



Communications Policy 3.0

Canadians' views on issues raised by the Broadcasting and Telecommunications Legislative Review

Results from a national survey commissioned by the
Forum for Research and Policy in Communications (FRPC)

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Highlights

A national, bilingual and interactive voice response survey of 1,246 adults (18 years or over) across Canada was conducted by Access Research on behalf of the Forum for Research and Policy in Communications (FRPC) from Tuesday April 30, 2019 to Thursday May 2, 2019.

The purpose of the survey was to learn about Canadians' views on several issues being addressed by the Broadcasting and Telecommunications Legislative Review panel, appointed in mid-2018 by the federal government to analyze and make recommendations about Canada's broadcasting, telecommunications and radiocommunications statutes.

In preparing to hold Policy 3.0, a national conference of scholars, companies, guilds and unions, public interest organizations and lawyer to discuss the issues raised by the Broadcasting and Telecommunications Legislative Review, the Forum decided to undertake a national survey on these issues.

The survey found that,

- 73.5% of Canadians did not know that the federal government had established a Broadcasting and Telecommunications Legislative Review
- 66.5% of Canadians believe it is important to retain Canadian ownership and control of radio and television services in Canada, because of concerns over cultural sovereignty and national security
- 59.2% of Canadians believe that if Parliament raises the CBC's annual budget, it should tie the new money to a commitment from CBC to restore the budgets of its local news services
- If Canada's telephone and Internet companies were foreign owned, 67.5% of Canadians do not believe the Canadian government would be able to protect their privacy, and 65.1% of Canadians do not believe it would be able to protect Canada's national security
- 49.9% of Canadians agree that Canadian Internet companies that sell their subscribers access to online radio and television programming should have to pay into funds that support Canadian program production, and
- 64.8% of Canadians believe that while competition was supposed to keep wireless telephone and Internet rates affordable, regulation would be a better way to ensure affordable rates for these services.

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 survey undertaken on behalf of the Forum in April and May 2019 about adult Canadians' views on four major issues raised by the Broadcasting and Telecommunications Legislative Review: Canadian ownership and control of broadcasting and telecommunications, CBC local news, regulatory approaches in telecommunications and support for Canadian program production. The survey was undertaken in tandem with a conference held by the Forum on 10-11 May 2019 at the University of Ottawa, which also considered these issues.

Part II, which follows, briefly describes the survey results, as follows:

- a. Awareness of the Broadcasting and Telecommunications Legislative Review
- b. Canadian ownership and control of broadcasting
- c. Restoration of the national public broadcaster's local news service
- d. Canadian ownership and control of telecommunications
- e. Internet service providers and financial support of Canadian program production, and
- f. Regulatory approaches in telecommunications: competition vs regulation.

The survey method and questionnaires are described and set out in Part III.

II. Analysis of survey results

Access Research conducted a bilingual, interactive-voice-response survey of 1,246 people over 18 years of age across Canada's provinces and territories, on behalf of the Forum, from 30 April 2019 to 2 May 2019. Access used an English-language and French-language questionnaire designed by the Forum, and provided survey weights that were applied to responses based on age and gender, using data from Statistics Canada.¹ Unlike Internet-based surveys, the use of telephones to reach potential respondents permits inferential statistics to be calculated with a known error rate. In this survey, the overall national results for the questions have a margin of error of up to (plus or minus) 2.5%, 19 times out of 20.

The survey asked respondents about

- their awareness of the Broadcasting and Telecommunications Legislative Review
- the implications for cultural sovereignty of Canadian or foreign ownership and control of broadcasting services
- their views on whether Parliament should increase the CBC's budget to restore its local news services
- the implications for privacy and national security of Canadian or foreign ownership and control of telecommunications services
- whether Canadian Internet service providers should or should not support Canadian program production, and
- the effectiveness of regulation or competition in ensuring that wireless and Internet rates are affordable.

We analyzed these concepts in terms of demographics and availability of technology: language, gender, age, age group (18-24 years of age, 25-64 years of age and those 65 years and older), region (in which respondents live), education, income, and availability of cellphones, smartphones and Internet at home. Responses suggesting uncertainty ("Do not know") 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).

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

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.

Statistically significant results can be generalized to the population being described,⁴ whom we describe in the remainder of this report as 'Canadians';⁵ levels of statistical significance does not measure the strength of an association between concepts.

Associations between concepts that were not statistically significant may have occurred by chance, and for that reason are not reported. That said, results that are not statistically significant can also convey meaning, however: results showing no statistically significant differences by gender, for example, establish that there are no differences between men, women and others (who chose not to identify as male or female) with respect to the specific survey question (or questions).

A. Awareness of the legislative review

The Broadcasting and Telecommunications Legislative Review was announced by the federal government on 5 June 2018.⁶ It met with more than 100 interested parties,⁷ and by 11 January 2019 had received 2,000 written submissions.⁸ The Review panel has not yet published the submissions it received in January. It is expected that the panel's first, interim report, will be published in June 2019.

In April 2019, nearly a year after its creation, seven in ten (73.5%) of Canadians said they did not know about the creation of the Broadcasting and Telecommunications Legislative Review panel, and three in ten (24.2%) said they were aware of the Review.

While just over a quarter (26.5%) of English-speaking Canadians were aware of the Review, half as many French-speaking Canadians (13.8%) were aware of it. Awareness of the Review was highest in the Prairies, with just under a third (30.6%) of people living there being aware of it.

Awareness of the Review rose with age (from 11.7% of young people being aware of it, to 28.7% of seniors being aware of it) and median income (with 20.5% of those with household income below the median being aware of it, and nearly a third, or 31.0%, of those with above-average median income being aware of it).

Survey result 1 Awareness of the Broadcasting and Telecommunications Legislative Review

Q1. Did you know the federal government created a panel last year to review Canada's broadcasting and telecommunications laws?	Yes	No	Not sure
TOTAL (N=1246; estimated margin of error: +/- 2.0%)	24.2%	73.5%	2.3%

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.

⁶ Canada, "Government of Canada launches review of Telecommunications and Broadcasting Acts" (5 June 2018), <https://www.canada.ca/en/canadian-heritage/news/2018/06/government-of-canada-launches-review-of-telecommunications-and-broadcasting-acts.html>; see also <file:///C:/Documents/1%20A%20BTLR/News%20release/CNW%20%20Government%20of%20Canada%20launches%20review%20of%20Telecommunications%20and%20Broadcasting%20Acts.html>.

⁷ Innovation, Science and Economic Development Canada, "Stakeholder meetings", <https://www.ic.gc.ca/eic/site/110.nsf/eng/00009.html>.

⁸ Innovation, Science and Economic Development Canada, "Broadcasting and Telecommunications Legislative Review: A call for comments", <https://www.ic.gc.ca/eic/site/110.nsf/eng/home>.

Q1. Did you know the federal government created a panel last year to review Canada's broadcasting and telecommunications laws?	Yes	No	Not sure
Language (p=.000)			
English	26.5%	71.0%	2.4%
French	13.8%	84.4%	1.8%
Age group (p=.002)			
Young: 18-24 years of age [Internet generations]	11.7%	85.9%	2.3%
Middle-aged: 25-64 years of age [personal computer generations]	24.5%	73.5%	1.95
Senior: 65 years of age and older [lived through Cold war etc.]	28.7%	67.4%	3.9%
Region (p=.004)			
British Columbia	26.6%	71.4%	2.0%
Prairies	30.6%	67.3%	2.0%
Ontario	26.0%	71.5%	2.6%
Quebec	12.7%	83.9%	3.4%
Atlantic	23.9%	74.3%	1.8%
North	27.0%	72.0%	3.6%
Income (p=.000)			
Less than \$20,000	16.0%	79.8%	4.3%
\$20,000 to \$39,000	19.7%	75.3%	5.1%
\$40,000 to \$59,000	26.6%	69.2%	4.2%
\$60,000 to \$79,000	24.7%	74.7%	0.6%
\$80,000 and above	31.0%	68.4%	0.6%
Prefer not to answer	21.4%	77.0%	1.6%
Median income (p=.000)			
Below median (below \$59,000)	20.5%	75.1%	4.4%
Around median (\$60,000 - \$79,000)	24.7%	74.7%	0.6%
Above median	31.0%	68.4%	0.6%
Prefer not to answer	21.4%	77.0%	1.6%

No statistically significant differences with respect to awareness of the Review were found based on

- gender (p=0.405 – ie, the results could have occurred by chance 40.5 times out of a hundred),
- age (p=.053)
- education (p=0.313)
- region (0.942)
- reached via smartphone (0.528), or
- availability of Internet in the household (.053).

B. Canadian ownership and control of broadcasting

In 1991 Parliament established in the *Broadcasting Act* that Canada's broadcasting system should be effectively owned and operated by Canadians. Throughout this period (and before), the Governor in

Council (or federal Cabinet) directed the CRTC not to issue broadcasting licences to non-Canadians or to non-Canadian companies.⁹

The *Terms of Reference* of the Broadcasting and Telecommunications Legislative Review state that “the Government is not interested in a proposal that reduces Canadian ownership of broadcasting”, but also ask “How can we ensure that Canadian and non-Canadian online players play a role in supporting the creation, production, and distribution of Canadian content?”. While many of the detailed submissions to the Broadcasting and Telecommunications Legislative Review agreed that Canadian broadcasting services should be owned and controlled by Canadians, some proposed changing the legislation to permit the CRTC to license or authorize non-Canadian programming services, and we therefore decided to ask Canadians about this issue.

Two thirds (66.5%) of Canadian believe it is important to retain restrictions that limit ownership of Canadian radio and television stations and services to Canadians, because of concerns over cultural sovereignty and national security.

Survey result 2 Canadian ownership and control of Canadian broadcasting services

Q2. Currently, only Canadians can own and operate radio and television stations and services in Canada because of concerns over cultural sovereignty and national security. Is it important to retain this restriction?	Yes	No	Don't know
TOTAL (N=1246; estimated margin of error: +/- 2.3%)	66.5%	17.6%	15.9%
Gender (p=.000)			
Male	66.1%	22.0%	11.9%
Female	67.3%	13.9%	18.8%
Other (n=24)	70.8%	12.5%	16.7%
Prefer not to say (n=45)	57.8%	13.3%	28.9%
Language (p=.021; n=1246)			
English	66.6%	18.6%	14.8%
French	66.2%	12.9%	20.9%
Age groups (p=.000; n=1244)			
18 – 24 years of age (born 1994 or after)	45.0%	34.9%	20.2%
25 – 64 (born 1954 to 1993)	69.7%	15.4%	14.9%
65 years of age or older (born before 1953)	69.4%	15.5%	15.1%
Median income (p=.001; n=1246)			
Below median (below \$60,000)	62.9%	17.4%	19.75
Around median (\$60,000 - \$79,000)	72.1%	19.5%	8.4%
Above median (\$80,000 or higher)	70.1%	19.1%	10.8%
Prefer not to answer			

⁹ *Direction to the CRTC (Ineligibility of Non-Canadians)*, (SOR/97-192), <https://laws.justice.gc.ca/eng/regulations/SOR-97-192/index.html>.

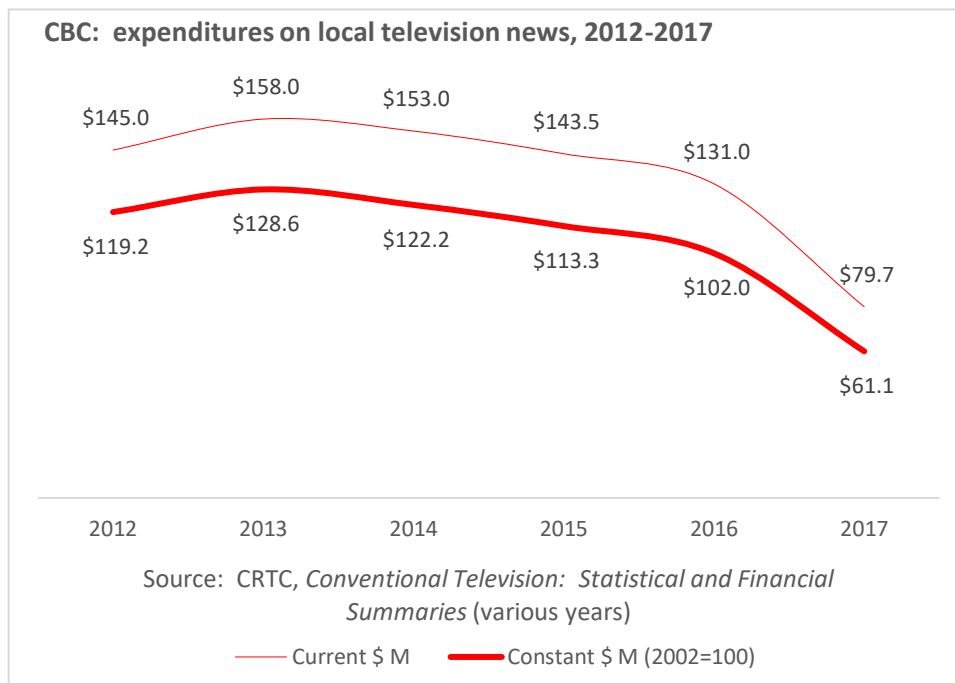
Q2. Currently, only Canadians can own and operate radio and television stations and services in Canada because of concerns over cultural sovereignty and national security. Is it important to retain this restriction?	Yes	No	Don't know
Education (p=.004; n=1202)			
Secondary school or less	60.5%	20.4%	19.2%
College or university	68.5%	18.2%	13.3%
Graduate or post graduate certification	75.9%	11.8%	12.4%
Household has Internet at home (p=.000; n=1246)			
Have Internet access at home	67.6%	17.9%	14.5%
Do not have Internet access at home	58.85	15.5%	25.8%

No statistically significant differences regarding Canadian ownership and control of broadcasting services was found with respect to region (p=.195), the respondent's being reached by cell or landline (p=.316) or on a smartphone (p=.064) (p=.141), language (p=.195) and region (p=.241).

C. Funding to restore the public broadcaster's local news services

Concerns about the availability of local news have been raised for the past decade or more. The CBC has reduced its expenditures on news since 2013, both in current- and constant-dollar terms (Figure 1), and a number of submissions to the Broadcasting and Telecommunications Legislative Review have proposed that funding for the Corporation be strengthened.

Figure 1 CBC expenditures on local television news, 2012-2017



The Forum therefore asked Canadians about increased funding for the CBC, in the context of a requirement that CBC use this increase to restore its local news services, which have been reduced since 2013.

Over half (59.2%) of Canadians agreed that any new Parliamentary funding for the CBC should be tied to the restoration of CBC's local news services, with nearly equal numbers either disagreeing with tied funding (21.2%) or indicating that they did not know (19.6%)

Survey result 3 Increasing CBC budget if used to restore its local news services

Q3. Concerns have been expressed for some time about declining local news service. Since 2013, Canada's national public broadcaster has cut the budget of its local TV news programs in half, and its radio news budgets have also suffered. If Parliament were to increase its annual grant to the CBC [in French, Radio Canada], should it tie that new money to restoration of the budgets of its local news services?	Yes (tie new money to restoration of news)	No (do not tie new money to restoration of news)	Do not know
TOTAL (N=1246; estimated margin of error: 3.0%)	59.2%	21.2%	19.6%
Gender (p=.009)			
Male	58.9%	24.9%	16.6%
Female	60.9%	17.8%	21.3%
Other	50.0%	29.2%	20.8%
Prefer not to say	44.4%	22.2%	33.3%
Language (p=.006)			
English	59.0%	20.0%	21.0%
French	60.4%	26.7%	12.9%
Age groups (p=.037)			
18 – 24 years of age (born 1994 or after)	56.6%	20.2%	23.3%
25 – 64 (born 1954 to 1993)	57.4%	23.4%	19.2%
65 years of age or older (born before 1953)	66.75	15.5%	17.8%
Education (p=.018)			
Secondary school or less	55.3%	21.0%	23.7%
College or university	59.6%	58.5%	56.6%
Post graduate studies	67.3%	21.4%	11.3%
Regions (p=.002)			
British Columbia	64.6%	17.7%	17.7%
Prairies	51.6%	25.0%	23.4%
Ontario	58.3%	21.3%	20.4%
Quebec	56.5%	26.6%	16.95
Atlantic provinces	63.2%	13.65	23.2%
North	66.7%	24.2%	9.1%
Median income (p=.001)			
Below median income	58.6%	18.2%	23.2%
Around median income (\$60,000 - \$79,000)	67.3%	20.3%	12.4%
Above median income	58.3%	26.8%	14.9%
Prefer not to answer	56.9%	19.85	23.4%
Household has Internet at home (p=.039)			
Have Internet access at home	59.3%	21.6%	19.1%
Do not have Internet access at home	60.85	18.6%	20.6%
Do not know whether have Internet access at home (n=16)	37.5%	12.5%	50.0%

No statistically significant differences were found with respect to this question based on respondents' being reached by cellphone or landline ($p=.052$) or by smartphone (.077), or in terms of their language ($p=.699$) or region ($p=.298$).

D. Canadian ownership and control of telecommunications

In 2012 Parliament amended the *Telecommunications Act* to remove foreign ownership restrictions on Canadian telecommunications service providers that hold 10% or less of the total Canadian telecommunications revenue.¹⁰ It is unclear what the level of foreign ownership in Canada's telecommunications system is, however, as the CRTC does not publish information about this issue. The federal government's *Terms of Reference* for the Broadcasting and Telecommunications Legislative Review state that "barriers to dynamic competition need to be considered in the context of convergence", and do not preclude the idea of foreign ownership of telecommunications services. Some submissions to the Broadcasting and Telecommunications Legislative Review went on to recommend that all foreign ownership restrictions be removed from Canadian telecommunications, as a means of increasing investment in this sector.

The Forum therefore asked Canadians whether they believe that the Canadian government would be able to protect telephone and Internet privacy, if Canada's telephone and Internet companies were owned and controlled by non-Canadians. We also asked whether, if foreign ownership of Canadian telephone and Internet companies were allowed, the government would be able to protect Canada's national security.

1. Protection of privacy

Two thirds of Canadians (67.5%) believe that the federal government would be unable to protect their telephone and Internet privacy if Canada's telephone and Internet companies were owned by non-Canadians. Women expressed more concern on this point than men: 73.8% of women believed their privacy could not be protected if Canada's telephone and Internet companies were foreign-owned, compared to 61.1% of men.

Survey result 4 Canadian ownership and control of Canadian telecommunications services

Q4. If Canada's telephone and Internet companies were foreign owned, do you think that the Canadian government would be able to protect your telephone and Internet privacy?	Yes	No	Don't know
TOTAL (N=1246; estimated margin of error: +/- 2.3%)	18.5%	67.5%	14.0%
Gender (p=.000)			
Male	25.4%	61.1%	13.5%
Female	12.2%	73.8%	14.0%
Other (n=24)	16.7%	70.8%	12.5%
Prefer not to say (n=45)	15.6%	62.2%	22.2%

¹⁰ The changes were set out in the federal government's 2012 omnibus budget (Bill C-38), which entered into effect on 29 June 2012.

Q4. If Canada's telephone and Internet companies were foreign owned, do you think that the Canadian government would be able to protect your telephone and Internet privacy?	Yes	No	Don't know
Household has Internet at home (p=.002)			
Have Internet access at home	18.2%	68.5%	13.3%
Do not have Internet access at home	21.6%	60.8%	17.5%

Canadians tended to hold the same views on this issue, regardless of their language (p=.388), age (.089), age group (.056), education (p=.325), geographic region (.388), income (.324), median income (.494), or whether they were reached by cellphone or landline (.512) or on a smartphone (.836).

2. Protection of national security

Concerns have long been expressed that foreign ownership of telecommunications services poses risks to national security. On May 8, 2019, for example, the Chairperson of the United States Federal Communications Commission told the United States Senate that

...Chinese suppliers, such as Huawei, do indeed present a threat to the United States, either on their own or because of Chinese domestic law. For example, China's national intelligence law explicitly requires any individual or entity subject to that law to comply with requests to intelligence services.¹¹

We therefore asked Canadians whether they thought that foreign ownership of Canada's telecommunications companies would affect the federal government's ability to protect Canada's national security.

Two out of three (65.1%) of Canadians believe that the government would be unable to protect Canada's national security if Canada's telephone and Internet companies were foreign owned. More women held this view (68.5%) than men (60.6%). Of those born before 1953, 69.9% agreed that foreign telecommunications ownership would leave the government unable to protect Canada's national security, while only a third of those born since 1994 (33.3%) held this view.

Survey result 5 Foreign telecommunications ownership and Canada's national security

Q5. If Canada's telephone and Internet companies were foreign owned, do you think that the Canadian government would be able to protect Canada's national security?	Yes	No	Don't know
TOTAL (N=1246; estimated margin of error: +/- 2.5%)	21.6%	65.1%	13.3%
Gender (p=.000)			
Male	27.8%	60.6%	11.6%
Female	16.8%	68.5%	14.7%
Other (n=24)	8.3%	75.0%	16.7%

¹¹ John Eggerton, "FCC's Pai to Senate: Huawei is National Security Threat", *Broadcasting and Cable* (8 May 2019), <https://www.broadcastingcable.com/news/fccs-pai-to-senate-huawei-is-national-security-threat>.

Q5. If Canada's telephone and Internet companies were foreign owned, do you think that the Canadian government would be able to protect Canada's national security?	Yes	No	Don't know
Prefer not to say (n=45)	13.3%	71.1%	15.6%
Age groups (p=.001)			
18 – 24 years of age (born 1994 or after)	33.3%	51.2%	15.5%
25 – 64 (born 1954 to 1993)	22.0%	65.5%	12.5%
65 years of age or older (born before 1953)	15.4%	69.9%	14.7%
Reached on a cell or landline (p=.045)			
Reached by cellphone	23.9%	63.3%	12.8%
Reached by landline	18.0%	67.8%	14.2%

No differences about the government's ability to protect national security emerged with respect to language (.361), education (.266), region (.844), median income (.256), whether reached on smartphone (.300), or whether the household has Internet service (.285)

E. ISPs and financial support of Canadian program production

For the past quarter century cable and satellite television services have remitted monies to funds established to help finance Canadian program production. For the past several years, however, subscriptions to cable television have declined, as some subscribers have moved towards accessing broadcast programming content online. One result is that the level of financing available for Canadian program production is no longer growing.

The *Terms of Reference* for the Broadcasting and Telecommunications Legislative Review ask Canadians how "the objectives of the Broadcasting Act be adapted to ensure that they are relevant in today's more open, global, and competitive environment". Some submissions to the Broadcasting and Telecommunications Legislative Review have therefore proposed that Internet Service Providers begin to contribute towards Canadian program production funds. The Forum's survey asked Canadians about this issue.

Overall five out of ten (49.9%) Canadians agree that Canadian ISPs should help to fund Canadian program productions, with a quarter (24.9%) disagreeing, and another quarter (25.2%) saying they do not know. Just over half of men (53.2%) and just under half of women (46.5%) agreed. Support for ISPs' helping to fund Canadian program production was especially strong among Francophones – with 70.4% agreeing with the proposal; just 45.4% of Anglophones shared this view. Support for the proposal was especially low in the Prairies (39.9%), among those with up to high-school education (40.5%), and among those between the ages of 18 and 24 years of age (41.1%).

Survey result 6 Requiring Canadian Internet Service Providers to pay into Canadian program production funds

Q7. Canadian cable and satellite television service companies sell their subscribers access to radio and TV channels, and have to pay into funds that support Canadian program production. Should Canadian Internet service companies that sell their subscribers access to online radio and TV programming have to pay into these same production funds?	Yes	No	Don't know
TOTAL (N=1246; estimated margin of error: +/- 2.3%)	49.9%	24.9%	25.2%
Gender (p=.000)			
Male	53.2%	29.4%	17.3%
Female	46.5%	21.6%	31.8%
Other (n=24)	45.8%	29.2%	25.0%
Prefer not to say (n=45)	55.6%	11.1%	33.3%
Language (p=.000)			
English	45.4%	27.7%	26.95
French	70.4%	11.9%	17.7%
Age groups (p=.005)			
18 – 24 years of age (born 1994 or after)	41.1%	36.4%	22.5%
25 – 64 (born 1954 to 1993)	51.8%	24.3%	23.9%
65 years of age or older (born before 1953)	48.8%	20.9%	30.2%
Region (p=.000)			
British Columbia	44.7%	29.6%	25.6%
Prairies	39.9%	31.9%	28.2%
Ontario	50.9%	25.2%	23.9%
Quebec	67.1%	16.0%	16.9%
Atlantic	43.2%	23.8%	33.05
North	58.6%	20.2%	21.2%
Median income (p=.000)			
Below median (below \$59,000)	46.0%	26.7%	27.3%
Around median (\$60,000 - \$79,000)	55.6%	20.9%	23.5%
Above median	59.4%	24.0%	16.6%
Prefer not to answer	40.7%	25.0%	34.3%
Education (p=.000)			
Secondary school or less	40.5%	30.5%	29.05
College or university	52.0%	24.3%	23.7%
Graduate or post graduate certification	63.9%	17.2%	18.95
Reached by cellphone or landline (p=.013)			
Reached by cellphone	49.1%	27.7%	23.3%
Reached by landline	51.3%	20.7%	28.0%
Used smartphone to answer survey (n=753; estimated margin of error: 3.6%)			

Q7. Canadian cable and satellite television service companies sell their subscribers access to radio and TV channels, and have to pay into funds that support Canadian program production. Should Canadian Internet service companies that sell their subscribers access to online radio and TV programming have to pay into these same production funds?	Yes	No	Don't know
Used smartphone	51.1%	26.7%	22.2%
Did not use smartphone	34.5%	34.5%	31.05
Household has Internet at home (p=.000)			
Have Internet access at home	51.4%	25.2%	23.4%
Do not have Internet access at home	38.8%	21.4%	3985
Do not know if have Internet access at home (n=16)	12.5%	25.0%	62.5%

F. Regulatory approaches in telecommunications: competition vs regulation

While Parliament's telecommunications policy for Canada sets a number of social-policy objectives the federal government in 2006 directed the Commission to "rely on market forces to the maximum extent feasible as the means of achieving" these objectives.¹² In the past decade, however, studies commissioned by the CRTC or the federal government have generally found that Canadians pay higher rates than people in a number of other countries, including the United States and European nations.

The Terms of Reference for the Broadcasting and Telecommunications Legislative Review's comment that "[a] world-class communications sector should enable Canadians to connect with each other and the world, be competitive, be innovative, contribute to economic growth, and provide reliable services at affordable rates to Canadians across the country." Some submissions have recommended continuing or increased reliance on 'market forces' in Canada's telecommunications legislation.

The Forum's survey therefore asked Canadians whether competition or regulation would be the best way to ensure that the rates they pay for wireless telephone and for Internet service are affordable.

Nearly two thirds (64.8%) of Canadians think that rate regulation is a better way to ensure affordable rates for basic wireless and Internet services, with seven out of ten people in Ontario (70.6%), those with median or higher income (70.8%), and those with graduate university education (70.4%) holding this view.

Survey result 7 Effectiveness of regulations in ensuring affordability of wireless and Internet service

¹² *Order Issuing a Direction to the CRTC on Implementing the Canadian Telecommunications Policy Objectives*, SOR/2006-355, s.1(a).

Q6. Rates for basic wireless telephone and Internet services are not regulated in Canada, because competition is supposed to keep these affordable. Do you think that rate regulation would be a better way to ensure affordable rates for basic Internet and wireless services?	Rate regulation would be better way to ensure affordable rates	Rate regulation would not be a better way to ensure affordable rates	Don't know
TOTAL (N=1246; estimated margin of error: +/- 3.0%)	64.8%	18.7%	16.5%
Gender (p=.001)	67.3%	21.2%	11.5%
Male	63.4%	16.0%	20.6%
Female	62.5%	25.0%	12.5%
Other (n=24)	53.3%	22.2%	24.4%
Prefer not to say (n=45)			
Region			
British Columbia	59.6%	19.2%	21.2%
Prairies	56.6%	23.7%	19.7%
Ontario	70.6%	16.2%	13.2%
Quebec	69.2%	19.0%	11.8%
Atlantic	64.3%	16.3%	19.4%
North	72.7%	16.2%	11.1%
Median income (p=.000)			
Below median	61.0%	18.7%	20.3%
Around median (\$60,000 - \$79,000)	70.8%	19.5%	9.7%
Above median	69.95%	19.9%	10.2%
Prefer not to answer	61.3%	16.5%	22.2%
Education (p=.000; n=1199)			
Secondary school or less	55.3%	21.3%	23.4%
College or university	69.2%	17.2%	13.6%
Graduate or post graduate certification	70.4%	19.5%	10.1%
Uses smartphone (p=.011)			
Using smartphone	68.3%	18.3%	13.4%
Not using smartphone	58.1%	16.3%	25.65%
Household has Internet at home (p=.000)			
Have Internet access at home	66.4%	19.0%	14.65%
Do not have Internet access at home	54.6%	13.4%	32.0%
Do not know if have Internet access at home (n=15)	13.3%	33.3%	53.3%

No statistically significant differences existed with respect to Canadians' views on the effectiveness of regulation in terms of language (p=.263), age groups (p=.088) or whether they were reached by cellphone or landline (p=.093).

III. Research method

A. Survey

A survey of 1,246 adults (18 years or over) across Canada was conducted in English and in French by Access Research using interactive voice response technology on behalf of the Forum for Research and Policy in Communications (FRPC). Survey responses were gathered from Tuesday, April 30, to Thursday, May 2, 2019. The survey was discontinued (see question 2) if respondents were under 18 years of age, or worked for a broadcasting or telecommunications company. Results were weighted by age and gender.

Copies of the English-language and French-language surveys are attached.

The purpose of the survey was to learn about Canadians' views on several issues involving broadcasting and/or telecommunications.

Province or Territory dialled		Frequency	Percent	Valid Percent
Valid	British Columbia	199	15.9%	15.9%
	Alberta	76	6.1	6.1
	Saskatchewan	91	7.3	7.3
	Manitoba	82	6.6	6.6
	Ontario	235	18.9	18.9
	Quebec	237	19.0	19.0
	New Brunswick	97	7.7	7.7
	Newfoundland and Labrador	51	4.1	4.1
	Nova Scotia	72	5.8	5.8
	Prince Edward Island	8	.6	.6
	Northwest Territories	23	1.8	1.8
	Nunavut	16	1.3	1.3
	Yukon	60	4.8	4.8
	Canada	1246	100.0	100.0

To facilitate statistical analysis we combined the results from the three territories, the four Atlantic provinces, and the three prairies, retaining British Columbia, Ontario and Quebec as separate entities.

Regions

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	British Columbia	199	15.9	15.9	15.9
	Prairies	249	20.0	20.0	35.9
	Ontario	235	18.9	18.9	54.8
	Quebec	237	19.0	19.0	73.8
	Atlantic	227	18.2	18.2	92.0
	North	99	8.0	8.0	100.0
	Total	1246	100.0	100.0	

Next, we asked respondents about their completed levels of education. Although nearly all (96.3%) answered the questions, relatively few responses were received with respect to "Grade 8 or less" (36) and "some high school" (72).

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

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Grade 8 or less	36	2.9	2.9	2.9
	Some high school	72	5.8	5.8	8.7
	High school diploma or equivalent	230	18.5	18.5	27.2
	College or CEGEP	377	30.2	30.2	57.4
	Bachelor's degree	316	25.4	25.4	82.8
	Master's, Doctorate or post-doctoral	169	13.6	13.6	96.3
	Prefer not to answer	46	3.7	3.7	100.0
	Total	1246	100.0	100.0	

We therefore combined the education answers into three categories: up to and including high school; college or bachelor's degree, and post-graduate (Bachelor's, Master's, Doctorate or post-doctoral certification).

Education

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Secondary school or less	339	27.2	28.2	28.2
	College or BA	693	55.6	57.7	85.9
	Graduate or post-graduate	169	13.6	14.1	100.0
	Canada	1200	96.3	100.0	
Missing	Prefer not to answer	46	3.7		
Total		1246	100.0		

We also asked respondents about their household income. Four fifths (80.1%) of respondents provided answers.

Q12 Which of the following categories best describes your total household income, before taxes?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Less than \$20K	163	13.1	13.1	13.1
	\$20-39K	177	14.2	14.2	27.3
	\$40-59K	142	11.4	11.4	38.7
	\$60-79K	154	12.3	12.3	51.1
	\$80 +	361	29.0	29.0	80.1
	Prefer not to answer	248	19.9	19.9	100.0
	Total	1246	100.0	100.0	

We decided to analyze the results in terms of recent median income (\$70,336 in 2015¹³) and regrouped the responses into three categories: household income below median, around median (\$60,000 - \$79,000) and above median (\$80,000).

Median household income

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Under median (\$70.3K)	482	38.7	48.4	48.4
	Median (\$60-79K)	154	12.3	15.4	63.8
	Above median (\$80K +)	361	29.0	36.2	100.0
	Total	998	80.1	100.0	
Missing	9.00	248	19.9		
Total		1246	100.0		

Finally, we asked respondents about their age, using 10-year categories to the age of 75.

Q12. How old are you?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	18-24	129	10.4%	10.4%	10.4%
	25-34	201	16.1	16.1	26.5
	35-44	200	16.0	16.0	42.5
	45-54	214	17.2	17.2	59.6
	55-64	210	16.8	16.8	76.5
	65-74	148	11.9	11.9	88.4
	75+	110	8.8	8.8	97.2
	Prefer not to answer	35	2.8	2.8	100.0
Total		1246	100.0	100.0	

We decided to regroup these into three larger categories to reflect potential app: 18-24 years of age (born from 1995 to 2001, and having lived almost all their lives with the Internet); 25 to 64 years of age (born from 1954 to 1994, and having lived most of their working with personal computers); and from 65 years of age or older (born before 1954) including 110 respondents or 8.8% of the total sample having been born before or just after the Second World War (therefore having lived through the Cold war, nuclear armament and disarmament negotiations, the collapse of the Berlin Wall and other events involving considerations of national security).

Age groups

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	18-24 (born for 1995-2001)	129	10.4	10.7	10.7
	25 – 64 (born from 1954-1994)	824	66.1	68.0	78.7
	65 + (born before 1954)	258	20.7	21.3	100.0
	Total	1211	97.2	100.0	
Missing	Prefer not to answer	35	2.8		

¹³ Statistics Canada, "Household income in Canada: Key results from the 2016 Census", <https://www150.statcan.gc.ca/n1/daily-quotidien/170913/dq170913a-eng.htm>.

Total	1246	100.0		
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B. Survey questionnaires

FRP4

Forum for Research and Policy in Communications Legislative Review Survey

Forum Research Inc.

April 2019

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 broadcasting and telephone services in Canada. 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.

- S.1 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**
- S.2 Do you work for a telecommunications or a broadcasting company?
- c. Press 1 if Yes → **TERMINATE**
 - d. Press 2 if No → **CONTINUE**
- T.1 Thank you, that's all the questions I have. Have a great day.

¹ Calling split evenly per day, and within each day, evenly across the provinces/territories

¹ Remove emergency lines and healthcare facilities

¹ Calling hours (local) 10 am to 9:30 pm weekdays, 10 am to 6 pm on weekends

Part B – Main Survey

- 1. Did you know the federal government created a panel last year to review Canada's broadcasting and telecommunications laws?**
 - a. Press 1 for Yes, I did know about this panel
 - b. Press 2 for No, I did not know about this panel
 - c. Press 3 for Don't know

- 2. Currently, only Canadians can own and operate radio and television stations and services in Canada because of concerns over cultural sovereignty and national security. Is it important to retain this restriction?**
 - a. Press 1 for Yes
 - b. Press 2 for No
 - a. Press 3 for Don't know

- 3. Concerns have been expressed for some time about declining local news service. Since 2013, Canada's national public broadcaster has cut the budget of its local TV news programs in half, and its radio news budgets have also suffered. If Parliament were to increase its annual grant to the CBC [*in French, Radio Canada*], should it tie that new money to restoration of the budgets of its local news services?**
 - a. Press 1 for Yes
 - b. Press 2 for No
 - c. Press 3 for Don't know

- 4. If Canada's telephone and Internet companies were foreign owned, do you think that the Canadian government would be able to protect your telephone and Internet privacy?**
 - a. Press 1 for Yes
 - b. Press 2 for No
 - c. Press 3 for Don't know

- 5. If Canada's telephone and Internet companies were foreign owned, do you think that the Canadian government would be able to protect Canada's national security?**
 - a. Press 1 for Yes
 - b. Press 2 for No
 - c. Press 3 for Don't know

- 6. Rates for basic wireless telephone and Internet services are not regulated in Canada, because competition is supposed to keep these affordable. Do you think that rate regulation would be a better way to ensure affordable rates for basic Internet and wireless services?**
 - a. Press 1 if you think that rate regulation would be a better way to ensure affordable rates for basic Internet and wireless services
 - b. Press 2 if you think that rate regulation would not be a better way to ensure affordable rates for basic Internet and wireless services
 - c. Press 3 if you do not know

- 7. Canadian cable and satellite television service companies sell their subscribers access to radio and TV channels, and have to pay into funds that support Canadian program production. Should Canadian Internet service companies that sell their subscribers access to online radio and TV programming have to pay into these same production funds?**
 - a. Press 1 for YesQ1
 - b. Press 2 for No

- c. Press 3 for Don't know

Part C – Demographics

The next few questions are about yourself. Your answers will be kept confidential and anonymous.

8. Please indicate your gender.

- a. Press 1 for Male
- b. Press 2 for Female
- c. Press 3 for Other
- d. Press 4 for prefer not to say

9. Have we reached you on a cellphone or landline?

- a. Press 1 for cellphone → Go to Q10
- b. Press 2 for landline → Go to Q11

10. Have we reached you on a smartphone?

- a. Press 1 for Yes
- b. Press 2 for No

11. Do you or does your household have access to the Internet at home?

- a. Press 1 for Yes
- b. Press 2 for No
- c. Press 3 for Don't know

12. How old are you?

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

13. In which province or territory do you live?

- a. Press 1 for British Columbia or Alberta
- b. Press 2 for Saskatchewan or Manitoba
- c. Press 3 for Ontario
- d. Press 4 for Quebec
- e. Press 5 for Newfoundland or New Brunswick
- f. Press 6 for Nova Scotia or Prince Edward Island
- g. Press 7 for Northwest Territories, Nunavut or 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, Doctorate or post-doctoral
- g. Press 7 if you prefer not to answer

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

- a. Press 1 for less than \$20,000
- b. Press 2 for \$20,000 to just under \$40,000
- c. Press 3 for \$40,000 to just under \$60,000
- d. Press 4 for \$60,000 to just under \$80,000
- e. Press 5 for \$80,000 or more
- f. Press 6 for you prefer not to answer

1

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.

FRP4

**Forum pour la recherche et les politiques en communications
Sondage sur l'examen de la législation**

Forum Research Inc.

Avril 2019

n=1 200

n=1 000 NATIONAL (n=200 par région : Atlantique; QC; ON; Prairies + NT + TNO; BC + YK)
+ n=200 SURÉCHANTILLON POUR LES TERRITOIRES

Partie A – Présentation et questions de présélection

Bonjour. Ici Access Research qui vous téléphone au nom du Forum pour la recherche et les politiques en communications. Nous aimerions vous poser quelques questions au sujet des services de radiodiffusion et de téléphonie au Canada. Répondre à ce sondage prendra environ 5 minutes de votre temps. Il vous suffit d'utiliser le clavier numérique de votre appareil téléphonique pour sélectionner la bonne réponse à l'invite. Si vous avez des questions concernant cet appel, vous pouvez communiquer avec notre firme, Access Research, en composant le 1 855 561-3603 ou en écrivant à l'adresse inquiry@access-research.com.

S.1 D'abord, avez-vous 18 ans ou plus?

e. Si oui, appuyez sur 1

→ **CONTINUER**

f. Si non, appuyez sur 2

→ **TERMINER**

S.2 Travaillez-vous pour une société de télécommunications ou de radiodiffusion?

g. Si oui, appuyez sur 1

→ **TERMINER**

h. Si non, appuyez sur 2

→ **CONTINUER**

T.1 Merci. C'est tout pour mes questions aujourd'hui. Passez une excellente journée.

¹ Appels répartis uniformément chaque jour, et au cours de chaque journée, uniformément entre les provinces/territoires

¹ Retrait des lignes d'urgence et des installations de soins de santé

¹ Heures d'appel (locales) : de 10 h à 21 h 30 en semaine, de 10 h à 18 h la fin de semaine

Partie B – Questions de sondage

- 16. Saviez-vous que le gouvernement fédéral a réuni un groupe d'experts l'an dernier pour examiner le cadre législatif canadien de la radiodiffusion et des télécommunications?**
- Appuyez sur 1 pour Oui, j'étais au courant de l'existence de ce groupe d'experts
 - Appuyez sur 2 pour Non, je n'étais pas au courant de l'existence de ce groupe d'experts
 - Appuyez sur 3 pour Ne sais pas
- 17. À l'heure actuelle, la détention et l'exploitation de postes et de service de radio et de télévision au Canada sont réservées aux Canadiens en raison de préoccupations relatives à la souveraineté culturelle et à la sécurité nationale. Est-il important de maintenir cette restriction?**
- Appuyez sur 1 pour Oui
 - Appuyez sur 2 pour Non
 - Appuyez sur 3 pour Ne sais pas
- 18. Des préoccupations sont formulées depuis un certain temps concernant le déclin des services de nouvelles locales. Depuis 2013, le radiodiffuseur public national du Canada a réduit de moitié son budget alloué aux émissions télévisées de nouvelles locales, tout en réduisant ses budgets alloués aux émissions radiophoniques de nouvelles. Si le Parlement devait bonifier sa subvention annuelle à Radio-Canada, cette bonification devrait-elle servir obligatoirement au rétablissement des budgets alloués aux services de nouvelles locales?**
- Appuyez sur 1 pour Oui
 - Appuyez sur 2 pour Non
 - Appuyez sur 3 pour Ne sais pas
- 19. Si les sociétés de téléphonie et d'Internet au Canada étaient détenues par des intérêts étrangers, pensez-vous que le gouvernement du Canada serait en mesure de protéger votre vie privée au téléphone et sur Internet?**
- Appuyez sur 1 pour Oui
 - Appuyez sur 2 pour Non
 - Appuyez sur 3 pour Ne sais pas
- 20. Si les sociétés de téléphonie et d'Internet au Canada étaient détenues par des intérêts étrangers, pensez-vous que le gouvernement du Canada serait en mesure de protéger la sécurité nationale au pays?**
- Appuyez sur 1 pour Oui
 - Appuyez sur 2 pour Non
 - Appuyez sur 3 pour Ne sais pas
- 21. Les tarifs des services de base en matière de téléphonie sans fil et d'Internet ne sont pas réglementés au Canada, car la concurrence est censée assurer le maintien de tarifs abordables. Pensez-vous que la réglementation des tarifs représenterait un moyen plus efficace pour maintenir des tarifs abordables pour les services de base en matière de téléphonie sans fil et d'Internet ?**
- Appuyez sur 1 si vous pensez que la réglementation des tarifs représenterait un moyen plus efficace pour maintenir des tarifs abordables pour les services de base en matière de téléphonie sans fil et d'Internet

- b. Appuyez sur 2 si vous pensez que la réglementation des tarifs ne représenterait pas un moyen plus efficace pour maintenir des tarifs abordables pour les services de base en matière de téléphonie sans fil et d'Internet
- c. Appuyez sur 3 si vous ne savez pas

- 22. Les sociétés canadiennes qui vendent des services de câblodistribution et de télévision par satellite vendent à leurs abonnés un accès à des postes de radio et de télévision et doivent contribuer financièrement à la production de contenu canadien. Les sociétés canadiennes de services Internet qui vendent à leurs abonnés un accès à des émissions radiophoniques et télévisuelles en ligne devraient-elles aussi être mises à contribution pour ce qui est de la production de contenu canadien?**
- a. Appuyez sur 1 pour Oui
 - b. Appuyez sur 2 pour Non
 - c. Appuyez sur 3 pour Ne sais pas

Partie C – Données démographiques

Les quelques questions qui suivent portent sur vous. Vos réponses seront gardées confidentielles et anonymes.

- 23. Veuillez 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 pour Préfère ne pas répondre
- 24. Est-ce que nous vous avons joint(e) sur un téléphone cellulaire ou une ligne terrestre?**
- a. Appuyez sur 1 pour Téléphone cellulaire → Aller à Q10
 - b. Appuyez sur 2 pour Ligne terrestre → Aller à Q11
- 25. Est-ce que nous vous avons joint(e) sur un téléphone intelligent?**
- a. Appuyez sur 1 pour Oui
 - b. Appuyez sur 2 pour Non
- 26. Vous ou votre ménage avez accès à Internet à la maison?**
- a. Appuyez sur 1 pour Oui
 - b. Appuyez sur 2 pour Non
 - c. Appuyez sur 3 pour Ne sais pas
- 27. Quel âge avez-vous?**
- a. Appuyez sur 1 pour Entre 18 et 24 ans
 - b. Appuyez sur 2 pour Entre 25 et 34 ans
 - c. Appuyez sur 3 pour Entre 35 et 44 ans
 - d. Appuyez sur 4 pour Entre 45 et 54 ans
 - e. Appuyez sur 5 pour Entre 55 et 64 ans
 - f. Appuyez sur 6 pour Entre 65 et 74 ans
 - g. Appuyez sur 7 pour 75 ans ou plus

h. Appuyez sur 8 pour Préfère ne pas répondre

28. Quelle province ou quel territoire habitez-vous?

- a. Appuyez sur 1 pour la Colombie-Britannique ou l'Alberta
- b. Appuyez sur 2 pour la Saskatchewan ou le 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, le Nunavut ou le Yukon

29. Quel est le niveau de scolarité le plus élevé que vous avez atteint?

- a. Appuyez sur 1 si c'est la huitième année ou moins
- b. Appuyez sur 2 si ce sont des études secondaires non terminées
- c. Appuyez sur 3 si c'est le diplôme d'études secondaires ou l'équivalent
- d. Appuyez sur 4 si c'est le diplôme d'études collégiales
- e. Appuyez sur 5 si c'est le baccalauréat
- f. Appuyez sur 6 si c'est la maîtrise, le doctorat ou le post-doctorat
- g. Appuyez sur 7 si vous préférez ne pas répondre

30. Laquelle des catégories suivantes décrit le mieux le revenu total brut (avant impôt) de votre ménage?

- a. Appuyez sur 1 pour Moins de 20 000 \$
- b. Appuyez sur 2 pour De 20 000 \$ à tout juste moins de 40 000 \$
- c. Appuyez sur 3 pour De 40 000 \$ à tout juste moins de 60 000 \$
- d. Appuyez sur 4 pour De 60 000 \$ à tout juste moins de 80 000 \$
- e. Appuyez sur 5 pour 80 000 \$ ou plus
- f. Appuyez sur 6 pour Préfère ne pas répondre

Merci. Ce sont toutes les questions que j'avais à vous poser. Si vous avez des questions concernant cet appel, vous pouvez communiquer avec notre firme, Access Research, en composant le 1 855 561-3603 ou en écrivant à l'adresse inquiry@access-research.com.

Je vous souhaite une excellente journée.