

**J.D. Power Reports:
Customers Who Bundle TV, Internet and Phone are
Most Satisfied and Likely to Recommend Their Service Provider**

SaskTel and Vidéotron Rank Highest in Both Television and Internet
Customer Satisfaction in the West and East Regions, Respectively

TORONTO.: 27 June 2013 — Overall satisfaction is highest among customers who bundle their television, Internet and telephone services with the same provider, and these customers are also likely to recommend their provider to family and friends, according to the J.D. Power 2013 Canadian Television Provider Customer Satisfaction StudySM and the 2013 Canadian Internet Service Provider Customer Satisfaction StudySM, both released today.

The Television Provider Customer Satisfaction Study measures overall satisfaction with television providers based on six factors: performance and reliability; cost of service; programming; communication; customer service; and billing. The Internet Service Provider Customer Satisfaction Study is based on five factors: performance and reliability; cost of service; communication; billing; and customer service.

According to the Television Provider Customer Satisfaction Study, 83 percent of customers bundle their TV and Internet service with the same provider, while 17 percent subscribe to just TV service with their telecom provider. Among customers who bundle, 59 percent also have telephone service with their provider—commonly referred to as a triple-play package.

Overall satisfaction is highest among triple-play customers (690 on a 1,000-point scale), compared with among TV and Internet bundlers (678) and TV-only subscribers (658). With 19 percent of customers indicating they “definitely will” recommend their provider, bundled customers also have higher rates of advocacy, compared to those with only TV and Internet service (17%) or TV service only (12%).

“Bundling typically provides discounts and has the added convenience of one bill with one provider,” said Adrian Chung, account director at J.D. Power. “These elements are key drivers of higher satisfaction and provide the stickiness that leads to long-term loyalty.”

Triple-play customers pay an average of \$165(CAD) per month for service, while TV and Internet bundlers pay an average of \$156 and TV-only subscribers pay an average of \$89. Satisfaction with cost of service is highest among triple-play customers and is lowest among TV-only subscribers.

KEY FINDINGS

- Eighty-three percent of customers bundle their TV and Internet service with the same provider.
- Satisfaction with Internet service providers is highest among customers with fibre optic Internet access.
- Forty two percent of customers view television content from their tablet or mobile device.

Speed Is Key for Internet

Satisfaction with Internet service providers is highest among customers with fibre optic Internet service. These customers also experience the fewest problems; however, when they do experience an issue with their connection, the decline in satisfaction is more substantial than it is among customers without fibre optic access who experience a connection problem.

In addition, only 25 percent of fibre optic customers experience an outage with their Internet connection, compared with 29 percent of DSL customers and 31 percent of cable customers. However, when fibre optic customers do experience an outage, overall satisfaction with their Internet provider drops by 114 points, on average. In comparison, when cable Internet customers experience a problem, overall satisfaction declines an average of 101 points, while DSL customer satisfaction falls by 99 points.

Overall customer satisfaction among customers with fibre optic Internet access averages 682, compared with 672 among those with cable Internet access and 646 among those with a DSL Internet connection.

Internet speed is a key expectation among customers. Among Internet customers with fibre optic access, 15 percent indicate their Internet speed exceeds their expectations, while only 8 percent of both DSL and cable customers indicate the same.

“While customers with fibre optic connections are very pleased with the speed and reliability of their Internet connection, they also have very high expectations,” said Chung.

Premium Television Packages Build Loyal Customers

Among television provider customers, those who subscribe to premium TV service packages have higher rates of loyalty to their provider, as only 16 percent indicate they “will likely” switch to another provider in the next 12 months, compared with 22 percent of basic TV subscribers. Additionally, premium package subscribers are more “likely” to purchase additional services from their provider than are basic TV subscribers (36% vs. 29%, respectively).

More than one-half (52%) of customers subscribe to HD channels; 42 percent have a PVR/DVR; and 35 percent use or subscribe to video on demand (VOD). Of these, both overall and TV programming satisfaction are highest among VOD subscribers, compared with the Television Provider Customer Satisfaction Study average.

The Television Provider Customer Satisfaction Study also finds that 42 percent of customers view content from a mobile device, such as their tablet or mobile phone; however, overall satisfaction among these customers averages 661, lower than among those who watch from their television only (683).

“Satisfaction for mobile users suffers because they tend to experience more problems with picture and download speed,” said Chung. “They expect their mobile device to have the same speed and quality as their home TV, and in many cases their expectations are not met.”

Study Rankings

East Region

Vidéotron ranks highest in both television customer satisfaction and Internet customer satisfaction in the East region. Vidéotron has an overall score in television customer satisfaction of 747. Shaw ranks second in the East region with a score of 703, while Cogeco ranks third at 685. In Internet customer satisfaction, Vidéotron ranks highest in the East region with a score of 755. Cogeco ranks second (686) and Bell Aliant ranks third (675).

West Region

SaskTel ranks highest in both television and Internet service customer satisfaction in the West region. SaskTel achieves an overall score of 730 among television customers. MTS ranks second in the region with a score of 687, followed by TELUS at 684. In Internet customer satisfaction, SaskTel ranks highest with a score of 705, followed by TELUS at 672.

The 2013 Canadian Television Provider Customer Satisfaction Study and the 2013 Canadian Internet Service Provider Customer Satisfaction Study are based on responses from more than 10,500 telecommunication customers—more than 4,500 customers in the West region and 6,000 customers in the East region. Both studies were fielded in October 2012 and April 2013.

About J.D. Power

J.D. Power is a global marketing information services company providing performance improvement, social media and customer satisfaction insights and solutions. The company's quality and satisfaction measurements are based on responses from millions of consumers annually. Headquartered in Westlake Village, Calif., J.D. Power has offices in North America, Europe and Asia Pacific. For more information on [car reviews and ratings](#), [car insurance](#), [health insurance](#), [cell phone ratings](#), and more, please visit JDpower.com. J.D. Power is a business unit of McGraw Hill Financial.

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NOTE: Four charts follow.

J.D. Power 2013 Canadian Television Provider Customer Satisfaction StudySM

East Region Television Customer Satisfaction Index Ranking *(Based on a 1,000-point scale)*



Power Circle Ratings Legend

- Among the best
- Better than most
- About average
- The rest

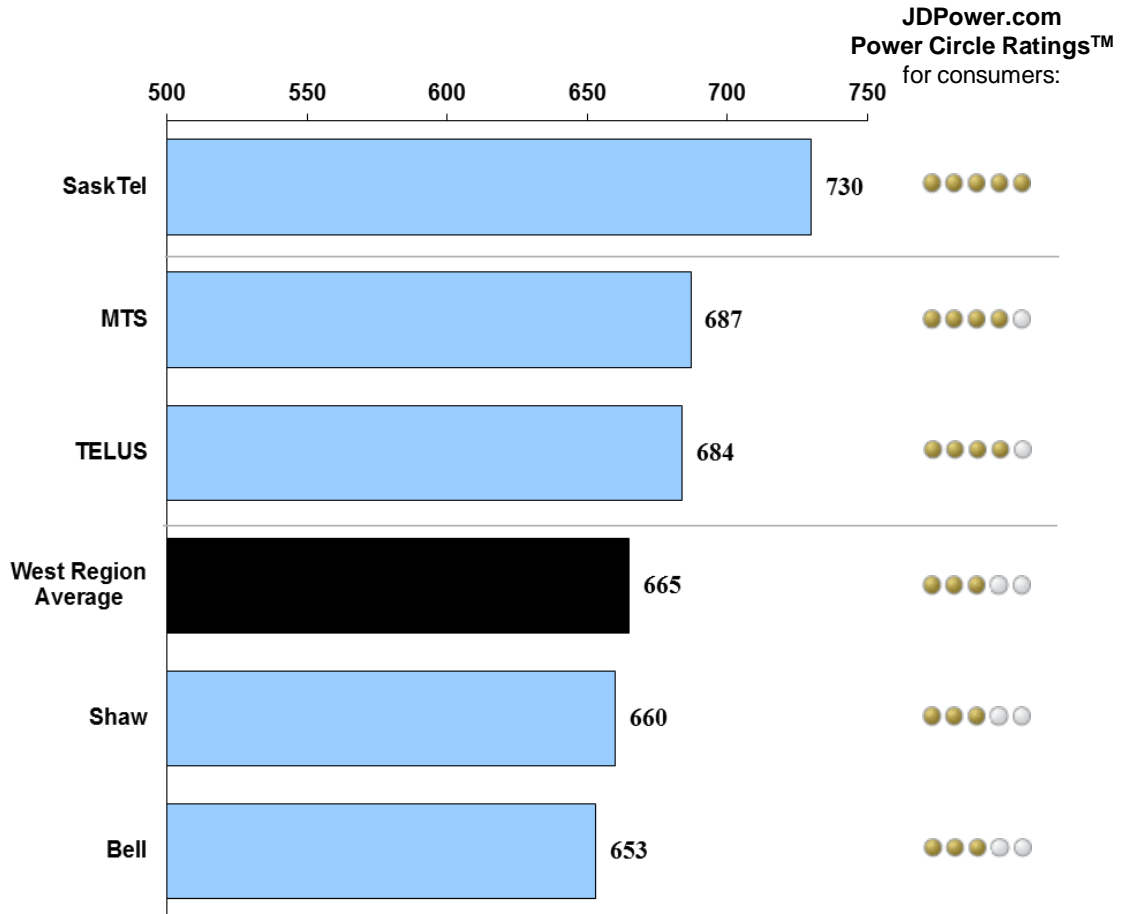
Included in the study but not ranked due to small sample size is Bell Aliant.

Source: J.D. Power 2013 Canadian Television Provider Customer Satisfaction StudySM

Charts and graphs extracted from this press release must be accompanied by a statement identifying J.D. Power as the publisher and the J.D. Power 2013 Canadian Television Provider Customer Satisfaction StudySM as the source. Rankings are based on numerical scores, and not necessarily on statistical significance. JDPower.com Power Circle RatingsTM are derived from consumer ratings in J.D. Power studies. For more information on Power Circle Ratings, visit jdpower.com/faqs. No advertising or other promotional use may be made of the information in this release or J.D. Power survey results without the express prior written consent of J.D. Power.

J.D. Power 2013 Canadian Television Provider Customer Satisfaction StudySM

West Region Television Customer Satisfaction Index Ranking *(Based on a 1,000-point scale)*



Power Circle Ratings Legend

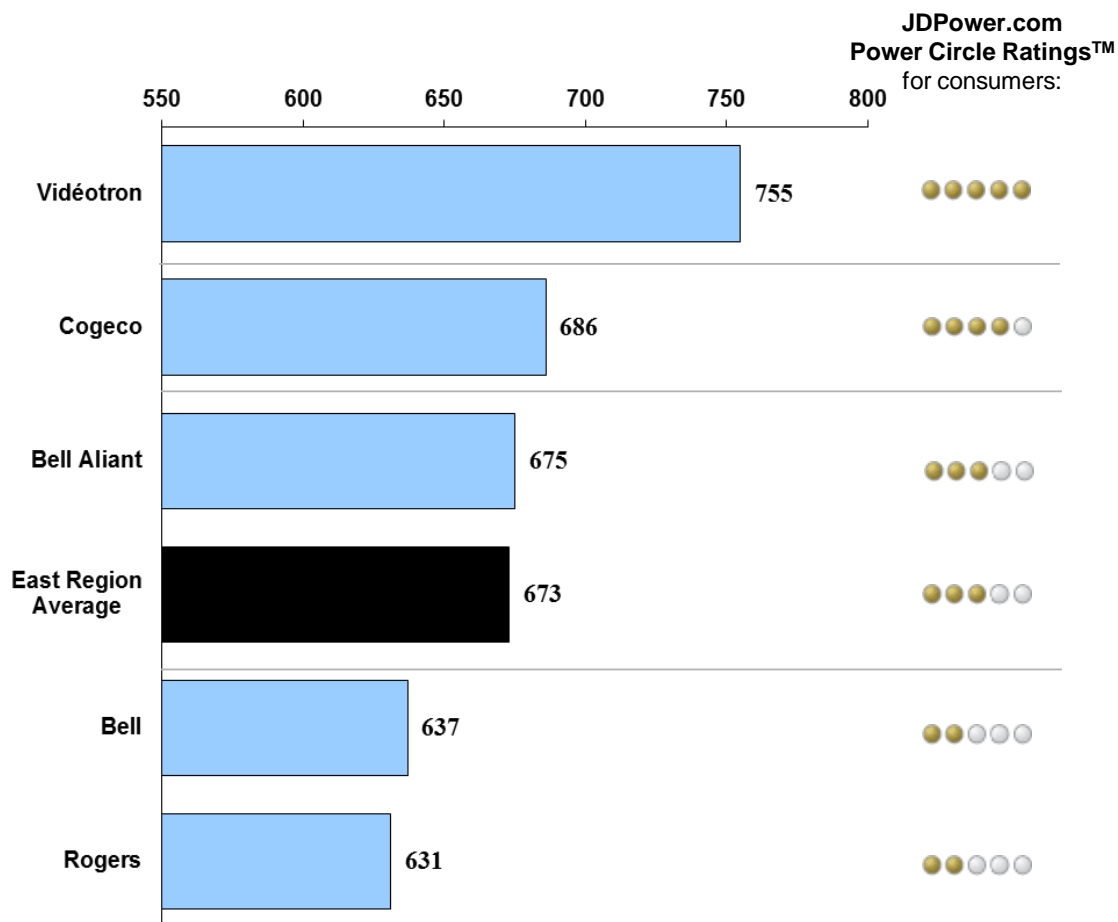
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Source: J.D. Power 2013 Canadian Television Provider Customer Satisfaction StudySM

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J.D. Power 2013 Canadian Internet Service Provider Customer Satisfaction StudySM

East Region Internet Customer Satisfaction Index Ranking *(Based on a 1,000-point scale)*



Power Circle Ratings Legend

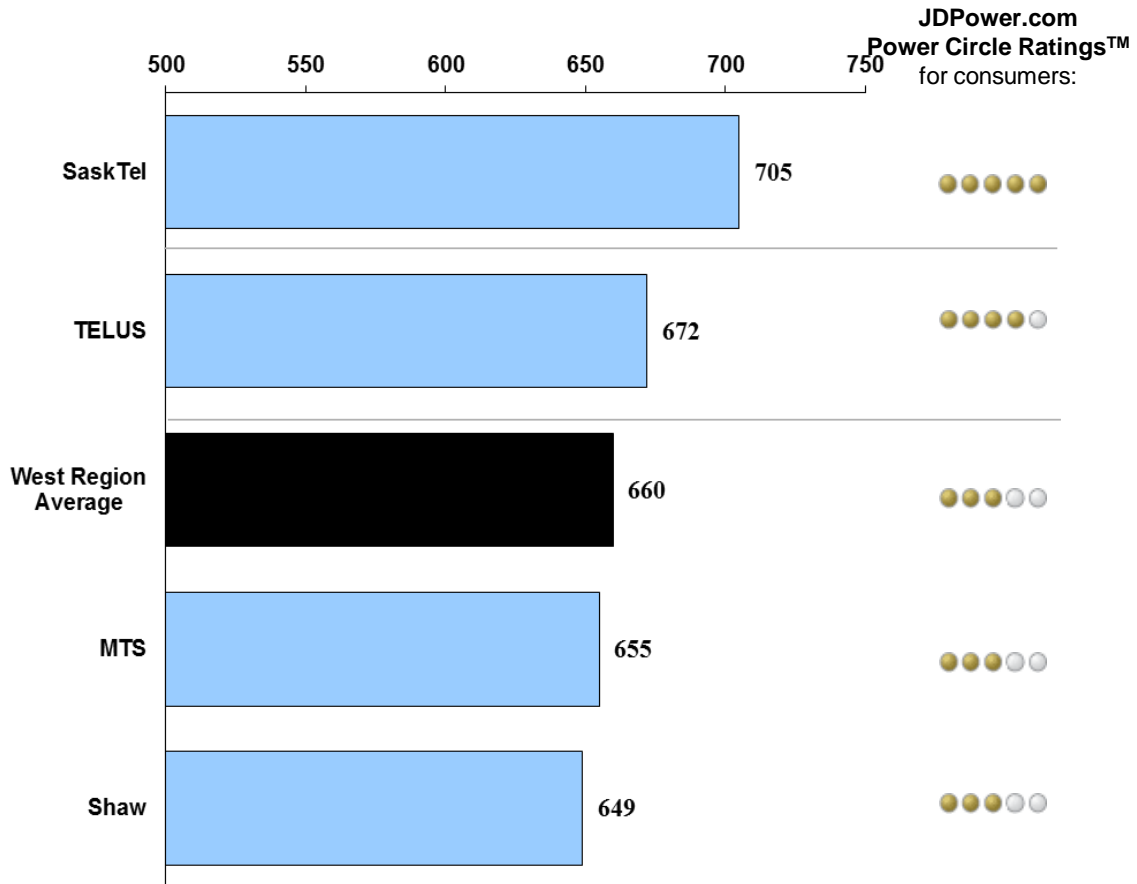
- Among the best
- Better than most
- About average
- The rest

Source: J.D. Power 2013 Canadian Internet Service Provider Customer Satisfaction StudySM

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J.D. Power 2013 Canadian Internet Service Provider Customer Satisfaction StudySM

West Region Internet Customer Satisfaction Index Ranking *(Based on a 1,000-point scale)*



Power Circle Ratings Legend

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Source: J.D. Power 2013 Canadian Internet Service Provider Customer Satisfaction StudySM

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