



# 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:  $\pm 9.2$  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</u>		<u>Q10</u>	
	<u>Adults</u>		<u>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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	<u>Very Important 2011</u>	<u>Very Important 2007</u>	<u>Somewhat Important 2011</u>	<u>Somewhat Important 2007</u>	<u>Not Very Important 2011</u>	<u>Not at all Important 2011</u>	<u>Don't Know 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.....	--

Base 112

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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

Base 112

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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

Base 112 (Base 300 in 2007)

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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

Base 112 (Base 300 in 2007)

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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