4. Combien de données sont incluses dans votre forfait mensuel de téléphonie mobile?

- a. Appuyez sur 1 s'il inclut 50 à 100 mégabytes
- b. Appuyez sur 2 s'il inclut 100-250 mégabytes
- c. Appuyez sur 3 s'il inclut 250-500 mégabytes
- d. Appuyez sur 4 s'il inclut 500-999 mégabytes
- e. Appuyez sur 5 s'il inclut 1 à 2 gigabytes de données par mois
- F. Appuyez sur 6 s'il inclut 2 à 3 gigabytes de données par mois
- g. Appuyez sur 7 s'il inclut 3 gigabytes ou plus de données par mois
- h. Appuyez sur 8 si vous ne savez pas

5. Votre forfait téléphonique mensuel actuel vous donne-t-il une bonne valeur pour l'argent que vous payez?

- a. Appuyez sur 1 pour Oui
- b. Appuyez sur 2 pour Non

6. Au cours de la dernière année, avez-vous dû payer des frais supplémentaires pour votre service de téléphonie mobile parce que vous avez utilisé plus de données que ce qui est inclus dans votre forfait téléphonique?

- a. Appuyez sur 1 si vous n'avez jamais eu à payer pour des données supplémentaires
- b. Appuyez sur 2 si vous avez dû payer des données supplémentaires plusieurs fois au cours de la dernière année
- c. Appuyez sur 3 si vous avez dû payer des données supplémentaires quatre ou cinq fois la dernière année
- d. Appuyez sur 4 si vous avez dû payer des données supplémentaires presque tous les mois au cours de la dernière année

- e. Appuyez sur 5 si vous avez toujours dû payer pour des données supplémentaires au cours de la dernière année
- f. Appuyez sur 6 si vous ne savez pas

7. Avez-vous limité l'utilisation de votre téléphone portable au cours de la dernière année parce que vous craigniez que des frais supplémentaires vous soient facturés pour les données que vous utilisez?

- a. Appuyez sur 1 si vous n'avez pas limité l'utilisation de vos données de téléphone portable l'année dernière en raison du coût des données
- b. Appuyez sur 2 si vous avez limité l'utilisation des données de votre téléphone cellulaire une ou deux fois au cours de l'année dernière en raison du coût des données
- c. Appuyez sur 3 si vous avez limité l'utilisation de vos données de téléphone portable plusieurs fois par semaine l'année dernière en raison du coût des données
- d. Appuyez sur 4 si vous avez limité l'utilisation de vos données de téléphone portable presque tous les jours l'année dernière en raison du coût des données
- e. Appuyez sur 5 si vous avez toujours limité l'utilisation de vos données de téléphone portable l'année dernière en raison du coût des données

8. Combien de données utilisez-vous sur votre téléphone portable dans un mois typique?

- a. Appuyez sur 1 si vous utilisez de 50 à 100 mégabytes dans un mois normal
- b. Appuyez sur 2 si vous utilisez 100-250 MB
- c. Appuyez sur 3 si vous utilisez 250-500 MB
- d. Appuyez sur 4 si vous utilisez 500-999 MB
- e. Appuyez sur 5 si vous utilisez 1 à 2 gigabytes de données par mois
- F. Appuyez sur 6 si vous utilisez de 2 à 3 gigabytes de données par mois
- g. Appuyez sur 7 si vous utilisez 3 gigabytes ou plus de données par mois
- h. Appuyez sur 8 si vous ne savez pas

9. De nombreux plans mobiles incluent la voix et les données, mais certains ne comprennent que des données. Les utilisateurs disposant de plans de données uniquement peuvent toujours utiliser Internet et peuvent effectuer des appels et envoyer des messages s'ils téléchargent et utilisent des applications ou des services Internet. Souhaitez-vous passer à un forfait de données uniquement s'il coûte moins cher que votre plan actuel?

- a. Appuyez sur 1 si vous voulez passer à un plan de données uniquement
- b. Appuyez sur 2 si vous ne souhaitez pas passer à un plan de données uniquement
- c. Appuyez sur 3 si vous avez déjà un plan de données uniquement
- d. Appuyez sur 4 si vous avez besoin de plus d'informations
- e. Appuyez sur 5 si vous ne savez pas

Partie C - Données démographiques

10. Les prochaines questions concernent vous-même. Vos réponses resteront confidentielles et anonymes. S'il vous plaît indiquer votre sexe.

- a. Appuyez sur 1 pour Homme
- b. Appuyez sur 2 pour Femme
- c. Appuyez sur 3 pour Autre
- d. Appuyez sur 4 si vous préférez ne pas répondre

11. Où habitez-vous?

- a. Appuyez sur 1 si vous vivez dans une ville de 100 000 habitants ou plus
- b. Appuyez sur 2 si vous vivez dans une ville avec entre 30 000 et 99 999 résidents
- c. Appuyez sur 3 si vous vivez dans une ville de 1 000 à 29 999 habitants
- d. Appuyez sur 4 si vous vivez dans une communauté de 500 à 999 résidents
- e. Appuyez sur 5 si vous vivez dans une communauté de moins de 500 résidents

12. Quel âge avez-vous?

- a. Appuyez sur 1 si entre 18 et 24 ans
- b. Appuyez sur 2 si entre 25 et 34 ans
- c. Appuyez sur 3 si entre 35 et 44 ans
- d. Appuyez sur 4 si entre 45 et 54 ans
- e. Appuyez sur 5 si entre 55 et 64 ans
- F. Appuyez sur 6 si entre 65 et 74 ans
- g. Appuyez sur 7 si 75 ans ou plus
- h. Appuyez sur 8 si vous préférez ne pas répondre

13. Dans quelle province ou territoire habitez-vous?

- a. Appuyez sur 1 pour la Colombie-Britannique ou l'Alberta
- b. Appuyez sur 2 pour Saskatchewan ou Manitoba
- c. Appuyez sur 3 pour l'Ontario
- d. Appuyez sur 4 pour le Québec
- e. Appuyez sur 5 pour Terre-Neuve ou le Nouveau-Brunswick
- f. Appuyez sur 6 pour la Nouvelle-Écosse ou l'Île-du-Prince-Édouard
- g. Appuyez sur 7 pour les Territoires du Nord-Ouest
- h. Appuyez sur 8 pour Nunavut
- i. Appuyez sur 9 pour le Yukon

14. Quel est le niveau d'éducation le plus élevé que vous avez complété?

- a. Appuyez sur 1 pour secondaire 2 ou moins
- b. Appuyez sur 2 pour une peu d'école secondaire
- c. Appuyez sur 3 pour diplôme d'études secondaires ou équivalent
- d. Appuyez sur 4 pour le collège ou le cégep
- e. Appuyez sur 5 pour un baccalauréat
- F. Appuyez sur 6 pour une Maîtrise
- g. Appuyez sur 7 pour un Doctorat
- h. Appuyez sur 8 si vous préférez ne pas répondre

15. Laquelle des catégories suivantes décrit le mieux le revenu total de votre ménage, avant impôts?

- a. Appuyez sur 1 si moins de 20 000 \$

- b. Appuyez sur 2 si 20 000 \$ à un peu moins de 40 000 \$
- c. Appuyez sur 3 si 40 000 \$ à un peu moins de 60 000 \$
- d. Appuyez sur 4 si 60 000 \$ à un peu moins de 80 000 \$
- e. Appuyez sur 5 si 80 000 \$ à un peu moins de 100 000 \$
- f. Appuyez sur 6 si 100 000 \$ à un peu moins de 150 000 \$
- g. Appuyez sur 7 si 150 000 \$ et plus
- h. Appuyez sur 8 si vous préférez ne pas répondre

Merci, c'est toutes les questions que j'ai pour vous. Si vous avez des questions à propos de cet appel, vous pouvez joindre notre cabinet, Access Research, au 1-855-561-3603 ou à inquiry@access-research.com. Passez une bonne journée.