



CTIA Mobile Wireless Service Survey

December 2014



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Methodology

Methodology

- TechnoMetrica conducted a CATI (Computer-Assisted Telephone Interview) survey among randomly selected households within the continental United States. In order to minimize non-response bias, TechnoMetrica interviewers conducted the interviews during weeknights and weekends.
- TechnoMetrica completed 1,280 interviews for the survey. Of the 1,280 interviews, 616 came from an RDD (Random Digit Dial) landline sample, while 664 came from a cell phone sample.
- At the 95% confidence level, the margin of error for respondents' overall sample is +/- 2.8 percentage points. The margin of error is higher for subgroups. For example, the subgroup consisting of the 71% of respondents who are very familiar or somewhat familiar with mobile wireless service that forms the core of the survey (n=800) has a margin of error of +/- 3.3 percentage points.
- The survey was conducted from December 1st to December 12th.

Executive Summary

Executive Summary

- **Wireless Choice:** When it comes to the choices made available to consumers regarding both mobile broadband providers and home Internet and cable providers, a majority of respondents (57%) believe that they have more choices among wireless providers..
- **Sponsored Data:** According to most consumers, when it comes to selecting mobile providers, “free” content is highly attractive: More than two-thirds of respondents (67%) report they are more likely to choose a provider if the company offered content that would not count against their monthly data allowance.
- **Start-up Opportunity:** Consumers are more likely to watch content if it does not count against their monthly data allowance. Nearly three-quarters of respondents (74%) say that they would be more likely to watch content from start-up companies if it does not count against their monthly limit.
- **Limit Government Role:** Just 6% think the federal government should decide what new options and services application providers and mobile providers make available. Most consumers believe that the government should have a limited role in the development of mobile broadband and application services.
 - Half of Americans say the government should intervene only where services and options become anti-competitive or anti-consumer, while over one-third (38%) say consumers should be allowed to decide for themselves which new services succeed or fail.

Executive Summary (cont.)

- Further, consumers are leery about the government's involvement in the evolution of Internet and mobile broadband networks, as nearly three-quarters (73%) think the government should be less involved in the process.
- **Recognize Competitive Reality:** Two-thirds of Americans (66%) agree that the government, if it were to regulate mobile services, should adopt rules that take into account today's mobile technologies and competitive landscape.
 - Meanwhile, less than one-third (29%) believe that the government should use the old rules designed for monopoly wired phone services.
- **Treat Wireless Differently:** A majority (78%) say government should treat mobile wireless services distinctly, or take into account the differences in mobile technology, services, and competitive conditions between wired and wireless services. Only 16% say mobile services ought to be treated exactly the same as wired services.
- **Manage For Quality:** When it comes to how service providers should manage the flow of traffic across their networks, consumers value quality of service over the equal treatment of traffic.
 - Nearly two-thirds (64%) say that wireless providers should be allowed to manage their network traffic in order to ensure the best service for their entire customer base, while less than a third (31%) believe that wireless providers should be required to treat all users and traffic the same.

Executive Summary (cont.)

- **Wireless Innovation:** According to a ranking of four major entities on the innovation they demonstrate, mobile wireless companies garnered the top spot, with 42% of consumers reporting that this type of entity was innovative.
 - In a distant second place were cable TV companies, at 17%. Water and electric utility companies, with a score of 13%, came in third.
 - Less than one in ten consumers (9%) rated the federal government as innovative.
- **Consumers Favor Prioritization:** A majority of consumers (63%) favor the prioritization of mobile network traffic.
 - Nearly two in five consumers (39%) believe that mobile networks and application providers should prioritize services that need higher quality or more real-time functionalities. Almost one-quarter (24%) say users seeking prioritization of services should pay additional fees.
 - Less than one-third (30%) hold that mobile networks and application providers should treat all content the same.

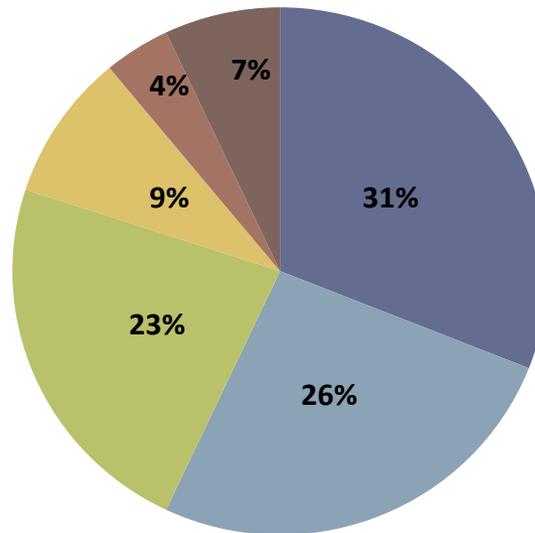
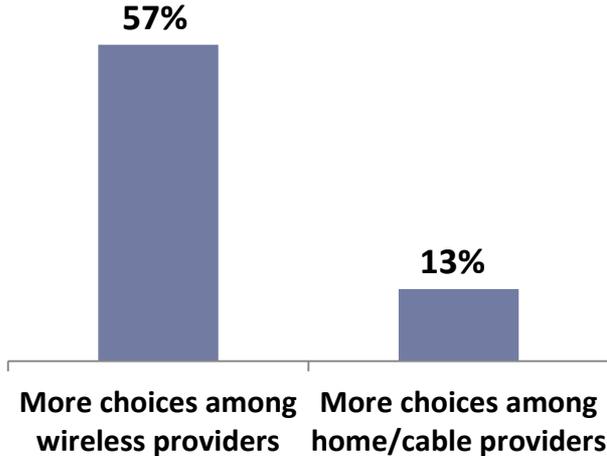
Detailed Findings

Most Consumers Report They Have More Choices Among Mobile Providers

A majority of respondents (57%) reported that they have more available choices among mobile wireless providers than home Internet or cable providers. Nearly one-third (31%) assert that they have significantly more choices among mobile providers, while 23% say that they have the same degree of choice.

(Base = Respondents Who are Familiar with Mobile Wireless Service: 800)

Overall



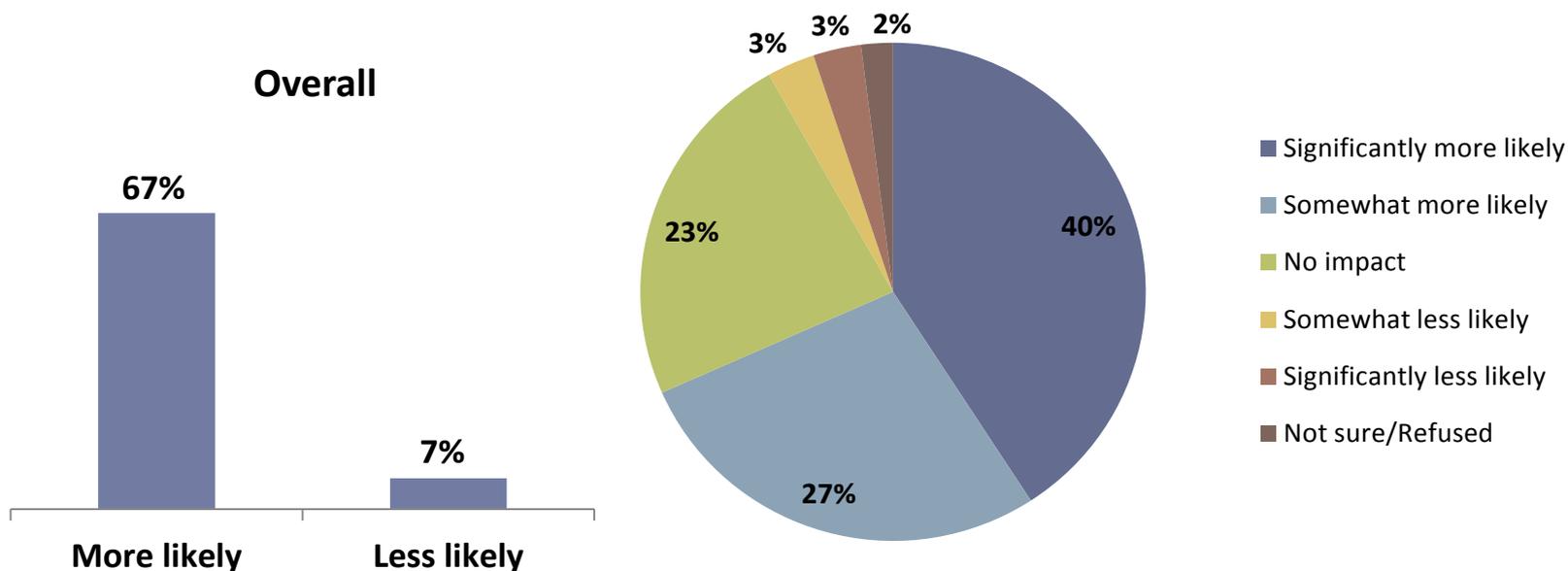
- Have significantly more choices amongst mobile wireless providers
- Have somewhat more choice amongst mobile wireless providers
- Have same degree of choice
- Have somewhat more choice amongst home Internet or cable providers
- Have significantly more choice amongst home Internet or cable providers
- Not sure/Refused

Q2. Next, thinking of the CHOICES of service providers available in your area, how would you compare the providers of mobile wireless to home Internet or cable providers?

Consumers Say Availability of Free Content Has High Impact on Selection of Mobile Service Providers

More than two-thirds of Americans (67%) say they are more likely to select a provider if the company offered content that would not count against their monthly data allowance.

(Base = Respondents Who are Familiar with Mobile Wireless Service: 800)

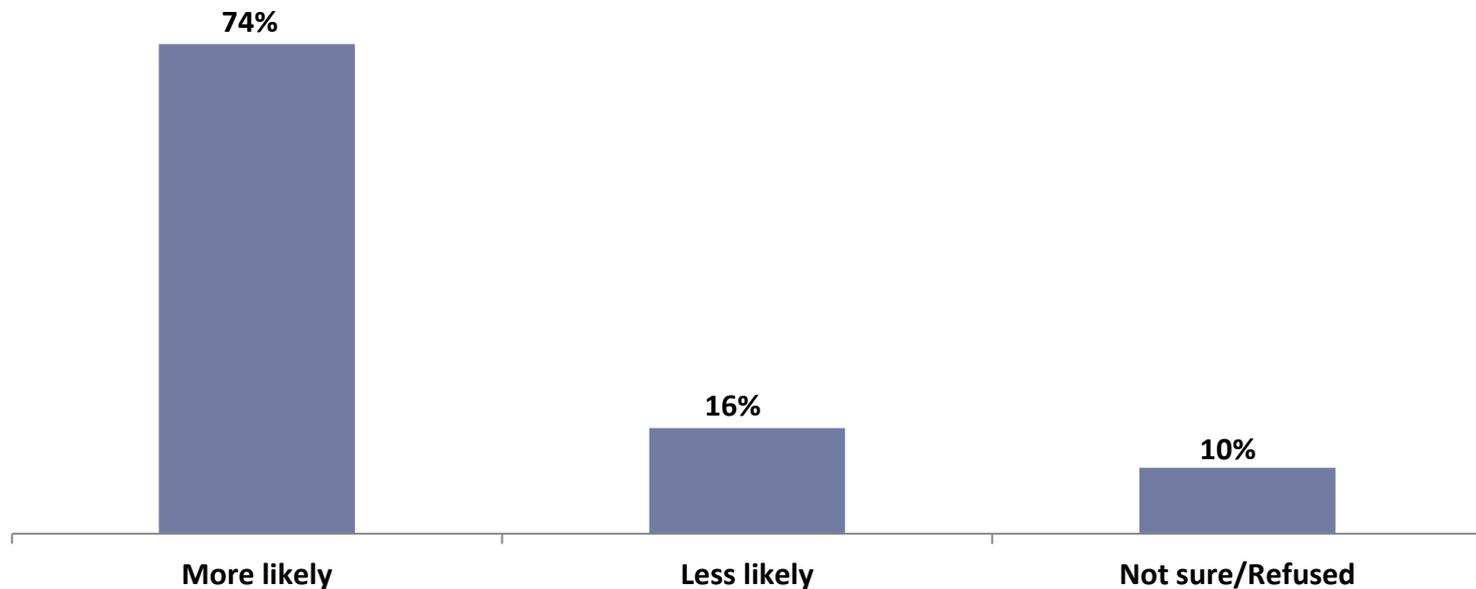


Q3. If providers and application companies were to work together and develop offers for free content, such as music or videos, that would not count against your monthly limit, how would your selection of mobile providers be impacted?

Consumers More Likely To Try New Providers' Offerings If They Do Not Count Against Monthly Data Allowance

Nearly three-quarters of respondents (74%) report that they would be more likely to watch videos offered by a new provider if the content did not count against their monthly limit.

(Base = Respondents Who are Familiar with Mobile Wireless Service: 800)

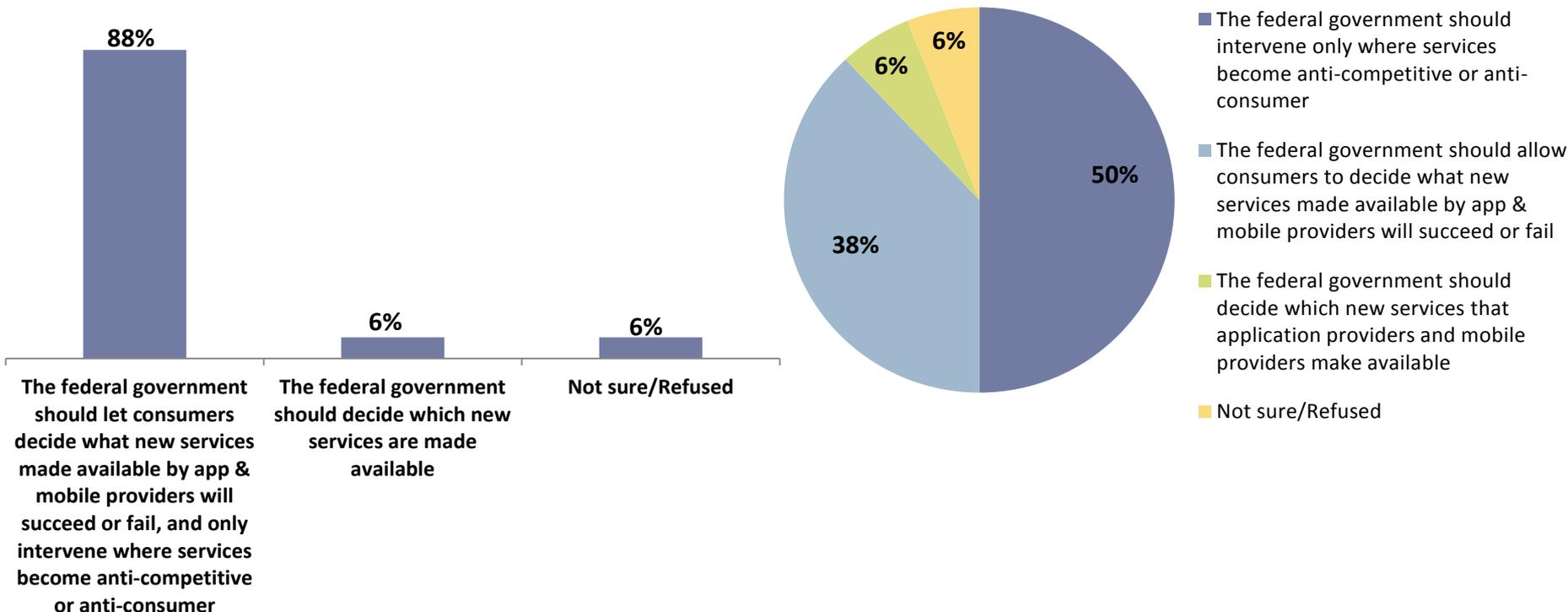


Q4. Next, assume a new video provider aspiring to be the next YouTube worked with your mobile service provider so that watching their videos would not count against your data allowance. Does the fact that watching their videos would not count against your data allowance make you more likely or less likely to try out their videos?

Consumers Back Consumer Choice and Support Government Intervention Only If Services Become Anti-Competitive

Almost 9 out of 10 Americans (88%) support a very limited government role in the introduction of new services by mobile providers and application developers.

(Base = Respondents Who are Familiar with Mobile Wireless Service: 800)

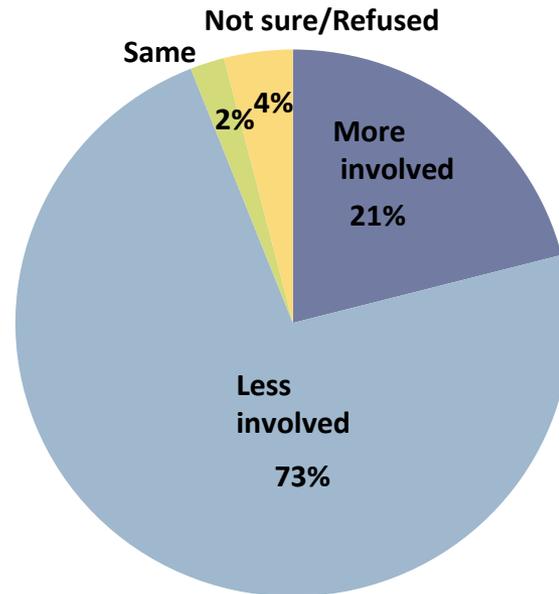


Q5. Many new options and services from mobile broadband providers and application developers, such as music streaming and remote health monitoring, are currently under development. Generally speaking, which of the following statements BEST describes your opinion of the role the government should play regarding the development of services?

Government Should Be Less Involved in Evolution of Mobile Broadband and Internet Networks

While about one in five believe that the government should be more involved in the evolution of Internet and mobile broadband networks, nearly three-quarters (73%) say the government ought to be less involved in the process.

(Base = Respondents Who are Familiar with Mobile Wireless Service: 800)

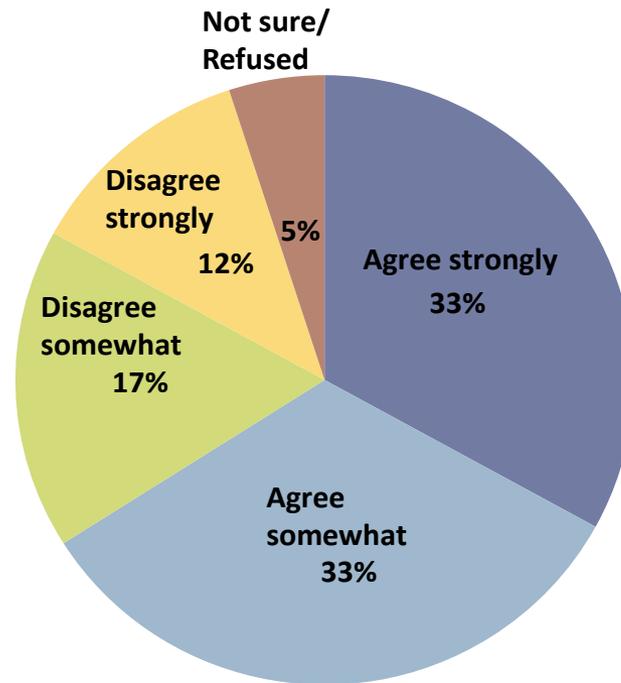


Q6. Generally speaking, when it comes to how the Internet and mobile broadband networks evolve, do you think the U.S. government should be ...more involved, less involved, the same?

Wireless Services and the Role of Government: Consumers Prefer New Rules Over Old Monopoly Regulations

Two-thirds of respondents (66%) agree that the government, if it were to regulate mobile services, should apply rules that take into account today's technologies and competitive landscape.

(Base = Respondents Who are Familiar with Mobile Wireless Service: 800)

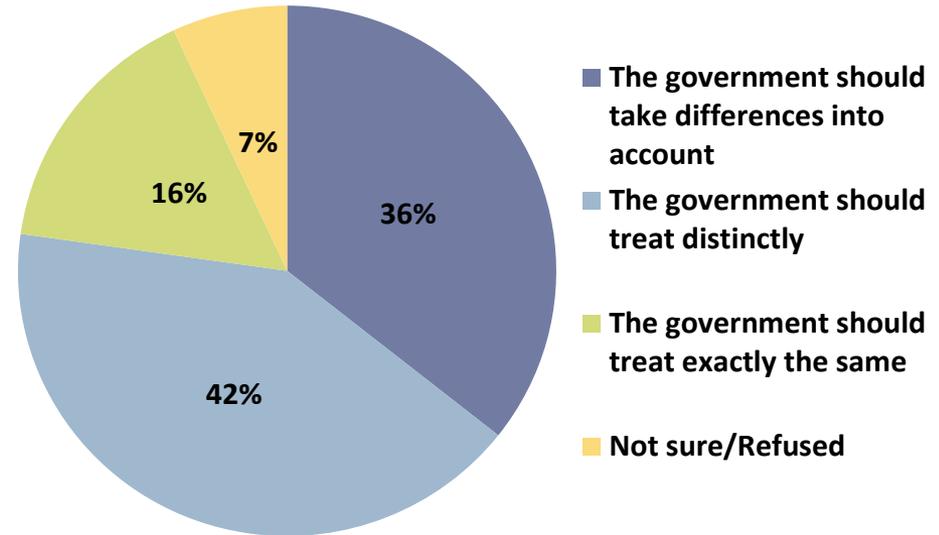
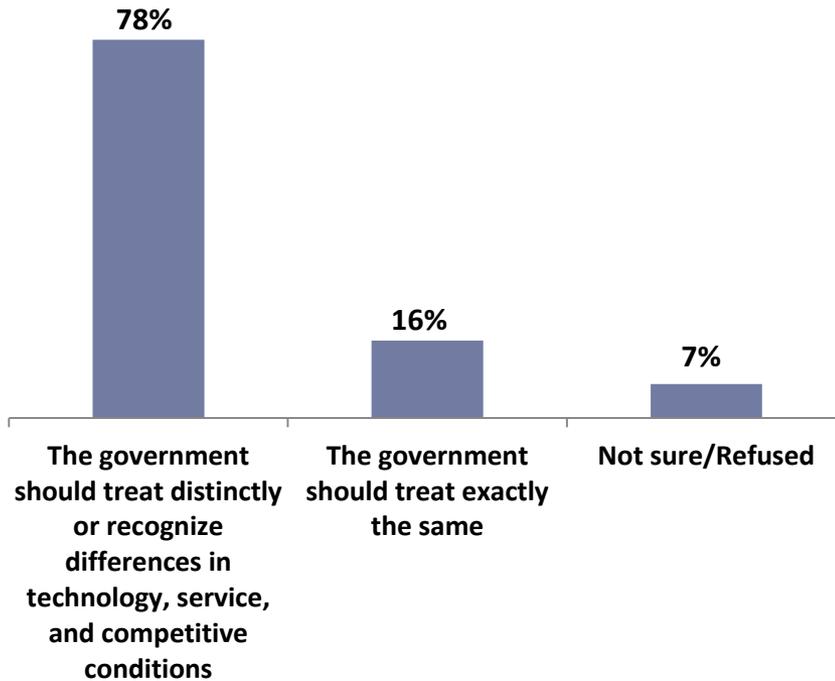


Q10. Please tell me the extent to which you agree or disagree with the following statement: If the government were to regulate services like Smartphone and 4G mobile services, it should use the rules that take into account today's technologies and competitive landscape rather than use the old rules designed to deal with monopoly wired phone services.

Government Should Treat Mobile Wireless Distinctly or Take Into Account Differences in Technology, Services, & Competitive Conditions

A majority (78%) say the government should treat mobile wireless distinctly, or take into account the differences in mobile wireless technology, services, and competitive conditions. Only 16% say mobile services ought to be treated exactly the same as wired services. Only 7% say mobile services ought to be treated exactly the same as wired services.

(Base = Respondents Who are Familiar with Mobile Wireless Service: 800)

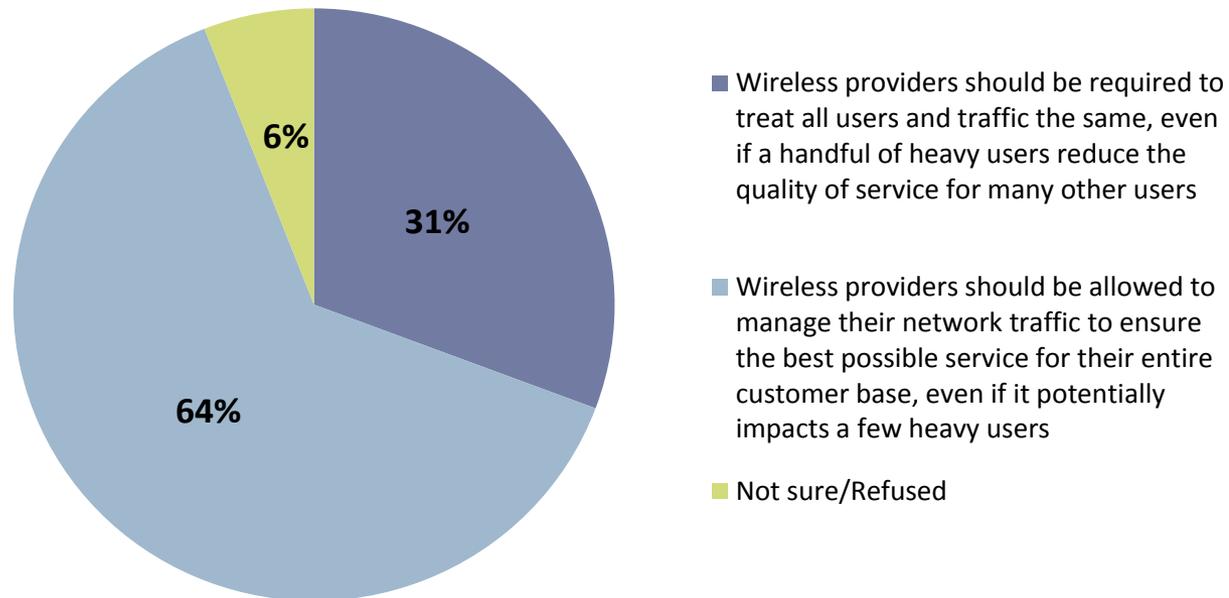


Q11. From the standpoint of how you use mobile wireless technology, recent innovations, and the available choice of providers, generally speaking, which of the following statements BEST describes how the government should treat mobile wireless services, as compared to cable and wired Internet services?

Consumers Reject Treating All Traffic the Same, Support Wireless Service Providers' Management of Network Traffic

Regarding how wireless providers should manage their network traffic, nearly two-thirds (64%) believe that providers should be able to manage traffic in order to ensure the best service for all customers.

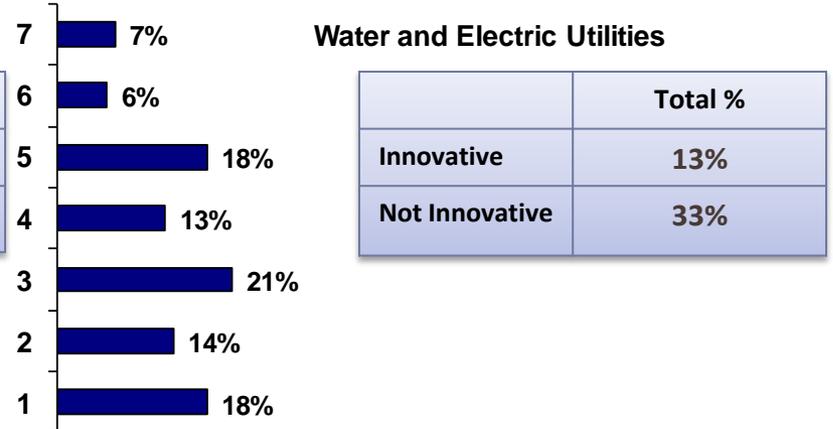
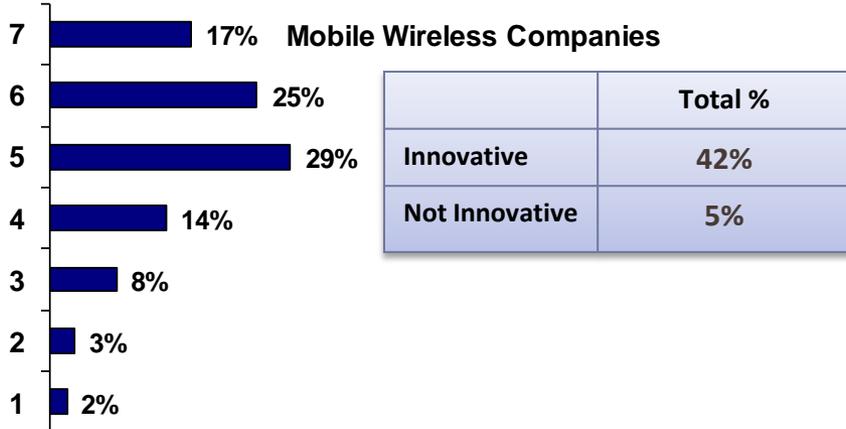
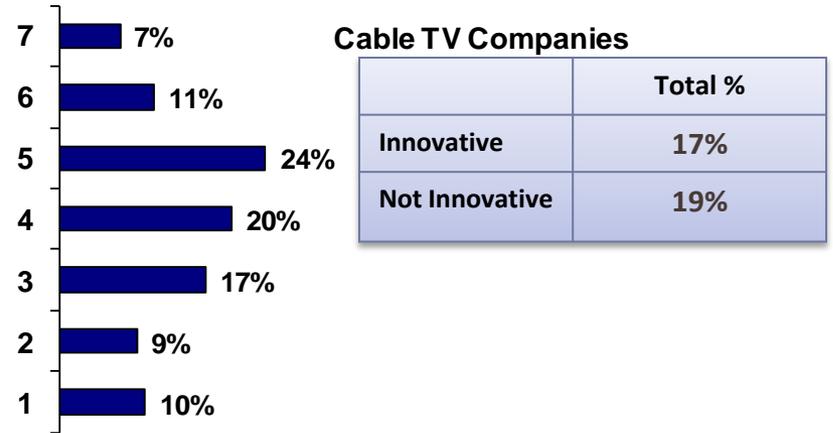
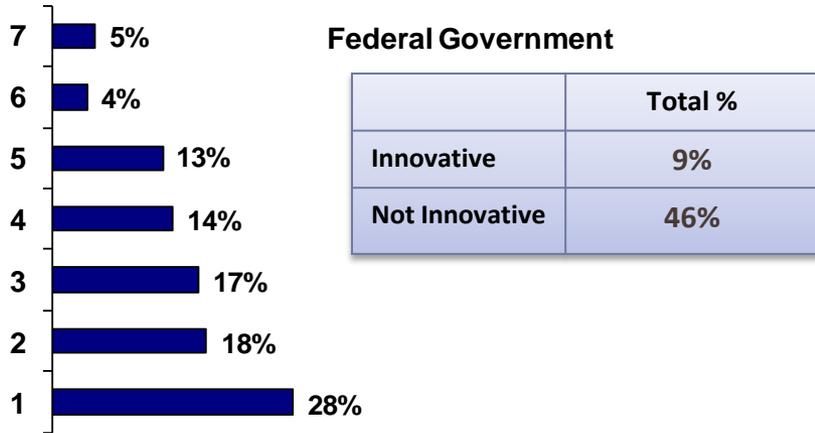
(Base = Respondents Who are Familiar with Mobile Wireless Service: 800)



Q7. All users of a wireless provider's network typically share a large network. A single heavy user or a data intensive application near you can significantly worsen the quality of service you get. Which of the following statements BEST describes your point of view on this issue?

Consumers Rate Wireless Most Innovative Industry in Survey

According to consumers, mobile wireless companies were the most innovative of the four tested entities. Around two in five (42%) rated wireless companies as innovative, followed by 17% for cable companies, 13% for water and electric utilities, and 9% for the federal government. *(Base = Respondents Who are Familiar with Mobile Wireless Service: 800)*

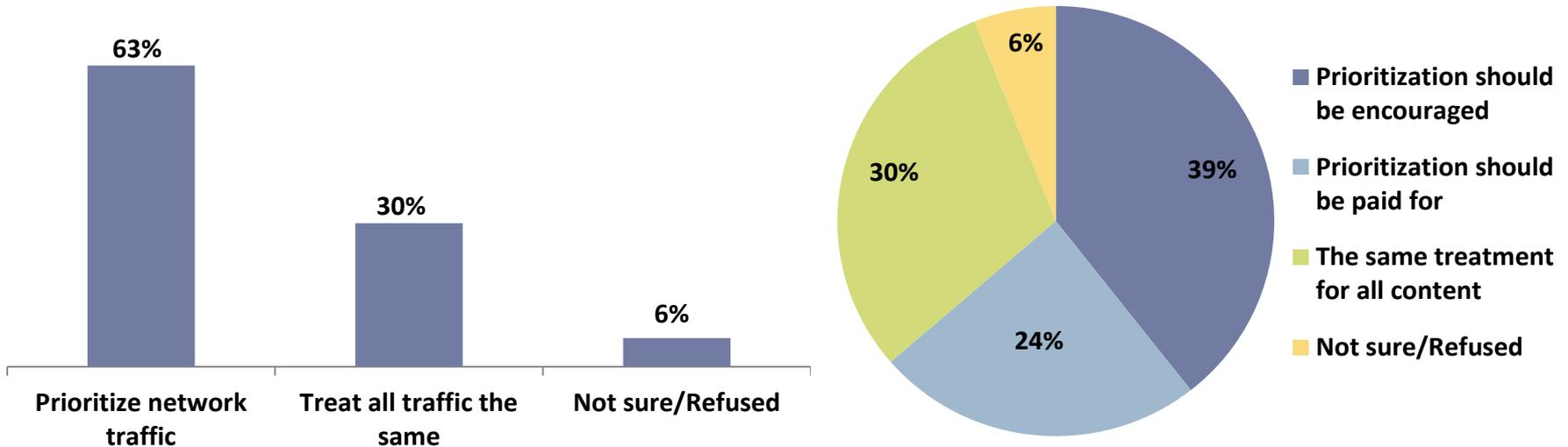


Q8A-D. Thinking of innovation, meaning the development of cool or creative new products and services, please tell me how you would rate the following entities. We will use a scale from 1 to 7, where 1 is Not At All Innovative and 7 is Extremely Innovative?

Consumers Prefer Traffic To Be Prioritized

A majority of Americans (63%) favor prioritization. Nearly two in five consumers (39%) believe that mobile networks and application providers should prioritize services that need higher quality or more real-time functionalities. Another 24% say users seeking prioritization of services should pay additional fees.

(Base = Respondents Who are Familiar with Mobile Wireless Service: 800)



Q9. Should mobile networks and application providers give the exact same priority to tweets and music videos as new critical applications, like health monitoring and connected car services? Which of the following statements best describes your opinion on this topic?

Demographics

Demographics

Age

Range	Overall	Familiar	Not Familiar
<i>Sample</i>	1,280	800	472
18-24	6%	7%	4%
25-34	14%	17%	9%
35-44	20%	25%	9%
45-54	17%	18%	16%
55-64	21%	21%	22%
65+	20%	12%	38%

Gender

Gender	Overall	Familiar	Not Familiar
<i>Sample</i>	1,280	800	472
Male	48%	50%	45%
Female	52%	50%	55%

Household Income

Income Level	Overall	Familiar	Not Familiar
<i>Sample</i>	1,280	800	472
Under \$20k	9%	7%	4%
Between \$20k and \$30k	9%	8%	9%
Between \$30k and \$40k	10%	10%	9%
Between \$40k and \$50k	9%	9%	16%
Between \$50k and \$75k	18%	19%	22%
Between \$75k and \$100k	11%	11%	38%
Over \$100k	19%	22%	
Not sure/refused	14%	13%	

Demographics

Education

Level of Education	Overall	Familiar	Not Familiar
<i>Sample</i>	1,280	800	472
Some high school	3%	2%	5%
High school graduate	19%	16%	27%
Some college	23%	23%	23%
College graduate	31%	33%	27%
Some graduate courses	3%	3%	2%
Graduate/ Professional degree	19%	20%	14%
Not sure/refused	3%	2%	2%

Race/Ethnicity

Race	Overall	Familiar	Not Familiar
<i>Sample</i>	1,280	800	472
White Non-Hispanic	66%	66%	4%
Black Non-Hispanic	13%	13%	9%
Hispanic	11%	11%	9%
Asian	2%	3%	16%
Native American	2%	2%	22%
Other	3%	4%	38%
Not sure/Refused	3%	2%	