

APPENDIX 5

Public Interest Advocacy Centre 2012 Telephone Survey about Consumer Choice in TV Service

Between August 23 and 26, 2012, Environics Research Group conducted a Canada-wide survey for PIAC as a follow-up to our 2005 survey for the Telecommunications Policy Review Panel. The survey focused on consumer opinion with respect to choice, flexibility and prices for television (BDU) services.

We submit that many consumers believe that the rates for cable television services are unreasonably high, and are not satisfied with their ability to pick and pay for cable television services that they want. The Environics August 2012 survey findings support and strengthen this statement:

Cost of television services: In 2005, 44% of consumer respondents said that cable television service prices were unreasonably high. In August 2012, 82% of the respondents said the cost of television service was too high.

Choice of competitors: In 2005, 58% of respondents said that there was not enough choice of competitors for cable television services. In August 2012, 71% of respondents said that there was no real choice between television service providers.

Flexibility in television service packages: In 2005, 41% of respondents were dissatisfied with their ability to pick and pay for cable television services. Our August 2012 findings show that consumers continue to be dissatisfied with the level of flexibility and choice offered for television services:

- 39% were dissatisfied with the choice of pre-set packages offered by their television service provider;
 - 35% were dissatisfied with the choice of additional pre-set “theme packs” of television channels;
 - 43% were dissatisfied with their ability to pick and pay for a set number of television channels on top of their pre-set package; and
 - 47% were dissatisfied with their ability to pick and pay for individual television channels on top of their pre-set package.
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**Public Interest Advocacy Centre
Telephone Survey about Consumer Choice in TV Service**

TOPLINE RESULTS

Field dates: August 23 - 26, 2012
Total sample size: 1,005 Canadians (aged 18 and over)
Margin of sampling error: +/- 3.1 percentage points at 95% confidence level

** indicates less than 1%*

1. Which company do you subscribe to for your television service?
 IF NECESSARY: We mean the company that provides cable TV or satellite TV to your home.
 DO NOT READ – CODE ONE ONLY

CAN	EC	QC	
%	%	%	
18	16	25	Bell
17	23	*	Rogers
17	22	3	Shaw
11	-	43	Québecor/Videotron
6	8	2	TELUS
6	6	7	Cogeco
2	3	-	Eastlink/Bragg
1	1	-	MTS
7	6	10	Other
10	11	8	Do not subscribe to television service provider
4	5	1	DK/NA

2. Do you feel that the cost of television service for the average consumer is...?
 READ

CAN	EC	QC	
%	%	%	
48	53	34	Much too high
34	32	39	A little too high
14	10	24	About right
*	*	-	A little too low
*	*	-	Much too low
4	4	3	DK/NA

3. Do you feel that you have real choice between companies who offer significantly different options for your television service, or do you feel that there is no real choice?

CAN	EC	QC	
%	%	%	
25	22	32	Yes, real choice
71	73	63	No, not real choice
5	4	5	DK/NA

4. Are you very satisfied, somewhat satisfied, somewhat dissatisfied or very dissatisfied with each of the following aspects of television service currently available to you?

READ IN ORDER SHOWN

- a) The choice of pre-set packages offered to you by your television service provider

CAN	EC	QC	
%	%	%	
9	6	18	Very satisfied
45	41	57	Somewhat satisfied
21	23	13	Somewhat dissatisfied
18	22	6	Very dissatisfied
1	1	2	Don't have that option with my current provider
5	6	3	DK/NA

- b) The choice of additional pre-set "theme packs" of television channels, such as news, sports or movie packs

CAN	EC	QC	
%	%	%	
10	8	14	Very satisfied
43	41	51	Somewhat satisfied
20	22	14	Somewhat dissatisfied
15	19	4	Very dissatisfied
3	2	5	Don't have that option with my current provider
9	8	11	DK/NA

- c) The ability to pick and pay for a set number of television channels you want on top of your pre-set package

CAN	EC	QC	
%	%	%	
10	8	14	Very satisfied
35	29	51	Somewhat satisfied
24	26	18	Somewhat dissatisfied
19	24	6	Very dissatisfied
3	3	3	Don't have that option with my current provider
10	10	7	DK/NA

d) The ability to pick and pay for individual television channels you want on top of your pre-set package

CAN %	EC %	QC %	
11	10	14	Very satisfied
29	25	44	Somewhat satisfied
23	24	19	Somewhat dissatisfied
24	29	10	Very dissatisfied
3	3	5	Don't have that option with my current provider
10	10	9	DK/NA