



Ciruli Associates

Colorado Office of Consumer Counsel Landline 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 landline telephone primarily or exclusively for personal calls
- Sample Size: 388 Colorado voters
- Margin of Error: ± 5.0 percentage points in 95 out of 100 cases
- Date in Field: January 26-30, 2011

Colorado Office of Consumer Counsel Landline Telephone Customers

Telephone Line/Cell Phone Inventory

1. Excluding cellular phones, how many different telephone lines with their own telephone numbers do you have in your household?

	<u>2011</u>	<u>2007</u>	
One	83%	80%	GO TO Q2
Two	13	16	GO TO Q2
Three or more	4	4	GO TO Q2
Cellular only household.....	--	--	THANK AND TERMINATE
Don't know/refused	--	--	THANK AND TERMINATE

Base of 388 landline respondents (Base of 611 landline respondents in 2007)

2. Does anyone in your household have cellular phone service?

	<u>2011</u>	<u>2007</u>	
Yes.....	88%	80%	GO TO Q3
No.....	12	20	GO TO Q5
Don't know/refused.....	--	0.2	GO TO Q5

Base 388 (Base 611 in 2007)

IF CELL PHONE:

- 3-4. How many adults (18 years old or older) in your household have a cellular phone? How many children?

	<u>Q3</u>	<u>Q4</u>	<u>Q3</u>	<u>Q4</u>
	<u>Adults</u>	<u>Adults</u>	<u>Children</u>	<u>Children</u>
	<u>2011</u>	<u>2007</u>	<u>2011</u>	<u>2007</u>
One	30%	39%	10%	10%
Two.....	59	49	3	3
Three or more	11	11	0.3	1
None	1	0.4	86	86
Don't know/refused.....	--	0.4	0.3	0.2

Base of 343 landline respondents with a cell phone (Base 489 in 2007)

Wireless Only

5. Would you consider or not consider totally replacing your home telephone service with cellular phone service only?

	<u>2011</u>	<u>2007</u>
Yes, would consider	26%	26%
No, wouldn't consider	70	70
Don't know/refused.....	3	4

Base 388 (Base 611 in 2007)

Local Phone Service

6. I would now like to ask you some questions about your local landline telephone company – that is, the company that provides LOCAL telephone service to your home and handles your LOCAL telephone calls. First of all, what is the name of the company that provides your household with local telephone service?

	<u>2011</u>	<u>2007</u>	
Qwest Communications (Mountain Bell, US West).....	61%	76%	
Comcast.....	26	10	
CenturyLink.....	3	--	
AT&T.....	2	1	
Bresnan.....	2	--	
MCI.....	1	1	
VoIP.....	1	--	GO TO Q8
Liberty Bell.....	0.3	--	
McLoud/GEA.....	--	2	
Other.....	3	9	
Non-rural.....	1	4	
Rural.....	2	5	
Don't know/refused.....	3	2	

Base 388 (Base 611 in 2007)

Voice over Internet Protocol

7. Does anyone in your household subscribe to a Voice over Internet Protocol, or VoIP service?

	<u>2011</u>	<u>2007</u>	
Yes.....	8%	3%	GO TO Q8
No.....	88	93	GO TO Q10
Don't know/refused	4	4	GO TO Q10

Base of 386 landline respondents connected to Internet (Base 453 in 2007)

IF YES ON Q7, ASK:

As I read the following list of features related to VoIP, please tell me if they were very important, somewhat important, not very important or not at all important in subscribing to VoIP?

[ROTATED]

	<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>
8. It uses new technology.....	18%	53%	38%	20%	21%	21%	3%
9. It has a bundled service package	38	33	26	13	18	18	--

Base of 34 landline respondents connected to VoIP (Base 15 in 2007)

Advanced Features

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

	<u>Yes 2011</u>	<u>Yes 2007</u>	<u>No 2011</u>	<u>No 2007*</u>	<u>Don't Know 2011</u>
10. Caller ID, in which the name and/or phone number of the caller is displayed on a screen on or near the phone.....	78%	66%	22%	34%	--
11. Call Waiting, in which you can place a caller on hold and answer another incoming call.....	63	55	34	44	3%
12. Call Forwarding, in which phone calls that come to your home phone can be transferred to other phone numbers	37	36	53	60	10

Base 388 (Base 611 in 2007)

*No in 2007 included "can't receive." One percent or less said they couldn't receive feature.

Features Policy

Telephone customers in some parts of the state don't receive some of the features we just discussed. If such services were included in basic service, telephone companies would have to provide the services to everyone and everyone would have to pay for them. We would like to know your views about adding the features to the basic service that phone companies must provide to all Colorado telephone customers.

As I read the following two statements, please tell me which one comes closest to your viewpoint. [ROTATED]

13A. Statement A: People throughout Colorado should have advanced features, such as Call Waiting, Call Forwarding and Caller ID, included in their basic local telephone service, even if it raises everyone’s basic phone bill a few dollars per month.

or

13B. Statement B: People throughout Colorado should pay for their own advanced features, such as Call Waiting, Call Forwarding and Caller ID. If they can’t afford it, they will have to do without or move to areas with more services. We shouldn’t raise everyone’s basic phone bill a few dollars per month.

	<u>2011</u>	<u>2007</u>
Statement A.....	12%	12%
Statement B.....	86	87
Don’t know/refused	2	2

Base 388 (Base 611 in 2007)

Purchase Preference

14. Let me ask you how you purchase telephone services and products. As I read the following list of three choices, please tell me which one best describes how you purchase services and products. [READ IN ORDER LISTED]

	<u>2011</u>	<u>2007*</u>
Basic local phone service without any optional service or features	16%	25%
Basic local phone service with long distance services	7	--
Basic local phone service and one or more calling features, such as Caller ID, Call Waiting or Call Forwarding and long distance services	22	30
Bundle of services that includes basic local phone service, calling features, long distance services and high-speed Internet	55	43
Don’t know/refused	0.3	2

Base 388 (Base 611 in 2007)

*There were four options in 2007. Basic with long distance (second item) was not offered.

Cost of Phone Service

15. Approximately what would you say your non-cellular household 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	21%	20%
\$31 - \$50	39	41
\$51 - \$100	22	25
More than \$100	5	7
Don't know/refused.....	12	6

Base 388 (Base 611 in 2007)

16. Excluding cellular phones, would you say the monthly cost your household pays for your non-cellular household 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	24%	22%
High but acceptable.....	33	32
About expected.....	38	38
Less than expected	2	5
Don't know/refused.....	3	4

Base 388 (Base 611 in 2007)

Personal Computer

17. Are you connected or not connected to the Internet or an Internet provider at your home?

	<u>2011</u>	<u>2007</u>	
Yes.....	85%	93%	GO TO Q18
No.....	15	6	GO TO Q28
Don't know/refused.....	0.3	1	GO TO Q28

Base 388 (Base of 487 respondents in 2007 who had a home computer)

Internet Connection

IF YES ON Q17, ASK:

18. Are you connected to the Internet on a: [*READ LIST. DO NOT READ "DON'T KNOW."*]
[*MULTIPLE ANSWERS*]

	<u>2011</u>
Desktop computer.....	79%
Laptop computer.....	48
Your cell phone.....	15
Your television.....	11
Other	2
Don't know/refused	0.3

Base of 330 landline respondents connected to the Internet

19. Is your Internet use at home primarily for personal- or business-related use?

	<u>2011</u>	<u>2007</u>
Personal	62%	61%
Business.....	3	3
Both (vol)	34	36
Don't know/refused.....	0.3	--

Base 330 (Base of 427 respondents in 2007 who use the Internet connection)

20. Thinking about your household use of the Internet, about how many hours per week does your household, on average, spend on the Internet? [*READ IN ORDER LISTED*]

	<u>2011</u>	<u>2007*</u>	
Fewer than 10 hours per week.....	28%	23%	(4 hours or less)
About 10 to 20 hours per week	31	28	(5-10 hours)
More than 20 and up to 40 hours per week ...	23	18	(11-20 hours)
More than 40 hours per week.....	15	30	(More than 20 hours)
Don't know/refused.....	2	1	

Base 330 (Base 427 in 2007)

*Hours were lower in 2007 (4 hours or less, 5-10 hours, 11-20 hours, more than 20 hours)

Dial-up or Broadband

21. How do you connect to the Internet from your home? [*PROMPT WITH LIST IF NEEDED*]

	<u>2011</u>	<u>2007</u>	
Dial-up	2%	24%	GO TO Q22
DSL	37	35	GO TO Q25
Cable modem	44	28	GO TO Q25
Wireless (cell phone).....	12	8	GO TO Q25
Television cable.....	2	--	GO TO Q25
Other.....	1	1	GO TO Q25
Don't know/refused.....	3	4	GO TO Q25

Base 330 (Base of 453 respondents in 2007 who have an Internet connection)

IF DIAL-UP ON Q21, ASK:

22. Would you consider changing from dial-up to a broadband connection?

	<u>2011</u>	<u>2007</u>
Yes	38%	53%
No.....	50	38
Don't know/refused.....	12	8

Base 8 landline respondents on dial-up (Base of 109 respondents in 2007 using dial-up)

23. Why haven't you changed to a broadband connection?

	<u>2011</u>	<u>2007</u>	
Dial-up cheaper/broadband too expensive	50%	44%	GO TO Q24
Broadband not available.....	25	17	GO TO Q25
Don't need more speed.....	12	14	GO TO Q25
No reason	--	12	
Like dial-up	--	6	
Don't know/refused.....	12	7	GO TO Q25

Base 8 (Base 109 in 2007)

IF COST ON Q23, ASK:

24. If broadband were available and the price was between (\$21 and \$30 dollars per month), would you consider switching from dial-up to broadband? [*READ IN ORDER LISTED*]

	<u>Yes</u> <u>2011</u>	<u>Yes</u> <u>2007</u>
\$21-\$30 per month	50%	25%
\$16-\$20 per month	--	35
\$11-\$15 per month	--	10
\$5-\$10 per month	25	13
No at all listed level.....	25	10
Don't know/refused.....	--	6

Base of 4 respondents who don't use broadband due to price
(Base of 48 respondents in 2007 who don't use broadband due to price)

Data Speed

25. Once you or someone in your household is on the Internet, how would you rate the speed of your Internet service: very fast, fast, about right, slow or very slow?

	<u>2011</u>	<u>2007</u>
Very fast.....	19%	18%
Fast	38	33
About right	24	22
Slow	15	15
Very slow.....	2	11
Don't know/refused.....	2	2

Base of 330 landline respondents connected to the Internet (Base 453 in 2007)

Internet Connection Cost

26. What do you currently pay for your Internet data connection per month?

	<u>2011</u>	<u>2007</u>
\$1-\$15	3%	15%
\$16-\$25	12	15
\$26-\$35	21	27
\$36-\$45	15	15
\$46 or more	24	16
Don't pay for it.....	2	3
Don't know/refused.....	22	10

Base 330 (Base 453 in 2007)

27. Would you say the monthly cost your household pays for your Internet connection 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 for it?

	<u>2011</u>	<u>2007</u>
Way too high	24%	18%
High but acceptable.....	36	30
About expected.....	34	39
Less than expected	1	8
Don't know/refused.....	6	6

Base 330 (Base 453 in 2007)

Complaints

28. 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>
No one	45%
Cell phone service provider.....	41
Cell phone manufacturer	1
Colorado Public Utilities Commission.....	--
Colorado Attorney General.....	--
Federal Communications Commission or Federal Trade Commission.....	--
U.S. Senator or congressperson.....	--
Other.....	0.3
Don't have cell phone service	10
Don't know/refused	2

Base of 388 landline respondents

29. 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	21%
No	62
Don't know/refused	17

Base 388

Policy Changes

Some changes in local phone service are being considered by state legislators and state utility regulators. As I read the following statements, please tell me if you agree or disagree. If you don't have an opinion, just say so. [READ STATEMENT] [PROMPT: Do you strongly (agree/disagree) with the statement or somewhat (agree/disagree)?] [ROTATED]

	<u>Strongly Agree 2011</u>	<u>Somewhat Agree 2011</u>	<u>Somewhat Disagree 2011</u>	<u>Strongly Disagree 2011</u>	<u>Don't Know 2011</u>
30. The Public Utilities Commission should reduce the price of in-state long distance telephone calls.....	30%	29%	13%	7%	21%
31. The Public Utilities Commission should shift funds that subsidize the cost of basic services and put the funds into expanded rural broadband.....	10	18	18	21	32

Base 388

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.

32. How old are you?

	<u>2011</u>	<u>2007</u>
(18-24).....	1%	2%
(25-34).....	2	10
(35-44).....	12	17
(45-54).....	20	22
(55-64).....	29	21
(65-74).....	25	12
(75 and over)	9	13
Don't know/refused.....	3	3

33. 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	19	22
Some college/business/vocational school....	20	22
College graduate	34	28
Post grad work/professional graduate.....	24	19
Don't know/refused	1	2

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

	<u>2011</u>	<u>2007</u>
Married to a partner of the opposite sex	68%	61%
Single.....	11	16
Divorced	10	11
Widowed.....	8	9
In a relationship with a same-sex partner	0.3	1
Don't know/refused	2	2

35. How would you describe the area you live?

	<u>2011</u>	<u>2007</u>
Farm or rural area	16%	16%
Small town – fewer than 5,000 people	11	9
Small city – 5,000 to 50,000 people	15	16
Large city – 50,000 to 500,000	28	29
Suburb – adjacent or near, but outside of a city limit	27	25
Exurb – outside of a city limit and separated by some distance	2	2
Don't know/refused	1	3

36. 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	86%	82%
Hispanic.....	5	6
Black.....	2	4
Asian.....	1	1
Native American.....	1	2
Other.....	2	2
Don't know/refused.....	5	4

37. 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%	25%
\$40,000, but less than \$80,000.....	28	28
\$80,000, but less than \$100,000.....	11	13
\$100,000 to \$150,000.....	9	9
More than \$150,000	10	7
Don't know/refused.....	23	17

38. In what county is this residence?

	<u>2011</u>	<u>2007</u>
Metro Area:		
Adams, Arapahoe, Boulder, Broomfield, Denver, Douglas, Jefferson.....	56%	55%
North Front Range:		
Larimer, Weld.....	11	10
Eastern Plains:		
Baca, Bent, Cheyenne, Crowley, Elbert, Huerfano, Kiowa, Kit Carson, Las Animas, Lincoln, Logan, Morgan, Otero, Phillips, Prowers, Sedgwick, Washington, Yuma	3	4
South Front Range:		
El Paso, Teller, Pueblo.....	14	16
Western Slope:		
Alamosa, Archuleta, Chaffee, Clear Creek, Conejos, Costilla, Custer, Delta, Dolores, Eagle, Fremont, Garfield, Gilpin, Grand, Gunnison, Hinsdale, Jackson, Lake, Las Plata, Mesa, Mineral, Moffat, Montezuma, Montrose, Ouray, Park, Pitkin, Rio Blanco, Rio Grande, Routt, Saguache, San Juan, San Miguel, Summit.....	16	15

39. Record respondent's gender.

	<u>2011</u>	<u>2007</u>
Male.....	42%	40%
Female.....	58	60

Landline Screen Questions

I need to speak to the adult 18 years or older in the household who knows the most about the phone service related to this phone number.

S2. Excluding cellular phones, how many different telephone lines with their own telephone numbers do you have in your household?

	<u>2011</u>	<u>2007</u>	
One.....	83%	80%	GO TO QS3
Two.....	14	16	GO TO QS3
Three or more.....	3	4	GO TO QS3
Cellular only household	--	--	GO TO WIRELESS FOLLOW-UP QUESTIONS (QS7)
Don't know/refused.....	--	--	THANK AND TERMINATE

Base 388 (Base 611 in 2007)

S3. Does anyone in your household have working cellular phone service?

	<u>2011</u>	<u>2007</u>	
Yes	88%	80%	GO TO QS4
No	12	20	GO TO LANDLINE QUESTIONNAIRE
Don't know/refused	--	0.2	THANK AND TERMINATE

Base 388 (Base 611 in 2007)

IF CELL PHONE:

S4-5. How many adults (18 years old or older) in your household have a cellular phone? How many children?

	<u>Q4 Adults</u>		<u>Q5 Children</u>	
	<u>2011</u>	<u>2007</u>	<u>2011</u>	<u>2007</u>
One	30%	39%	10%	10%
Two.....	59	49	4	3
Three or more	11	11	1	1
None	1	0.4	86	86

Base of 341 landline respondents with a cell phone
(Base of 489 respondents in 2007 with a cell phone)

S6. Are all or almost all household calls received on a cell phone, would you say some are received on cell phones and some on regular phones, or are very few or none received on cell phones?

	<u>2011</u>	
All or almost all on cell	--	GO TO WIRELESS FOLLOW-UP QUESTIONS (QS7)
Some cell and some landline	58%	GO TO LANDLINE QUESTIONNAIRE
Few or none on cell	42	GO TO LANDLINE QUESTIONNAIRE
Don't know/refused	--	THANK AND TERMINATE

Base 341

GO TO LANDLINE QUESTIONNAIRE