



Ciruli Associates

Colorado Office of Consumer Counsel Wireless Telephone Customers

Survey Results 2011 Data Compared to 2007 Data

January 2011

Research Design

- Conducted by: Ciruli Associates
- Sponsored by: Colorado Office of Consumer Counsel
- Sample: Random sample of registered voters who use a cell phone primarily or exclusively for personal calls
- Sample Size: 112 Colorado residents
- Margin of Error: ± 9.2 percentage points in 95 out of 100 cases
- Date in Field: January 26-30, 2011

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Colorado Office of Consumer Counsel Wireless Phone Customers

Cell Phone/Landline Telephone Inventory

1. Do any other adults 18 years of age or older use this cell phone?

	<u>2011</u>	<u>2007</u>
Yes	46%	19%
No	54	81
Don't know/refused	--	--

Base of 112 respondents with wireless phones (Base 300 in 2007)

2. Do you regularly use more than one cell phone?

	<u>2011</u>	<u>2007</u>
No, one	80%	84%
Yes, more than one	20	16
Don't know/refused	--	--

Base 112 (Base 300 in 2007)

3. Is this household a wireless only household? That is, a residence without a working landline telephone.

	<u>2011</u>	<u>2007</u>	
Yes	46%	37%	GO TO Q4
No	54	63	GO TO Q7
Don't know/refused	--	--	GO TO Q7

Base 112 (Base 300 in 2007)

History of Landline Service

4. Did you ever have a landline telephone service?

	<u>2011</u>	<u>2007</u>	
Yes	65%	88%	GO TO Q5
No	35	12	GO TO Q8
Don't know/refused	--	--	GO TO Q8

Base of 52 respondents in wireless only households (Base 300 in 2007)

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5. Did you replace your landline telephone service in the last 12 months, 1 to 2 years, or more than 2 years ago?

	<u>2011</u>	<u>2007</u>	
Last 12 months	15%	8%	GO TO Q6
1 to 2 years	9	6	GO TO Q6
More than 2 years	74	17	GO TO Q6
Haven't replaced landline (vol)	3	68	GO TO Q7
Don't know/refused	--	--	GO TO Q6

Base of 34 respondents who are currently wireless only, but had a landline service in the past
 (Base of 265 in 2007, include current wireless only and all respondents with current landline)

6. Why did you replace your landline with a wireless cell phone?

	<u>2011</u>	<u>2007</u>
Price/cheaper	40%	25%
More convenient	24	17
Need/desire mobility	15	29
Just like cell phones	6	2
Landlines are old-fashioned	6	2
Very reliable	6	--
More features (texting/entertainment/news/sports/music)	--	2
Good reception	--	--
All my friends have them	--	--
Never used a landline/no need for it		6
Moved/never hook it back up		84
No longer have Internet/computer		4
Other	3	2
Don't know/refused	--	1

GO TO Q8

Base of 33 respondents who replaced their landline with wireless (Base 84 in 2007)

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Amount of Cell Phone/Landline Use

IF LANDLINE:

7. Of all the phone calls that you or other members of your household receive, about how many are received on a cell phone and not on a landline:

	<u>2011</u>	<u>2007</u>
All or most calls on cell phone	74%	33%
More than half	21	44
Less than half.....	3	14
Very few or none.....	2	9
Don't know/refused	--	--

Base of 61 respondents who have a landline (Base of 189 respondents in 2007 who had a landline)

Number of Cell Phones

8. How many, if any, different wireless only cell telephones with their own telephone numbers are in this household?

	<u>2011</u>	<u>2007</u>	
One	24%	28%	GO TO Q9 AND Q10
Two.....	44	38	GO TO Q9 AND Q10
Three or more	32	34	GO TO Q9 AND Q10
None	--	--	GO TO Q11
Don't know/refused.....	--	--	GO TO Q9 AND Q10

Base 112 (Base 300 in 2007)

IF CELL PHONE:

- 9-10. How many adults (18 years old or more) in this household have a cellular phone? How many children?

	<u>Q9 Adults</u>		<u>Q10 Children</u>	
	<u>2011</u>	<u>2007</u>	<u>2011</u>	<u>2007</u>
One	25%	31%	4%	12%
Two.....	57	47	4	3
Three or more	18	21	6	1
None	--	--	85	84
Don't know/refused.....	--	--	--	--

Base 112 (Base 300 in 2009)

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Cell Phone Features Use

As I read the following list, please tell me if you do or don't use your cell phone for it.

	<u>Yes</u> <u>2011</u>	<u>Yes</u> <u>2007</u>	<u>No</u> <u>2011</u>	<u>Don't Know</u> <u>2011</u>
11. Making local calls.....	97%	99%	2%	1%
12. Long distance calls.....	96	92	4	--
13. Texting	82	58	18	--
14. Internet access.....	52	17	48	--
15. Music or games.....	31	14	69	--
Video.....	--	6		

Base 112 (Base 300 in 200)

Do you have or not have (read feature below) on your phone? [ROTATED]

	<u>Yes</u> <u>2011</u>	<u>Yes</u> <u>2007</u>	<u>No</u> <u>2011</u>	<u>No</u> <u>2007</u>	<u>Don't Know</u> <u>2011</u>
16. Call Waiting, in which you can place a caller on hold and answer another incoming call.....	82%	87%	16%	10%	2%
17. Call Forwarding, in which phone calls that come to your home phone can be transferred to other phone numbers	61	58%	29	25	11

Base 112

Importance of Cell Phone Attributes

As I read the following statements concerning wireless cellular telephone service, please tell me if it is a very important aspect, somewhat important, not very important or not at all important aspect. [ROTATED]

	<u>Very Important</u> <u>2011</u>	<u>Very Important</u> <u>2007</u>	<u>Somewhat Important</u> <u>2011</u>	<u>Somewhat Important</u> <u>2007</u>	<u>Not Very Important</u> <u>2011</u>	<u>Not at all Important</u> <u>2011</u>	<u>Don't Know</u> <u>2011</u>
18. Use for travel out-of-state and out-of-the-country.....	63%		25%		4%	8%	--
19. Use for convenience while driving	43		30		14	13	--
20. It is as reliable as landline phone service	60	85%	29	11%	7	1	4%
21. Use for keeping contact with children.....	54		8		3	31	4

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	Very Important <u>2011</u>	Very Important <u>2007</u>	Somewhat Important <u>2011</u>	Somewhat Important <u>2007</u>	Not Very Important <u>2011</u>	Not at all Important <u>2011</u>	Don't Know <u>2011</u>
22. It has the same reception or signal quality as landline phone service	62%	79%	22%	16%	3%	11%	2%
23. It can use the same features as landline phone service.....	66	56	26	31	4	4	1
24. Use for personal protection and emergencies	78		13		6	2	--
25. It has access to the Internet...	38	12	25	20	13	24	--
26. Prices are similar to or less than landline phone service ..	46	67	30	25	8	9	6
27. A landline is still needed for security features, such as a house alarm.....	16		9		12	53	10
Mobility of phone service.....		90		7			

Base 112 (Base 300 in 2007)

Satisfaction

28. Overall, how satisfied would you say you are with your wireless cell phone service: very satisfied, somewhat satisfied, somewhat dissatisfied or very dissatisfied with your wireless cell phone service?

	<u>2011</u>	<u>2007</u>
Very satisfied	58%	50%
Somewhat satisfied.....	28	43
Somewhat dissatisfied.....	12	2
Very dissatisfied	1	2
Don't know/refused.....	1	--

Base 112 (Base 300 in 2007)

Choice of Cell Phone Service

29. Is there a choice or not a choice of cell phone companies from which to purchase service for your home area?

	<u>2011</u>	<u>2007</u>
Yes.....	94%	91%
No.....	4	5
Don't know/refused.....	2	3

Base 112 (Base 300 in 2007)

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Cost of Phone Service

30. Approximately what would you say your cellular telephone bill was for an average month during 2010? [TOTAL BILL – LOCAL AND LONG DISTANCE FOR ALL LINES] [READ IN ORDER LISTED]

	<u>2011</u>	<u>2007</u>
\$1 - \$30	4%	6%
\$31 - \$50	12	24
\$51 - \$100	39	42
More than \$100	38	24
Don't know/refused.....	6	5

Base 112 (Base 300 in 2007)

31. Would you say the monthly cost you pay for your cellular telephone service is way too high for what you get, high but acceptable, about what you would expect to pay or is it less than what you would expect to pay?

	<u>2011</u>	<u>2007</u>
Way too high	20%	14%
High but acceptable.....	41	35
About expected.....	33	45
Less than expected	3	3
Don't know/refused.....	3	3

Base 112 (Base 300 in 2007)

Complaints

32. If you had a complaint about your cell phone service in the last 12 months, who, if anyone, did you contact to correct the problem?

	<u>2011</u>
Cell phone manufacturer	4%
Cell phone service provider.....	64
Colorado Public Utilities Commission.....	--
Colorado Attorney General.....	--
Federal Communications Commission or Federal Trade Commission.....	--
U.S. Senator or congressperson.....	--
Other (list)	--
No one	32
Don't know/refused.....	--

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33. Should the State of Colorado have an agency or not have an agency that regulates cell phone use and could address customer complaints?

	<u>2011</u>
Yes	34%
No	54
Don't know/refused	12

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Demographics

The final questions are for background information only. The answers to these questions help us to understand the results.

Your answers to these questions, like all the survey questions, are confidential and used only when combined with all other persons who are interviewed.

34. How old are you?

	<u>2011</u>	<u>2007</u>
(18-24).....	6%	14%
(25-34).....	20	21
(35-44).....	14	20
(45-54).....	25	25
(55-64).....	23	12
(65-74).....	6	4
(75 and over)	1	3
Don't know/refused.....	5	2

35. What was the last grade or degree you completed at school?

	<u>2011</u>	<u>2007</u>
Not a high school graduate.....	1%	6%
High school graduate.....	12	27
Some college/business/vocational school	27	22
College graduate.....	34	26
Post grad work/professional graduate	24	18
Don't know/refused.....	3	1

36. What is your current marital status? Are you:

	<u>2011</u>	<u>2007</u>
Married to a partner of the opposite sex	62%	54%
Single.....	27	35
Widowed.....	1	1
Divorced	9	8
In a relationship with a same-sex partner	--	0.3
Don't know/refused	2	1

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37. How would you describe the area you live?

	<u>2011</u>	<u>2007</u>
Farm or rural area	12%	10%
Small town – fewer than 5,000 people	9	11
Small city – 5,000 to 50,000 people	20	17
Large city – 50,000 to 500,000	31	37
Suburb – adjacent or near, but outside of a city limit	25	22
Exurb – outside of a city limit and separated by some distance	1	2
Don't know/refused	1	1

38. Are you from Hispanic or Spanish-speaking background? IF YES, MARK BELOW. IF NO, ASK: With which race do you identify yourself: Are you white, black, Asian, Native American or some other ethnic or racial background?

	<u>2011</u>	<u>2007</u>
White	84%	71%
Hispanic.....	5	18
Black.....	4	3
Asian.....	--	2
Native American.....	2	1
Other.....	1	2
Don't know/refused	4	2

39. For statistical purposes only, as I read the following income groups, please stop me when the figure includes an approximation of your total income for you and members of your household for last year, 2010, before taxes? [ROTATED]

	<u>2011</u>	<u>2007</u>
Less than \$40,000.....	18%	27%
\$40,000, but less than \$80,000.....	25	35
\$80,000, but less than \$100,000.....	9	12
\$100,000 to \$150,000.....	20	13
More than \$150,000	12	6
Don't know/refused	15	7

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County Location

40. In what county is this residence?

	<u>2011</u>	<u>2007</u>
Metro Area:		
Adams, Arapahoe, Boulder, Broomfield, Denver, Douglas, Jefferson.....	54%	56%
North Front Range:		
Larimer, Weld	12	9
Eastern Plains:		
Cheyenne, Elbert, Kit Carson, Lincoln, Logan, Morgan, Phillips, Sedgwick, Washington, Yuma, Baca, Bent, Crowley, Huerfano, Kiowa, Las Animas, Otero, Prowers	4	10
South Front Range:		
El Paso, Teller, Pueblo.....	17	16
Western Slope:		
Clear Creek, Eagle, Garfield, Gilpin, Grand, Jackson, Mesa, Moffat, Pitkin, Rio Blanco, Routt, Summit, Chaffee, Custer, Delta, Fremont, Gunnison, Hinsdale, Lake, Montrose, Ouray, Park, San Miguel, Alamosa, Conejos, Costilla, Mineral, Rio Grande, Saguache, Archuleta, Dolores, Las Plata, Montezuma, San Juan	12	14

41. Record respondent's gender.

	<u>2011</u>	<u>2007</u>
Male.....	45%	56%
Female	55	44

Wireless Screen Questions

I need to speak to the adult 18 years or older in the household who knows the most about uses of this cell phone. Are you 18 years old or older? (Note: A roam phone is associated with a landline.)

S7.	<u>2011</u>	<u>2007</u>	
Yes.....	100%	100%	
No.....			GO TO QS8
Don't know/refused			THANK AND TERMINATE

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- S8. IF NOT 18 YEARS OLD OR OLDER, ASK: Is there a person 18 years old or older who regularly uses the phone? IF AVAILABLE, PROCEED WITH ADULT. IF NOT, ATTEMPT TO SCHEDULE TIME FOR PARTICIPATION. IF CAN'T BE SCHEDULED, THANK AND TERMINATE.

Respondent's name _____
 Date/time _____

- S9. Do you regularly answer this cell phone?

	<u>2011</u>	<u>2011</u>	
Yes.....	100%	100%	GO TO QS10
No.....			IS AN ADULT WHO
			REGULARLY ANSWERS
			THIS PHONE AVAILABLE?
			IF SO, ASK QS10. IF NOT,
			THANK AND TERMINATE
Don't know/refused.....			THANK AND TERMINATE

Base 112 (Base 300 in 2007)

- S10. IF SO, ASK: Is this cell phone number used for?

	<u>2011</u>	<u>2007</u>	
Your personal calls	48%	47%	GO TO QS11
Personal and business calls.....	52	53	GO TO QS11
Business only calls.....	--	--	THANK AND
			TERMINATE
Don't know/refused	--	--	THANK AND
			TERMINATE

Base 112 (Base 300 in 2007)

- S11. Do you primarily use this cell phone for personal calls or do you primarily use a landline for personal calls?

	<u>2011</u>	<u>2007</u>	
Use cell phone	100%	100%	GO TO QS12
Use landline.....			GO TO LANDLINE FOLLOW-UP
			QUESTIONS (QS2)
Business only calls ...			THANK AND TERMINATE
Don't know/refused..			THANK AND TERMINATE

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S12. As we conduct this interview, are you...?

	<u>2011</u>	<u>2007</u>	
At home.....	74%	70%	
At work	11	14	
Some other place.....	7	5	
Driving (offer to call back).....	4	1	
Shopping	3	4	
Parked in car.....	2	2	
Recreation	--	3	
Don't know/refused.....	--	--	THANK AND TERMINATE

Base 112 (Base 300 in 2007)

GO TO WIRELESS QUESTIONNAIRE