Final Report

Usage of Wireless Communications in Canada

Prepared for: Canadian Wireless Telecommunications Association (CWTA)

April 2006
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# Table of Contents

Executive Summary ................................................................. 1

- Background and Methodology ........................................... 1
- Survey Results ................................................................. 1

Introduction ........................................................................... 5

- Background ..................................................................... 5
- Objectives ...................................................................... 5
- Methodology Overview .................................................. 6

Canadian Household Wireless Profile .................................... 7

- Access to Wireless Phones Across Canada ......................... 7
- Wireless Penetration by Area Code .................................... 10

Wireless Phone Ownership and Usage .................................. 11

- Number of Wireless Phones in the Household ................. 11
- Source of Wireless Phones Access .................................... 12
- Type of Wireless Phones in Household .............................. 12
- Length of Wireless Phone Ownership ................................ 13
- Personal Versus Business Usage of Wireless Phones ........ 14
- Frequency of Wireless Usage ........................................... 16

Likelihood of Acquiring a Wireless Phone .......................... 18

Cellular Phone Features Usage ............................................ 20

- Activities Performed Over Cellular Phone- Overview ........ 20
- Sending Text Messages ................................................... 22
- Taking Pictures ............................................................. 22
- Downloading Content .................................................... 23
- Instant Messaging .......................................................... 23
- Sending Emails ............................................................. 24
- Checking for Information on the Internet ......................... 24
- Sending Multi-Media Messages ....................................... 25
- Listening to Music .......................................................... 25
- Downloading Music ........................................................ 26
- Preferred Activities Over Wireless Phones ...................... 27
Wireless Versus Traditional Telephone Service..........................28
Number of Telephone Lines in the Household...............................28
Likelihood of Replacing Wireline with Wireless............................29
Cell-Phone Only Households in Canada.........................................31
Frequency of Wireless Usage at Home.........................................34
Attitudes Towards Wireless Services...........................................35
Appendix....................................................................................36
Executive Summary

Background and Methodology
In 2006, the Canadian Wireless Telecommunications Association (CWTA) commissioned Decima Research to assess the penetration of wireless phones among Canadian households and to help them understand key usage trends and attitudes surrounding wireless phones. This represents the fifth installment of this research study since 1997.

A total of 1,510 telephone surveys were completed with Canadians, 18 years of age and older, in April of 2006.

Survey Results
The results from the 2006 study reveal that not only has wireless phone usage increased significantly over the past 10 years, but that the way in which wireless phones are used has also changed a fair bit. Essentially, more Canadians are using wireless phones, usage of wireless phones is deeper within each household, wireless phones are being used more for personal purposes than for business purposes and Canadians continue to consider them viable alternatives to their traditional home phone with nearly 1 in 10 wireless users having already completely replaced their wireline service for a wireless one.

In terms of household usage, this study reveals that two-thirds (64%) of Canadian households report they have access to a wireless phone. This recent result represents a significant increase since the last time this study was conducted in 2000, when 44% of Canadian households claimed access.

Access to Wireless Phones: 1997 to 2006
Albertans continue to be at the forefront of wireless phone adoption with a household penetration rate of 79% while Quebeckers represent the other end of the wireless penetration spectrum at 51%. The research also shows a higher than average incidence of wireless phones among Canadians under 55 years of age, and a generally strong relationship between wireless phone penetration and household income and level of education achieved.

Of particular interest from an age segment perspective is the fact that Canadians in the 35 to 54 age bracket were typically the ones driving growth in wireless penetration. In our most recent study however, all age groups are now contributing to the overall increase in wireless penetration.

This research investigated a variety of key metrics among those who currently own or have access to a wireless phone in their household. Results show the following:

- Wireless phone penetration is not only widening, in other words spreading increasingly to more households, but also getting “deeper” within each household as each household has access to an increasingly greater amount of wireless phones.
- Seven-in-ten (70%) respondents personally own their wireless phone, while the remaining obtain access through their employer, self-employment or through someone else in the household.
- With regard to types of wireless devices in the home, nearly all households use cell phones exclusively (91%) whereas 8% have a combination of cell phones and wireless PDAs within the household.
- This year’s results suggest that the average wireless user is more “mature” or experienced compared to 6 years ago. In 2000, every one in four users had been accessing a wireless service for less than one year compared to only one in ten today.
- Results show that multiple wireless phone households are also showing greater wireless maturity as fully 50% claim to have had access to multiple wireless phones for at least 3 years (compared to 34% in 2000).
- The last six years have seen an important shift in how Canadians use their wireless phones. Between 1998 and 2000, between 25% and 30% used their wireless phone as much for business purposes as for personal purposes. Results in 2006 suggest a more polarized use of wireless phones – they are being used either mostly for personal (60%) or mostly for business calls (29%), with the proportion using it evenly for personal and business calls diminishing to 8%.
- Half have used their wireless phone to help them out of an emergency situation.
• In a typical week, Canadian wireless phone users estimate they talk for slightly over one hour (71 minutes) on their wireless phone, a result which increases to 84 minutes among 18 to 34 year olds and drops to 45 minutes among wireless users over 54 years of age.

About 16% of the households having indicated they do not currently own or have access to a wireless phone are likely to acquire one within the next year.

A part of the study examines usage of specific cellular phone features among Canadians who own or have access to a cellular phone. Incidence of each feature among cell phone users is summarized in the figure below:

Generally, as would be expected, younger users are significantly more likely to use, access or subscribe to nearly all the various cell phone features and services.

Respondents with access to a wireless phone and those who intend to acquire a wireless phone in the next year were asked what more they would like to do with their wireless phone. The most important prospective features to current and future wireless phone users were: sending or receiving text messages, sending or receiving emails and taking pictures. Another attractive feature among “intenders” appears to be music downloading.

An ongoing metric of interest for both the wireline and the wireless industry is the extent to which households are likely to replace one or all of their
traditional telephone lines with one or many wireless services. Results show that **17% are likely to replace an existing traditional telephone service with a wireless telephone service in the next year**. Segments most likely to consider this as an option include households with no wireless service today but likely to acquire one in the next year, younger respondents and heavy wireless users.

The natural extension to this analysis is to estimate the actual proportion of Canadian households who have already replaced their wireline service. A special research exercise has allowed us to estimate that **approximately 8% of households that own or have access to a wireless phone have in fact replaced their traditional telephone line**. This equates to approximately 5% of ALL Canadian households.

Finally, a few questions around attitudes towards wireless communications reveal the following:

- A strong majority of Canadians indicate they feel safer having access to a wireless phone for emergencies.
- Eight in ten report feeling comfortable with technologies such as wireless communications devices and a similar proportion feels that wireless communications devices are easy to use.
- Slightly over half say that wireless communications are good value for money.
- There is an increasing understanding among Canadians that private calls on wireless phones are safe from being overheard by eavesdroppers.
Introduction

Background

In 2006, the Canadian Wireless Telecommunications Association (CWTA) commissioned Decima Research to assess the penetration of wireless phones among Canadian households and to help them understand key usage trends and attitudes surrounding wireless phones.

Decima first worked on this project with the CWTA in April 1997 as a first step in developing a dashboard of key wireless market indicators to be annually tracked.

Over the years, Decima has completed five waves of research with the fifth phase recently completed this year. This survey, sample stratification and research methodology mirrors the previous phases conducted in 1997 through to 2000.

Objectives

The overall objectives of this research were to understand usage and attitudes toward wireless communications in Canada. Specifically, this research explored the following areas of interest:

- Penetration of wireless services and future acquisition intentions;
- Use of specific cellular phone features and services such as SMS, web access, photo capability, and push-to-talk;
- Household use of traditional phone line versus wireless phones;
- Likelihood of replacing a wireline service with a wireless one; and,
- Demographic profiling of wireless phone users.
Methodology Overview

A total of 1,510 telephone surveys were completed with Canadians, 18 years of age and older, in April of 2006. The results of this study can be considered accurate within a margin error of +/-2.5 at the 95% confidence level.

The data is weighted to reflect age and gender distribution within each province with the final distribution of interviews as follows:

<table>
<thead>
<tr>
<th>Region</th>
<th>Sample Size</th>
<th>Margin of Error</th>
</tr>
</thead>
<tbody>
<tr>
<td>British Columbia</td>
<td>200</td>
<td>+/-6.9%</td>
</tr>
<tr>
<td>Alberta</td>
<td>200</td>
<td>+/-6.9%</td>
</tr>
<tr>
<td>Saskatchewan/Manitoba</td>
<td>203</td>
<td>+/-6.9%</td>
</tr>
<tr>
<td>Ontario</td>
<td>303</td>
<td>+/-5.6%</td>
</tr>
<tr>
<td>Quebec</td>
<td>300</td>
<td>+/-5.7%</td>
</tr>
<tr>
<td>Atlantic Canada</td>
<td>304</td>
<td>+/-5.6%</td>
</tr>
<tr>
<td><strong>National</strong></td>
<td><strong>1510</strong></td>
<td>+/-2.5%</td>
</tr>
</tbody>
</table>
Canadian Household Wireless Profile

The first part of the study focuses on the wireless profile of Canadian households by region, age, income, level of education and telephone area code.

Access to Wireless Phones Across Canada

Almost two-thirds (64%) of Canadians report they have access to a wireless phone.

This recent result represents a significant increase since the last time this study was conducted in 2000 when 44% of Canadian households claimed access. While this does represent an important upward shift in wireless phone accessibility over a 6-year period, it is in fact very consistent with the growth trend that had been observed between 1997 and 2000.

Access to Wireless Phones: 1997 to 2006
Consistent with all the previous waves of this study, a number of key population segments stand out as being significantly more likely to have access to a wireless phone. At the regional level, residents in Alberta have always been at the forefront and continue to be so again this year with a household penetration rate of 79%. Quebecers represent the other end of the wireless penetration scale, trailing all other regions by a significant margin at 51%. This has been another consistent trend since 1997. Most of the other regions show penetration levels ranging between 63% and 68%.

Other important demographic trends that have withstood the test of time include higher penetration rates among Canadians under 55 years of age compared to their older counterparts, and a generally strong relationship between wireless phone penetration and household income and level of education achieved. Again, these trends hold true in our most recent data as much as they did in all previous waves.

Results for the 2006 study are presented below and the time-series data are presented on the following page.

---

Wireless phones, also known as cellular phones are telephones that are either installed in cars or carried from place to place (not cordless phones). Some people also use a PDA such as a Blackberry as a wireless phone. Do you or does someone else in your household own or have access to a wireless phone? (Base: All respondents)

<table>
<thead>
<tr>
<th>Total</th>
<th>64%</th>
</tr>
</thead>
<tbody>
<tr>
<td>BC</td>
<td>65%</td>
</tr>
<tr>
<td>Alberta</td>
<td>79%</td>
</tr>
<tr>
<td>Sask / Manitoba</td>
<td>68%</td>
</tr>
<tr>
<td>Ontario</td>
<td>68%</td>
</tr>
<tr>
<td>Quebec</td>
<td>51%</td>
</tr>
<tr>
<td>Atlantic</td>
<td>63%</td>
</tr>
<tr>
<td>18-34</td>
<td>74%</td>
</tr>
<tr>
<td>35-54</td>
<td>72%</td>
</tr>
<tr>
<td>55+</td>
<td>48%</td>
</tr>
<tr>
<td>&lt; $30K</td>
<td>36%</td>
</tr>
<tr>
<td>$30K - $59K</td>
<td>65%</td>
</tr>
<tr>
<td>$60K+</td>
<td>82%</td>
</tr>
<tr>
<td>Some High School</td>
<td>44%</td>
</tr>
<tr>
<td>Completed High School</td>
<td>57%</td>
</tr>
<tr>
<td>Some Post Secondary</td>
<td>67%</td>
</tr>
<tr>
<td>University</td>
<td>73%</td>
</tr>
</tbody>
</table>

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The 20% increase in penetration is, for the most part, consistent across all segments of the population. The increase in penetration has however been particularly sharp among the following segments:

- in Atlantic Canada – from 36% to 63%;
- among 18 to 34 year olds – from 45% to 74%;
- among older Canadians (55+) – from 24% doubling to 48%;
- among university graduates - from 50% to 73%.

Of particular interest from an age segment perspective is the fact that in 1999 and 2000, the middle segment (35 to 54 years old) was the only one to show signs of growth in wireless penetration. In our most recent study, all age groups are now contributing to the overall increase in wireless penetration.

<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Across Canada</td>
<td>64%</td>
<td>44%</td>
<td>41%</td>
<td>37%</td>
<td>29%</td>
</tr>
<tr>
<td><strong>Region</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BC</td>
<td>65%</td>
<td>43%</td>
<td>39%</td>
<td>34%</td>
<td>29%</td>
</tr>
<tr>
<td>Alberta</td>
<td>79%</td>
<td>60%</td>
<td>52%</td>
<td>51%</td>
<td>37%</td>
</tr>
<tr>
<td>Saskatchewan/Manitoba</td>
<td>68%</td>
<td>45%</td>
<td>43%</td>
<td>42%</td>
<td>28%</td>
</tr>
<tr>
<td>Ontario</td>
<td>68%</td>
<td>47%</td>
<td>43%</td>
<td>41%</td>
<td>36%</td>
</tr>
<tr>
<td>Quebec</td>
<td>51%</td>
<td>35%</td>
<td>27%</td>
<td>26%</td>
<td>16%</td>
</tr>
<tr>
<td>Atlantic</td>
<td>63%</td>
<td>36%</td>
<td>32%</td>
<td>30%</td>
<td>25%</td>
</tr>
<tr>
<td><strong>Age</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18-34</td>
<td>74%</td>
<td>45%</td>
<td>52%</td>
<td>37%</td>
<td>32%</td>
</tr>
<tr>
<td>35-54</td>
<td>72%</td>
<td>55%</td>
<td>42%</td>
<td>38%</td>
<td>33%</td>
</tr>
<tr>
<td>55+</td>
<td>48%</td>
<td>24%</td>
<td>25%</td>
<td>31%</td>
<td>18%</td>
</tr>
<tr>
<td><strong>Income</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>&lt;$30K</td>
<td>36%</td>
<td>18%</td>
<td>19%</td>
<td>18%</td>
<td>17%</td>
</tr>
<tr>
<td>$30K - $59K</td>
<td>65%</td>
<td>43%</td>
<td>35%</td>
<td>31%</td>
<td>28%</td>
</tr>
<tr>
<td>$60K+</td>
<td>82%</td>
<td>62%</td>
<td>59%</td>
<td>59%</td>
<td>46%</td>
</tr>
<tr>
<td><strong>Education</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Some High School</td>
<td>44%</td>
<td>25%</td>
<td>26%</td>
<td>28%</td>
<td>23%</td>
</tr>
<tr>
<td>Completed High School</td>
<td>57%</td>
<td>48%</td>
<td>40%</td>
<td>33%</td>
<td>25%</td>
</tr>
<tr>
<td>Some Post Secondary</td>
<td>67%</td>
<td>45%</td>
<td>42%</td>
<td>35%</td>
<td>32%</td>
</tr>
<tr>
<td>University</td>
<td>73%</td>
<td>50%</td>
<td>47%</td>
<td>41%</td>
<td>32%</td>
</tr>
</tbody>
</table>
Wireless Penetration by Area Code

Similar to the report issued in 2000, special analysis was conducted to understand the penetration of wireless phones by Canadian area codes (NPA’s). Results presented below are sorted in descending order based on 2006 results. Generally, results show that Canadians in northern Alberta (83%), the Greater Toronto area (78%) and Metro Vancouver (78%) are most likely to have access to a wireless phone. Conversely, those in North East Quebec are least likely (38%). Because of small sample sizes, caution is warranted in considering some of the results presented in this table.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>780 – Northern Alberta, north of Lacombe</td>
<td>95</td>
<td>83%</td>
<td>57%</td>
</tr>
<tr>
<td>905 – S Cent. Ontario: Greater Toronto Area</td>
<td>82</td>
<td>78%</td>
<td>61%</td>
</tr>
<tr>
<td>604 – Metro Vancouver</td>
<td>93</td>
<td>78%</td>
<td>52%</td>
</tr>
<tr>
<td>403 – Southern Alberta</td>
<td>105</td>
<td>75%</td>
<td>63%</td>
</tr>
<tr>
<td>306 – Saskatchewan</td>
<td>100</td>
<td>71%</td>
<td>49%</td>
</tr>
<tr>
<td>613 – SE Ontario: Ottawa</td>
<td>65</td>
<td>71%</td>
<td>36%</td>
</tr>
<tr>
<td>416 – Metro Toronto</td>
<td>39</td>
<td>68%</td>
<td>45%</td>
</tr>
<tr>
<td>204 – Manitoba</td>
<td>103</td>
<td>66%</td>
<td>42%</td>
</tr>
<tr>
<td>709 – Newfoundland and Labrador</td>
<td>105</td>
<td>65%</td>
<td>31%</td>
</tr>
<tr>
<td>519 – SW Ontario: Windsor</td>
<td>72</td>
<td>64%</td>
<td>47%</td>
</tr>
<tr>
<td>450 – Southeastern Quebec; suburbs outside metro Montreal</td>
<td>93</td>
<td>64%</td>
<td>46%</td>
</tr>
<tr>
<td>902 – Nova Scotia, Prince Edward Island</td>
<td>97</td>
<td>64%</td>
<td>38%</td>
</tr>
<tr>
<td>506 – New Brunswick</td>
<td>102</td>
<td>60%</td>
<td>38%</td>
</tr>
<tr>
<td>705 – NE Ontario: Sault Ste. Marie/N Ontario: N Bay, Sudbury</td>
<td>43</td>
<td>57%</td>
<td>46%</td>
</tr>
<tr>
<td>250 – British Columbia (except Vancouver)</td>
<td>106</td>
<td>55%</td>
<td>36%</td>
</tr>
<tr>
<td>514 – SW Quebec: Montreal city</td>
<td>74</td>
<td>54%</td>
<td>34%</td>
</tr>
<tr>
<td>819 – West/North Quebec</td>
<td>54</td>
<td>46%</td>
<td>29%</td>
</tr>
<tr>
<td>418 – NE Quebec: Quebec</td>
<td>80</td>
<td>38%</td>
<td>26%</td>
</tr>
<tr>
<td><strong>Total Across Canada</strong></td>
<td><strong>1510</strong></td>
<td><strong>64%</strong></td>
<td><strong>44%</strong></td>
</tr>
</tbody>
</table>

* results for area code 807 (W Ontario: Thunder Bay region to Manitoba border) were excluded since only 2 respondents were from this region.
Wireless Phone Ownership and Usage

This part of the study looks at the number of wireless phones in Canadian households, how Canadians typically obtain access to their wireless phones, the types of wireless phones they use (cellular vs. PDA), how long they have been accessing wireless phones, how their wireless phone is typically used and frequency of usage. Results in this section are based exclusively on households that have access to at least one wireless phone (i.e. 64% of households).

Number of Wireless Phones in the Household

Among those who currently own or have access to a wireless phone in their household, over four-in-ten (43%) indicate there is only one wireless phone in their household, while over half of them (57%) report having access to two or more wireless phones, including 8% with access to four or more wireless phones.

When compared to the 1997-2000 studies, these results represent a significant shift in the wireless phone household. Not only is wireless phone penetration widening, in other words spreading increasingly to more households, results also show that access to wireless phones is also getting “deeper” within each household as each one has access to an increasingly greater amount of wireless phones.

How many of the people in this age group, if any, have a wireless phone that they’re the main user of? (Base: Households with a wireless phone)

<table>
<thead>
<tr>
<th>Year</th>
<th>One</th>
<th>Two</th>
<th>Three</th>
<th>Four or more</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>38%</td>
<td>43%</td>
<td>11%</td>
<td>8%</td>
</tr>
<tr>
<td>2000</td>
<td>25%</td>
<td>69%</td>
<td>4%</td>
<td>2%</td>
</tr>
<tr>
<td>1999</td>
<td>20%</td>
<td>73%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>1998</td>
<td>18%</td>
<td>77%</td>
<td>3%</td>
<td>1%</td>
</tr>
<tr>
<td>1997</td>
<td>20%</td>
<td>75%</td>
<td>3%</td>
<td>2%</td>
</tr>
</tbody>
</table>
Source of Wireless Phones Access

Among those who currently own or have access to a wireless phone in their household, seven-in-ten (70%) respondents personally own their wireless phone, another 10% indicate an employer has provided their phone and nine percent access their wireless phone through their home business or small office/home office (SOHO). Finally, another 15% say they have access to a wireless phone through someone else in the household. These results are very similar to those from previous waves.

Type of Wireless Phones in Household

Among those who currently own or have access to a wireless phone in their household, nine-in-ten (91%) report having access to a cellular phone only. Just a handful only have access to a PDA such as Blackberry (1%). Another eight percent report having access to both a cellular phone and a PDA.
Length of Wireless Phone Ownership

This year’s results suggest that the average wireless user is more “mature” or experienced compared to 6 years ago. In 2000, every one in four user had only been accessing a wireless service for less than one year compared to only one in ten today. Wireless households today are twice as likely to have been accessing such services for at least 3 years compared to wireless households in 2000.

Length of Ownership Among Multi-Phone Households

Households with multiple wireless phones in the home were asked how long they’ve owned or had access to more than one wireless phone. Results show that these households are also showing greater wireless longevity as fully 50% claim to have had access to multiple phones for at least 3 years. This compares to 34% in 2000.

And how long have you owned or had access to more than one wireless phone?
(Base: Households with access to more than one wireless phone)
Personal Versus Business Usage of Wireless Phones

The last six years have seen an important shift in how Canadians use their wireless phones. Between 1998 and 2000, between 24% and 30% used their wireless phone as much for business purposes as for personal purposes and about one-quarter used it mostly for business purposes. Results in 2006\(^1\) suggest a more polarized use of wireless phones – they are being used either mostly for personal or mostly for business, with the proportion using it evenly diminishing to 8%. While slightly more use their wireless phone for business calls today compared to 6 years ago, the greatest shift has occurred with respect to personal usage where fully 60% of wireless users use their phone mostly for personal calls today compared to 46% 6 years ago.

\(^1\) Results for 2006 have been recalculated for reporting purposes to allow for comparison with previous waves of the study.
Wireless Phone Usage by Age Group

As one would expect, wireless phone usage does significantly differ by age group. As shown in the figure below, personal usage is much more common among younger wireless users (18 to 34 years of age) and among older wireless users (55 years of age and older). Although users between 35 and 54 still predominantly use their wireless phones for personal purposes (to the order of 54%), they are more likely than other age groups to use their wireless phones mostly for business purposes.

Emergency Purposes

Half of respondents who own or have access to a wireless phone (50%) have used their wireless phone to help them out of an emergency situation. This result is higher than the 42% and 43% reported in 2000 and 1999 respectively.
Frequency of Wireless Usage

In a typical week, Canadian wireless phone users estimate they talk for slightly over one hour (71 minutes) on their wireless phone. Generally, nearly half of wireless owners (48%) talk on their wireless phone for less than an hour, while 13% say they talk for just about an hour. Over a quarter (28%) indicate they talk for more than one hour. About six percent indicate they don’t talk on their wireless phone in a typical week – these are probably wireless phone users who only use their phone for emergency purposes.

*In a typical week, for approximately how many minutes do you talk on your wireless phone in total? (Base: Households with a wireless phone)*

![Frequency of Wireless Usage Chart](chart.png)

- Zero: 6%
- Less than an hour: 48%
- 1 hour: 13%
- 1 to less than 2 hours: 7%
- 2 to less than 3 hours: 10%
- 3 hours or more: 11%
Wireless Phone Usage by Age Group

Just as the types of calls made from wireless phones differed by age group, so do the call volumes in a typical week. As shown below, young wireless users (18 to 34 years of age) spend nearly twice as much time (in minutes per week) on their wireless phone compared to users 55 and older (84 minutes compared to 45 minutes). Wireless users between 35 and 44 are not far behind their younger counterparts in terms of usage with an average of 76 minutes per week.
Likelihood of Acquiring a Wireless Phone

Respondents who indicated they do not currently own or have access to a wireless phone (36%) were asked how likely it is they will acquire a wireless phone in the next year.

Overall Acquisition Intentions

Only 16% of respondents who do not currently have a wireless phone say they are either very (7%) or somewhat (9%) likely to acquire one in the next year. The likelihood of acquiring a wireless phone shows a 6-percentage point decline, compared to the 2000 and 1999 studies and a 9-percentage point decline compared to 1998.

These results, in combination with an already significantly reduced base of non-subscribing households, suggests that the future growth of the wireless industry is showing signs of slowing down in terms of the number of households owning or accessing a wireless service. These, along with earlier results showing the number of units per household, would suggest that future growth will continue to be driven by new households becoming first-time users in combination with an increased number of units among currently subscribed households.

How likely is it that you or someone else in your household will acquire a wireless phone within the next year? (Base: Households without a wireless phone)
Acquisition Intentions by Region

This year’s survey results indicate a decrease in the likelihood of acquiring a wireless phone across all regions. Anticipated likelihood of acquiring a wireless phone ranges from 10% to 22%. British Columbians and Ontarians are the most likely to indicate an intention to acquire a wireless phone within the next year, followed by Albertans at 18%. Not only does Québec have a low penetration of wireless services, but they also appear to have relatively low intentions to obtain access to a wireless phone in the next year (10%).

Acquisition Intentions by Age and Income

Canadian non-users under the age of 35 (37% either ‘very likely’ or ‘somewhat likely’) and non-users with total household incomes exceeding $60,000 (26%) are most likely to acquire a wireless phone in the next year.
Cellular Phone Features Usage

This part of the study examines usage of specific cellular phone features among Canadians who own or have access to a cellular phone.

Activities Performed Over Cellular Phone- Overview

Results across respondents who own or access a cellular phone show that:

- One-quarter (25%) currently send or receive text messages - also known as SMS,
- 15% take pictures,
- 15% download content such as ring-tones, wallpapers or games, and,
- Only six percent report sending or receiving emails over their cellular phone; a 2- percentage point increase since 2000 (4%).

Other activities performed over cellular phones are presented below.

Now I would like to ask you a few questions about some of the activities that you would do over your cellular phone. Do you currently [activities] over your cellular phone?

(Base: Respondents who own or have access to a cellular phone)
Additional analysis yielded important differences across age categories. For summary purposes and because of reduced sample sizes, respondents were grouped into two age categories for this analysis: 18 to 54 years of age and those over 55 years old. Although admittedly the first grouping is broad and we certainly don’t assume that a 19 year-old wireless user behaves like a 53 year-old user, the exercise is still useful to help demonstrate the clear differences that exist between younger and older Canadians cell phone users.

Generally, as would be expected, younger users are significantly more likely to use, access or subscribe to nearly all the various cell phone features and services. Point in case, they are over four times more likely to send or receive text messages, take pictures and download content. They are also early adopters of more recent wireless features such as listening to music and downloading music through their cell phones.

Each service is discussed in detail in the following sections.
Sending Text Messages

Among the 25% of cellular phone users who send or receive text messages, 18% say they send one text message in a typical day and 30% send about 2 to 5 messages per day. A total of 12% report sending 6 or more messages per day. On average, “texters” send three text messages in a typical day.

Canadian cellular phone users under the age of 35 (50%) are more likely than older users to send two or more text messages per day (37% for 35-54, and 15% for 55+).

Taking Pictures

Among the 15% of cellular phone users who take pictures with their cellular phones, one-third (33%) report taking on average one picture per week while over half (53%) report taking two or more pictures in an average week. On average, cellular phone users take four pictures per week.
Downloading Content

Among the 15% of cellular phone users who currently download content, such as ring-tones, wallpapers or games over their cellular phone, about four-in-ten (42%) download content once a week and 30% do so less frequently. On average, cellular phone users download content once per week.

Instant Messaging

Of the few respondents (6%) who currently use their cellular phone for instant messaging, about six-in-ten (62%) use it for this purpose either every day or a few times a week.
Sending Emails

Of the few (6%) who currently use their cellular phones to send or receive emails, about one-in-ten (11%) report sending one email per day and 40% do so less frequently. Almost a quarter (24%) report sending between 2 to 5 emails, and 13% indicate they send six or more emails per day. On average, cellular phone users send three emails in a day.

Checking for Information on the Internet

Of the few (4%) who currently check for information such as the weather, sport scores or stock info on the Internet using their cellular phone’s web browser, over half (56%) report doing so once a day. Another 17% check information two or more times a day. On average, cellular phone users check for information twice a day.
Sending Multi-Media Messages

Of the small portion (3%) of cellular phone users who currently send or receive multi-media messages such as pictures, sound clips or videos over their cellular phones, the majority (67%) report sending two or more multi-message per week. Another 15% send only one message per week. On average, cellular phone owners send five multi-media messages in a week.

In a typical week, how many multi-media messages do you SEND with your cellular phone?
(Base: Cellular phone users who currently send or receive multi-media messages over their cellular phone)

Listening to Music

Among the two percent of cellular phone users who listen to music over their cellular phones, two-thirds (65%) report doing so every day or a few times a week.
**Downloading Music**

Only two percent of cellular phone users report downloading music to their cellular phone. Almost four-in-ten (40%) indicate downloading one song per week. Over half (52%) download two or more songs to their cellular phone. On average, cellular phone users download six songs per week.

*In a typical week, how many songs do you download to your cellular phone?*
*(Base: Cellular phone users who currently download music to their cellular phone)*
Preferred Activities Over Wireless Phones

Respondents who own or have access to a wireless phone and those who intend to acquire a wireless phone in the next year were asked what services or activities other than voice calls they would like to do with their wireless phone. Results have been crossed by wireless users and wireless phone intenders to compare their responses. Results show the following:

- Sending or receiving text messages appears to be the preferred feature among both wireless users and wireless intenders (8% and 17% respectively).
- Sending or receiving emails is equally desired among both wireless users and wireless intenders (7% each).
- Taking pictures is the third preferred choice among wireless users, while it appears to be the second choice for wireless intenders (6% vs. 11%).
- Another attractive feature among “intenders” appears to be music downloading (9%).
- Over half of wireless users (55%) report existing wireless phone services are fine as they are and a quarter of wireless intenders (25%) feel voice calls would suffice.

If you had the choice, what services or activities other than voice calls would you like to do with your wireless phone?

(Base: Wireless users and wireless intenders)
Wireless Versus Traditional Telephone Service

This part of the study outlines the number of residential telephone lines in Canadian households, the actual extent of wireline replacement and the likelihood of replacing existing traditional telephone services with a wireless telephone service in the next year, and the frequency of wireless usage at home.

Number of Telephone Lines in the Household

Eight-in-ten respondents (82%) say there is only one telephone line in their home, while 12% report having two. Only 5% of respondents report having three or more telephone lines. This represents an important decrease in multiple line households compared to 2000 where 34% of households claimed subscribing to more than one traditional phone line. This significant decrease in the proportion of multiple-line households is likely attributable to growth in the residential adoption of high speed Internet service vis a vis dial-up services (negating the use of a separate line for households not wanting to block the main telephone line in order to access the Internet). The recent introduction of IP-based voice services by cable companies, VOIP companies and a few incumbent telephone companies may also be having an impact on the use of traditional phone lines. Certainly, the presence of cell-phone only homes would also have an impact on these results however due to the nature of the methodology used (this survey was administered over the telephone), cell-phone only homes would not have participated and therefore their impact on traditional phone services would not be captured in the results from this question. There remains however the possibility that households may have reduced the number of traditional lines because of increased use of wireless services in the home.
Likelihood of Replacing Wireline with Wireless

An ongoing metric of interest for both the wireline and the wireless industry is the extent to which households are likely to replace one or all of their traditional telephone lines with one or many wireless services. Respondents that indicated currently having access to a wireless phone and those expecting to have access to one in the next year (71% of all households) were asked how likely they would be to replace an existing traditional telephone service with a wireless telephone service in the next year.

Overall results show that 17% are likely to do so (6% ‘very likely’ and 11% ‘somewhat likely’), and the remaining 82% are not likely. These numbers are identical to those obtained in 1999 and 2000.

Examining the sub-groups reveals that respondents who indicate they are likely to acquire a wireless phone in the next year are more likely than existing wireless owners to replace a traditional phone service with a wireless telephone service in the next year (31% vs. 16%, respectively).
Additional analysis also reveals that younger wireless users and intenders are more likely to consider abandoning a traditional service for a wireless one within the next year.

How likely would you be to replace [one of] your existing traditional telephone service(s) with a wireless telephone service in the next year? (Base: Wireless users and wireless intenders)

Finally, among respondents who own or have access to a wireless phone, those who use their wireless phones for an hour or more in a typical week, are more likely than less frequent users to replace an existing traditional telephone service with a wireless phone (23% vs. 9% respectively).

How likely would you be to replace [one of] your existing traditional telephone service(s) with a wireless telephone service in the next year? (Base: Households with a wireless phone)
Cell-Phone Only Households in Canada

The natural extension to the analysis surrounding intentions to abandon a traditional telephone service with a wireless one is to estimate the actual proportion of Canadian households who have already done so. The following were considered in capturing this metric:

- One cannot estimate the proportion of cell-phone only households by using a traditional telephone survey methodology because cellular telephone numbers are not part of telephone number databases market research firms typically use nor are they captured through random digit dialing approaches.

- Therefore, to circumvent this difficulty, Decima resorted to its national online panel - the Decima eVox is a proprietary database of over 90,000 Canadian households who agree to complete online surveys from time to time. As part of an April omnibus study administered by Decima Research, we asked the following key question to 1,519 households having specified having access to a wireless phone:
  
  o *Do you have a wireless phone in addition to the traditional telephone line or is it a replacement of your traditional telephone line?*

- A word of caution in interpreting these results though. The notion of literally replacing a traditional telephone line with a wireless one is still a relatively new development across Canadian households and as such there is the possibility that some of these results may be overestimated. The overestimation could derive from the fact that some respondents may be interpreting “replacement of your traditional telephone line” as meaning they are using their wireless phone *instead* of their traditional landline rather than interpret it to mean that they’ve completely discontinued their wireline service.

The outcome from this exercise reveals that approximately **8% of households that own or access a wireless phone have in fact replaced their traditional telephone line.**

Additional analysis on this data reveals important sub-group trends which mirror in large part many of the sub-group findings uncovered around wireless user intentions to replace their wireline service. More specifically, results show that wireless users in Alberta and BC are more likely to have already replaced their wireline service compared to wireless users in other
parts of the country. Conversely, those least likely to have already done so are those in Atlantic Canada and those in Manitoba / Saskatchewan.

Furthermore, the likelihood of replacing the wireline service decreases with age. In other words, younger wireless users (18 to 34 years old) are much more likely to have already replaced their wireline service compared to their older counterparts. In fact, our data shows that about 1 in 5 wireless users between 18 and 34 have replaced their wireline service.

Knowing that approximately 64% of Canadian households own or access a wireless phone, we can then estimate that approximately 5% of all Canadian households have replaced their traditional telephone line with a wireless service (obtained by multiplying the overall wireless incidence of 64% by the substitution incidence of 8%). This outcome is actually consistent with recently released data from a residential telephone service survey conducted by Statistics Canada which showed that 4.8%, or 615,000 households have a cell phone exclusively (Source: *The Daily*, Wednesday April 5, 2006).
Results by region show that residents in Alberta and BC are at the forefront in terms of replacing their wireline service with a wireless one whereas growth in this area is relatively consistent in all other parts of the country.
Frequency of Wireless Usage at Home

Nearly half (49%) of respondents who own or have access to a wireless phone report up to 25% of their telephone talk-time at home is over their wireless phone, and another one-in-five report 26% or more. On the other hand, almost one-in-three (29%) indicate they don’t use their wireless phone while at home.

*On average, what percentage of your telephone talk-time at home is over a wireless phone? (Base: Households with a wireless phone)*

The likelihood of using a wireless phone for conversations when at home increases significantly among younger wireless phone users. As shown below, 29% of those 18 to 34 believe that over 26% of their telephone talk-time at home is over their wireless phone. This compares to only 15% and 12% for those in older age groups.

*On average, what percentage of your telephone talk-time at home is over a wireless phone? (Base: Households with a wireless phone)*
Attitudes Towards Wireless Services

In order to capture Canadians’ attitudes and perceptions towards wireless services, all respondents were asked to rate their level of agreement with five statements about wireless communications. The highlights of these questions are outlined below:

♦ A majority of respondents (87%) indicate they feel safer having access (95% wireless users) or would feel safer if they had access (73% non-wireless users) to a wireless phone for emergencies. This perception has decreased by 5-percentage points since 1999.

♦ Eight in ten (79%) report feeling comfortable with technologies such as wireless communications devices; less so than in the past. In previous studies people tended to feel more comfortable with wireless communications devices (1999: 83%, 1998: 87%).

♦ Similarly, in 2006 fewer people (80%) feel that wireless communications devices are easy to use, compared to 1999 and 1997 (87%) and in 1998 (91%).

♦ Slightly over half of respondents (53%) say that wireless communications are good value for money. This attitude has improved compared to 1999 (49%) and is similar to 1998 (52%).

♦ There is an increasing understanding among Canadians that private calls on wireless phones are safe from being overheard by eavesdroppers. The proportion who agree with this has increased steadily since 1997 – from 20% to today’s 32%.
Appendix
Introduction / Household Wireless Profile

Hello, my name is _______________. I'm phoning from Decima Research, a national market research company. We're conducting a survey about telecommunications services used by Canadian households. I would like to ask you a few questions. The survey will take about 10 minutes. Do you have time to answer some questions now?

Are you 18 years of age or older? IF NO: May I please speak to the individual in your household 18 years of age or older who will next be celebrating their birthday?

1  Yes, now is good
2  No, not now => SCHEDULE CALLBACK
9  No, immediate refusal => ATTEMPT CONVERSION, OTHERWISE TERMINATE

1. Wireless phones, also known as cellular phones are telephones that are either installed in cars or carried from place to place (not cordless phones). Some people also use a PDA such as a Blackberry as a wireless phone. Do you or someone else in your household own or have access to a wireless phone?

1  Yes
2  No => Q29
9  DK => Q29

2. How many people in your household are from 8 to 14 years of age?

0  Zero
1  One
2  Two
3  Three
4  Four or more
9  Don’t know

3. SKIP IF Q2=ZERO OR DK  How many of the people in this age group, if any, have a wireless phone that they're the main user of?

0  Zero
1  One
2  Two
3  Three
4  Four or more
9  Don’t know
REPEAT Q2-Q3 FOR: 15-19, 20-34, 35-54 AND 55 OR MORE YEARS OF AGE.

SKIP Q4 IF:

- ONLY ONE PERSON LIVES IN THE HOUSEHOLD (BASED ON SUM OF Q2)
- ONLY 8 TO 14 YEARS OLDS HAVE ACCESS TO A CELL PHONE IN THE HOUSEHOLD

4. Which of the following best describes those who have access to a wireless phone in your household?

1. You are the only one in the household who owns or has access to a wireless phone
2. Someone else in the household owns or has access to a wireless phone but you don’t
3. You and someone else in the household own or have access to a wireless phone
9. Don’t know

ASK Q4a AND Q5a IF (Q4=1 OR 3) OR (ONLY ONE PERSON LIVES IN THE HOUSEHOLD)

4a. Which of the following best describes how you have access to a wireless phone?
   (READ LIST - ALLOW MULTIPLE RESPONSES.)

1. You personally own your wireless phone
2. You pay for it through a home business or through self-employment
3. It is provided to you by your employer
9. Don’t know

5a. To which type of wireless phone do you personally have access: is it a cellular phone, a PDA such as a Blackberry or both?
   (READ LIST IF NECESSARY. ALLOW MULTIPLE RESPONSES.)

1. Cellular phone
2. PDA such as a Blackberry
9. Don’t know
ASK Q4b AND Q5b IF (Q4=2 OR 3) OR (ONLY 8 TO 14 YEARS OLDS HAVE ACCESS TO A CELL PHONE IN THE HOUSEHOLD)

4b. Which of the following best describes how the other people in your household have access to a wireless phone? (READ LIST - ALLOW MULTIPLE RESPONSES.)

1. It is personally owned
2. It is paid for through a home business or through self-employment
3. It is provided by an employer
9. Don’t know

5b. To which type(s) of wireless phone do others have access in your household, is it a cellular phone, a PDA such as a Blackberry or both? (READ LIST IF NECESSARY. ALLOW MULTIPLE RESPONSES.)

1. Cellular phone
2. PDA such as a Blackberry
9. Don’t know

NOTE REGARDING SKIPS THROUGHOUT THE SURVEY:
- All questions requiring personal use / access to a wireless phone (Q8, Q9, Q10 to Q28, Q34 and Q35), will now be screened based on the following criteria: Q4=1, 3 or missing value because only one person lives in the household.
- For the Q10 to Q28 series which requires that the respondent use a cellular phone specifically, the criteria is now: (Q4=1, 3 or because only one person lives in the household) AND (Q5a=1)

6. And, how long have you owned or had access to a wireless phone? (READ LIST IF NECESSARY.)

1. Less than 1 year
2. 1 to less than 2 years
3. 2 to less than 3 years
4. 3 to less than 4 years
5. 4 to less than 5 years
6. 5 to less than 6 years
7. 6 years or more
9. Don’t know
ASK IF HAS MORE THAN ONE WIRELESS PHONE IN HOUSEHOLD (SUM OF Q3 SERIES >1)

7. And, how long have you owned or had access to more than one wireless phone? (READ LIST IF NECESSARY.)

1. Less than 1 year
2. 1 to less than 2 years
3. 2 to less than 3 years
4. 3 to less than 4 years
5. 4 to less than 5 years
6. 5 to less than 6 years
7. 6 years or more
9. Don’t know

ASK Q8 AND Q9 IF RESPONDENT OWNS OR HAS ACCESS TO A WIRELESS PHONE Q4=1, 3 OR MISSING VALUE BECAUSE ONLY ONE PERSON LIVES IN THE HOUSEHOLD.

8. People use their wireless phone for personal and business calls. During a typical week, what percentage of the calls on your wireless phone is for personal purposes?

________ % of calls on wireless phone per week that are personal
999 Don’t know

9. Have you ever used the wireless phone to help you out of an emergency situation?

1. Yes
2. No
9. Don’t know
Cellular Phone Features Usage

ASK Q10 THROUGH Q28 IF RESPONDENT OWNS OR HAS ACCESS TO A CELLULAR PHONE (Q5a=1 AND Q4=1, 3 OR BECAUSE ONE PERSON LIVES IN THE HOUSEHOLD)

Now I would like to ask you a few questions about some of the activities that you would do over your cellular phone.

10. Do you currently send or receive text messages, also known as SMS over your cellular phone? These are different from emails.

   1  Yes
   2  No  => Q12
   9  Don’t know  => Q12

11. In a typical day, how many text messages do you SEND over your cellular phone?

   ________ number of text messages sent per day
   99999    Don’t Know

12. Do you currently take pictures with your cellular phone?

   1  Yes
   2  No  => Q14
   9  Don’t know  => Q14

13. In an average week, how many pictures do you take with your cellular phone?

   ________ number of pictures taken per week
   99999    Don’t Know

14. Do you currently send or receive multi-media messages such as pictures, sound clips or videos over your cellular phone?

   1  Yes
   2  No  => Q16
   8  Don’t know  => Q16
15. In a typical week, how many multi-media messages do you SEND with your cellular phone?
   ________ number of multi-media messages sent per week
   99999    Don't Know

16. Do you currently download content such as ring-tones, wallpapers or games over your cellular phone?
   
   1   Yes
   2   No     => Q18
   9   Don't know  => Q18

17. In a typical week, how many times do you download content to your cellular phone?
   ________ number of times content downloaded per week
   99999    Don't Know

18. Do you currently download music to your cellular phone?
   
   1   Yes
   2   No     => Q20
   9   Don't know  => Q20

19. In a typical week, how many songs do you download to your cellular phone?
   ________ number of songs downloaded per week
   99999    Don't Know

20. Do you currently listen to music such as MP3 files or the radio over your cellular phone?
   
   1   Yes
   2   No     => Q22
   9   Don't know  => Q22

21. On average, how often do you listen to music over your cellular phone? (READ LIST)
   
   1   Every day
   2   A few times a week
   3   Once a week
   4   A few times a month
   9   Don't know
22. Do you currently check for information such as the weather, sport scores or stock info on the Internet using your cellular phone’s web browser?

1  Yes
2  No  => Q24
9  Don’t know  => Q24

23. In a typical day, how many times do you check information on the Internet using your cellular phone’s web browser?

_________ number of times info checked per day
99999  Don’t Know

24. Do you currently send or receive emails over your cellular phone?

1  Yes
2  No  => Q26
9  Don’t know  => Q26

25. In a typical day, how many emails do you SEND over your cellular phone?

_________ number of emails sent per day
99999  Don’t Know

26. Do you currently use your cellular phone for instant messaging?

1  Yes
2  No  => Q28
9  Don’t know  => Q28

27. On average, how often do you use your cellular phone for instant messaging?
(READ LIST)

1  Every day
2  A few times a week
3  Once a week
4  A few times a month
9  Don’t know
28. Does your cellular phone function as a Push-to-Talk service? A Push-to-Talk service, also known as PTT, is a wireless service that works like a walkie-talkie.

1 Yes  
2 No  
9 Don’t know

NON-WIRELESS USERS ONLY (Q1=2, 9), OTHERS SKIP TO Q30

29. And, how likely is it that you or someone else in your household will acquire a wireless phone within the next year? Is it very likely, somewhat likely, not very likely, or not likely at all?

1 Very likely  
2 Somewhat likely  
3 Not very likely => Q31  
4 Not likely at all => Q31  
9 Don’t know => Q31

30. If you had the choice, what services or activities other than voice calls would you like to do with your wireless phone? (DO NOT READ LIST. ALLOW MULTIPLE RESPONSES.)

1 Send or receive text messages  
2 Send or receive multi-media messages (pictures, sound clips or videos)  
3 Send or receive emails  
4 Do instant messaging  
5 Take pictures  
6 Record video  
7 Download content (ring-tones, wallpapers or games)  
8 Download music  
9 Listen to music such as MP3 files or radio  
10 Playing video games / Play more games  
11 Watch TV  
12 Nothing else / Fine as is  
77 Other (Specify)  
99 Don’t know
Wireless Versus Wireline Usage

ASK ALL
31. How many residential telephone lines do you have in your household, that is traditional phone lines from which you can make calls and for which you pay a monthly fee to a phone company? (DO NOT READ LIST. ACCEPT ONE RESPONSE.)

1 One
2 Two
3 Three
4 Four or more
9 Don’t know

ASK Q32 ONLY IF RESPONDENT:
- INTENDS ON ACQUIRING A WIRELESS PHONE OR IS UNSURE (Q29=1 OR Q29=2 OR Q29=DK)
- OR RESPONDENT ALREADY HAS A WIRELESS PHONE (Q29=MISSING VALUE)

32. Rather than having a traditional telephone line at home, some people have begun using a cellular phone as their home phone. How likely would you be to replace (IF Q31>1, insert: “one of”) your existing traditional telephone service(s) with a wireless telephone service in the next year? (READ LIST)

1 Very likely
2 Somewhat likely
3 Not likely
9 Don’t know

ASK Q33 AND Q34 IF RESPONDENT OWNS OR HAS ACCESS TO A WIRELESS PHONE Q4=1, 3 OR MISSING VALUE BECAUSE ONLY ONE PERSON LIVES IN THE HOUSEHOLD.

33. In a typical week, for approximately how many minutes do you talk on your wireless phone in total?

________minutes per week on wireless phone
99999 Don’t Know
34. On average, what percentage of your telephone talk-time at home is over a wireless phone and what percentage is over a traditional home telephone line? (MUST ADD UP TO 100%)

________% of wireless
________% of traditional home telephone
99999       Don’t Know

Attitudes Towards Wireless Services

ASK ALL
I’m now going to read you some statements about wireless communications.

35. For each statement, I’d like you to tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree. **REPEAT SCALE AS NEEDED.**

<table>
<thead>
<tr>
<th>RANDOMIZE</th>
<th>Strongly Agree</th>
<th>Somewhat Agree</th>
<th>Somewhat Disagree</th>
<th>Strongly Disagree</th>
<th>DK/NR</th>
</tr>
</thead>
<tbody>
<tr>
<td>a) Wireless communications are good value for money.</td>
<td></td>
<td></td>
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<tr>
<td>b) Wireless communications devices are easy to use.</td>
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<tr>
<td>c) I feel comfortable with technologies such as wireless communications devices.</td>
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<tr>
<td>d) Private calls made on wireless phones are safe from being overheard by eavesdroppers.</td>
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</tr>
</tbody>
</table>
| e) **WIRELESS USERS:** I feel safer having access to a wireless phone for emergencies.  
   **NON-WIRELESS USERS:** I would feel safer if I had access to a wireless phone for emergencies |                |                |                   |                   |       |
Demographics

Now I would like to ask you a few more questions of a general nature to help us classify your responses.

A. How old were you on your last birthday?
   _____________ YEARS OLD
   98 or older 98
   REFUSE 99

B. What is the highest level of education that you have completed? Is it . . . (READ LIST)
   1 Some high school or less
   2 High school graduate
   3 Some college or technical school / CEGEP
   4 College or technical school / CEGEP graduate
   5 Some university
   6 University graduate
   7 or post-graduate studies (Masters/Doctoral)
   9 REFUSE

C. Which of the following categories best reflects the total household income before taxes in 2005, that is the total income earned by all those living in your home? Is it . . . (READ LIST)
   1 $40,000 or less
   2 Between $40,000 and $80,000 => QE
   3 or more than $80,000 => QF
   9 DK/Refused => END

D. Is it . . . (READ LIST)
   1 $20,000 or less => END
   2 Between $20,000 and $30,000 => END
   3 Or more than $30,000 => END
   9 DK/Refused => END
E. Is it...(READ LIST)

1. $50,000 or less => END
2. Between $50,000 and $60,000 => END
3. Or more than $60,000 => END
9. DK/Refused => END

F. Is it . . . (READ LIST)

1. $100,000 or less => END
2. or more than $100,000 => END
9. DK/Refused => END

THANK RESPONDENT AND LOG INTERVIEW AS A COMPLETION

G. DO NOT READ - RECORD GENDER OF RESPONDENT

1. Male
2. Female