



Telecommunications Consumer Survey

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Oregon Public Utility Commission
State of Oregon

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TABLE OF CONTENTS

EXECUTIVE SUMMARY	1
Introduction.....	1
Key Findings.....	1
Regional Differences	1
Local Telephone Service	2
Cellular or Wireless Telephone Service.....	2
Long Distance Service.....	2
Internet Access	3
Directory Assistance	4
Do Not Call Registry.....	4
Conclusions.....	5
INTRODUCTION	7
Background and Objectives.....	7
Methodology	8
Sample Plan and Weighting.....	9
Analysis and Reporting.....	9
DETAILED FINDINGS	11
Respondent Profile	11
Portland Metro	11
Valley.....	11
Coast.....	12
SW Oregon.....	12
Central Oregon.....	13
Eastern Oregon	13
Telephone Service.....	15
Local Service	15
Wireless or Cellular Service	22
Long Distance Telephone Service	27
Internet Service.....	32
Types of Access Available	32
Personal Internet Access.....	33
Cost of Internet Access.....	36
Amount Willing to Pay for High Speed Internet	36

Satisfaction with Internet Service	38
Voice Over Internet Protocol (VOIP).....	40
Directory Assistance	41
Personal Use	41
Satisfaction with Directory Assistance	42
Awareness of Other Directory Assistance Providers.....	43
Do Not Call Registry	44
National Registry	44
State Registry	45
Preferred Do Not Call Program	45
Conclusions.....	46
APPENDIX.....	47
2004 Telecommunications Survey Instrument – Unweighted Findings.....	49

EXECUTIVE SUMMARY

Introduction

In Oregon, the Public Utility commission is responsible for overseeing the state's telecommunications industry. The PUC annually reports on competition within the industry and collects a variety of information from the regulated companies. In 2004, the Oregon PUC contracted with Gilmore Research Group to conduct a statewide survey of Oregonians to gauge their opinions on a range of telecommunication topics including:

- Number of telephone lines (both landlines and cell phones)
- Satisfaction with telephone service providers (local service and cellular services)
- Long Distance services used
- Internet access
- Directory Assistance services
- Registration for the national Do Not Call list
- Demographic characteristics by region

For survey purposes, the state was divided into six geographic regions and an equal number of surveys (401) were conducted in each region. This method provided enough responses in each region for subgroup analysis. For the statewide analysis, data were weighted to proportionately reflect the distribution of households in each county. Detailed information about the regions, survey sampling and weighting is found in the Methodology Section of this report. Key Findings from the statewide analysis are summarized below.

Key Findings

Regional Differences

There are distinct differences between regions in different areas of the state. The Portland Metro area and the Valley region are predominantly urban in nature with more multi-family dwellings, younger, better-educated respondents, and more respondents with young children. The Coast, Southwest, and Eastern regions are smaller in population and dominated by small towns and rural areas. There are more senior citizens in these regions and fewer young families. Central Oregon is an eclectic mix of both urban and rural areas with characteristics pertaining to both.

Local Telephone Service

- More than three-quarters of respondents (76%) have one hard wired telephone line (landline) and 24% have two or more landlines. Most respondents are not planning to add or drop a telephone line in the next two years. Those with two or more landlines are more likely to live in unincorporated rural areas, have incomes exceeding \$75,000 and be registered for the national Do Not Call list.
- 79% of respondents indicated they are *very unlikely* to drop their primary phone line and switch exclusively to cellular service in the next six months. Those who were considering a switch to cellular most often mentioned saving money on monthly or long distance bills and the convenience of being able to make or receive phone calls from almost any location.
- Six in ten respondents (60%) were satisfied with their local telephone service provider and 31% were neutral on the subject. Just 9% were dissatisfied—usually because of *high rates and overcharging, poor customer service, or poor line quality*.

Cellular or Wireless Telephone Service

- Two out of three respondents (67%) have at least one cell phone. Those most likely to have cell phones live in the Portland Metro or Central region, have Internet access, have children living at home, have incomes greater than \$40,000, and are registered for the national Do Not Call list.
- Most respondents with cell phones (85%) are not planning to either add or drop a cell phone in the next year.
- Cell phone users report few problems with unauthorized contract changes (6% have had this experience) or with purchasing contracts that weren't as advertised (17%).
- Satisfaction with cell phone service was lower on average than satisfaction with local telephone service. Fewer than half (47%) of all respondents were *very* or *somewhat* satisfied with their cellular service and 39% gave a neutral rating. Those who were dissatisfied (11%) most often cited *bad reception/dropped calls, unfair charges/charging for overtime minutes, and poor customer service*.

Long Distance Service

- Virtually all respondents (99%) reported making long distance telephone calls in the past year and many use more than one method. The method mentioned most often

was the home telephone line (56%) followed by using a cell phone (43%), or pre-paid calling card (24%).

- When asked which method they most commonly use for making long distance calls, landlines just barely edged out cell phones (39% and 37% respectively)
- More than two-thirds of respondents (68%) were *very* or *somewhat satisfied* with their long distance service. Those who live in the Coast and Central regions were less satisfied with their service than respondents from other areas.
- The majority of respondents (89%) said there had not been any unauthorized long distance charges on their phone bills in the past year. 83% of those who were charged for calls they did not make were able to have the charges reversed.

Internet Access

- Respondents demonstrated varying degrees of knowledge about the type of Internet access available to them. Three-quarters of respondents (74%) said they had dial-up service available, 58% said cable modem service was available in their area, and 54% said DSL service was available. When asked if satellite and wireless Internet service was available in their area, respondents were more likely to say *don't know* (47% and 59% respectively). Respondents in Eastern Oregon were less likely than average to say any of these services were available to them.
- Not quite three in four respondents (72%) have Internet access from home. Just over half of those with Internet access connect using a dial-up modem (52%), 24% use a cable modem, and 18% use DSL. Residents of the Portland Metro area are significantly more likely to have high speed Internet access than residents in other areas.
- The median monthly cost respondents reported paying for Internet access was \$24. Those who have high speed access reported a median monthly cost of \$40 while for those who use dial-up service, the median cost was \$17 per month.
- Respondents who do not have high speed Internet access were asked how much they would be willing to pay for the service. More than a third (37%) said they would not pay anything and 20% did not know how much they would be willing to pay. Among those who named an amount, the median was just under \$19 per month.
- Half of the respondents who have Internet access (50%) were *very* or *somewhat satisfied* with their Internet service. Those with high speed service were more likely to be satisfied (62%) than those with dial-up service (41%). The most common reasons for dissatisfaction were *speed* and *getting booted off line*.

- Although one in three respondents (33%) have heard of using high speed Internet service to make telephone calls, just nine respondents (0.4%) take advantage of this technology.

Directory Assistance

- Just over half (56%) of respondents have used Directory Assistance in the past 12 months. Those who did not use the service said they either did not need to look up any phone numbers or could look the numbers up themselves in the phone book or on line.
- Respondents who did use Directory Assistance most often dialed 411 (63%) or 555-1212 (28%).
- More than two out of three (68%) of respondents were generally satisfied with their Directory Assistance service, 21% were neutral, and 10% were dissatisfied. Those who were dissatisfied complained about *paying for a service that used to be free*, being given *incorrect information*, or being *unable to get telephone numbers they know are listed*.
- Half (51%) of respondents were aware Directory Assistance Services are available from providers other than the local telephone company but do not know how much these services cost.

Do Not Call Registry

- Just over half the households in Oregon (52%) are listed with the national Do Not Call registry. Those most likely to be registered live in suburban neighborhoods, have two or more cell phones, have two or more landlines, have high speed Internet access, and an annual income greater than \$75,000.
- Three in ten respondents (29%) who are registered for the national Do Not Call list participated in the Oregon Do Not Call program before the national program replaced it. Most of these respondents (66%) did not have a strong opinion favoring one program over the other. Those who did voice an opinion were almost equally divided between the Oregon program (16%) and the national program (19%).

Conclusions

There are few differences in satisfaction with telephone service providers across the state. Respondents in Central Oregon and those with one or more cell phones were less satisfied with local service providers than other respondents. Respondents in Central and Eastern Oregon are less satisfied with their cellular service providers than those in other areas, primarily because of poor reception and unfair charges (roaming/overtime).

The use of cell phones for long distance calling is becoming increasingly popular, especially in urban areas. In 2005, just over half (56%) of Oregon residents surveyed said they use their landline phone and 43% reported using a cell phone for long distance calling.

In urban areas such as the Portland Metro region, nearly three-quarters of respondents were connected to the Internet and half of those have high speed Internet connections. In more rural areas like the Eastern, Coast and Southwest regions, about two-thirds of respondents have Internet access from home, but fewer than one in ten have a high speed connection.

There does appear to be a “digital divide” between the urban and rural areas of the state. It is unclear, however, whether the divide is caused by lack of service options or by other factors. For example, there is a significant correlation between income and education and the use of cell phones and high speed Internet service. In the Eastern region where the lack of high speed Internet and cell phone use is most pronounced, residents also tend to be older, have lower incomes, and have less education than those in other parts of the Oregon.

INTRODUCTION

Background and Objectives

In Oregon, the Public Utility Commission (PUC) is responsible for overseeing the state's telecommunications industry. In recent years there have been extensive changes in the industry, both in technology and in the carriers providing service. The PUC also has varying degrees of authority over these carriers. The PUC annually reports on competition within the industry and collects a variety of information from the regulated companies.

In 2004, the Oregon PUC contracted with Gilmore Research Group to conduct a statewide survey of Oregonians to gauge their opinions on a range of telecommunications topics. Topics explored in the survey include:

- Number of telephone lines (both landlines and cell phones)
- Satisfaction with telephone service providers (local service and cellular services)
- Long Distance services used
- Internet access
- Directory Assistance services
- Registration for the national Do Not Call list
- Demographic characteristics by region

To ensure a sufficient number of responses for subgroup analysis, the state was divided into six distinct regions as described in the Methodology section and 401 surveys were completed with residents of each region. Results were then weighted to proportionately represent the statewide population.

Methodology

Gilmore Research Group conducted 2,406 telephone interviews with Oregon residents age 18 or older between December 17, 2004 and January 17, 2005.

Gilmore used a Computer Assisted Telephone Interviewing system (CATI) and an initial random digit dialing sample of 14,488 telephone numbers from which to conduct the interviews (Table 1). The random digit dialing method ensures that households with new or unlisted numbers are included in the survey. Gilmore made up to 11 attempts to reach each household before replacement, with an average of 3 attempts on all usable sample. The overall completion rate on usable telephone numbers in the sample was 29%. Interviews lasted just over 9 minutes on average.

Table 1
Sample Disposition

	Number	Percent
Completed Interviews	2,406	17%
No answer	1,091	8
Answering machine / Busy	1,003	7
Respondent not available	122	1
Total No Contact	2,216	15%
Refused survey	3,472	24
Terminate / Incomplete	139	1
Total Refusals	3,611	25%
Usable Sample*	8,233	57%
Blocked / Duplicate Numbers	27	<1
Disconnected	3,418	24
Business / Fax	2,135	15
Language Barrier/ Hearing Problem	401	3
Not qualified (over quota)	274	2
Total Non-working / Not Qualified	6,255	43%
Total Sample	14,488	100%
* Completed Interviews + No Contact + Total Refusals		

Sample Plan and Weighting

Quotas were established to ensure enough responses in each region for statistically reliable analysis. Counties were used to place respondents into six geographic regions as shown in Table 2.

Table 2
Counties by Region

Portland Metro	Valley	Coast	Southern Oregon	Central Oregon	Eastern Oregon
Clackamas	Benton	Clatsop	Douglas	Crook	Baker
Multnomah	Lane	Columbia	Jackson	Deschutes	Grant
Washington	Linn	Coos	Josephine	Gilliam	Harney
	Marion	Curry		Hood River	Malheur
	Polk	Lincoln		Jefferson	Morrow
	Yamhill	Tillamook		Klamath	Umatilla
				Lake	Union
				Sherman	Wallowa
				Wasco	Wheeler

Question 1: First, I need to ask a couple of quick questions about your household in order to make sure we represent the state's population. Which county do you live in?

To proportionally represent the state population, completed interviews were weighted to reflect the number of households in each region. The actual and weighted number of interviews in each category is shown in Table 3.

Table 3
Weighted and Unweighted Cell Sizes by Region

	n	n _w	Weight
Portland Metro	401	1,027	2.5618
Valley	401	638	1.5906
Coast	401	174	0.4334
Southwest Oregon	401	257	0.6404
Central Oregon	401	192	0.4779
Eastern Oregon	401	119	0.2959
Total	2,406	2,406	N/A

n = the number of interviews obtained in each cell.
n_w = the number in each cell after weighting

Analysis and Reporting

This report summarizes the major findings for each survey topic and compares differences between regions as appropriate. Unless otherwise noted, the statewide results in this report are based on the final weighted sample data while any statistically significant differences between regions are based on actual cell sizes. All differences called out in the text are statistically significant at the 95% confidence level.

The maximum margin of error at the 95% confidence level for a sample of 2,406 is $\pm 2\%$. The maximum margin of error for a sample of 401 is $\pm 4.9\%$. Responses to all questions are presented under separate cover in the form of banner tables.

DETAILED FINDINGS

Respondent Profile

Seven in ten Oregon households (70%) are situated along the Willamette River --43% in the Portland Metro area and 27% in the Valley. Half of the respondents characterize the area they live in as being in a small town (31%) or an unincorporated rural area (20%). The other half characterize their neighborhood as being urban (24%) or suburban (21%).

Most respondents (82%) live in single family homes, are between 25 and 64 years old (76%), and have at least some college education (68%). The majority of respondents have an annual income in excess of \$40,000 (52%) and are more likely to be female than male (56% and 44% respectively). Table 4 on page 14 provides a detailed listing of respondent characteristics by region. The characteristics that best differentiate and describe each the six regions are listed below.

Portland Metro

With 43% of Oregon households, the Portland Metro region is the largest in the state. Compared to other regions, the Portland Metro region:

- Is the most urban in character with the highest proportions of urban (34%) and suburban (30%) respondents and the lowest proportion of small towns (15%) and rural areas (16%)
- Has the greatest proportion of apartments (15%) and smallest proportion of single-family homes (78%)
- Is the most likely to have children living at home (35%)
- Has younger respondents than all regions (median age of 48) except the Valley
- Has the most educated respondents (41% have a 4 year college degree)
- Has the highest median income (\$53,554 compared with \$48,818 statewide)

Valley

The Valley region is the second largest region in Oregon with 27% of total households and is very similar to the Portland Metro region. Compared to other regions, the Valley area:

- Is second most urban in character with 25% of respondents describing their neighborhood as urban, 21% suburban and 34% small town
- Has the second highest proportion of apartments (14%) and second lowest proportion of single-family homes (80%)
- Has more children living at home (34%) than respondents in the Coast or Southwest Oregon regions
- Has younger respondents than all regions except Portland Metro (median age of 48)
- Has higher than average education levels (39% have a 4-year college degree)
- Has a median income below the statewide median (\$45,387)

Coast

The Coast region contains 7% of the total households in Oregon. It is one of the two smallest regions in the state, with just slightly more households than the Eastern Oregon region. Compared to other regions, the Coast area:

- Is made up predominantly of small towns (60%) and rural areas (29%)
- Has fewer children living at home (26%) than all regions except Southwest Oregon
- Has older respondents (median age of 53) than all regions except Southwest Oregon
- Has the greatest proportion of respondents with vocational certificates or some college, but less than a four-year degree (41% compared with 35% statewide)
- Has the second lowest median income (\$43,925)

SW Oregon

Southwest Oregon is the third largest of the six regions studied with 11% of the total households in the state. Compared to other regions, SW Oregon:

- Includes a diversity of neighborhood types dominated by small towns (44%) and unincorporated rural areas (29%)
- Is tied with the Coast region for fewest number of children living at home (26%)

- Has the greatest proportion of seniors (31% compared with 19% statewide) and thus, the oldest median age (56) of any region
- Has a median income (\$45,485) that is comparable to the Valley and Coast regions

Central Oregon

The Central Oregon region includes 8% of all Oregon households and contains an interesting mixture of urban and rural areas. Compared to other regions, Central Oregon:

- Is almost evenly divided between small town (39%), rural (31%) and urbanized areas (29%), the latter group including both urban and suburban designations
- Has the greatest proportion of respondents who live in single-family homes (91%)
- Has more children living at home than the Coast or Southwest regions (34%)
- Has better educated respondents (32% have a 4-year college degree) than either the Coast or Eastern Oregon, but less than residents of the Valley or Portland Metro region
- Has the second highest median income (\$50,365)

Eastern Oregon

The Eastern Oregon region is the smallest in the state in terms of total households (5%). Compared to other regions, Eastern Oregon:

- Is the least urbanized with just 8% living in urban or suburban neighborhoods and 66% living in small towns
- Has a higher proportion of respondents living in single-family homes (87%) than the Portland Metro, Valley, or Coast regions
- Has more children living at home (34%) than the Coast or Southwest regions (26% each)
- Has the lowest median income of all regions (\$40,574)

Table 4
Respondent Characteristics

	State Total (2,406)	Portland (1,207)	Valley (638)	Coast (174)	SW Oregon (257)	Central Oregon (192)	Eastern Oregon (119)
(Weighted Base)							
Region							
Portland	43%	100%	—	—	—	—	—
Valley	27	—	100%	—	—	—	—
Coast	7	—	—	100%	—	—	—
SW Oregon	11	—	—	—	100%	—	—
Central Oregon	8	—	—	—	—	100%	—
Eastern Oregon	5	—	—	—	—	—	100%
Area Description							
Urban	24%	34%	25%	7%	13%	15%	6%
Suburban	21	30	21	5	12	12	2
Small town	31	15	34	60	44	39	66
Unincorporated rural	20	16	17	29	29	31	22
Don't know/Refused	4	6	3	<1	3	4	3
Dwelling							
Single family	82%	78%	80%	85%	87%	91%	87%
Apartment/ Duplex/Triplex	12	15	14	9	8	7	10
Townhouse/Condominium	3	4	3	2	2	<1	1
Mobile/Manufactured home	1	1	2	2	2	1	1
Other	1	2	1	3	2	1	1
Refused	1	1	<1	0	<1	1	1
Children in Household							
None	66%	64%	65%	72%	72%	65%	67%
Under 12	16	18	16	12	13	18	16
12 to 17	10	10	11	10	8	10	10
Both Under 12 and 12 to 17	6	7	8	4	6	5	6
Don't know/Refused	1	1	1	2	2	1	1
Age							
18 to 24	4%	4%	5%	3%	4%	3%	3%
25 to 44	34	37	37	22	23	30	33
45 to 64	42	43	38	50	42	47	45
65 to 84	17	13	17	21	29	17	17
85 or older	2	3	1	2	2	2	2
Refused	2	2	2	2	1	2	1
<i>Median age (estimated)</i>	<i>49</i>	<i>48</i>	<i>48</i>	<i>53</i>	<i>56</i>	<i>51</i>	<i>50</i>
Education							
Less than high school	4%	4%	4%	4%	7%	5%	4%
High school graduate/GED	23	19	28	24	25	24	32
Vocational/Technical certificate	3	4	2	2	3	2	2
Some college/Associates degree	32	32	28	39	34	34	33
Bachelor's degree	22	25	23	17	17	21	17
Post graduate	14	16	16	12	13	11	10
Refused	2	2	1	3	2	3	2
Income							
<u>Under \$40,000 (Net)</u>	<u>36%</u>	<u>32%</u>	<u>38%</u>	<u>39%</u>	<u>38%</u>	<u>33%</u>	<u>45%</u>
Under \$25,000	15	13	17	19	18	15	21
\$25,000 to \$40,000	18	18	19	17	19	17	22
Refused under \$40,000	2	2	2	3	2	3	2
<u>\$40,000 or more (Net)</u>	<u>52%</u>	<u>55%</u>	<u>48%</u>	<u>46%</u>	<u>49%</u>	<u>54%</u>	<u>45%</u>
\$40,000 to \$75,000	27	25	26	27	29	32	30
\$75,000 to \$100,000	11	13	11	8	9	10	7
\$100,000 or more	10	13	8	7	7	8	7
Refused \$40,000 or more	4	5	5	4	4	4	1
<u>Total Refusal</u>	<u>13%</u>	<u>13%</u>	<u>14%</u>	<u>15%</u>	<u>13%</u>	<u>12%</u>	<u>10%</u>
<i>Median income (estimated)</i>	<i>\$48,818</i>	<i>\$53,554</i>	<i>\$45,397</i>	<i>\$43,925</i>	<i>\$45,385</i>	<i>\$50,365</i>	<i>\$40,574</i>
Gender							
Male	44%	47%	40%	46%	46%	44%	42%
Female	56	53	60	54	54	56	58
Questions: Area, Q2, Q53, Q55, Q56, Q57, Q58, INCOM, GENDR.							
*May not sum to 100% due to rounding.							

Telephone Service

Local Service

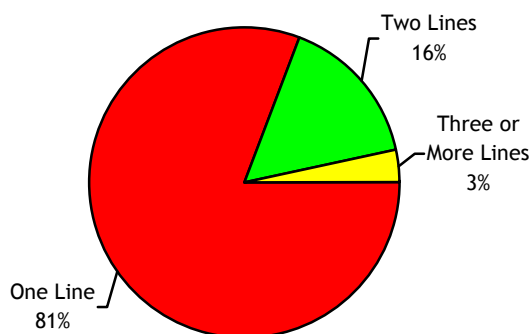
Number of Telephone Lines

Three out of four respondents (76%) indicated they have one telephone line that comes into their home on wires and 24% said they have two or more wired telephone lines or landlines (Figure 1). Respondents who reported having at least two landlines were significantly more likely to:

- Live in unincorporated rural areas (30% have 2+ telephone lines v. 24% statewide)
- Also have 2 or more cell phones (29%)
- Be registered for the national Do Not Call list (26%)
- Be age 45 to 64 (29%)
- Have more than a four-year college degree (34%)
- Have an annual household income greater than \$75,000

Figure 1
Number of Telephone Lines
All respondents

(Weighted base: 2,406)



Question 3: Now I would like to ask you some general questions regarding your landline telephone service, by that I mean the telephone service that comes into your home on wires, not your cellular or wireless service. Do you have more than one telephone line in your household? Do not include cell phones, but do include lines that are used for business, a computer or fax machine.

Question 4: How many telephone lines do you have? Do not include cable, broadband or DSL type of lines.

May not sum to 100% due to rounding.

Interestingly, when asked how many telephone lines they have excluding broadband, cable or DSL lines, about one in six of the respondents who initially indicated they have more than one landline (19%), said they only have one telephone line. The reason for this finding is unclear. It is possible that respondents misunderstood the question and did not include business and fax lines. It is also possible they did not include telephone lines dedicated to a dial-up modem.

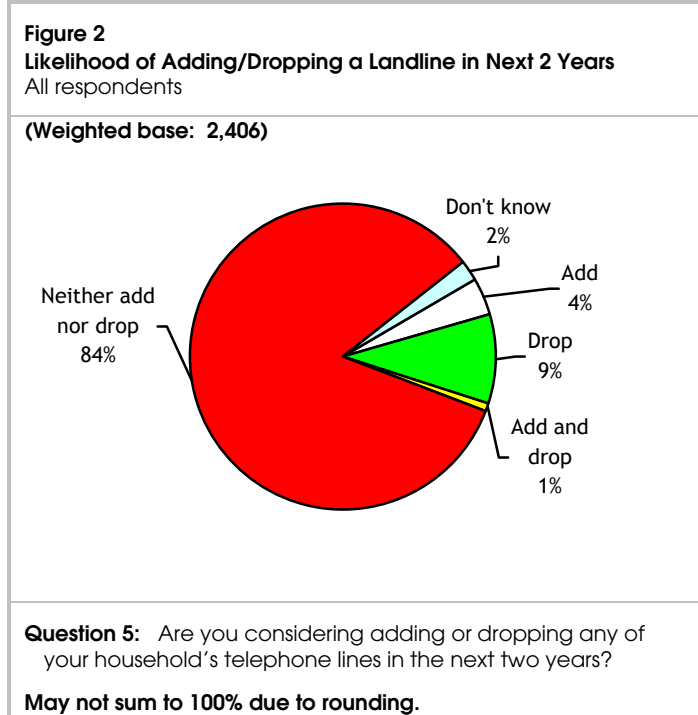
Respondents who said they have more than one landline, reported having two on average. Three percent of respondents statewide (3%) said they three or more landlines. These respondents were more likely than average to live in the Coast region, have an annual household income of at least \$75,000 and be registered for the national Do Not Call list.

Likelihood to Add/Drop Telephone Line

As Figure 2 shows, the vast majority of survey respondents (84%) were not considering changing the number of telephone lines they have coming into the house. Respondents who were considering changes were twice as likely to drop a landline as they were to add one (9% and 4% respectively).

Respondents who were considering adding a telephone line were more likely to:

- Live in Eastern Oregon (5%)
- Live in either an urban or unincorporated rural area (7%)
- Have children living at home (5%)



When asked why they might add a telephone line, the most commonly mentioned reason was *for Internet service* (61%). Other reasons mentioned include *an additional line for other household members* (11%), *having a dedicated fax line* (9%), and *having a business line*. Residents of the Coast region were more likely than all other respondents to say they wanted to add either a line for the computer or a business line.

Respondents who were considering dropping a telephone line were more likely to:

- Live in a region other than Eastern Oregon (10%)
- Have high speed Internet service (15%)
- Have at least one cell phone (11%)
- Have a 4 year college degree (14%)
- Have an annual income of at least \$75,000 (14%)

When asked why they might drop a telephone line, the most common response was that they were *switching to cell or didn't use the home phone enough* (32%). Other reasons for considering dropping a phone line were *cost/high bills* (15%), being *unhappy with the phone service* (12%), and *saving on taxes and fees* when using a cell phone (12%).

Likelihood of Switching to Cell Exclusively

Eight in ten respondents (79%) indicated they were *very unlikely* to drop their primary phone line and switch exclusively to cell in the next six months. Just 3% were *very likely* to make the change (Figure 3).

Respondents who were either *very likely* or *somewhat likely* to switch to cell phones exclusively were more likely than others to:

- Live in Central Oregon (14% likely to switch v. 10% statewide)
- Already have 2 or more cell phones (12% likely to switch)
- Be 18 to 24 (22%) or 25 to 44 (12%)
- Have a four-year college degree (12%)

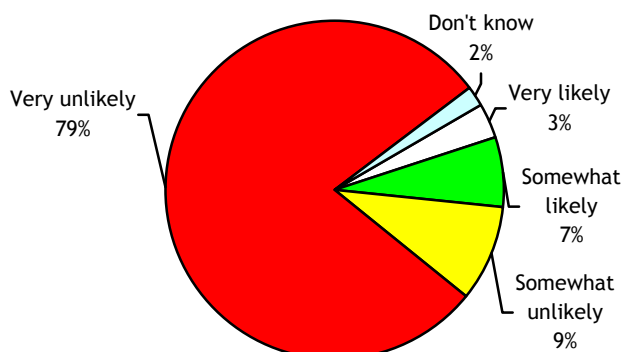
The most commonly mentioned reason for switching exclusively to cell phones was to *save money on the monthly bill or long distance bill* (44%), followed by the *convenience of being able to make or receive phone calls from anywhere* (33%). Other reasons included *already have a cell phone* (11%), *dissatisfied with the service provider* (13%) and a desire to *have only one phone bill* (11%).

Figure 3

Likelihood of Switching Exclusively to a Cell Phone

All respondents

(Weighted base: 2,406)



Question 7: How likely are you to drop your primary home phone line and switch exclusively to a cell phone in the next six months? Are you <likely/unlikely> to switch to using a cellular service only?

May not sum to 100% due to rounding.

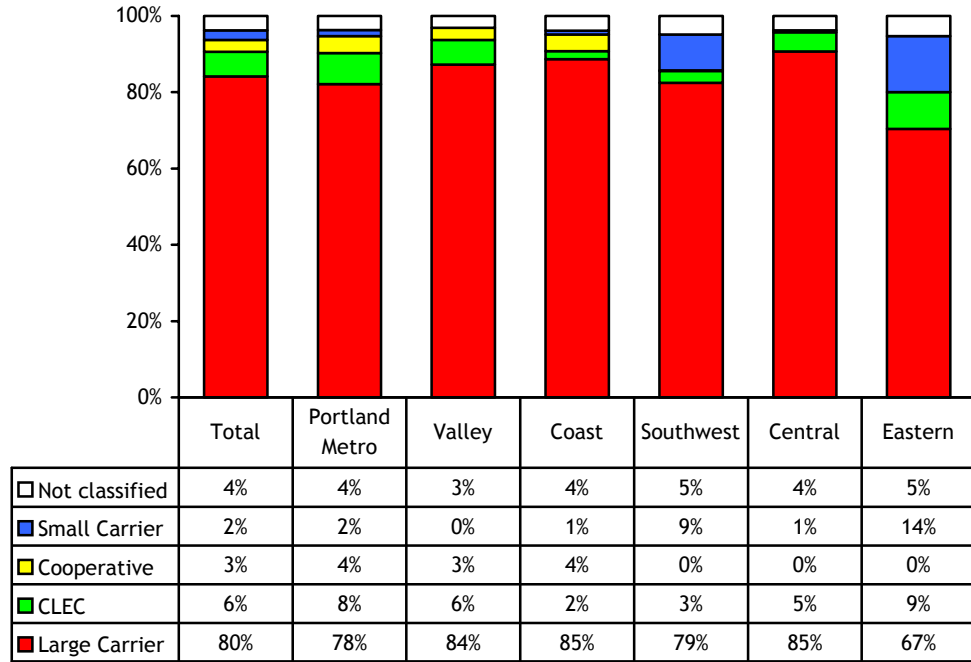
Type of Local Service Provider

Eight in ten respondents (80%) indicated the company that provides their local telephone service was a large provider like Qwest (52%) or Verizon (18%).

Respondents who live in urban areas were significantly more likely than those in small towns or rural areas to have a large carrier provide their service (85%, 78%, 77% respectively).

Figure 4
Type of Local Service Provider by Region
 All respondents

(Weighted base: 2,406)



Question 8: What is the name of the company that provides your local telephone service?

*Don't know responses not shown. May not sum to 100% due to rounding.

Residents of Eastern Oregon were the least likely to receive their telephone service from a large carrier (67%). Residents of Southwest and Eastern Oregon were more likely than others to have their service provided by a small carrier like Frontier Communications or Cascade Utilities (Figure 4).

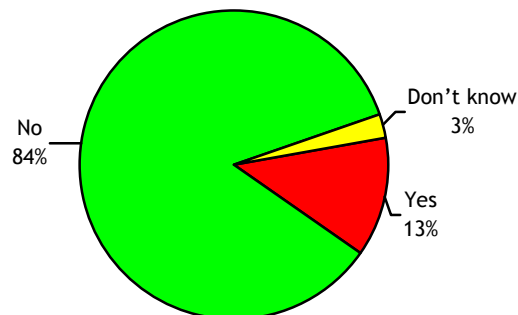
Change in Service Providers

The majority of respondents (85%) said they have not changed local telephone service providers in the past two years. While there were no statistically significant differences by region, it is interesting to note that those who live in suburban areas were half again as likely to change providers as those who live in other types of neighborhoods (18% v. 12% urban, 12% small town, and 10% rural).

Those who did change local service providers most commonly did so to *save money* (45%), because they *moved* (25%), or because they were *dissatisfied with the customer service they received* (20%).

Figure 5
Change in Local Service Providers in Past Two Years
All respondents

(Weighted base: 2,406)

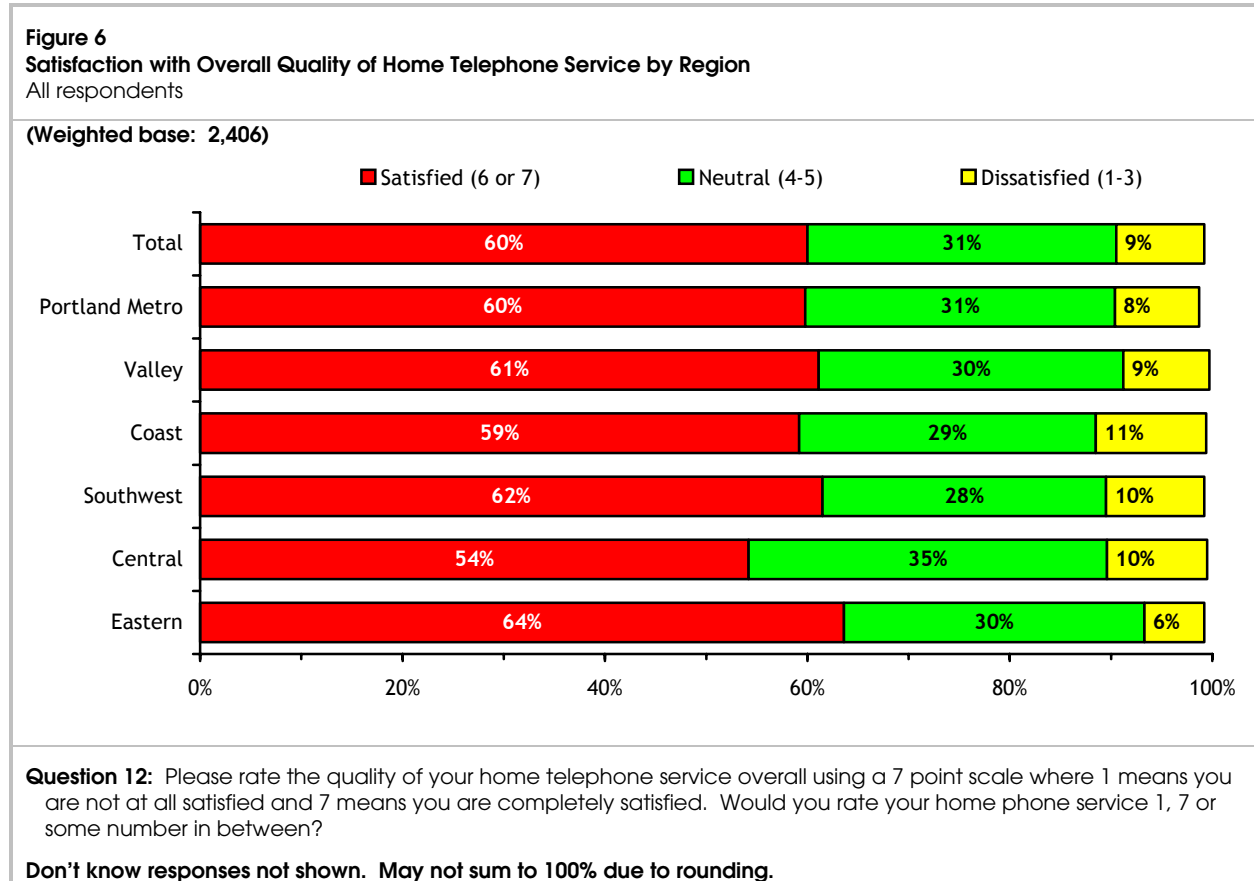


Question 10: In the past two years has your household changed the company that provides your local telephone service?

May not sum to 100% due to rounding.

Satisfaction with Local Service Provider

Respondents were asked to rate their overall satisfaction with the quality of their home telephone service using a 7-point scale where 1 means *not at all satisfied* and 7 means *completely satisfied*. Six in ten respondents (60%) indicated they are satisfied with the overall quality of the phone service they receive including 36% who are *very satisfied* (Figures 6 and 7).



Respondents who are *very satisfied* with their telephone service are more likely than other respondents to:

- Live in either the Eastern or Southwestern region (42% and 39%, respectively)
- Not have Internet service (48% v. 32% with Internet access)
- Not have a cell phone (45% v. 37% with one cell phone and 28% with two or more cell phones)
- Be unlikely to switch exclusively to cellular phone service (38% *very satisfied* v. 34% of those likely to switch)

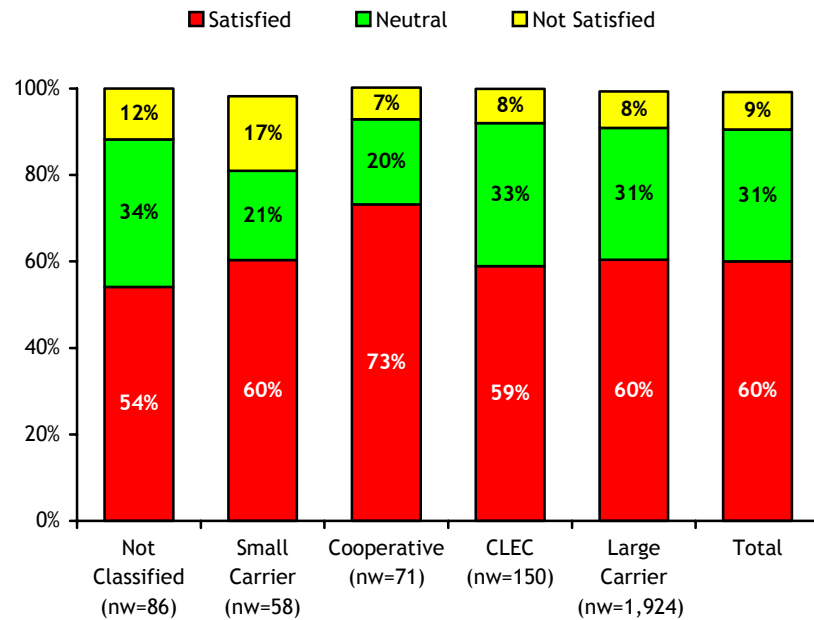
- Have telephone service provided by a phone cooperative (56% v. 35% of those with other provider types)
- Have no children living at home (40% v. 30% of those with children)
- Be age 65 or older (50% v. 33% of younger respondents)
- Be female (40% v. 32% males)

As Figures 6 and 7 show, fewer than one in ten respondents (9%) indicated they were dissatisfied with their

local telephone service. When asked the reason for their dissatisfaction, respondents most commonly mentioned *high rates and overcharging* (46%) followed by *poor customer service* (28%), and *poor reception/line quality* (23%).

Figure 7
Satisfaction with Local Provider by Type
All respondents

(Weighted base: 2,406)



Question 12: Please rate the quality of your home telephone service overall using a 7 point scale where 1 means you are not at all satisfied and 7 means you are completely satisfied. Would you rate your home phone service 1, 7 or some number in between?

Question 8: What is the name of the company that provides your local telephone service?

Don't know responses not shown. May not sum to 100% due to rounding.

Wireless or Cellular Service

Number of Cell Phones in Household

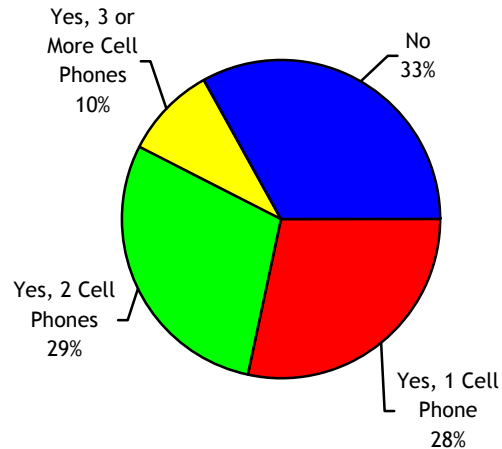
Two out of three respondents (67%) have at least one cell phone in addition to their landline phone. This figure includes 39% who have two or more active cell phones in their household (Figure 8).

Respondents who reported having at least one cell phone were significantly more likely than others to:

- Live in the Portland Metro or Central Oregon regions (69% each v. 61% from other regions)
- Not live in a small town (61% v. 71% from other neighborhood types)
- Have Internet access (78% v. 41% of those without Internet access)
- Have two or more landlines (76% v. 65% with one landline)
- Be likely to switch to cellular service exclusively (77% v. 66% of those unlikely to switch)
- Be registered for the national Do Not Call list (74% v. 59% who are not registered)
- Not live in an apartment (36% v. 70% in other types of dwellings)
- Have children living at home (76% v. 62% with no children at home)
- Younger than 65 (72% v. 48% age 65 and older)
- Have an income greater than \$40,000 (82% v. 47% with incomes less than \$40,000)

Figure 8
Number of Active Cell Phones
All respondents

(Weighted base: 2,406)



Question 14: Do you or does someone else in your household have a cell phone that you use in addition to your landline phone to make and receive personal calls?

Question 15: How many active cell phones is your household using now?

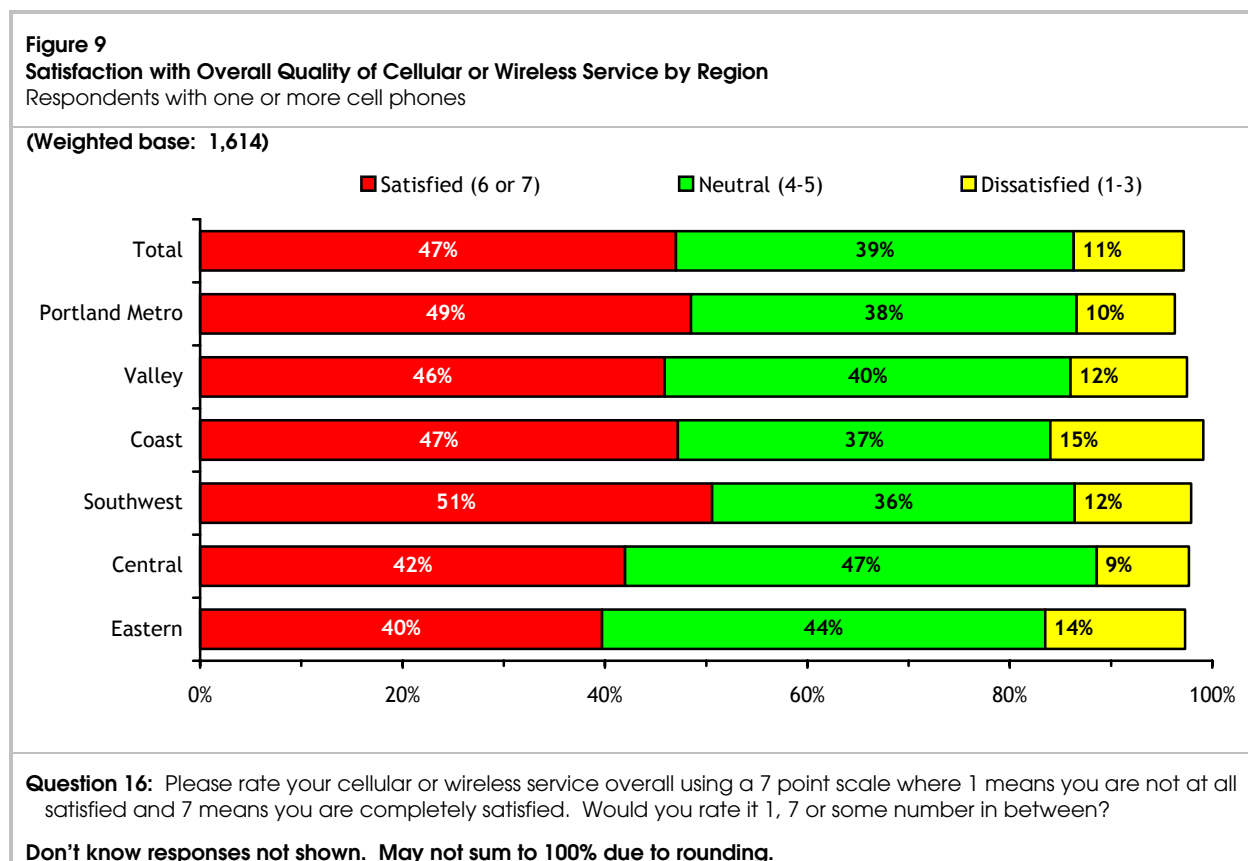
May not sum to 100% due to rounding.

- Have some higher education (71% v. 59% whose highest level of education was high school graduate)

Respondents who have three or more cell phones were especially likely to live in single-family homes, have children living at home, have high speed Internet access, and have an income of \$75,000 or more.

Satisfaction with Cell Phone Service

Satisfaction with cell phone service was lower on average than satisfaction with local telephone service. A little less than half (47%) of all respondents were satisfied with their cellular service and just 20% were *very satisfied*, four in ten respondents (39%) gave the overall quality of their cellular service a neutral rating and 11% were *very* or *somewhat dissatisfied* (Figure 9).



Respondents who were *very* or *somewhat satisfied* with their cellular service (6 or 7 on the scale) were more likely than respondents as a whole to:

- Live in the Portland Metro or Southwest Oregon Regions (49% and 51%, respectively)
- Be age 65 or older (62%)
- Be female (51%)

Respondents who were *very* or *somewhat dissatisfied* with their cellular service (1 to 3 on the scale) were more likely than respondents as a whole to:

- Live in the Coast region (15%)
- Have children living at home (12%)
- Be between 25 and 44 years old (15%)

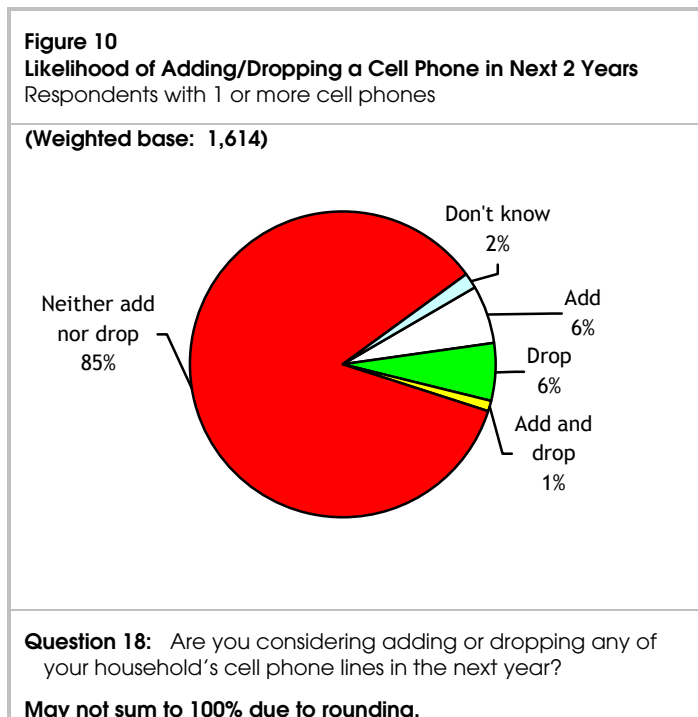
When asked the reason for their dissatisfaction, the primary complaint among respondents was *bad reception/dropped calls* (57%) followed by *unfair charges/charging for overtime minutes* (16%), and *poor customer service* (16%). Other problems mentioned included *cost or price* (10%), *problems with roaming* (6%), and *being trapped in contract* (3%).

Likelihood to Add/Drop Cell Phone

As Figure 10 shows, the vast majority of cell phone users (85%) are not planning any immediate changes in the number of cell phones household members use. Those who were considering changes in the number of household cell phones were as likely to add a cell phone as to drop one (6% each).

Respondents most likely to consider adding a cell phone were those who:

- Live in Central Oregon (10%),
- Have only one cell phone (9%)



- Are likely to switch exclusively to cellular service (16%)

When respondents who were considering adding a cell phone were asked why, they most frequently listed *having a phone for other household members* (50%), followed by *changing providers for better service* (15%), *more convenient* (11%), *switching to cell* (8%), and *having one for a business phone* (6%).

Respondents most likely to considering dropping a cell phone were those with two or more cell phones in the household. When asked why they were considering dropping a cell phone, these respondents most often said it *costs too much or is too expensive* (31%), followed by *I don't use it enough* (23%), *changing providers* (11%), *poor reception/ not enough coverage* (11%), and *only need one phone* (10%).

Cell Phone Contract Issues

Respondents who currently use one or more cell phones were asked if their wireless provider had ever changed their service contract without permission. Just 6% of cell phone users reported having this experience (Figure 11A). Cell phone users in suburban areas (8%) and small towns (9%) and those younger than age 65 were more likely than average to report having this experience.

All respondents, regardless of whether they currently use a cell phone, were asked if they had ever purchased a cell phone package and wanted to get out of the contract because it was not what was advertised. One in six respondents (17%) reported having this experience (Figure 11B).

<p>Figure 11A Unauthorized Changes to Service Contract Respondents with one or more cell phones</p>	<p>Figure 11B Contract Not as Advertised All respondents</p>																
<p>(Weighted base: 1,614)</p> <table border="1"> <caption>Data for Figure 11A</caption> <thead> <tr> <th>Response</th> <th>Percentage</th> </tr> </thead> <tbody> <tr> <td>No</td> <td>90%</td> </tr> <tr> <td>Yes</td> <td>6%</td> </tr> <tr> <td>Don't know</td> <td>4%</td> </tr> </tbody> </table>	Response	Percentage	No	90%	Yes	6%	Don't know	4%	<p>(Weighted base: 2,406)</p> <table border="1"> <caption>Data for Figure 11B</caption> <thead> <tr> <th>Response</th> <th>Percentage</th> </tr> </thead> <tbody> <tr> <td>No</td> <td>82%</td> </tr> <tr> <td>Yes</td> <td>17%</td> </tr> <tr> <td>Don't know</td> <td>1%</td> </tr> </tbody> </table>	Response	Percentage	No	82%	Yes	17%	Don't know	1%
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No	90%																
Yes	6%																
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Yes	17%																
Don't know	1%																
<p>Question 20: Has your wireless provider ever changed your service contract without your permission or authorization? May not sum to 100% due to rounding.</p>	<p>Question 21: Have you ever purchased a cell phone package and wanted to get out of the contract because it wasn't what was advertised? May not sum to 100% due to rounding.</p>																

Respondents most likely to report purchasing a contract other than what was advertised were more likely than average to:

- Have two or more cell phones (23%)
- Have high speed Internet access (21%)
- To not live in the Southwest Region (Just 13% of Southwest Respondents experienced this problem)
- To have children living at home (23%)

To have an income between \$40,000 and \$75,000 (21%)

Long Distance Telephone Service

All Methods

Virtually all respondents (99%) reported making long distance telephone calls. Just over half of these respondents (56%) indicated they usually use a landline phone or local dial-up, 43% use a cell phone, and 24% use pre-paid calling cards (Figure 12).

Respondents who were especially likely to use a landline for their long distance service:

- Live in the Coast region (62%)
- Are residents of unincorporated rural areas (63%)
- Do not have a cell phone (62%)
- Are age 65 or older (61%)

Those most likely to say they use cell phones to make long distance calls:

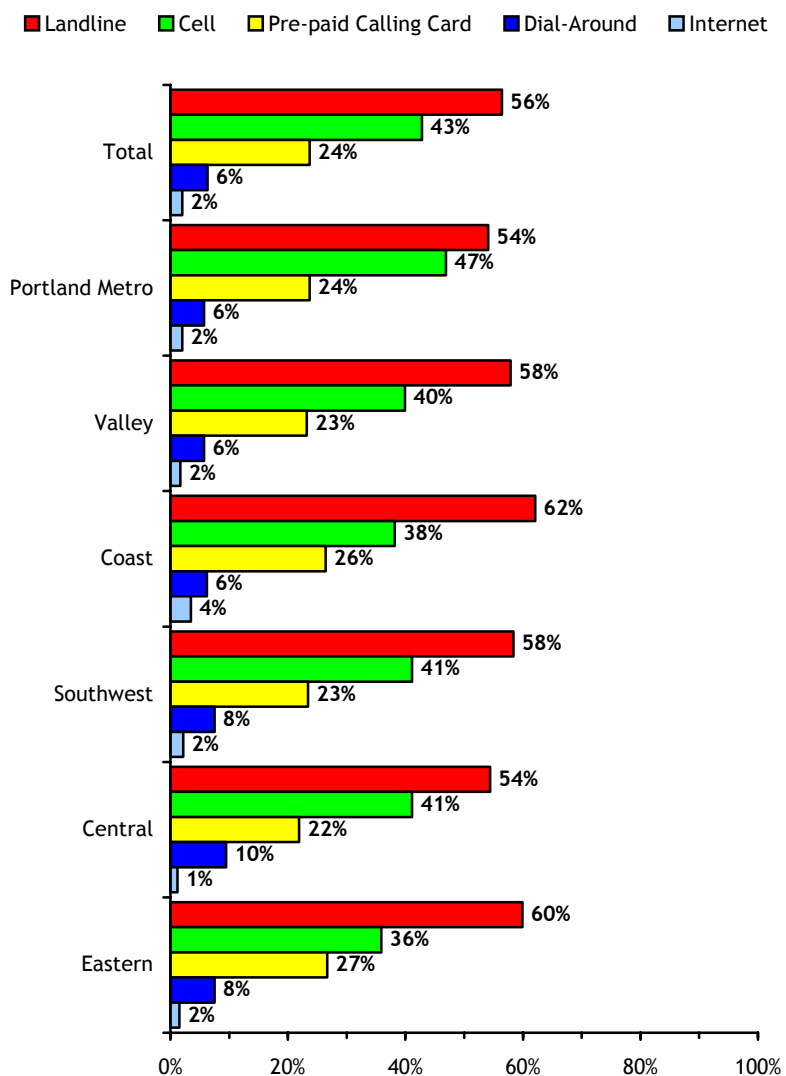
- Live in the Portland Metro area (47%)
- Live in urban (46%) or suburban (50%) areas
- Have Internet access (44% dial-up, 62% high speed v. 20% without access)
- Are registered for the national Do Not Call list (49%)

Figure 12

Methods for Making Long Distance Calls by Region

All respondents

(Weighted Base: 2,406)



Question 22: Not counting any international calls, which of the following does your household use to make long distance calls?

Multiple responses allowed.

Respondents most likely to use pre-paid calling cards were especially likely to live in an apartment (33%), have an income of less than \$40,000 (28%), and not own a cell phone (31%).

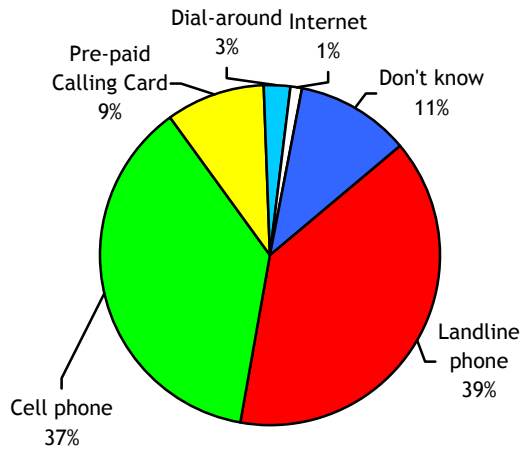
Most Common Long Distance Calling Method

Three in ten respondents (29%) use more than one method to make long distance calls. As Figure 13 shows, use of landlines and cell phones were approximately equal

When asked which method they use most often, landlines and cell phones were approximately equal (39% and 37% respectively). Residents of the Portland Metro (39%) and Southwest Oregon (41%) regions were significantly more likely than those from other areas to say they usually use cell phones for long distance calls.

Figure 13
Most Common Method of Making Long Distance Calls
 Respondents who use two or more long distance methods

(Weighted Base = 690)



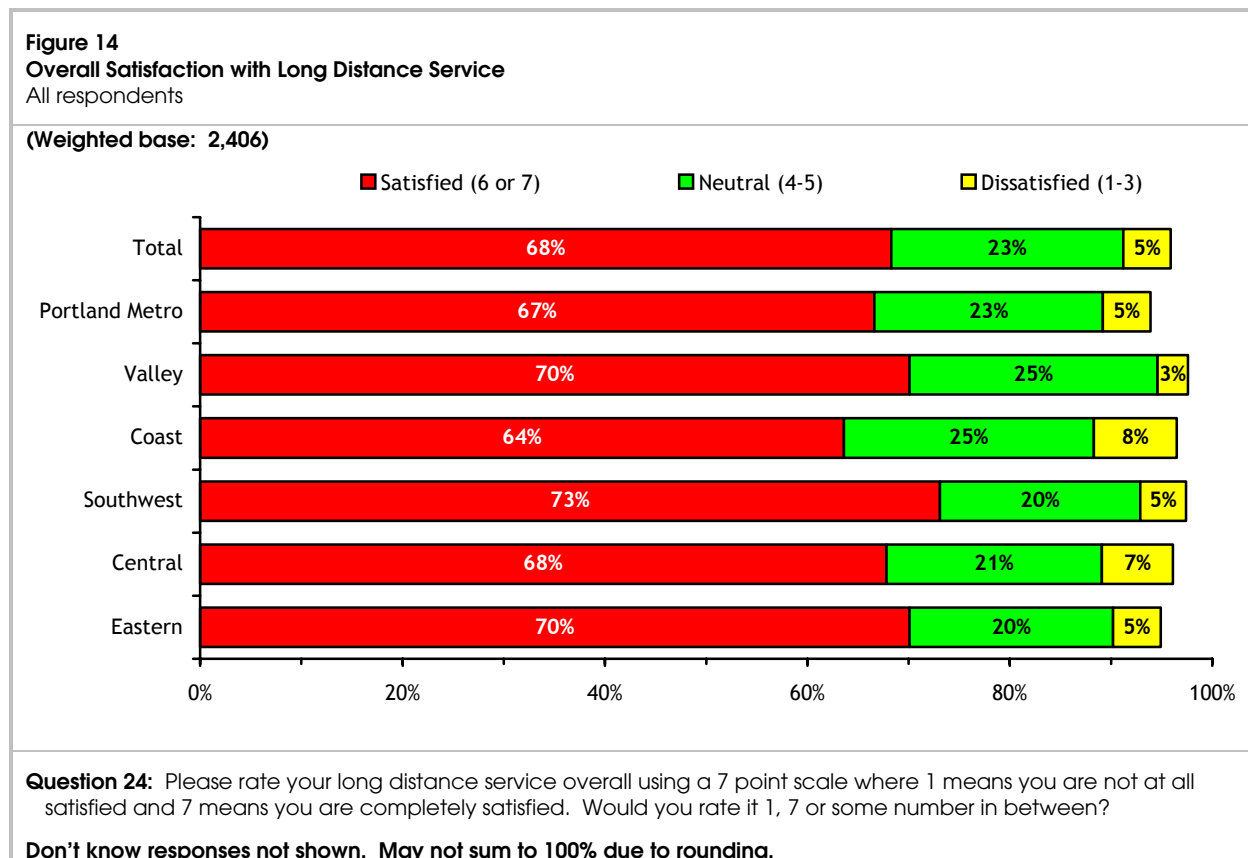
Question 23: Which method do you use most often?

May not sum to 100% due to rounding

Satisfaction with Long Distance Service

More than two-thirds (68%) of respondents indicated they were satisfied with their long distance service including 44% who were *very satisfied* (Figure 14). Respondents who were *very satisfied* with their long distance service were significantly more likely than others to:

- Live in the Southwest or Central region (49% and 48%, respectively)
- Live in a small town or unincorporated rural area (47% and 45%, respectively)
- Have fewer than two cell phones (48%)
- Not have Internet access (52%)
- Be 65 or older (60%)
- Be female (47%)
- Not have children living at home (49%)



Just 5% of all respondents indicated they were *somewhat* or *very dissatisfied* with their long distance service. Those who live in the Coast (8%) and Central regions (7%) were more likely to be *dissatisfied* with their service than those from other areas. *Dissatisfied* respondents were also more likely than others to:

- Be age 25 to 44 (6%)
- Have two or more landlines (7%)
- Not have a cell phone (7%)
- Be likely to switch exclusively to cellular service (12%)

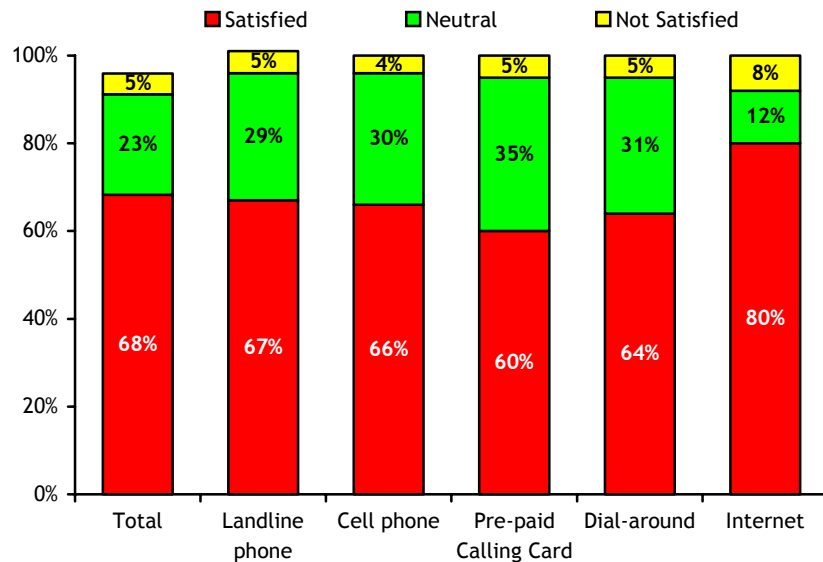
As Figure 15 shows, there were few differences in satisfaction based on the type of service used. Those who used the Internet were more polarized in their satisfaction levels with 80% saying they were *satisfied* and 8% *dissatisfied*.

Respondents who use pre-paid calling cards were less likely than others to indicate they were *satisfied* (60%) with their long distance service and more likely than others to choose a neutral rating (35%).

Cost was the primary reason given for dissatisfaction with long distance service. Those who rated their satisfaction less than four on the scale said the *cost was too high* (45% of comments), or cited *hidden costs and fees such as access charges, overtime minutes, and taxes* (17%). Respondents also mentioned *poor customer service* (13%), *poor connections or equipment* (12%), and *unauthorized changes to service contracts* (9%). The latter complaint was especially true among *dissatisfied* respondents who have high speed internet access (26% cited contract changes as the reason for their dissatisfaction).

Figure 15
Satisfaction with Long Distance Service by Type
All respondents

(Weighted base: 2,406)



Question 24: Please rate the quality of your home telephone service overall using a 7 point scale where 1 means you are not at all satisfied and 7 means you are completely satisfied. Would you rate your home phone service 1, 7 or some number in between?

Question 22: Not counting any international calls, which of the following does your household use to make long distance calls? (Multiple responses accepted)

Don't know responses not shown. May not sum to 100% due to rounding.

Unauthorized Long Distance Charges

Nine out of ten respondents (89%) said *no* in response to a question about whether there were any unauthorized long distance charges on their phone bills in the past year.

Interestingly, residents of Eastern Oregon (12%) were more likely to have been billed for unauthorized charges than respondents as a whole (8%).

Eighty-three percent (83%) of respondents who were billed for unauthorized charges were able to have the charges removed. This was especially true residents of the Portland Metro area where 97% were successful in having charges removed. In other areas, the success rate was 72%.

Internet Service

Types of Access Available

All respondents were read a list of different types of Internet service and asked if each type was available in their area. Their responses are shown in Table 5. Most respondents (74%) said dial-up service was available in their area, more than half said cable modem and DSL services were available, and less than half said Satellite service is available in their area.

Interestingly, more respondents in the Portland Metro area said they *don't know* if satellite service is available than those in other regions. It is possible that respondents confused availability of satellite Internet service with the availability of satellite television service.

As shown, a high proportion of respondents (22% to 59%) did not know whether the different types of access were available to them with the most confusion about whether wireless Internet was available and the least confusion about dial-up Internet service. Residents of Eastern Oregon were the least likely to say they have dial-up Internet, cable modem service, or satellite Internet service available

Table 5

Availability of Different Types of Internet Service by Region

All respondents

(Weighted Base: 2,406)	Yes	No	Don't Know
Dial-Up Internet Service (Net)	<u>74%</u>	<u>4%</u>	<u>22%</u>
Portland Metro	74	4	22
Valley	77	3	20
Coast	73	4	23
Southwest	69	5	26
Central	76	3	21
Eastern	66	4	30
Cable Modem Service (Net)	<u>58%</u>	<u>13%</u>	<u>28%</u>
Portland Metro	66	8	26
Valley	57	14	28
Coast	49	20	31
Southwest	48	20	32
Central	57	21	22
Eastern	33	20	46
Digital Subscriber Line/DSL (Net)	<u>54%</u>	<u>16%</u>	<u>30%</u>
Portland Metro	59	14	27
Valley	53	19	28
Coast	49	16	35
Southwest	43	18	39
Central	45	23	31
Eastern	49	17	34
Satellite Service	<u>41%</u>	<u>12%</u>	<u>47%</u>
Portland Metro	39	10	51
Valley	42	14	44
Coast	41	13	46
Southwest	46	11	43
Central	45	13	42
Eastern	41	15	44
Wireless Internet/Wi-Fi (Net)	<u>22%</u>	<u>19%</u>	<u>59%</u>
Portland Metro	27	18	55
Valley	18	20	62
Coast	13	20	67
Southwest	20	20	61
Central	19	23	58
Eastern	17	21	63

Question 29A - E: I'm going to read a list of options for connecting to the Internet. Which of these are available in your area? If you don't know, just say so.

May not sum to nets or to 100% due to rounding.

in their area. Residents of the Portland Metro region were the most likely to say cable modem service, DSL, and wireless service is available in their area.

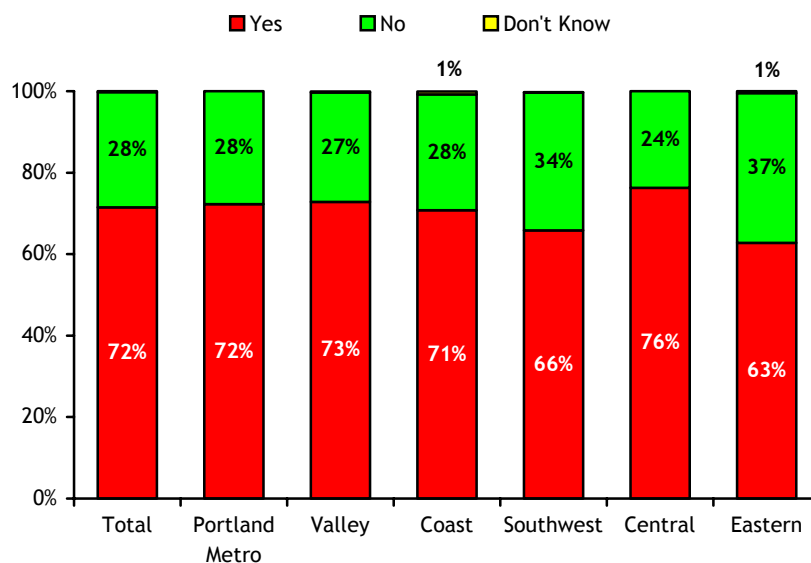
Personal Internet Access

As Figure 16 shows, nearly three-quarters (72%) of respondents have a computer that is connected to the Internet. Those least likely to have Internet access:

- Live in the Eastern or Southwest regions (63% and 66% have access, respectively)
- Live in small towns (65%)
- Do not have cell phones (49%)
- Are not registered for the national Do Not Call list (62%)
- Live in multi-family housing (48%)
- Do not have children at home (66%)
- Are at least 65 years old (47%)
- Are not college graduates (35%)
- Have an income below \$40,000 (53%)
- Are female (69%)

Figure 16
Personal Internet Access by Region
All respondents

(Weighted base: 2,406)



Question 28: Do you currently have a computer in your household that is connected to the Internet?

May not sum to 100% due to rounding.

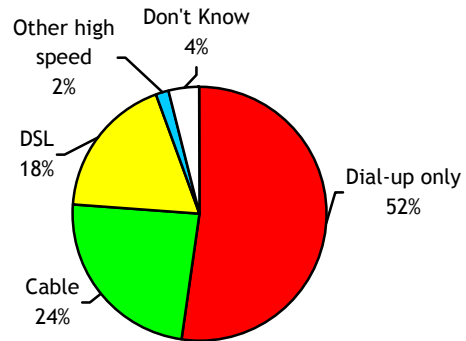
The majority of respondents who do not currently have Internet access (66%) do not plan to get it in the next year. Those who are planning to obtain access are under age 65, have an

income greater than \$25,000, and have at least one cell phone. The most common reason mentioned for not getting Internet access is a *lack of need or interest* (46% of all comments) followed by *cost* (17%) and *lack of knowledge of how to use it* (13%). Some respondents raised concerns about *materials inappropriate for children* (2%), and problems such as *identity theft, computer viruses, and pop-up advertising* (3%).

Respondents who reported having Internet access were asked how their computer is connected to the Internet. Just over half of those with Internet access (52%) use a dial-up modem (61% have a 56k modem, 6% have a 28.8k modem, and 33% don't know their modem speed). Cable modem is the second most popular type of Internet connection (24%) followed by DSL (18%). Just two percent of respondents with Internet access said they connect using other high speed methods including satellite and wireless access (Figure 17).

Figure 17
Type of Home Internet Access
 Respondents with home Internet access

(Weighted Base = 1,720)



Question 32: Is your computer connected to the Internet through a dial-up modem, cable modem, DSL, satellite service, wireless or cellular or some other high speed Internet access?

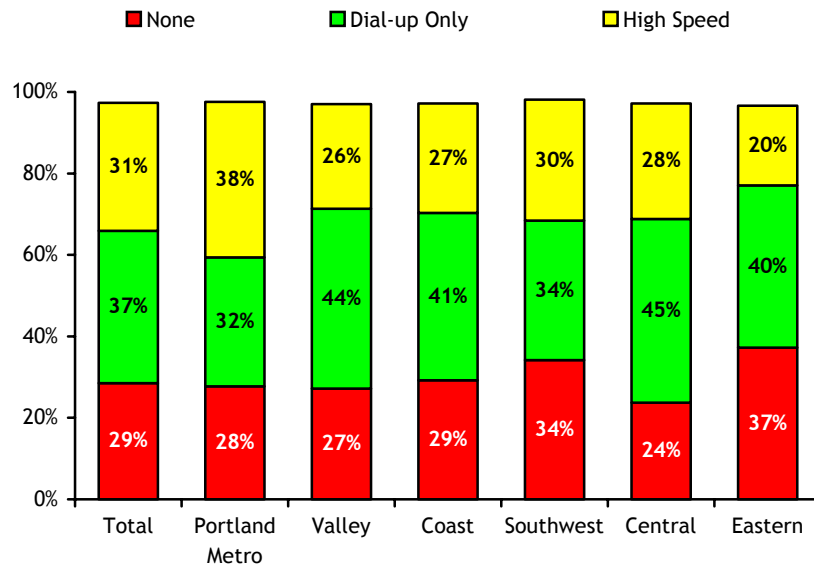
May not sum to 100% due to rounding.

In Figure 18, all forms of high speed Internet access are combined into one category and compared with dial-up service. As shown, residents of the Portland Metro (38%) were significantly more likely to have high speed Internet access than those in other areas (31% statewide). Respondents with high speed Internet access were also more likely than others to have at least one cell phone.

Respondents with Internet access who said they had dial-up service (including 2% who had both dial-up and high speed) were asked why they don't have a high-speed or broadband Internet connection.

Figure 18
Type of Internet Access by Region
All respondents

(Weighted base: 2,406)



Question 28: Do you currently have a computer in your household that is connected to the Internet?

Q32: Is your computer connected to the Internet through a dial-up modem, cable modem, DSL, satellite service, wireless or cellular or some other high speed Internet access?

Don't know responses not shown. May not sum to 100% due to rounding.

Among all respondents, the most common reason mentioned was *cost* (38%) followed by *no need* (21%) and *not available* (19%). While the reasons mentioned were consistent across all regions, the order was not. The reasons Portland Metro and Valley region residents gave were identical to the statewide responses. The Coast, Central and Southwest Oregon regions cited *cost* first, followed by *lack of availability*, then *no need*. In the Eastern region, *lack of availability* was the most commonly mentioned reason (25%) followed by *cost*.

A similar finding occurred based on geographic type. Those who live in more urban areas cited *cost*, *lack of need*, and *lack of availability* as their top three reasons. Residents in unincorporated rural areas, most often mentioned *lack of availability* (43%).

Cost of Internet Access

The median monthly cost of Internet access is just over \$24 across the state. The median cost for respondents with high speed access was \$40 while the median for those who pay for dial-up service was just under \$17. Costs varied by region, but the variation appeared to reflect use of dial-up and high speed Internet in each region. For example, the median monthly cost in the Portland Metro area was \$26.75. This area has the highest proportion of high speed Internet users. Respondents in the Eastern and Coastal regions are significantly more likely to use dial-up service. In these regions, the median monthly Internet cost was just over \$20 (Table 6).

Table 6
Monthly Cost of Internet Service by Region
Respondents who have Internet access

	TOTAL	Portland Metro	Valley	Coast	SW	Central	Eastern
(Weighted Base: 1,720)	(1,720)	(743)	(464)	(123)	(169)	(146)	(74)
\$0	4%	4%	7%	3%	2%	3%	2%
\$1 to \$10	8	8	8	10	8	11	6
\$11 to \$20	23	19	23	32	25	26	37
\$21 to \$30	22	20	25	20	23	21	22
\$31 to 40	9	9	6	8	16	14	10
\$41 to 50	12	17	11	11	7	6	4
Over \$50	6	8	6	3	5	3	4
Don't Know	15	15	13	15	15	17	14
Median (estimated)	\$24.18	\$26.75	\$22.95	\$20.36	\$24.21	\$22.13	\$20.29

Question 34: What do you pay monthly for your home Internet service?

*Excludes "Don't know" responses from calculation

May not sum to 100% due to rounding.

Amount Willing to Pay for High Speed Internet

Respondents who do not currently have high speed Internet access were asked how much they would be willing to pay per month to have it. More than one-third (37%) said they would not pay anything and 20% did not know how much they would be willing to pay. Respondents who were unwilling to pay for high speed Internet service were more likely than others to:

- Have an annual income of less than \$25,000 (49% unwilling to pay)
- Be female (41%)
- Have not been educated beyond high school (44%)

- Be age 65 or older (67%)
- Not have children living at home (44%)
- Live in the Portland Metro or Southwest regions (43% and 44% respectively)
- Have one telephone line (39%) and no cell phones (49%)
- Not have Internet access (52%)

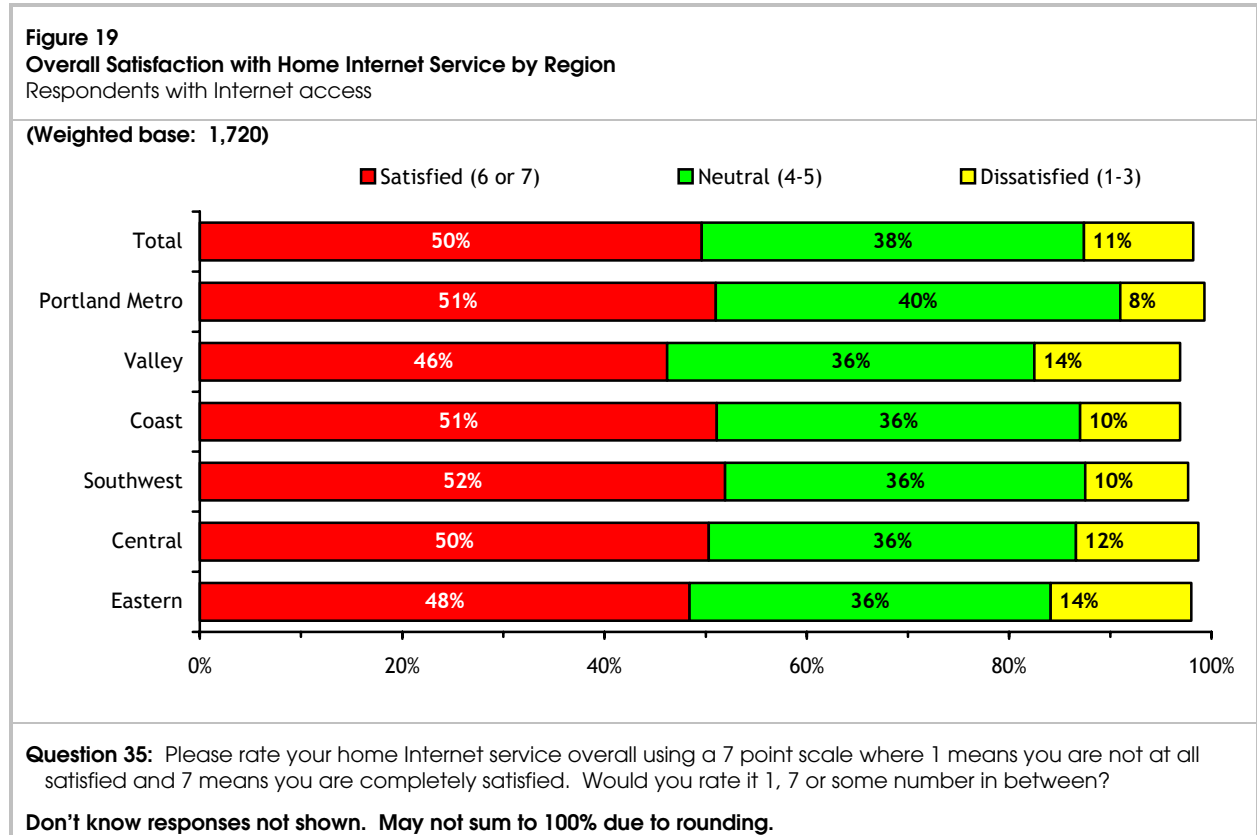
When respondents who are unwilling to pay anything and those who do not know how much they would pay are removed from the equation, the median monthly amount respondents are willing to pay for high speed Internet access is \$18.53. The median amount residents of the Southwest and Eastern regions are willing to pay is significantly higher than the statewide median while Coast region residents are willing to pay significantly less than the median (Table 7).

	TOTAL	Portland Metro	Valley	Coast	SW	Central	Eastern
(Weighted Base: 1,720)	(1,650)	(635)	(474)	(127)	(181)	(137)	(96)
\$0	37%	43	29%	38%	44%	36%	32%
\$1 to \$10	9	9	11	8	6	9	6
\$11 to \$20	16	13	20	18	14	17	16
\$21 to \$30	12	13	11	8	11	12	14
\$31 to 40	4	3	6	2	3	3	1
\$41 to 50	1	<1	1	1	2	3	2
Over \$50	1	<1	1	1	0	<1	1
Don't Know	20	19	22	24	21	21	28
*Median (estimated)	\$18.53	\$18.99	\$18.12	\$17.09	\$19.80	\$18.83	\$19.67
Question 40: How much would you be willing to pay per month to have high speed or broadband Internet access?							
* Excludes "Don't know" and "\$0" responses from calculation							
May not sum to 100% due to rounding.							

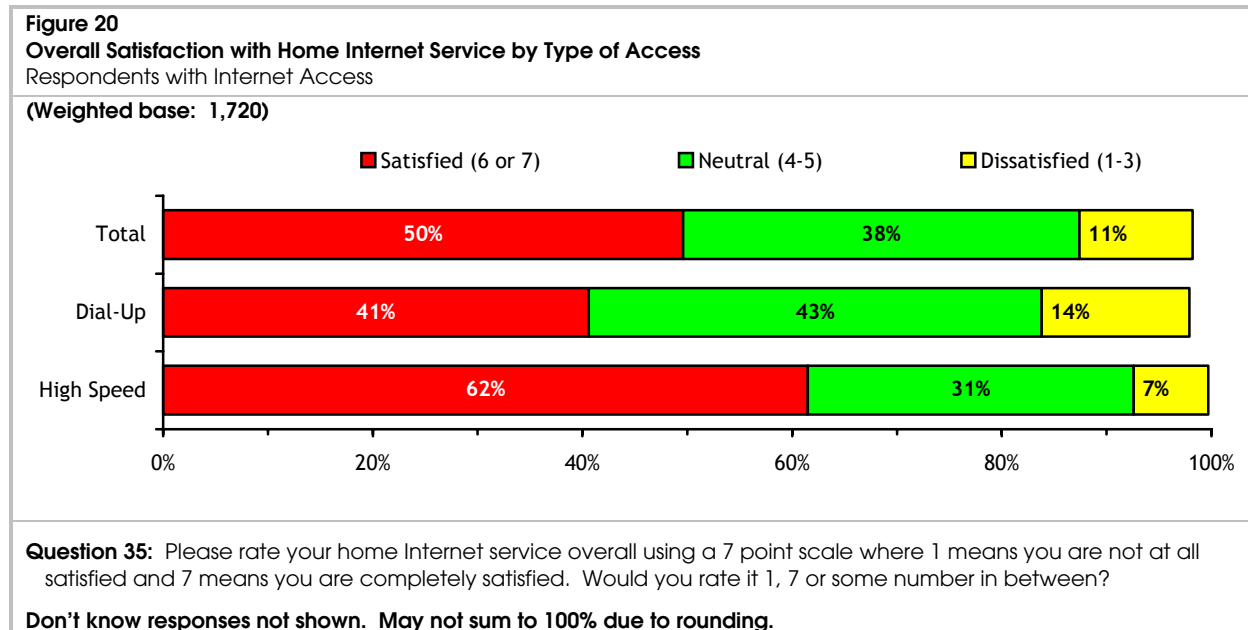
The median amount respondents who currently have dial-up service are willing to pay (\$19.60) is nearly 30% more than the median those who do not have Internet access at all are willing to pay (\$15.12).

Satisfaction with Internet Service

Half of the respondents with Internet access indicated they were satisfied with their Internet service including 26% who were *very satisfied*. There were no statistically significant differences in satisfaction between regions (Figure 19).



Respondents with high speed internet access were significantly more likely to be satisfied with their Internet service than those with dial-up service (Figure 20).



Respondents who were dissatisfied with their Internet service most commonly cited speed (52%) and getting booted off line (33%) as the primary problems. Although these were the top issues for both dial-up and high speed service users, significantly more dial-up users mentioned them. High speed users were more likely than dial-up users to complain about poor service (22%) and problems with junk email, spam, viruses and pop-ups (12%).

Voice Over Internet Protocol (VOIP)

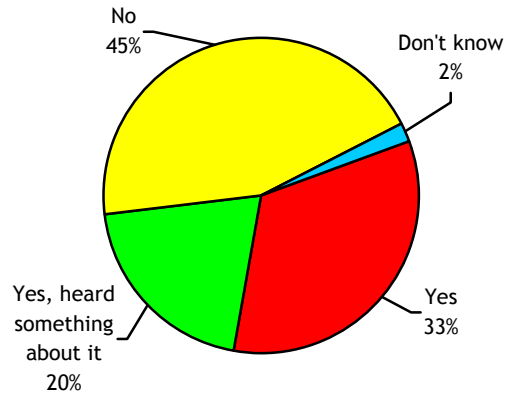
One in three respondents (33%) said they had heard of using high speed Internet service to make telephone calls and an additional 20% recalled hearing something about this capability (Figure 21). Those most likely to have definite knowledge of VOIP:

- Live in the Portland Metro region (37%)
- Describe their neighborhood as suburban (40%)
- Have Internet service (38%)
- Are registered with the national Do Not Call list (38%)
- Have a college degree (41%)
- Have an income greater than \$40,000 (39%)
- Are male (41%)

Respondents with high speed Internet service who had heard at least a little about making phone calls over the Internet were asked if they currently use the Internet to make phone calls from home. Just nine respondents (0.4%) said they use the Internet to make telephone calls from home.

Figure 21
Heard of Making Phone Calls Over the Internet
 All respondents

(Weighted Base = 2,406)



Question 37: Have you heard of ways to use high speed or broadband Internet service to make telephone calls?

May not sum to 100% due to rounding.

Directory Assistance

Personal Use

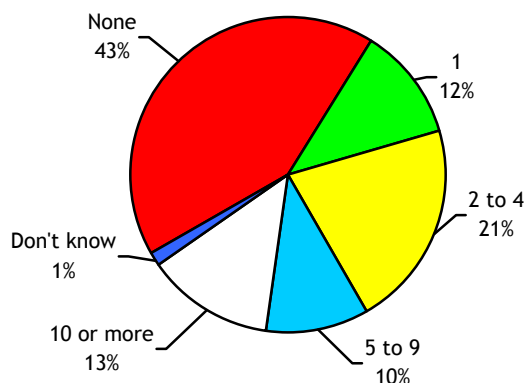
Respondents were asked a series of questions about Directory Assistance services designed to determine how frequently they use the service and their level of knowledge about the different services available.

Most respondents indicated they have used Directory Assistance or Information services at least one time in the past year (Figure 22).

While there were no differences in use by region, it is interesting to note that respondents who do not have Internet access (48%), those without cell phones (53%), and those with only one telephone line (44%) were more likely than others to say they have not used Directory Assistance in the past year. Respondents who own two or more cell phones reported using Directory Assistance more than any other respondent group (21% used it 10 or more times).

Figure 22
Use of Directory Assistance in Past 12 Months
All respondents

(Weighted Base = 2,406)



Question 41: How many times have you personally called Directory Assistance or information to find out a phone number in the past 12 months?

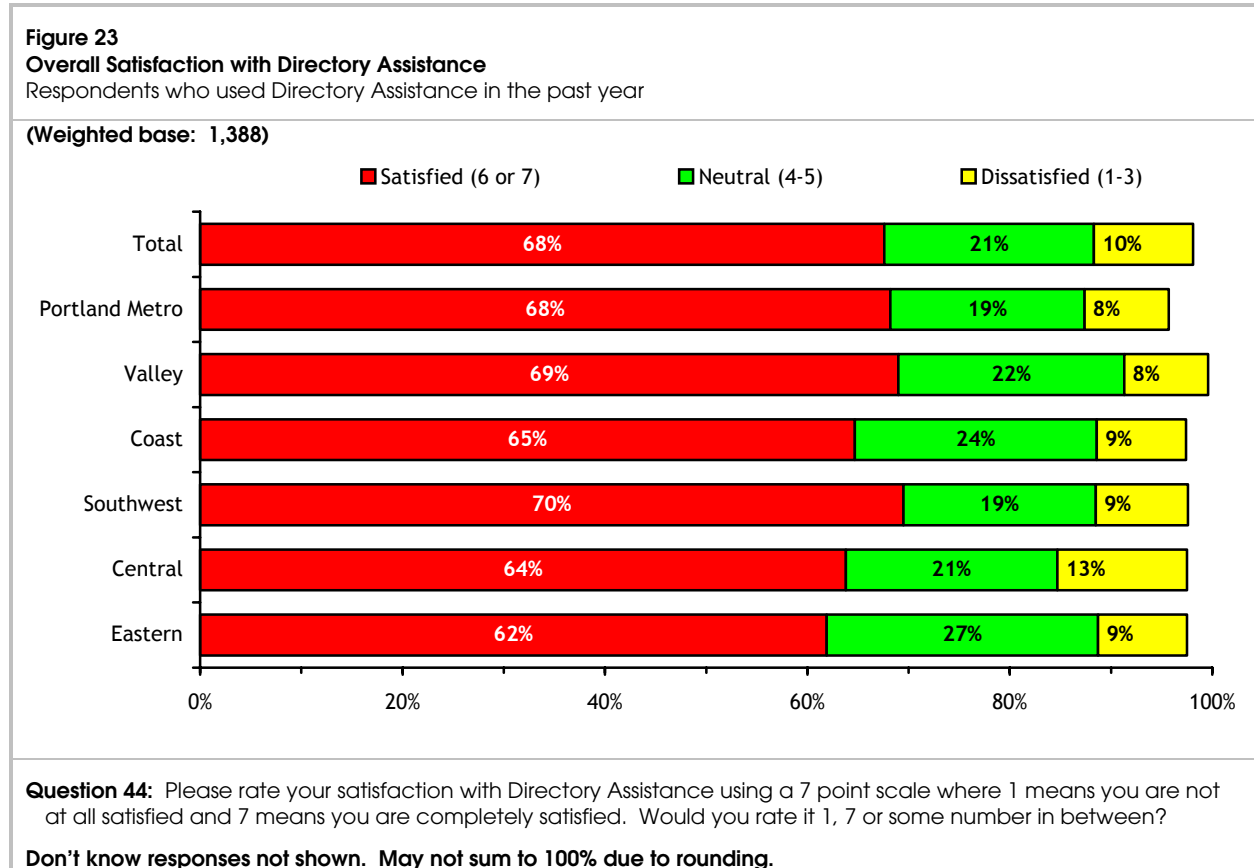
May not sum to 100% due to rounding.

The most common reason for not using Directory Assistance is *have not needed to look up numbers* (65% of all comments). Sixteen percent of those who have not used Directory Assistance *did not want to pay for the service*—this was especially true of respondents with high speed Internet service (24% did not want to pay for the service)—and 13% indicated they *look up the numbers themselves* either in a phone book or online.

Nearly two out of three respondents (63%) who reported using Directory Assistance said they called 411, and 28% called (area code) 555-1212. One in eight respondents did not remember which service they used and 1% reported calling the Operator.

Satisfaction with Directory Assistance

More than two-thirds of respondents (68%) indicated they were generally satisfied with their Directory Assistance service including 46% who were *very satisfied* with the service they received (Figure 23). Residents of the Southwest region (51%) were especially likely to say they were *very satisfied* with Directory Assistance as were respondents who were not educated beyond high school (55%) and those age 65 or older (54%).



Respondents who were not satisfied with Directory Assistance complained about *the cost of paying for a service that used to be free* (28% of all comments), said they are given *incorrect information* or they *can't get numbers they know are listed* (23%). Other complaints included *not talking with a live Operator* (12%), *being charged for the service even when they can't find the listing* (11%), and *poor service* (11%).

Awareness of Other Directory Assistance Providers

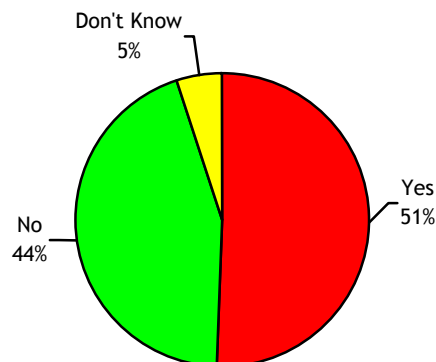
Just over half of all respondents were aware Directory Assistance services are available from providers other than the local phone company (Figure 24).

Respondents most likely to be aware of other Directory Assistance providers:

- Live in the Coast region (54%)
- Are 18 to 24 (61%)
- Have a post-graduate degree (56%)
- Are male (57%)

Figure 24
Awareness of Other Directory Assistance Providers
All respondents

(Weighted Base = 2,406)



Question 46: Are you aware that Directory Assistance services are available from providers other than your local telephone company?

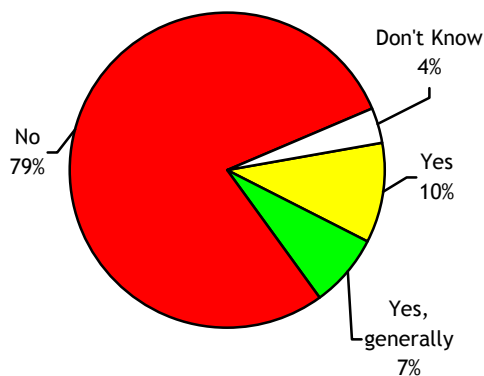
May not sum to 100% due to rounding.

Most respondents who are aware of Directory Assistance services other than the local telephone company do not know how much these other services charge (Figure 25).

Respondents with two or more cell phones (13%) are more likely than others to say they know what other providers charge for looking up a number.

Figure 25
Awareness of What Other Directory Assistance Providers Charge
Respondents aware of other Directory Assistance Providers

(Weighted Base = 1,217)



Question 47: Do you know the price charged by any of these providers for looking up a number?

May not sum to 100% due to rounding.

Do Not Call Registry

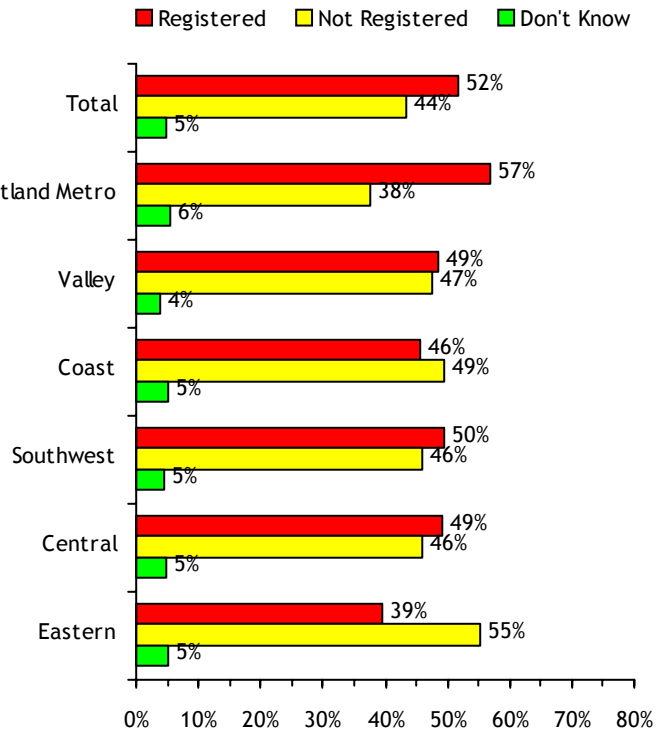
National Registry

Survey responses indicate that just over half of the households in Oregon (52%) are listed with the National Do Not Call registry (Figure 26). Those most likely to be registered:

- Live in the Portland Metro area (57%)
- Live in suburban neighborhoods (61)
- Have high speed Internet access (63%)
- Have two or more landlines (60%)
- Have two or more cell phones (60%)
- Are 45 to 64 years old (60%)
- Have an annual income greater than \$75,000 (65%)

Figure 26
Participate in the National Do Not Call Registry
 All respondents

(Weighted Base = 2,406)



Questions 50: Has your household signed up for the national Do Not Call registry?

May not sum to 100% due to rounding.

Those least likely to be registered for the National Do Not Call list:

- Live in Eastern Oregon (39%)
- Live in small towns (45%)
- Are 18 to 24 years old (64%)
- Have an income below \$25,000 (61%)
- Are not educated beyond high school (61%)

State Registry

A second question asked respondents if they participated in the Oregon Do Not Call program before the national program replaced it. Not quite three in ten respondents (29%) participated in the statewide Do Not Call program. Those most likely to say they participated:

- Live in suburban areas (34%)
- Have high speed Internet (36%)
- Have at least one cell phone (33%)
- Are age 45 to 64 (36%)
- Have an annual income of \$75,000 or more

Preferred Do Not Call Program

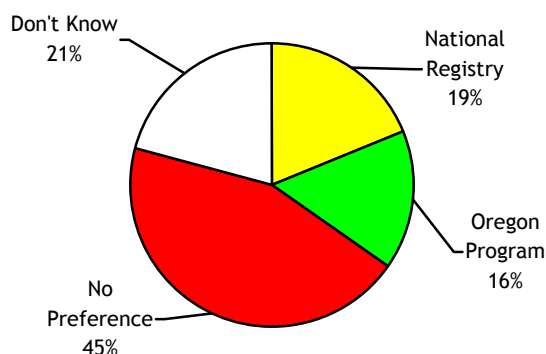
Respondents who participated in both programs were asked if they preferred the national Do Not Call registry or the Oregon program. Most participants did not have a strong opinion favoring one program or the other (Figure 27).

Respondents who preferred the national registry were more likely than others to:

- Live in Eastern Oregon (28%)
- Have two or more cell phones (22%)
- Be 18 to 44 years old (27%)

Figure 27
Preferred Do Not Call Program
Respondents registered for both the Oregon and National programs

(Weighted Base = 599)



Question 52: Do you prefer the current national Do Not Call registry or the Oregon Do Not Call program that it replaced?

May not sum to 100% due to rounding.

Respondents who preferred the Oregon Do Not Call program were more likely than others to:

- Have an income of less than \$25,000 (29%)
- Have dial-up Internet access (22%)

Conclusions

There are distinct differences between regions of the State. The Portland Metro area and the Valley are predominantly urban in nature with more multi-family dwellings, younger, better-educated respondents with young children at home. The Coast, Southwest, and Eastern regions are dominated by small towns and rural areas. There are more senior citizens in these regions and fewer young families. Central Oregon is an eclectic mix of both urban and rural areas and has characteristics pertaining to both.

There are few differences in satisfaction with telephone service providers across the state. Respondents in Central Oregon and those with one or more cell phones were less satisfied with local service providers than other respondents. Respondents in Central and Eastern Oregon are less satisfied with their cellular service providers than those in other areas, primarily because of poor reception and unfair charges (roaming/overtime).

The use of cell phones for long distance calling is becoming increasingly popular, especially in urban areas. In 2005, just over half (56%) of Oregon residents surveyed said they use their landline phone and 43% reported using a cell phone for long distance calling.

In urban areas such as the Portland Metro region, nearly three-quarters of respondents were connected to the Internet and half of those have high speed Internet connections. In more rural areas like the Eastern, Coast and Southwest regions, about two-thirds of respondents have Internet access from home, but fewer than one in ten have a high speed connection.

There does appear to be a “digital divide” between the urban and rural areas of the state. It is unclear, however, whether the divide is caused by lack of service options or by other factors. For example, there is a significant correlation between income and education and the use of cell phones and high speed Internet service. In the Eastern region where the lack of high speed Internet and cell phone use is most pronounced, residents also tend to be older, have lower incomes, and have less education than those in other parts of the Oregon.

APPENDIX

2004 Telecommunications Survey Instrument - Unweighted Findings

INTRO:

Hello, this is _____ calling on behalf of the Oregon Public Utility Commission. We are conducting a survey to improve telephone and internet service for Oregonians. We would really appreciate it if you would take a few minutes of your time to give us your opinions. May I speak with a male aged 18 years or over who is responsible for decisions about your telephone service? IF NO MALES OR NOT AVAILABLE, CONTINUE. IF NEEDED: The survey will take about 8-10 minutes depending on your answers. IF NEEDED: This is not a sales call, it's for research only.

N =	2406	100%
Continue	91	=> /LASTQ2406 100%

Q1:

First, I need to ask a couple of quick questions about your household in order to make sure we represent the state's population. Which county do you live in?

N =	2406	100%
Baker	40	2%
Benton	40	2%
Clackamas.....	126	5%
Clatsop.....	66	3%
Columbia	78	3%
Coos.....	126	5%
Crook	44	2%
Curry.....	32	1%
Deschutes.....	190	8%
Douglas.....	115	5%
Gilliam.....	2	0%
Grant.....	24	1%
Harney	17	1%
Hood River	22	1%
Jackson	190	8%
Jefferson	30	1%
Josephine	96	4%
Klamath	68	3%
Lake	16	1%
Lane	149	6%
Lincoln.....	74	3%
Linn	51	2%
Malheur	64	3%
Marion	97	4%
Morrow	28	1%
Multnomah	173	7%
Polk.....	36	1%
Sherman.....	0	0%
Tillamook	25	1%
Umatilla.....	148	6%
Union	61	3%
Wallowa.....	14	1%
Wasco	29	1%
Washington.....	102	4%
Wheeler.....	5	0%
Yamhill.....	28	1%

WHERE:

AREA quotas			
N =	2406	100%	
Portland Metro..... 1	401	17%	
Valley..... 2	401	17%	
Coast..... 3	401	17%	
Southwestern Oregon..... 4	401	17%	
Central Oregon..... 5	401	17%	
Eastern Oregon..... 6	401	17%	

GENDR:

RECORD GENDER

N =	2406	100%	
Male..... 1	1059	44%	
Female..... 2	1347	56%	

Q2:

Is the area in which you live urban, suburban, small town or an unincorporated rural area?

N =	2406	100%	
Urban..... 1	396	16%	
Suburban..... 2	323	13%	
Small town..... 3	1037	43%	
Unincorporated rural area..... 4	577	24%	
Don't know..... 5	72	3%	
Refused..... 6	1	0%	

Q3:

I would now like to ask you some general questions regarding your landline telephone service, by that I mean the telephone service that comes into your home on wires, not your cellular or wireless service. Do you have more than one telephone line in your household? Do not include cell phones but do include lines that are used for business, a computer or fax machine.

N =	2406	100%	
Yes..... 1	564	23%	
No..... 2	1835	76%	
Don't know/Not sure..... 3	4	0%	
Refused..... 4	3	0%	

Q4:

How many telephone lines do you have? Do not include cable, broadband or DSL type of lines.

=> +1
if NOT Q3=1

N =	564	100%	
Don't know..... 98	7	1%	
Refused..... 99	1	0%	

Q5:**PROBE TO FIT**

Are you considering adding or dropping any of your household's telephone lines in the next two years? IF NEEDED: Do not include cell phones but do include lines that are used by a computer or fax machine. IF DON'T KNOW/NOT SURE, ASK: If you were to change the number of lines, would you be adding or dropping?

N =	2406	100%
Yes, adding/might add	95	4%
Yes, dropping/might drop	211	9%
Yes, both adding and dropping/might add and drop	14	1%
No, neither	2032	84%
Don't know/Not sure	54	2%
Refused	0	0%

Q6A:**CLARIFY**

Why might you add a telephone line?

=> +1

if NOT Q5=1,3

N =	109	100%
For Computer/Internet/DSL	63	58%
Business line	12	11%
FAX machine	9	8%
Separate line for spouse/kids/roommate	10	9%
Cell phone/mobile phone	5	5%
Need phone line in kitchen/bedroom/other room	3	3%
Cost too high/easier to pay bills	4	4%
Other	12	11%
Don't know	3	2%
Refused	3	3%

Q6B:**CLARIFY**

Why might you drop a telephone line?

=> +1

if NOT Q5=2,3

N =	225	100%
Switching to cell/don't use home phone	70	31%
Unhappy with phone service	25	11%
Cell phone costs less (no taxes, extra charges, hidden fees)	26	12%
Don't use it enough/Don't need it	21	9%
Moving	19	8%
Changing to DSL/Broadband (upgrading)	18	8%
Cost/High bills	35	16%
Mainly keep it for internet	11	5%
Other	16	7%
Don't know	6	2%
Refused	2	1%

Q7:

How likely are you to drop your primary home phone line and switch exclusively to a cell phone in the next 6 months? Are you <sell> to switch to using cellular service only?

N =	2406	100%
Very unlikely	1903	79%
Somewhat unlikely	208	9%
Somewhat likely	169	7%
Very likely	79	3%
Don't know/Not sure	43	2%
Refused	4	0%

Q8:

CLARIFY

Why might you switch to a cell phone rather than having a phone line?

=> +1
if NOT Q7=3,4

N =	248	100%
Save money on monthly bill/long distance	110	44%
Save money on taxes/fees	9	4%
Don't use home phone much	14	6%
Better service/Different service provider	32	13%
More convenient/portable can call or be called from anywhere	75	30%
Poor service with current provider	2	1%
Already have cell phones/don't need landline	26	10%
One phone bill	19	8%
Wireless internet/internet on my cell phone	1	0%
Phone numbers are portable/I move a lot	2	1%
Not planning to switch to cell	3	1%
Other	13	5%
Don't know	3	1%
Refused	3	1%

Q9:

What is the name of the company that provides your local telephone service? IF NEEDED: the telephone service that comes into your home on wires, not your cellular or wireless service.

N =	2406	100%
Century Tel..... 01	191	8%
Qwest..... 02	1228	51%
Sprint/United Telephone Company of NW 03	127	5%
Verizon/Verizon Northwest..... 04	370	15%
ATT/AT&T 05	79	3%
Cascade Utilities, Inc. 06	17	1%
Comcast 07	16	1%
East Oregon Telephone Company 08	25	1%
Frontier/Frontier Communications 09	30	1%
Malheur Home Telephone Company/Malheur Bell 10	49	2%
MCI 11	28	1%
Pioneer 12	23	1%
US West..... 13	18	1%
Clear Creek Mutual Telephone Co. 14	4	0%
Canby Telephone Assoc. 15	7	0%
Unicom/ United Communications Inc. 16	7	0%
Tel West Communications LLC 17	5	0%
Nehalem Telecommunications, Inc./ Nehelam Tel & Tel 19	5	0%
Molalla Telephone..... 18	4	0%
Excel Telecommunications, Inc. 20	3	0%
Stayton Cooperative Telephone Co. 21	4	0%
Scio Mutual Telephone Assn..... 22	3	0%
Oregon-Idaho Utilities, Inc. 23	3	0%
Beaver Creek 24	2	0%
VCI..... 25	2	0%
Other (SPECIFY:) 97	43	2%
Don't know 98	106	4%
Refused 99	7	0%

Q10:

In the past two years has your household changed the company that provides your LOCAL telephone service?

N =	2406	100%
Yes..... 1	294	12%
No 2	2061	86%
Don't know/Not sure..... 3	50	2%
Refused..... 4	1	0%

Q11:

CLARIFY

Why did you change providers?

=> +1

if NOT Q10=1

N =	294	100%
Moved.....02	75	26%
Better rates/better deal from new provider03	114	39%
Poor customer service.....04	55	19%
Changed to digital/cable internet.....05	5	2%
Company changed names/was brought out06	8	3%
Wanted a local provider.....07	7	2%
Switching back/wasn't a better deal/hidden costs08	14	5%
Wanted everything combined on one bill/One provider09	13	4%
Other97	21	7%
Don't know98	7	2%
Refused.....99	2	1%

Q12:

Please rate the QUALITY of your home telephone service OVERALL using a 7 point scale, where 1 means you are not at all satisfied and 7 means you are completely satisfied. Would you rate your home phone service 1, 7, or some number in-between?

N =	2406	100%
Not at all satisfied.....1	40	2%
2.....2	47	2%
3.....3	127	5%
4.....4	158	7%
5.....5	577	24%
6.....6	549	23%
Very satisfied.....7	892	37%
Don't know8	12	0%
Refused.....9	4	0%

Q13:

CLARIFY

What is the biggest cause of your dissatisfaction?

=> +1 if NOT Q12=1-3

N =	214	100%
Cost/overcharging/high rates02	96	45%
Lack of options/no competition/monopoly.....03	16	7%
Poor quality lines/reception04	53	25%
Poor customer service.....05	71	33%
Difficulty w/Internet connections/Can't use DSL & phone simultaneously06	7	3%
No/poor quality/Expensive long distance07	6	3%
DSL/Broadband not available in my area.....08	4	2%
No local calling/Everything is long distance09	2	1%
Telemarketers/Unwanted calls.....10	4	2%
Other97	7	3%
Don't know98	7	3%
Refused.....99	1	0%

Q14:

Do you or does someone else in your household have a cell phone that you use in addition to your landline phone to make and receive personal calls?

N =	2406	100%
Yes..... 1	1567	65%
No 2	836	35%
Don't know/Not sure..... 3	3	0%
Refused..... 4	0	0%

Q15:

How many active cell phones is your household using now? IF NEEDED: Include phones that other members of your household may have such as children away at college.

=> Q21

if NOT Q14=1

N =	1567	100%
Don't know	5	0%
Refused..... 99	4	0%

Q16:

Please rate your cellular or wireless service OVERALL using a 7 point scale, where 1 means you are not at all satisfied and 7 means you are completely satisfied with your cellular service. Would you rate it 1, 7, or some number in-between?

N =	1567	100%
Not at all satisfied..... 1	32	2%
2..... 2	60	4%
3..... 3	91	6%
4..... 4	191	12%
5..... 5	437	28%
6..... 6	381	24%
Very satisfied..... 7	333	21%
Don't know	38	2%
Refused..... 9	4	0%

Q17:

CLARIFY

What is the biggest cause of your dissatisfaction?

=> +1
if NOT Q16=1-3

N =	183	100%
Bad reception/dropped calls/lack of signal/lack of coverage..... 02	110	60%
Unfair charges/charging for overtime minutes 03	20	11%
Problems with roaming (poor reception, overlapping areas)..... 04	12	7%
Poor customer service..... 05	31	17%
Cost/Price/Too expensive 06	19	10%
Contract issues/Don't like plan/Trapped in contract..... 07	6	3%
Dropped messages/messages arrive late 08	3	2%
Other 97	6	3%
Don't know 98	1	1%
Refused 99	0	0%

Q18:

PROBE TO FIT

Are you considering adding or dropping any of your household's cell phones in the next year? IF DON'T KNOW: If you were to change the number of cell phones, would you be adding or dropping?

N =	1567	100%
Yes, adding/might add..... 1	104	7%
Yes, dropping/might drop..... 2	97	6%
Yes, both adding and dropping/might add and drop..... 3	12	1%
Will change carriers or equipment but not number of phones..... 4	52	3%
No, neither..... 5	1272	81%
Don't know/Not sure..... 7	30	2%
Refused..... 8	0	0%

Q19A:

CLARIFY

Why might you add another cell phone?

=> +1
if NOT Q18=1,3

N =	116	100%
For kids/other household members/extra person..... 02	60	52%
More convenient..... 03	12	10%
Business phone 04	7	6%
Thinking of switching from landline to cell 05	13	11%
Changing providers for better service..... 06	16	14%
Other 97	17	15%
Don't know 98	0	0%
Refused 99	0	0%

Q19B:**CLARIFY**

Why might you drop a cell phone?

=> +1

if NOT Q18=2,3

N =	109	100%
Cost/price/too expensive..... 02	26	24%
Lack of use/Not using it much..... 03	21	19%
Not enough coverage/too many dead zones/poor reception 04	14	13%
Poor customer service..... 05	17	16%
Changing providers..... 06	15	14%
Provider changing plan/contract 07	2	2%
Only need one phone 08	10	9%
Not renewing contract 09	4	4%
Other 97	12	11%
Don't know 98	3	3%
Refused..... 99	0	0%

Q20:

Has your wireless provider ever changed your service contract without your permission or authorization?

N =	1567	100%
Yes..... 01	82	5%
No 02	1439	92%
Other (SPECIFY:) 97	1	0%
Don't know 98	45	3%
Refused..... 99	0	0%

Q21:

Have you ever purchased a cell phone package and wanted to get out of the contract because it wasn't what was advertised?

N =	2406	100%
Yes..... 01	408	17%
No 02	1981	82%
Other (SPECIFY:) 97	5	0%
Don't know 98	12	0%
Refused..... 99	0	0%

Q22:

READ 1-97. UP TO 6 RESPONSES

Now I have a few questions about your long distance phone service. Not counting any international calls, which of the following does your household use to make long distance calls?

N =	2406	100%
Don't make long distance calls	28	1%
Landline phone IF NEEDED: local dial-up phone	1390	58%
Wireless or cell phone	975	41%
Pre-paid calling card.....	583	24%
Dial-around numbers like 10-10.....	169	7%
The Internet	49	2%
ATT	6	0%
Or something else (SPECIFY:)	11	0%
Don't know - DO NOT READ.....	20	1%
Refused - DO NOT READ.....	5	0%

Q23:

Which method do you use most often?

```
=> +1
if NBR (Q22)<2
```

N =	686	100%
Landline phone IF NEEDED: local dial-up phone	268	39%
Wireless or cell phone	246	36%
Pre-paid calling card.....	74	11%
Dial-around numbers like 10-10.....	24	4%
The Internet	7	1%
Don't know - DO NOT READ.....	66	8%
Refused - DO NOT READ.....	1	0%

Q24:

Please rate your long distance service OVERALL using a 7 point scale, where 1 means you are not at all satisfied and 7 means you are completely satisfied with your long distance service. Would you rate it 1, 7, or some number in-between? IF CELL MENTIONED, ASK RESPONDENT TO RATE THE LONG DISTANCE ASPECTS OF THE CELL PHONE SERVICE.

N =	2406	100%
Not at all satisfied.....	40	2%
2.....	20	1%
3.....	69	3%
4.....	132	5%
5.....	406	17%
6.....	565	23%
Very satisfied.....	1084	45%
Don't know	71	3%
Refused.....	19	1%

Q25:**CLARIFY**

What is the biggest cause of your dissatisfaction?

=> +1

if NOT Q24=1-3

N =	129	100%
Price/cost is too high..... 02	51	40%
Hidden costs/fees (access charges, overtime minutes, taxes)..... 03	28	22%
Poor connections/poor quality lines/equipment..... 04	13	10%
Make changes in our contract without any notice 05	9	7%
Monopoly/no choice..... 06	3	2%
Poor customer service..... 07	16	12%
Don't have long distance service..... 00	7	5%
Other..... 97	13	10%
Don't know 98	6	5%
Refused..... 99	1	1%

Q26:

Within the past year have you had unauthorized long distance charges on your phone bill?

N =	2406	100%
Yes..... 1	216	9%
No..... 2	2131	89%
Don't know/Not sure..... 3	54	2%
Refused..... 4	5	0%

Q27:

Were you able to have those charges removed?

=> +1

if NOT Q26=1

N =	216	100%
Yes..... 1	164	76%
No..... 2	45	21%
Don't know/Not sure..... 3	6	3%
Refused..... 4	1	0%

Q29A:

(I'm going to read a list of options for connecting to the internet. Which of these are available in your area? If you don't know, just say so.)

Dial up internet service

N =	2406	100%
Yes..... 1	1740	72%
No..... 2	93	4%
Don't know/Not sure..... 3	570	24%
Refused..... 4	3	0%

Q29B:

(I'm going to read a list of options for connecting to the internet. Which of these are available in your area? If you don't know, just say so.)

Cable modem?

N =	2406	100%
Yes..... 1	1243	52%
No 2	413	17%
Don't know/Not sure..... 3	747	31%
Refused..... 4	3	0%

Q29C:

(I'm going to read a list of options for connecting to the internet. Which of these are available in your area? If you don't know, just say so.)

DSL?

N =	2406	100%
Yes..... 1	1198	50%
No 2	423	18%
Don't know/Not sure..... 3	782	33%
Refused..... 4	3	0%

Q29D:

(I'm going to read a list of options for connecting to the internet. Which of these are available in your area? If you don't know, just say so.)

Satellite service?

N =	2406	100%
Yes..... 1	1017	42%
No 2	304	13%
Don't know/Not sure..... 3	1082	45%
Refused..... 4	3	0%

Q29E:

(I'm going to read a list of options for connecting to the internet. Which of these are available in your area? If you don't know, just say so.)

Wireless internet access, such as 3G phones or Wi-Fi?

N =	2406	100%
Yes..... 1	451	19%
No 2	487	20%
Don't know/Not sure..... 3	1464	61%
Refused..... 4	4	0%

Q28:

Do you currently have a computer in your household that is connected to the Internet?

N =	2406	100%
Yes..... 1	1688	70%
No 2	711	30%
Don't know/Not sure..... 3	5	0%
Refused..... 4	2	0%

Q30:

You indicated you do not have a computer in your home that is connected to the Internet.
Do you intend to get Internet access at home sometime in the next year?

=> Q32

if Q28=1

N =	718	100%
Yes..... 1	175	24%
No..... 2	466	65%
Don't know/Not sure..... 3	75	10%
Refused..... 4	2	0%

Q31:**CLARIFY**

Why has your household decided not to have a computer with Internet access in your home?

=> Q37

if Q30=1

N =	542	100%
Costs too much..... 02	97	18%
Not available in area..... 03	2	0%
Can use Internet at work..... 04	30	6%
Don't need to use Internet/Don't like it/Not at all interested..... 05	246	45%
Type I want is not available..... 06	1	0%
Request was refused..... 07	1	0%
Don't know how to use a computer/Internet/computer illiterate..... 08	35	6%
Can use one elsewhere (library/friend/children's)..... 09	18	3%
Too much that's not appropriate for young children..... 10	10	2%
Asking for trouble (ads, viruses, id theft, etc.)..... 11	18	3%
Not enough room in my home..... 12	5	1%
Bad phone lines/phone lines don't work..... 13	6	1%
Disability or medical problem..... 14	13	2%
Don't own a computer..... 15	13	2%
Elderly/retired/too old..... 16	24	4%
Not a high priority on my list of things to do..... 17	16	3%
Other..... 97	26	5%
Don't know..... 98	33	6%
Refused..... 99	6	1%

Q32:

READ 1-6. UP TO 3 RESPONSES

Is your home computer connected to the Internet through a...

=> Q37
if NOT Q28=1

N =	1688	100%
Dial up modem	961	57%
Cable modem	349	21%
DSL	290	17%
Satellite service	19	1%
Wireless or cellular	21	1%
Or some other high speed Internet Access (SPECIFY:)	5	0%
Don't know - DO NOT READ	61	4%
Refused - DO NOT READ	5	0%

Q32A:

Is the modem speed 28.8 or 56K?

=> +1
if NOT Q32=01

N =	961	100%
28.8 speed	69	7%
56K speed	577	60%
Don't know	315	33%
Refused	0	0%

Q33:

CLARIFY

Why do you not have a high-speed or broadband Internet connection?

=> +1
if Q32=02-97

N =	1011	100%
Costs too much	334	33%
Not available in area	203	20%
Can use Internet at work	11	1%
Don't want/need to use Internet	193	19%
Type I want is not available	34	3%
Request was refused	3	0%
Don't use it enough to justify the cost	13	1%
Dial up is fine	7	1%
Computer too old/need to upgrade computer first	19	2%
In process of getting DSL/cable	13	1%
Thinking about getting it but haven't done it yet	29	3%
Just moved/plan to move soon/remodeling	9	1%
Security reasons (SPAM, viruses, pop-ups)	5	1%
Have free online now	12	1%
Telephone lines won't support connection	5	1%
Not needed/Satisfied/Don't need the speed	28	3%
Wasn't aware of the connection/Lack of knowledge	10	1%
Only one company/don't like company you have to go through	4	0%
Would have to add another phone line	2	0%

Don't have cable/don't want cable TV	22	4	0%
Other	97	13	1%
Don't know	98	113	12%
Refused	99	6	1%

Q34:*READ 1-7 IF NEEDED:*

What do you pay monthly for your home Internet service?

N =		1688	100%
\$0	1	59	3%
\$1 to \$10	2	145	9%
\$11 to \$20	3	451	27%
\$21 to \$30	4	368	22%
\$31 to \$40	5	175	10%
\$41 to \$50	6	158	9%
Or over \$50	7	78	5%
Don't know - DO NOT READ	8	222	13%
Refused - DO NOT READ	9	32	2%

Q35:

Please rate your home internet service OVERALL using a 7 point scale, where 1 means you are not at all satisfied and 7 means you are completely satisfied with your home internet service. Would you rate it 1, 7, or some number in-between?

N =		1688	100%
Not at all satisfied	1	43	3%
2	2	54	3%
3	3	96	6%
4	4	187	11%
5	5	432	26%
6	6	398	24%
Very satisfied	7	440	26%
Don't know	8	36	2%
Refused	9	2	0%

Q36:

What is the biggest cause of your dissatisfaction?

=> +1

if NOT Q35=1-3

N =		193	100%
Too slow/way too slow/takes too long	02	109	56%
Weak signal/poor phone lines	03	4	2%
Getting kicked offline/blackouts/disconnects/computer freezes	04	60	31%
Junk email/spam/pop-ups/viruses/spyware	05	15	8%
Poor service from provider	06	18	9%
Cost	07	14	7%
Monopoly/no choice	08	5	3%
Other	97	10	5%
Don't know	98	0	0%
Refused	99	0	0%

Q37:

Have you heard of ways to use high speed or broadband internet service to make telephone calls?

N =	2406	100%
Yes..... 1	755	31%
Yes, heard something about it 2	466	19%
No 3	1133	47%
Don't know/Not sure..... 4	52	2%
Refused..... 5	0	0%

Q38:

Are you currently using the internet to make telephone calls from home?

=> +1
if NOT Q37=1,2 OR NOT Q32=02-97

N =	404	100%
Yes..... 1	9	2%
No 2	395	98%
Don't know/Not sure..... 3	0	0%
Refused..... 4	0	0%

Q39:

Do you think you might switch to one of these internet telephone services within the next 12 months?

=> +1
if Q38=1 OR Q38<1

N =	395	100%
Yes..... 1	43	11%
No 2	291	74%
Don't know/Not sure..... 3	61	15%
Refused..... 4	0	0%

Q40:

PROBE TO FIT
How much would you be willing to pay per month to have high speed or broadband Internet access?

=> +1
if Q32=02-97

N =	1731	100%
\$0..... 1	633	37%
\$1 to \$10..... 2	138	8%
\$11 to \$20..... 3	282	16%
\$21 to \$30..... 4	196	11%
\$31 to \$40..... 5	51	3%
\$41 to \$50..... 6	26	2%
Or over \$50..... 7	10	1%
Don' t know 8	366	21%
Refused..... 9	29	2%

Q41:

How many times have you personally called Directory Assistance or Information to find out a phone number in the past 12 months? This would include calling from your home phone, a pay phone or a cell phone. IF NEEDED: Do not include looking a number up on the internet.

N =	2406	100%
Zero/None..... 1	1012	42%
1..... 2	287	12%
2-4..... 3	535	22%
5-9..... 4	247	10%
10 or more..... 5	287	12%
Don't know..... 6	37	2%
Refused..... 7	1	0%

Q42:

READ 1-97 IN ORDER SHOWN

You said you haven't used Directory Assistance. Is that because you..

=> +1

if NOT Q41=1

N =	1012	100%
Didn't know what number to call for assistance..... 01	25	2%
Didn't want to pay for the lookup..... 02	159	16%
Have not needed to look up numbers..... 03	671	66%
Can use the phone book/look up numbers myself..... 04	35	3%
Look up numbers on the Internet/online..... 05	62	6%
I don't call numbers I don't know..... 06	12	1%
Ask family/friends to look up numbers..... 07	3	0%
Both online and phone book..... 08	6	1%
Look them up myself..... 09	6	1%
Or some other reason (SPECIFY:)..... 97	11	1%
Don't know - DO NOT READ..... 98	18	2%
Refused - DO NOT READ..... 99	4	0%

Q43:

PROBE TO FIT. UP TO 4 RESPONSES

There are several standard numbers to dial for directory assistance. Do you remember what number you used? IF YES, ASK: What number was that?

=> Q46

if Q41=1

N =	1394	100%
411..... 01	804	58%
1-800-555-1212..... 02	310	22%
Area code and 555-1212..... 03	158	11%
O/Operator..... 04	12	1%
Other (SPECIFY:)..... 97	14	1%
Don't know/Don't remember..... 98	196	14%
Refused..... 99	0	0%

Q44:

Please rate your satisfaction with Directory Assistance using a 7 point scale, where 1 means you are not at all satisfied and 7 means you are completely satisfied with your Directory Assistance. Would you rate it 1, 7, or some number in-between?

N =	1394	100%
Not at all satisfied..... 1	49	4%
2..... 2	36	3%
3..... 3	51	4%
4..... 4	103	7%
5..... 5	204	15%
6..... 6	283	20%
Very satisfied..... 7	639	46%
Don't know..... 8	28	2%
Refused..... 9	1	0%

Q45:

CLARIFY

What is the biggest cause of your dissatisfaction?

=> +1
if NOT Q44=1-3

N =	136	100%
Cost/don't like to pay/it used to be free/costs too much..... 02	41	30%
Get wrong numbers/don't give me correct number..... 03	28	21%
Don't get to talk to a live operator..... 04	20	15%
Can't find the listings that I know are listed..... 05	14	10%
They charge you for bad information or when they can't find the listing..... 06	18	13%
Takes too long..... 07	13	10%
Can't reach a local operator so they don't know your area..... 08	7	5%
Poor service/poor problem solvers/rude..... 09	11	8%
Other..... 97	14	10%
Don't know..... 98	3	2%
Refused..... 99	0	0%

Q46:

Are you aware that Directory Assistance services are available from providers other than your local telephone company? IF NEEDED: Other national companies or wireless services.

N =	2406	100%
Yes..... 1	1205	50%
No..... 2	1094	45%
Don't know/Not sure..... 3	107	4%
Refused..... 4	0	0%

Q47:

Do you know the price charged by any of these other providers for looking up a number?

=> +1

if NOT Q46=1

N =	1205	100%
Yes..... 1	131	11%
Yes, generally..... 2	83	7%
No..... 3	942	78%
Don't know/Not sure..... 4	49	4%
Refused..... 5	0	0%

Q50:

Has your household signed up for the National Do Not Call Registry?

N =	2406	100%
Yes..... 1	1160	48%
No..... 2	1130	47%
Don't know/Not sure..... 3	116	5%
Refused..... 4	0	0%

Q51:

Did you participate in the Oregon Do Not Call program before it was replaced with the national one?

N =	2406	100%
Yes..... 1	647	27%
No..... 2	1495	62%
Don't know/Not sure..... 3	262	11%
Refused..... 4	2	0%

Q52:

Do you prefer the current National Do Not Call Registry or the Oregon Do Not Call program that it replaced?

=> +1

if NOT Q50=1 OR NOT Q51=1

N =	559	100%
National Do Not Call Registry..... 1	116	21%
Oregon Do Not Call program..... 2	80	14%
No preference/Both the same..... 3	254	45%
Don't know..... 4	106	19%
Refused..... 5	3	1%

Q53:

READ 1-97

I have just a few more questions to group your answers with other people. Which of the following best describes the home you live in?

N =	2406	100%
Single family home..... 01	2033	84%
Duplex or triplex..... 02	72	3%
Apartment..... 03	175	7%
Townhouse, or condominium..... 04	48	2%
Dormitory or group living situation..... 05	17	1%
Mobile/manufactured home..... 06	38	2%
Trailer/Fifth wheel/RV..... 07	13	1%
Or something else (SPECIFY:)..... 97	6	0%
Don't know - DO NOT READ..... 98	0	0%
Refused - DO NOT READ..... 99	12	0%

Q54:

What is your five-digit home zip code?

N =	2406	100%
Don't know..... 99998	51	2%
Refused..... 99999	43	2%

Q55:

Do you have any children under 18 years living in your household?

N =	2406	100%
Yes..... 1	755	31%
No..... 2	1626	68%
Don't know/Not sure..... 3	8	0%
Refused..... 4	17	1%

Q56:

Are those children under 12 years of age, between 12 and 17, or both?

=> +1
if NOT Q55=1

N =	755	100%
Under 12 years..... 1	368	49%
12 to 17 years old..... 2	243	32%
Both under 12 and 12 to 17..... 3	140	19%
Don't know..... 4	1	0%
Refused..... 5	3	0%

Q57:**READ 1-8**

Which of the following categories includes your age? IF RESPONDENT IS OBVIOUSLY OLDER, YOU MAY OMIT THE FIRST 2-3 CATEGORIES.

N =	2406	100%
18 to 24	82	3%
25 to 34	296	12%
35 to 44	434	18%
45 to 54	581	24%
55 to 64	479	20%
65 to 74	308	13%
75 to 84	149	6%
Or 85 or older	39	2%
Refused - DO NOT READ	38	2%

Q58:**DO NOT READ PROBE TO FI**

What is the highest level of education you have completed?

N =	2406	100%
Less than high school	106	4%
High school diploma/GED	610	25%
Vocational/Technical certificate	54	2%
Some college/Associate's degree (2year)	800	33%
Bachelor's degree (4year)	480	20%
Post graduate (?)	305	13%
Refused	51	2%

Q59:

Is your total annual household income above or below \$40,000?

N =	2406	100%
Below \$40,000	907	38%
\$40,000 or above	1197	50%
Don't know/Refused	302	13%

Q59A:**READ 1-2**

Is that. . .

=> +1

if NOT Q59=1

N =	907	100%
Under \$25,000	412	45%
or \$25,000 to \$40,000	444	49%
Don't know/Refused - DO NOT READ	51	6%

Q59B:

READ 3-5

Is that . .

=> +1

if NOT Q59=2

N =	1197	100%
\$40,000 to \$75,000	681	57%
\$75,000 to \$100,000	231	19%
Or over \$100,000	197	16%
Don't know/Refused - DO NOT READ	88	7%

INCOM:

Combined income

=> *

if IF ((Q59=3),8, IF ((Q59A>0),Q59A, IF ((Q59B>0),Q59B,0)))

N =	2406	100%
Under \$25,000	412	17%
\$25,000 to \$40,000	444	18%
\$40,000 to \$75,000	681	28%
\$75,000 to \$100,000	231	10%
Over \$100,000	197	8%
Refused under \$40,000	51	2%
Refused \$40,000 or more	88	4%
Total refusal	302	13%