FLORIDA PUBLIC SERVICE COMMISSION

# Consumer Survey Results: July - December 2005

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# Consumer Survey Results

The Florida Public Service Commission (Commission) has gathered a variety of consumer survey information since mid-1997. During that time, responsibility for the interpretation of the data has been in several divisions within the Commission. Currently, the Office of Standards Control and Reporting receives the monthly updates, prepares a monthly report of survey results, and distributes those results to the technical divisions. After topic areas of interest are identified and survey questions are developed, the University of Florida's Bureau of Economic and Business Research (BEBR), as the sampling agent, conducts the actual monthly survey. This report presents results for telecommunications and Internet-related topics and was compiled and analyzed by staff in the Division of Competitive Markets and Enforcement.

The current survey questions primarily address telecommunications service offerings and competitive market development. The questions are designed to gather data on consumer preferences and buying patterns in the telecommunications market. Analysis of this data allows broad conclusions to be drawn regarding trends in consumer usage of telecommunication and information services. Understanding consumer preferences and market trends improves the ability of the Commission to promote a balanced policy for Florida consumers and utilities. The survey questions will continue to be modified in order to address current issues before the Commission.

This report presents results of the surveys conducted during the six-month period ending in December 2005. Results are compared by quarter in order to show emerging market trends. In some cases, where survey questions have been asked consistently over several years, longer trend analyses appear. Results from selected questions have also been compiled according to demographics and by regions of the state. The report highlights trends in:



# Statistical Methodology

BEBR employees conduct random-digit dialing telephone screening calls to reach end-users based on specified geographic locators. Each month, a minimum of 500 households are asked a series of questions, including those questions developed by PSC staff.

The data collected by BEBR is based solely on residential households responding to survey questions by way of landline telephones. The sample excludes households who are currently using wireless as their sole technology for telecommunications. The exclusion of these "wireless only" households limits the current survey's ability to measure some consumers' preferences for substituting wireless telephony for landline-based services. However, even with the exclusion of the wireless-only population, the monthly sample provides a reasonable representation in profiling Florida households about the consumption of public utility services.

BEBR conducts the survey according to the basic requirements of statistical randomness and weights the results to ensure that the data is representative of the population of each county in Florida. Moreover, statistical confidence improves each month as the aggregate sample size increases. However, as is the case in all surveys, the validity of the data is largely dependent on the accuracy of the respondents' answers.

## Report Highlights

Voice and data telecommunications, especially wireless and broadband, continue to captivate Florida consumers. Competition in the telecommunications industry has brought significant consumer benefits in the form of expanded provider choice, innovation in service offerings, and reduced prices for basic local telephone service. The major findings of this report show the following:

- Lifeline program awareness is highest for those respondents in the lowest income group and for those 71 years of age and older in the July to December 2005 period.

- Lifeline program awareness is highest for respondents served by Verizon at 24% when compared to other local exchange companies.

- Lifeline program awareness continues to be surprisingly low, 20% as of 4Q 2005, despite concerted efforts to promote the program.

- Approximately 28% of respondents subscribe only to basic local telecommunications service and do not subscribe to additional services.

- Subscribership to wireless telephone service continues to grow, reaching a peak of 71% in 3Q 2005.

- 40% of survey respondents use a wireless telephone to make long-distance calls.

- Internet penetration in Florida seems to have leveled off, ranging from 69% to 73% since 3Q 2004.

- Broadband penetration in Florida has almost doubled, from 24% in 1Q 2003 to 46% in 4Q 2005.

- Most respondents prefer bundled service offerings.

## Lifeline Awareness

Raising awareness and enrollment for the Lifeline and Link-Up assistance programs remains a Commission objective as pro-competitive deregulatory policies evolve for the telecommunications industry. Unfortunately, despite the efforts of the telecommunications industry, the Commission, other state agencies, and citizen action groups such as AARP, awareness among the general population of households continues to be relatively low. Figure 1, Lifeline Awareness in Florida, indicates that since 4Q 2003 (the first quarter that the survey tracked this information) awareness of the Lifeline program has ranged from a high of 27% in 1Q 2004 to a low of 19% in 1Q 2005. Most troubling is the drop off in the level of awareness beginning in 4Q 2004.

**Figure 1**

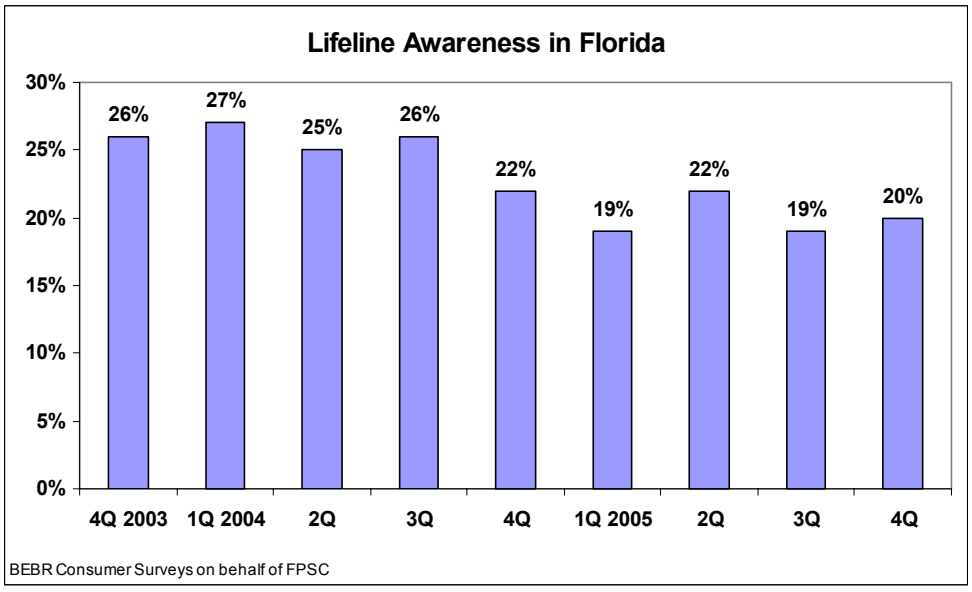
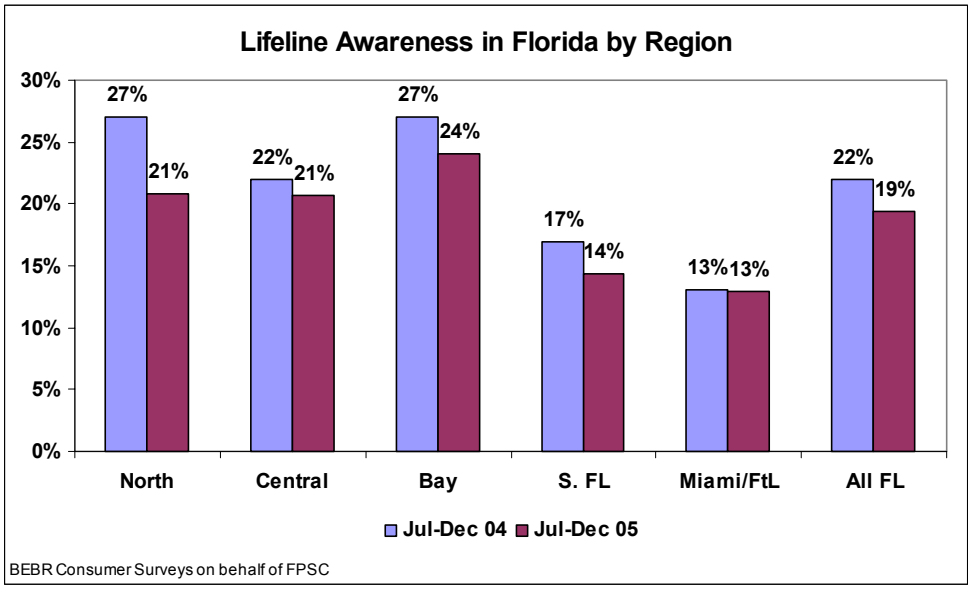


Figure 2, Lifeline Awareness in Florida by Region, shows awareness by region[1] of the state, comparing the July to December 2004 period to the July to December 2005 period. When compared region by region, the results are consistently lower in the most recent time period, but there are variations among regions that are consistent across both time periods. The Bay area had the highest level of awareness in both periods, while the Miami/Ft. Lauderdale region had the lowest level of awareness in each period. It is not clear what causes this wide variation between regions; however, Figure 3, Lifeline Awareness by Florida LEC, also shows regional variation.

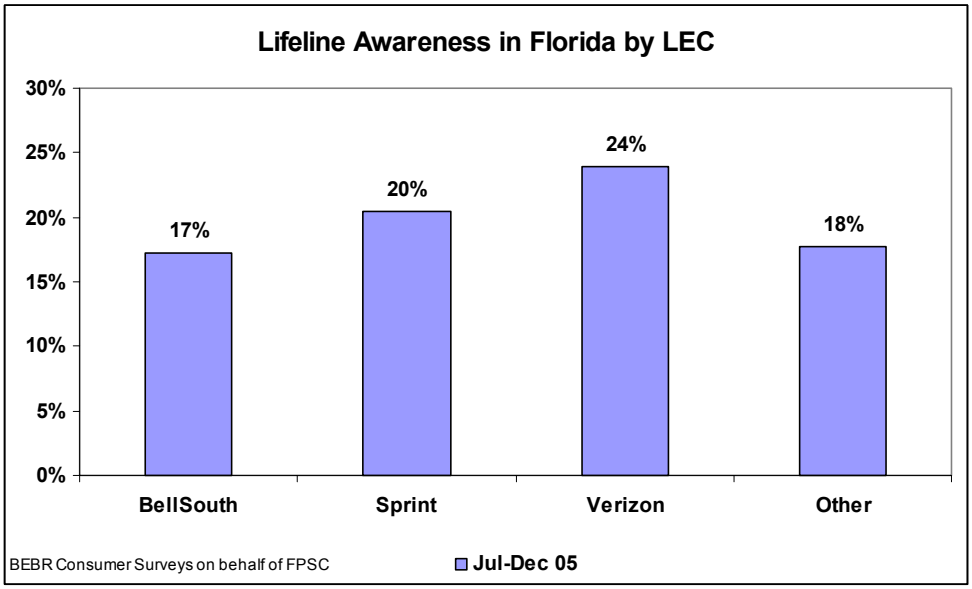
**Figure 2**




[1] The regions of the state are arbitrary groupings of contiguous counties as determined by PSC staff. A map of the designated regions appears as Attachment A to this report. The sample sizes across regions are not uniform. However, the size of the sample for each region is large enough to provide statistically valid values for each.

Figure 3, Lifeline Awareness in Florida by LEC (local exchange company), reveals that respondents who claim Verizon as their LEC have a higher level of Lifeline awareness than any other LEC. This result correlates with Figure 2 results for the Bay region, which has the highest level of awareness for any region from July - December 2005. Verizon is the primary LEC serving the Bay region. BellSouth accounts for approximately one-half of all residential access lines in Florida; Verizon and Sprint account for approximately 20% and 19% respectively; and the rural and competitive LECs account for slightly more than 10%.[2]

**Figure 3**




[2] *Report on the Status of Competition in the Telecommunications Industry as of May 31, 2005*, Florida Public Service Commission, Table 2 Florida CLEC Market Penetration by ILEC Service Territory as of May 31, 2005, p. 20.

Figure 4, Lifeline Awareness in Florida by Income, shows that the highest level of awareness occurs among those households whose income is less than $20,000. It is positive that the highest level of awareness occurs among the group most likely to be eligible to receive Lifeline benefits, though awareness is relatively low across all levels of income.

**Figure 4**

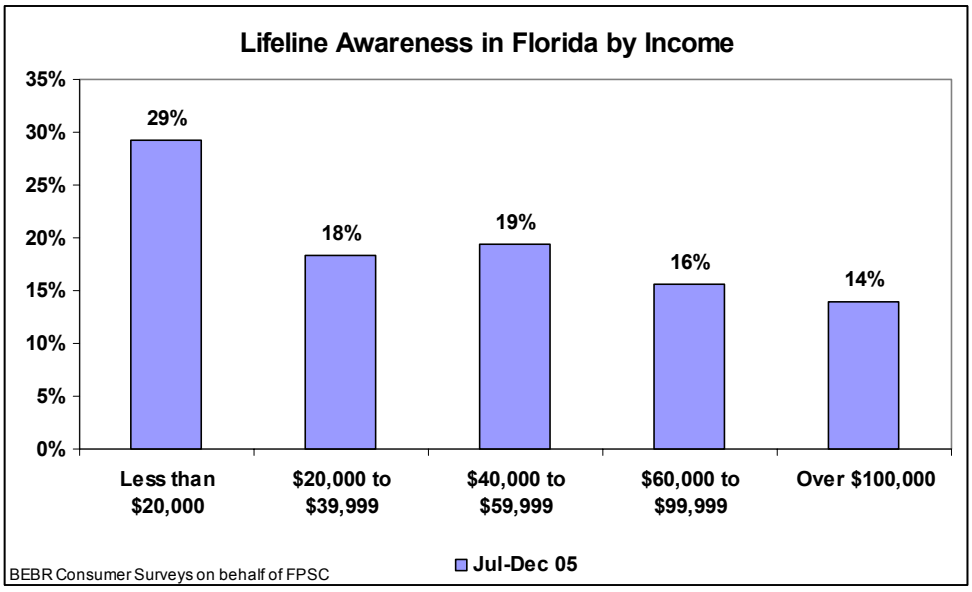



Figure 5, Lifeline Awareness in Florida by Age, shows a general decline in awareness across all but one age group when comparing the July to December 2004 period to the July to December 2005 period. The decline is most pronounced in the 61-70 years of age bracket.

**Figure 5**

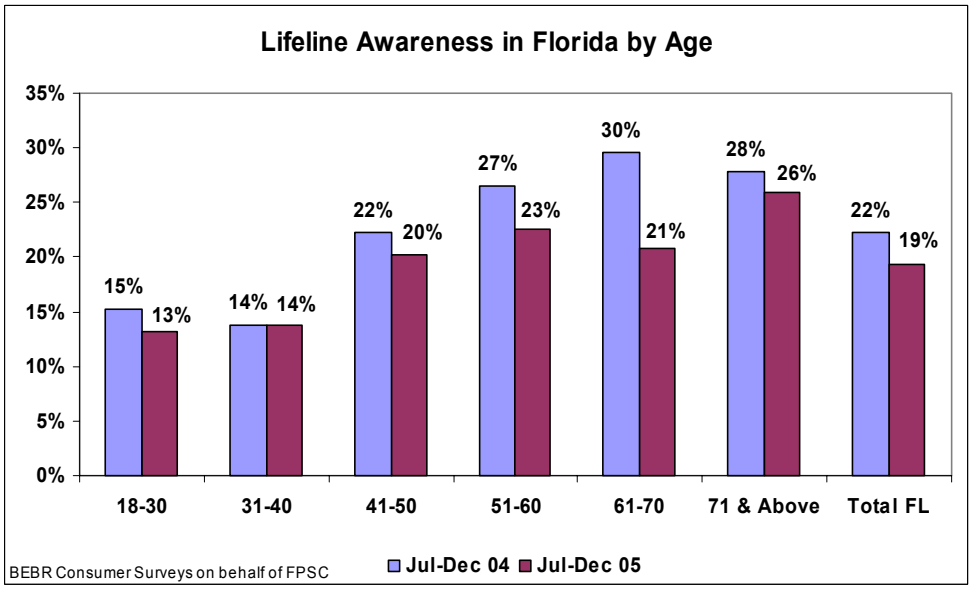
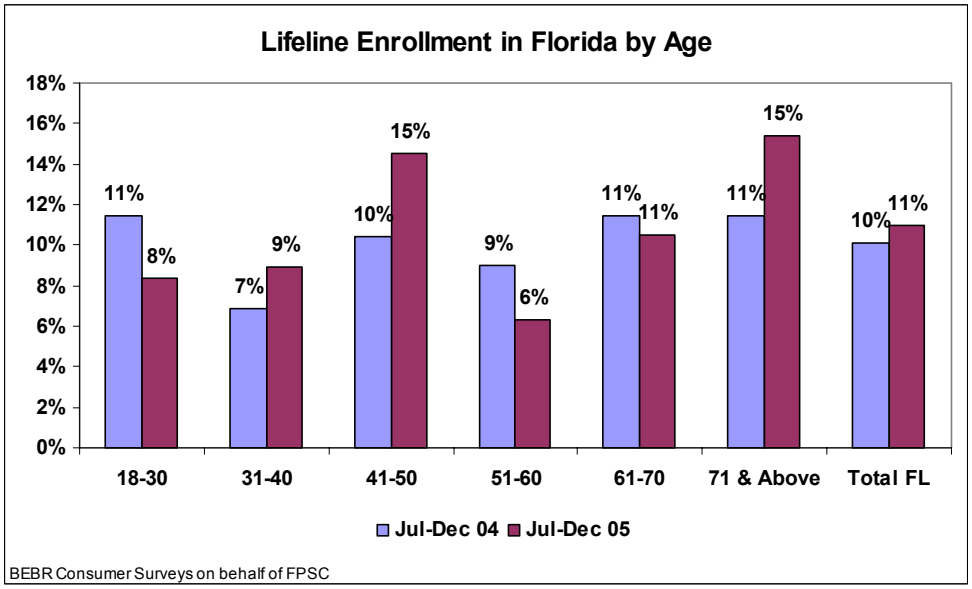


Figure 6, Lifeline Enrollment in Florida by Age, shows some surprising variation between the two survey periods shown. Enrollment was significantly higher in the most recent time period for those respondents in the 41-50 years of age bracket and the 71 years of age and above bracket. However, awareness for those age brackets, as reflected in Figure 5, was lower for the same time period.

**Figure 6**




On February 27, 2005, Dr. Mark Jamison, Director of the Public Utilities Research Center (PURC) at the University of Florida, presented results from a study entitled *Making Telephone Service Affordable for Low-Income Households: An Analysis of Lifeline and Link-Up Telephone Programs in Florida*. In his presentation, Dr. Jamison identified several characteristics of Lifeline eligible households in Florida. The age profile of the head of eligible households was particularly interesting:

- Approximately 73% of heads of households in Lifeline eligible households were 55 years of age and older.

- Approximately 27% of heads of households in Lifeline eligible households were 74 years of age and older.

Given the calculations that PURC reported on Lifeline eligibility, it is particularly interesting to look at the survey data for Lifeline awareness and enrollment by age. Figure 7, Lifeline Eligibility v. Lifeline Awareness in Florida -- > or < Age 55, compares the PURC eligibility results to the survey enrollment results. The graph shows that awareness of the Lifeline program is somewhat greater for respondents 55 and older at 23%, compared to 17% for those 54 years of age or below. Comparing these awareness results to the PURC study eligibility figures for the same age brackets suggests that there is greater awareness of Lifeline in the *eligible* households in the 18-54 age group than for *eligible* households in the 55 and above age group. Assuming both the PURC results and the survey results are accurate, one might conclude that promotional efforts targeted to those 55 years of age and older have the greatest chance to increase Lifeline enrollment.

**Figure 7**

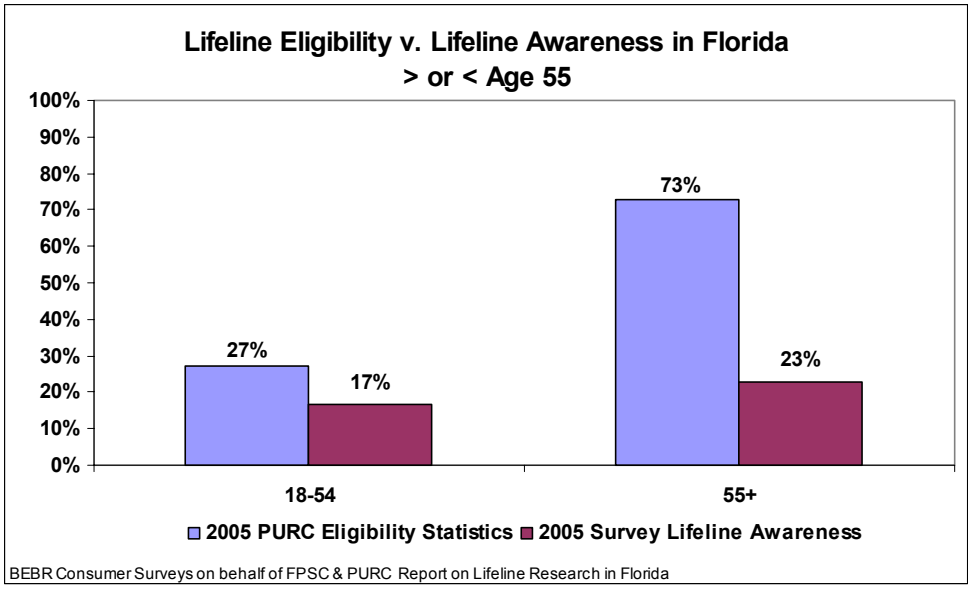
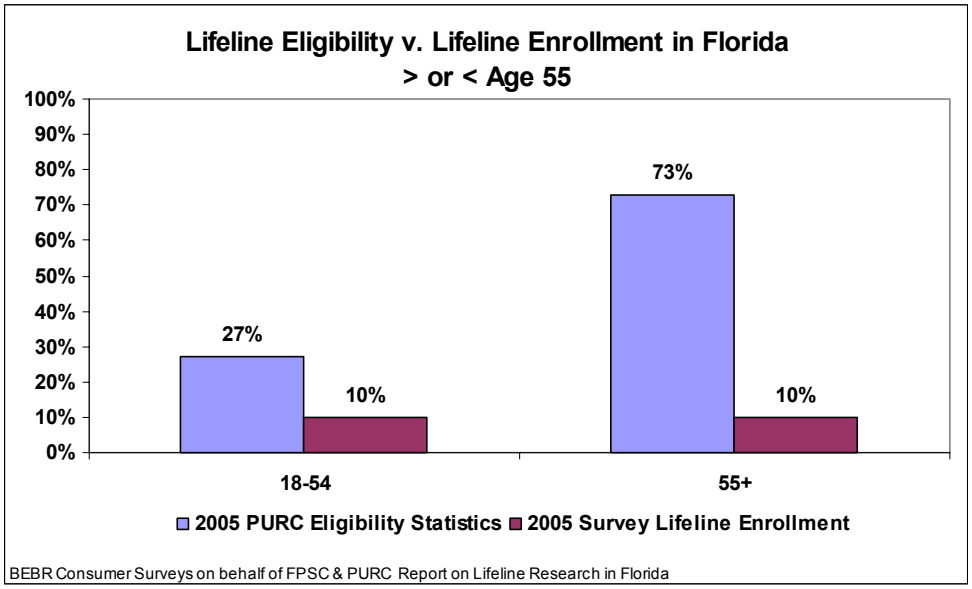


Figure 8, Lifeline Eligibility v. Lifeline Enrollment in Florida -- > or < Age 55, shows that, of the respondents that are aware of the Lifeline program, enrollment is evenly distributed at 10% among those above and below age 55. Comparing that result to the eligibility statistics presented by PURC reveals that there is a higher Lifeline enrollment rate for those individuals that are 18-54 years old.

**Figure 8**




When considering Figures 7 and 8, it should be emphasized that the PURC data and the survey data are drawn from different universes attempting to measure different aspects of Lifeline subscribership. The PURC study was designed to establish reliable estimates for Lifeline eligible households, while the PSC survey focuses on awareness and enrollment and is subject to the validity of individual responses. It is entirely possible that the PURC results and the survey results are both accurate. Since the subscribership of eligible households, in general, is relatively low, it is possible that enrollment is not evenly distributed across the age profile of eligible households. However, since the PURC analysis and the survey analysis are looking at different characteristics, it is difficult to know the extent of inconsistency between the data sets.

Figure 9, Respondents Knowledgeable of Lifeline Eligibility Criteria, shows that knowledge of Lifeline eligibility criteria is lower than general Lifeline awareness. This is not a surprising result since one would expect more people to have general knowledge of the program rather than more specific knowledge such as that of eligibility criteria.

**Figure 9**

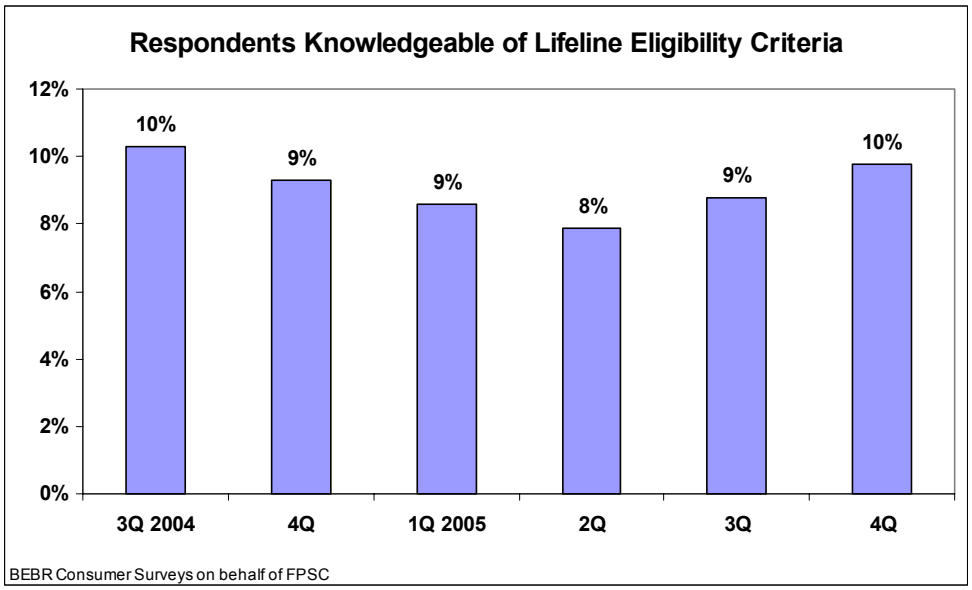
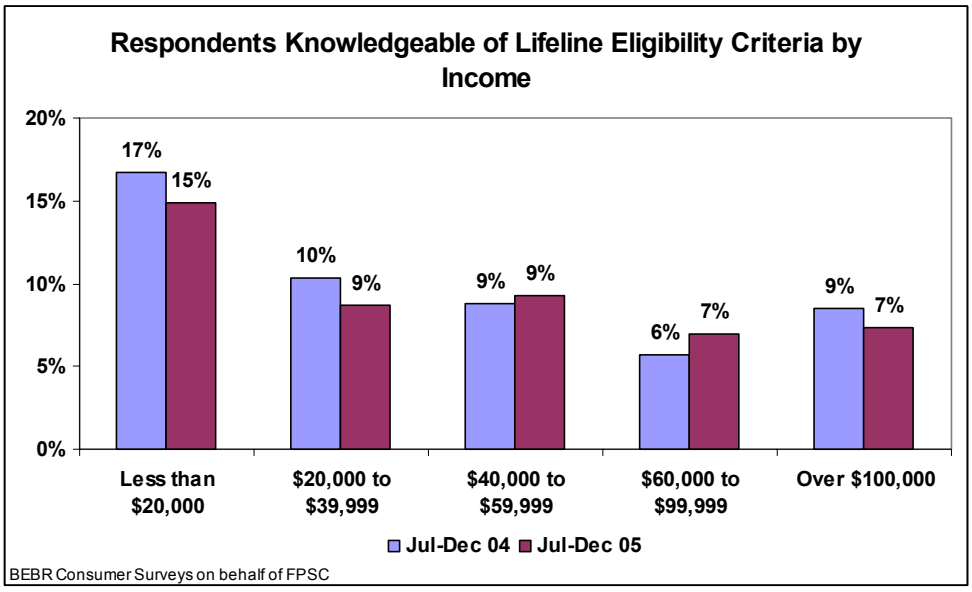



Figure 10, Respondents Knowledgeable of Lifeline Eligibility Criteria by Income, shows that those at the lowest income levels have the greatest awareness of Lifeline eligibility criteria. This is a positive result since this group of respondents would be most likely to qualify for Lifeline benefits.

**Figure 10**



In summary, awareness of the Lifeline program in Florida remains low across the universe of Florida households. Unfortunately, it also appears that awareness has declined in more recent time periods. However, awareness seems to be greatest among those demographic characteristics one might expect to have the greatest number of eligible households: those with income below $20,000 and those 61 years of age or older. When comparing survey results to the PURC study results on characteristics of Lifeline eligible households, it suggests that future promotional efforts might best be targeted at those eligible households 55 years of age and older. Finally, there seems to be some variation in Lifeline awareness levels across different regions of the state and between customers of different serving LECs.

## Basic Local Service

In the current environment of competition for telecommunications services, it is of interest to consider how many residential consumers subscribe to basic local telecommunications service with no additional services, such as voicemail, call waiting, caller ID, etc. The survey has been collecting this information since March 2004. Figure 11, Florida Respondents that Do Not Subscribe to Additional Services, indicates that the percentage of respondents not subscribing to any additional services has been relatively consistent, ranging from approximately 24% to 28% over the time period the data has been collected.

**Figure 11**

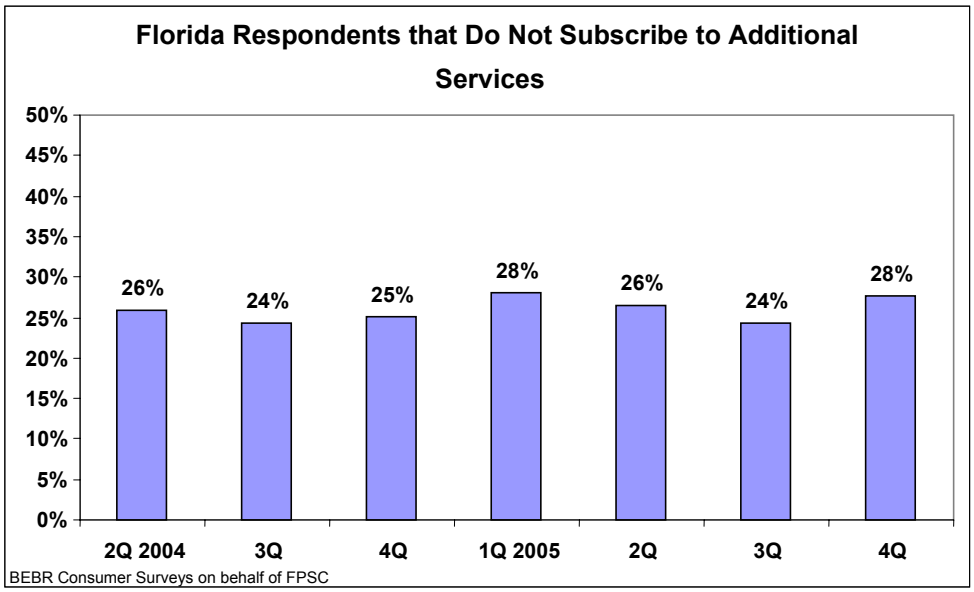


Figure 12, Florida Respondents that Do Not Subscribe to Additional Services by Income, indicates that, as annual income increases, the propensity to add additional services also increases, or conversely, the number of respondents with no additional services increases as income decreases. The most pronounced difference occurs between the lowest annual income bracket, those below $20,000, and the next lowest bracket, $20,000 to $39,999.

**Figure 12**

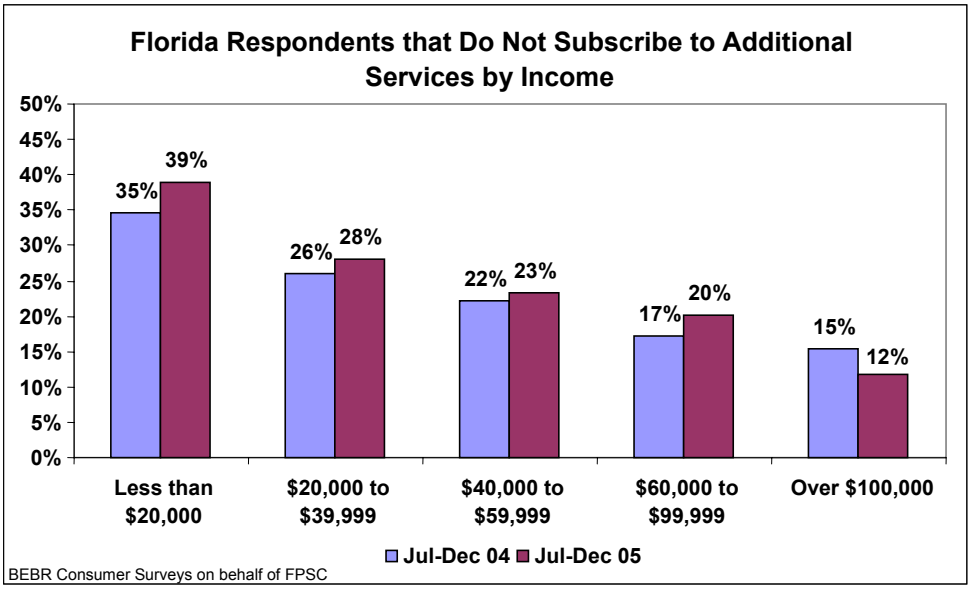


Figure 13, Florida Respondents that Do Not Subscribe to Additional Services by Age, reveals that the likelihood of adding additional features decreases with age, or conversely, the likelihood of a respondent not subscribing to additional feature increases with age. The decline in subscription to additional services is particularly evident in the two categories encompassing those 61 years of age to 70 years of age and 71 years of age and older. This result is consistent with the results addressed in the Customer Preferences section of the report that shows older Floridians have a lower preference for bundled packaged pricing than younger Floridians.

**Figure 13**

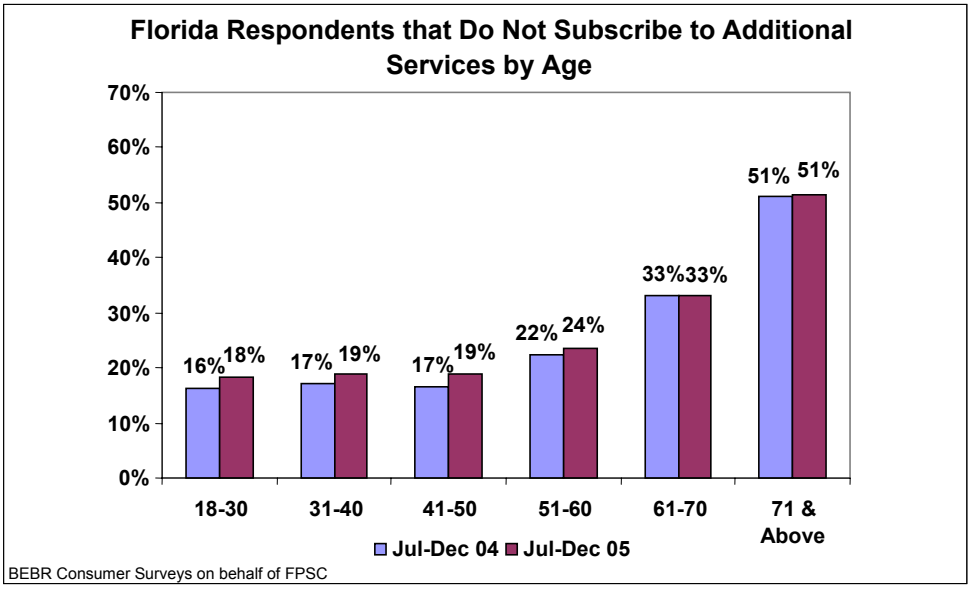


Figure 14, Florida Respondents that Do Not Subscribe to Additional Services by Race, reveals that black respondents are significantly more likely to subscribe to additional services than non-blacks. Figure 15, Florida Respondents that Do Not Subscribe to Additional Services by Hispanic Ethnicity, also indicates a slightly higher likelihood that those of Hispanic descent will subscribe to additional services than non-Hispanics.

**Figure 14**

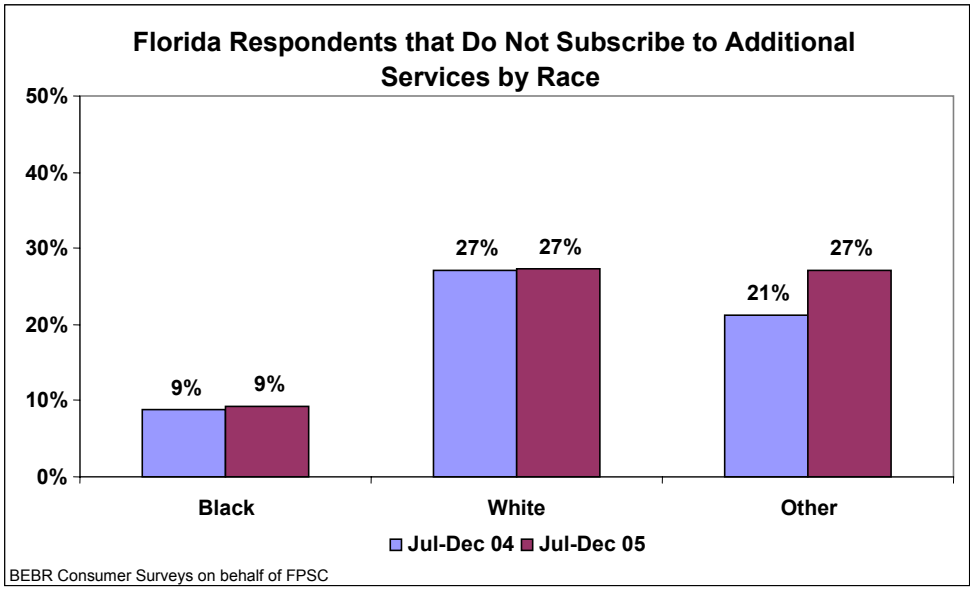
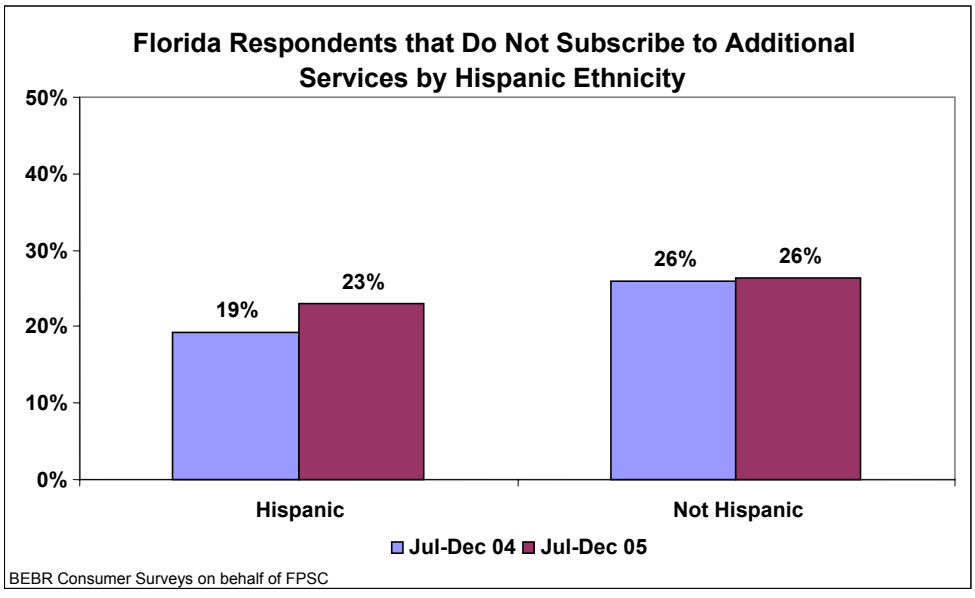
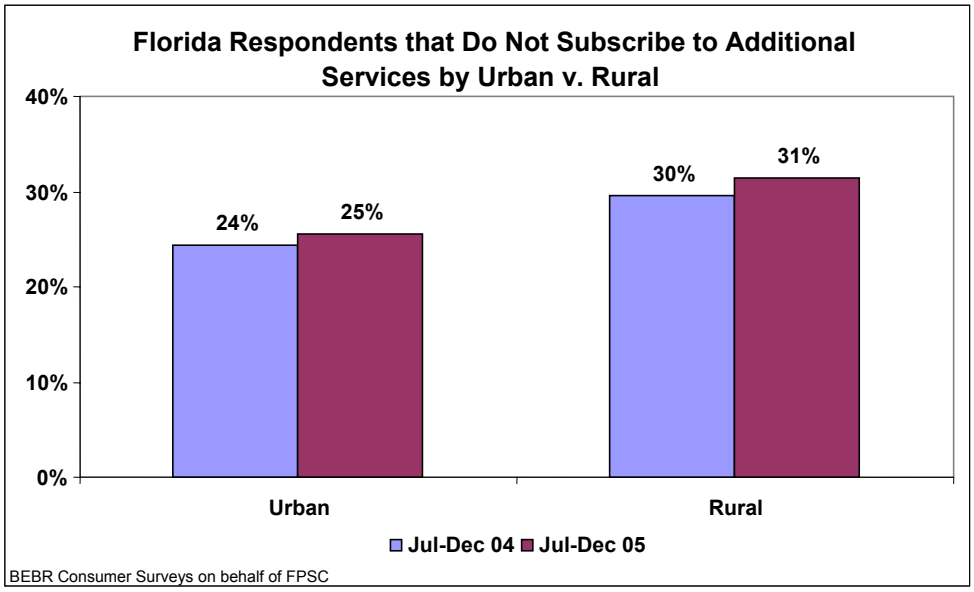



**Figure 15**



Finally, Figure 17, Florida Respondents that Do Not Subscribe to Additional Services by Urban v. Rural, shows that those respondents classifying themselves as rural have a six percentage point greater likelihood to not subscribe to services other than basic local service.

**Figure 17**

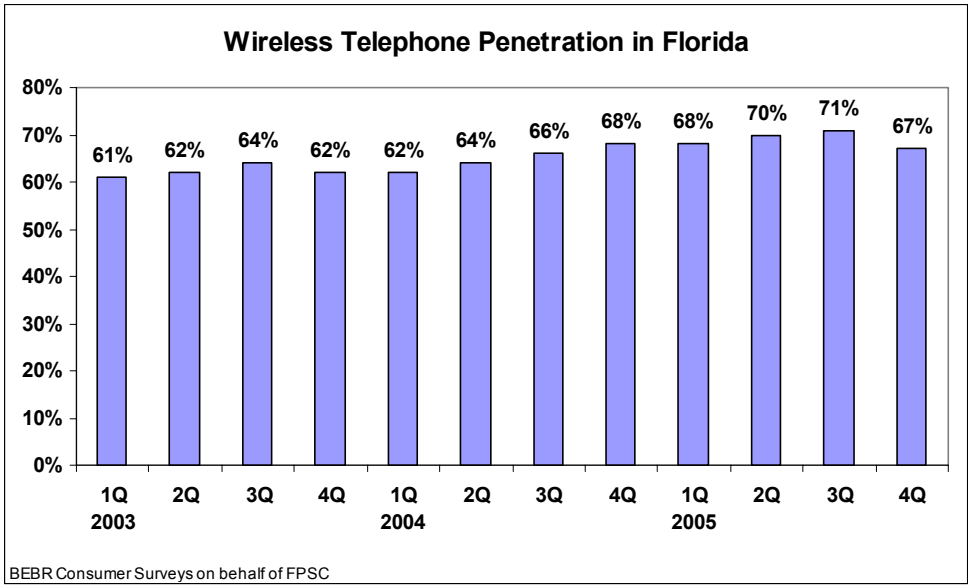



The survey results reveal that there is a segment of respondents that do not subscribe to telecommunications services and features beyond their basic local service. This group of respondents has accounted for approximately one-quarter on the surveyed population ranging from 24% to 28% over that time period. That percentage varies inversely with income and directly with age. Surprisingly, black respondents and those of Hispanic descent have a greater likelihood to subscribe to additional services than non-blacks and non-Hispanics.

## Wireless Competition

Floridians continue to value the convenience and portability of wireless services. There was little or no growth from 1Q 2003 through 1Q 2004. However, as shown in Figure 18, Wireless Telephone Penetration in Florida, penetration began to increase in 2Q 2004 and continued through 3Q 2005, to a peak of 71% of respondents. As of 4Q 2005, the current wireless penetration rate in Florida is 67% of respondents.

**Figure 18**



Figures 19, 20, and 21 show analysis of wireless penetration broken down by age, income, and marital status. Survey results indicate that older respondents, widowed respondents, and those that have a lower income are less likely to subscribe to wireless service. Respondents that are married or have a higher income are more likely to subscribe to wireless service. The exception to those general trends is reflected on Figure 20, Wireless Penetration in Florida by Income, which shows that the largest percentage point gain in subscribership occurring in the most recent time period occurred for respondents with household incomes below $20,000. Also somewhat surprising is that, as shown on Figure 19, Wireless Penetration in Florida by Age, subscribership for those 30 years of age and under is somewhat lower than for the next three older age groups. This belies the perception that younger people are more likely to subscribe to wireless service.

**Figure 19**

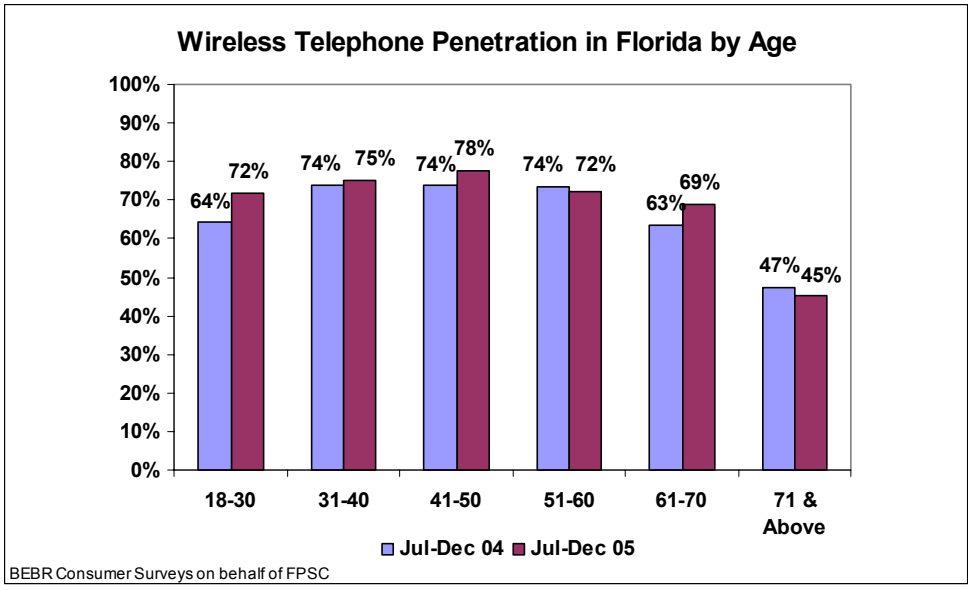


**Figure 20**

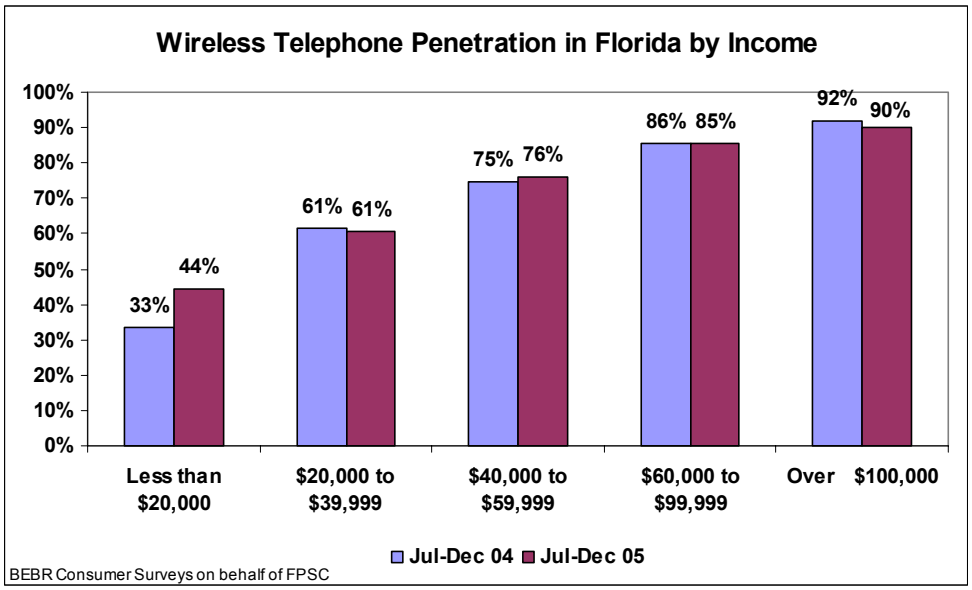



**Figure 21**

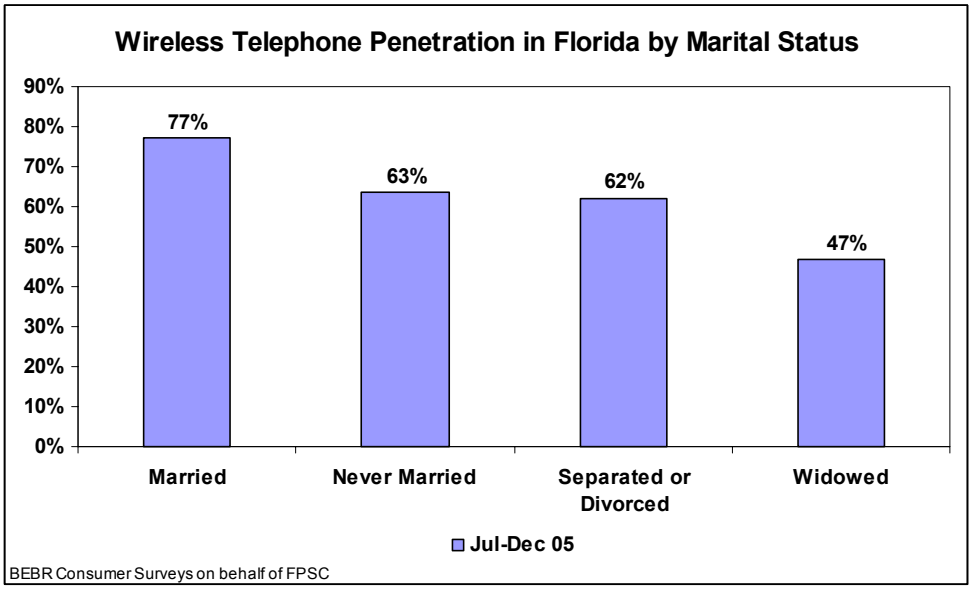



Figure 22, Type of Service Used by Florida Respondents to Make Long-Distance Calls, shows the type of services that Florida respondents use to make long distance calls. Home telephones continue to be the most used service to make long-distance calls at 42%, but wireless is not far behind at 40%. Analysis of the two time periods shown below indicates that wireless use is increasing.

**Figure 22**

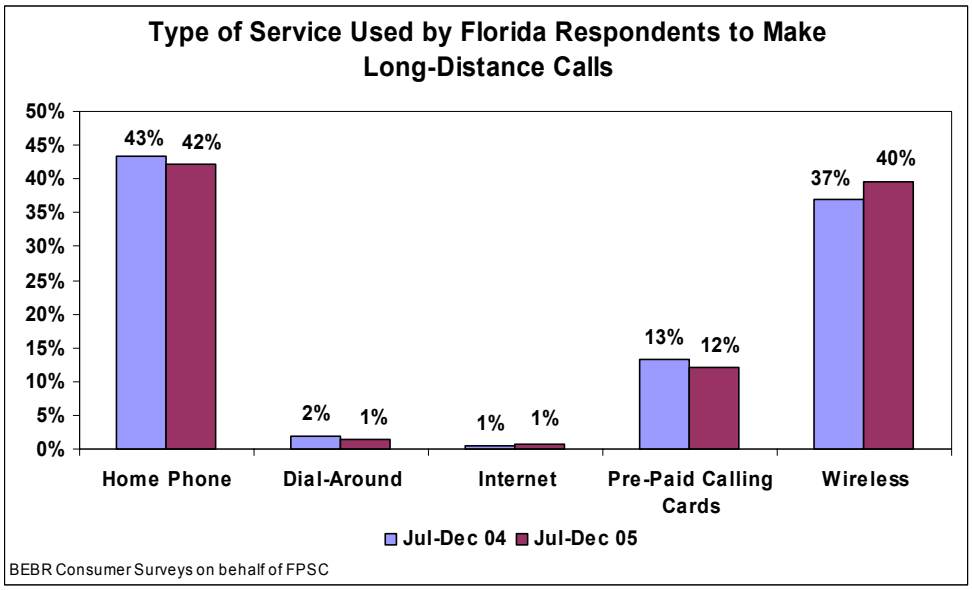



Figure 23, Reasons for Considering Wireless Only, shows that Florida consumers continue to consider dropping their traditional landline telephones in favor of using wireless service only. While saving money remains the number one reason given for considering wireless only, the percentage has decreased as a stated reason for considering wireless only since 1Q 2004.

**Figure 23**

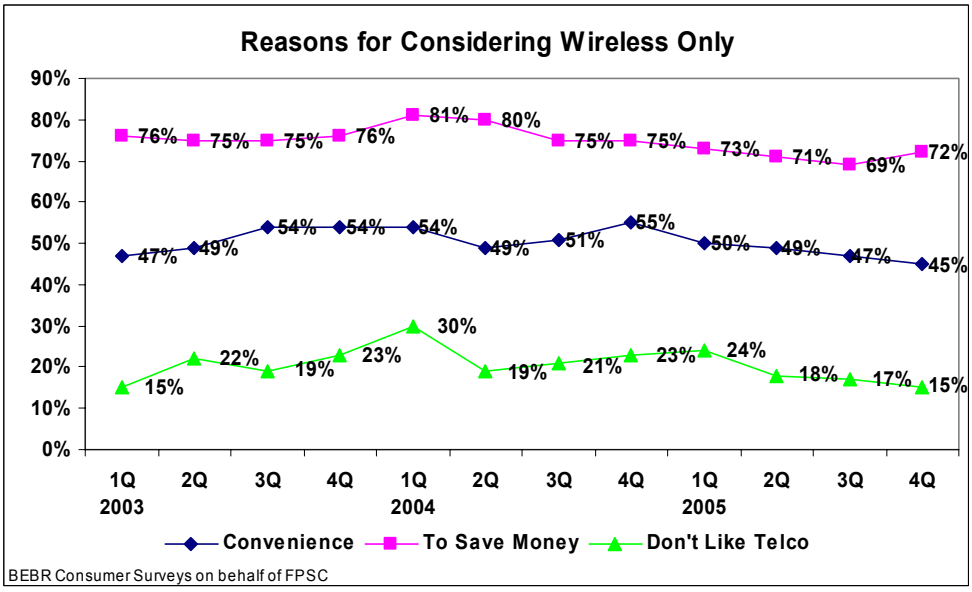
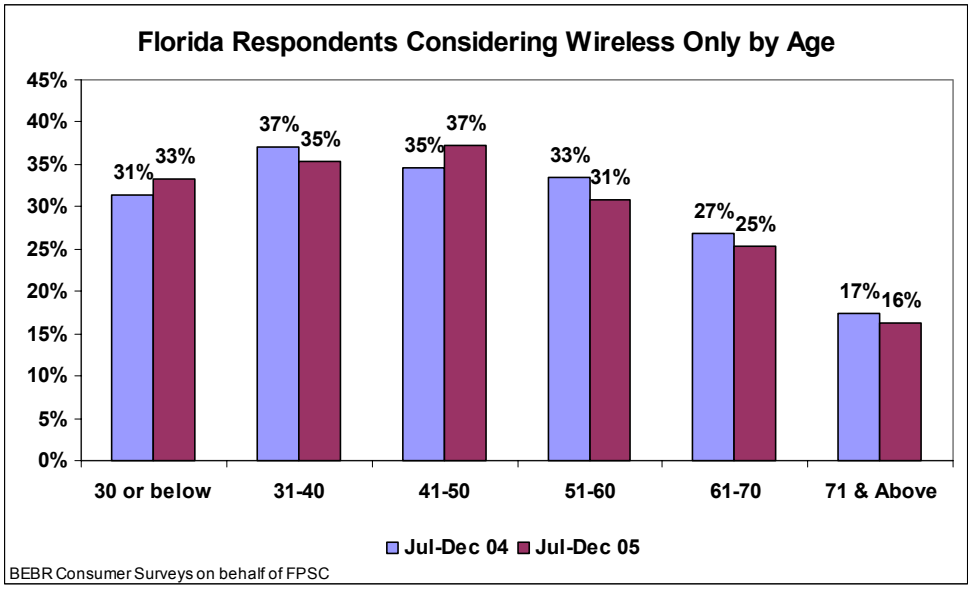



Figure 24, Florida Respondents Considering Wireless Only by Age, shows that the largest contingent of those considering wireless only occurs between ages 31-50. Those 71 and above continue to be less likely to consider giving up their landlines.

**Figure 24**




As shown in Figure 25, Florida Respondents Considering Wireless Only by Marital Status, those respondents that are separated or divorced are more likely to consider using wireless only. This may be because there is at least one new household being established and it may be more cost efficient and convenient to make use of an existing or new wireless telephone rather than subscribe to new landline service.

**Figure 25**

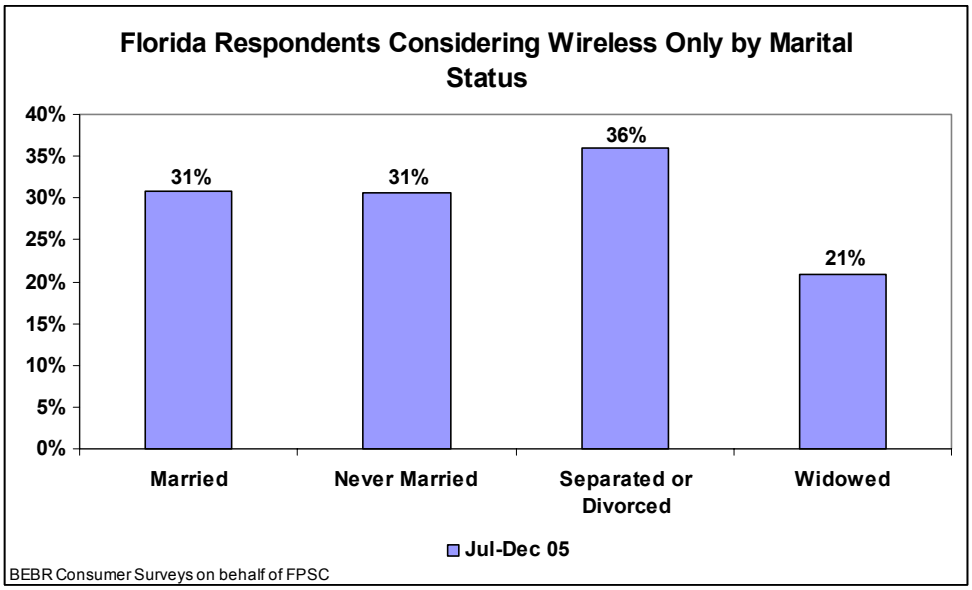
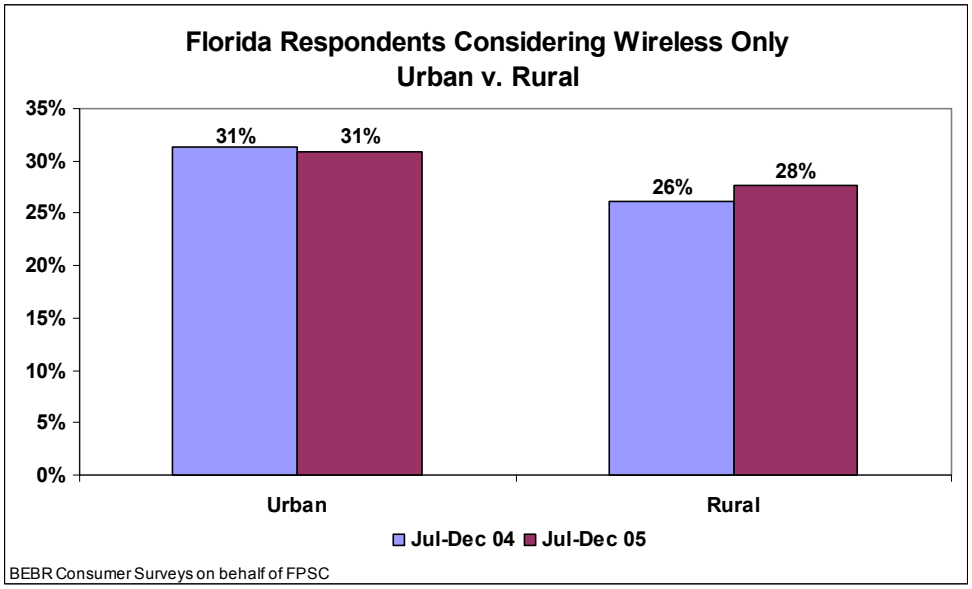


Figure 26, Florida Respondents Considering Wireless Only Urban v. Rural, looks at wireless only consideration by geographic area. Respondents that live in an urban area are still slightly more likely to consider using wireless only. However, the percentage of those in living in rural areas considering wireless only has increased by two percentage points in the most recent time period.

**Figure 26**




Wireless subscription in Florida continues to grow. That growth seems to be sustained across all age groups. In addition, wireless continues to grow as a substitute for traditional wireline long-distance services. Finally, wireless is less frequently viewed by Florida respondents as an overall cost saving alternative.

## Internet and Broadband

As shown in Figure 27, Florida Internet Penetration, overall Internet penetration in Florida increased from 66% in 1Q 2003 to 70% in 3Q 2003. Since then the penetration rate has varied by three points or less. This suggests a leveling-off of demand for the Internet, at least in the short term.

**Figure 27**

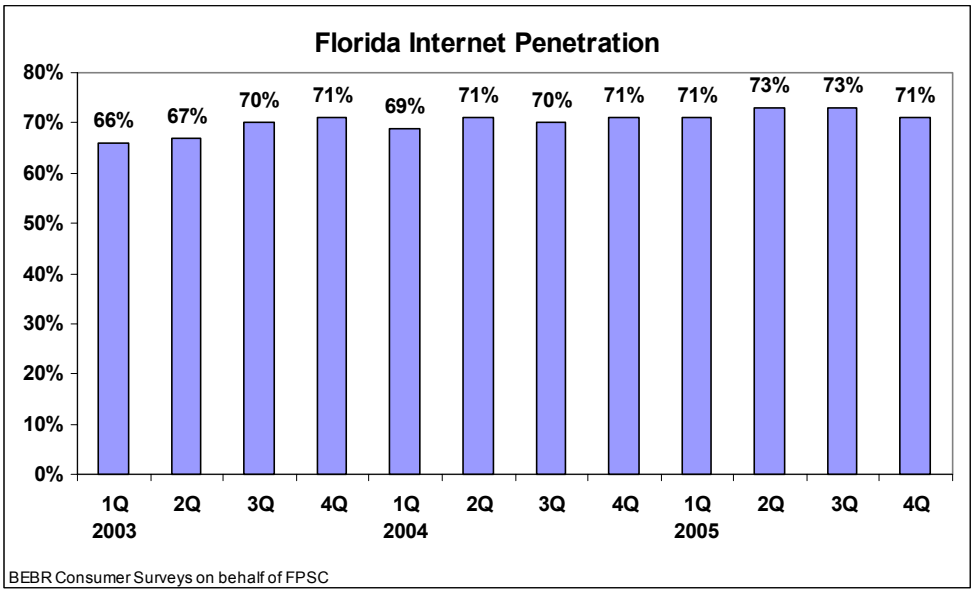
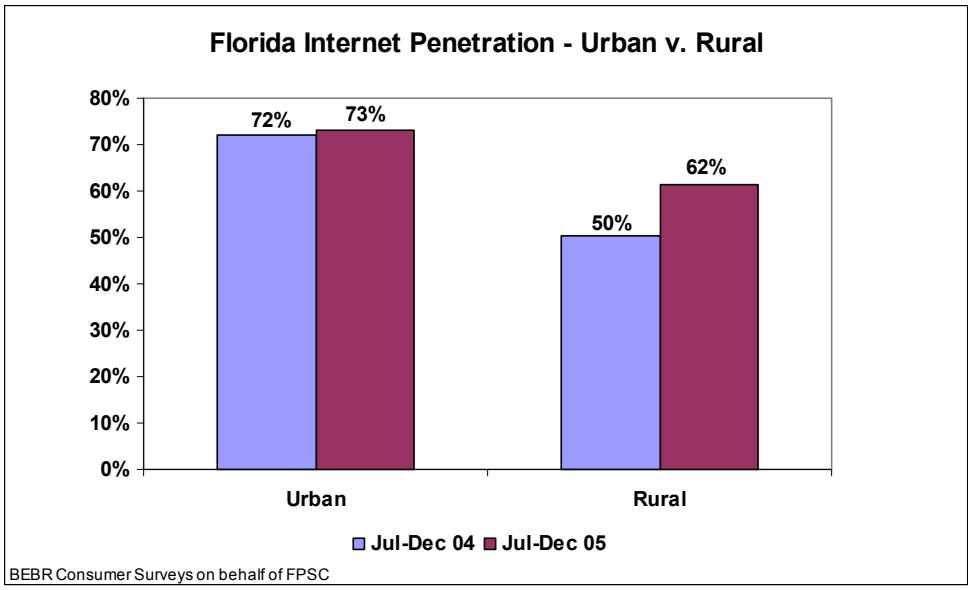


Figure 28, Florida Internet Penetration – Urban v. Rural, reveals that Internet penetration for rural customers increased from 50% to 62% from 2004 to 2005. The rate for urban users increased slightly during the same period, from 72% to 73%. These numbers are somewhat higher than the results of a recent Pew Internet & American Life Project survey (Pew), which reported national Internet penetration rates of 53% for rural adults and 60% for urban and suburban adults at the end of 2005.[3]

**Figure 28**




[3] Horrigan, John & Murray, Katherine (February 2006). Data Memo: Rural Broadband Internet Use February 2006 (Pew Internet & American Life Project), page 2. Retrieved March 22, 2006, from http://www.pewinternet.org/pdfs/PIP_Rural_Broadband.pdf

Figure 29, Florida Internet Penetration by Age, shows that 41-50 year olds have the highest penetration rate at 83%. It is noteworthy that the penetration rate for 61-70 year olds increased from 63% to 69%, the largest percentage point increase for any age group. The penetration rate for 71 and above also increased slightly from 44% to 46%.

**Figure 29**

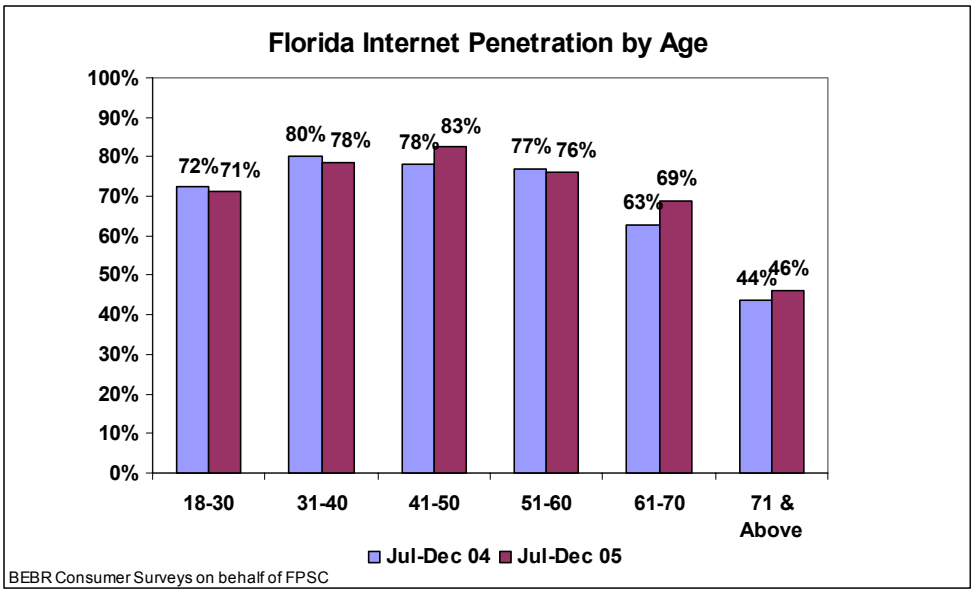
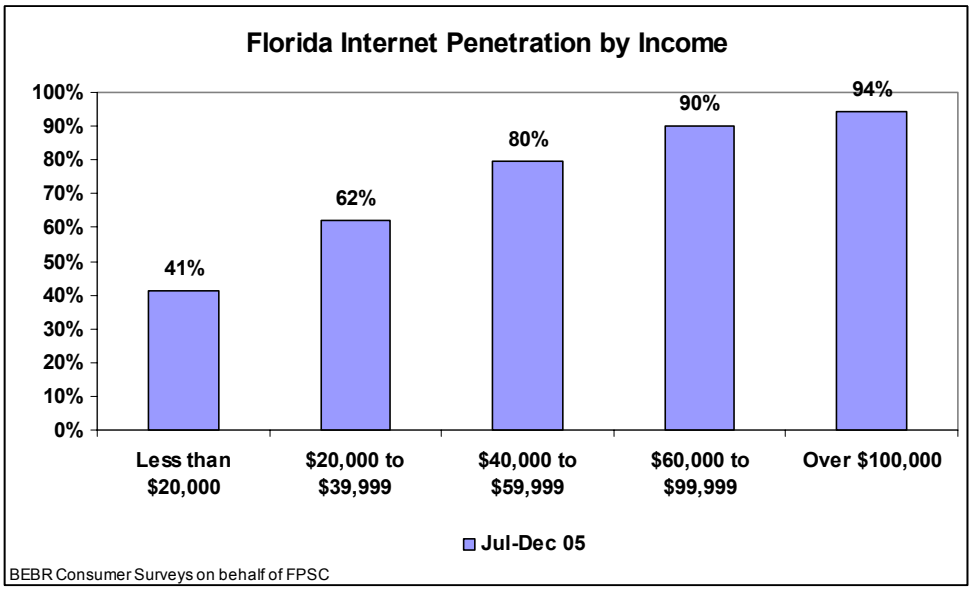



Figure 30, Florida Internet Penetration by Income, shows, unsurprisingly, that Internet penetration increases as income increases. Especially interesting is that the penetration rate is 41% for those with an income of less than $20,000. Even with the caveat that this group may include college students, this rate appears to indicate that the Internet is a relatively high priority for respondents with incomes of less than $20,000.

**Figure 30**



Access to the Internet is achieved through dial-up or broadband. Figure 31, Broadband v. Dial-Up Market Share in Florida**,** shows that the market share of broadband has been steadily increasing and is now more than twice as high as the dial-up market share. Even with broadband's growth, however, a significant portion of Internet users (29%) continue to access the Internet through dial-up connections.

**Figure 31**

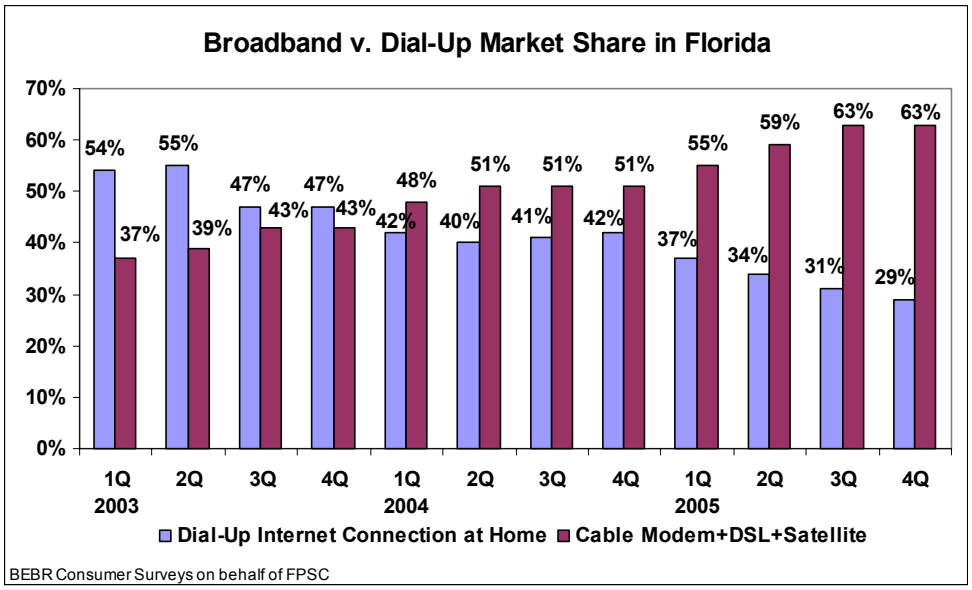
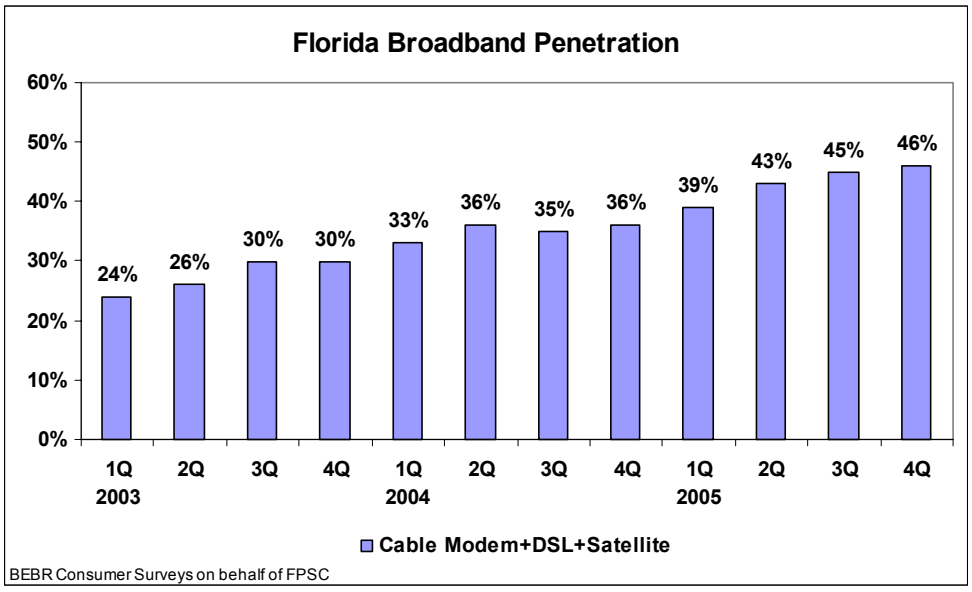


Figure 32, Florida Broadband Penetration, displays the percentage of Floridians with a broadband connection. It reveals that broadband penetration has grown steadily since early 2003, with the rate almost doubling in three years from 24% in 1Q 2003 to 46% by the end of 2005.

Floridians subscribing to broadband outpaced the rest of the country, according to the Pew survey results previously mentioned. Pew reported that, at the end of 2005, national broadband penetration was 36%, ten percentage points below Florida's 46% rate.[4] This is not surprising given that Florida is among the most populous states and that Florida's Governor and Legislature have created an environment to encourage high tech investment through tax incentives and grants.

This group, by virtue of their broadband access, also has direct access to VoIP services generally not available to those without broadband access.

**Figure 32**




[4] Ibid., page 8.

Figure 33, DSL v. Cable Modem Market Share in Florida, displays the market shares for the two most popular ways to subscribe to broadband: cable modem (cable companies) and DSL (telephone companies). In 1Q 2003 the cable modem market share was 61% compared to 39% for DSL. Cable modem remained the preferred choice until 2005 when DSL began to overtake it. DSL finished the year with a strong lead, 57%, compared to 43% for cable modem.

**Figure 33**

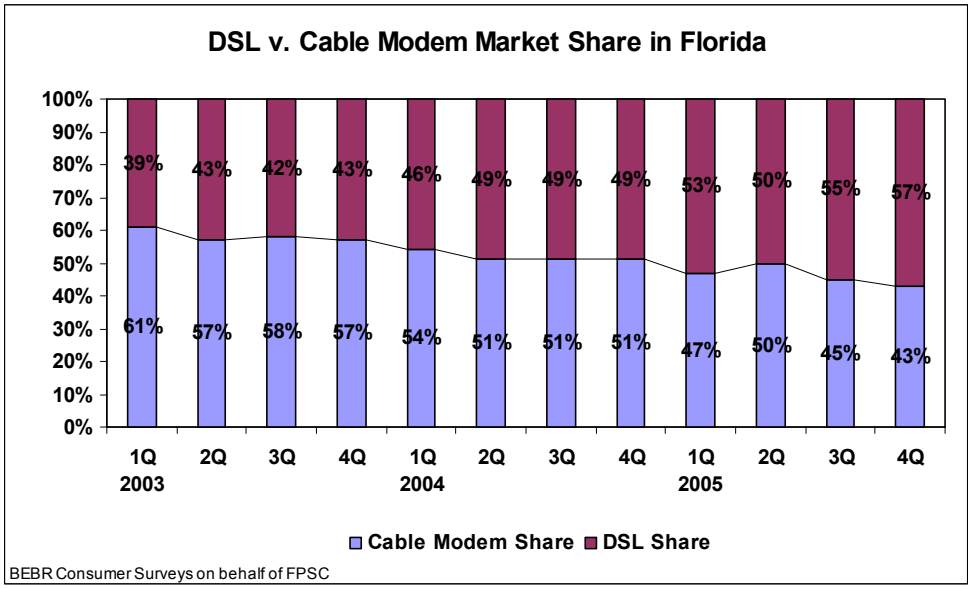


Figure 34, DSL v. Cable Modem Market Share by LEC, shows DSL's market share in the territory of each of the three LECs and for the Other category (comprised of other incumbent and competitive carriers, including cable companies). DSL is the preferred technology in the BellSouth, Sprint, and Verizon territories, ranging from a market share high of 64% in BellSouth's territory to a low of 52% in Verizon's territory. For the Other category, cable modem is the preferred provider with 66% of the market. Surprisingly, from 2Q 2005 through 4Q 2005, cable providers comprised 19% of "Other" responses when respondents were asked the name of their voice provider.

Assuming that cable companies market VoIP service first to their cable modem customers, Figure 34 also portrays the short-term potential market for cable VoIP service. From this perspective, it appears that cable VoIP is well positioned to be a major competitor to the voice services marketed by incumbent LECs and other competitive wireline providers.

**Figure 34**

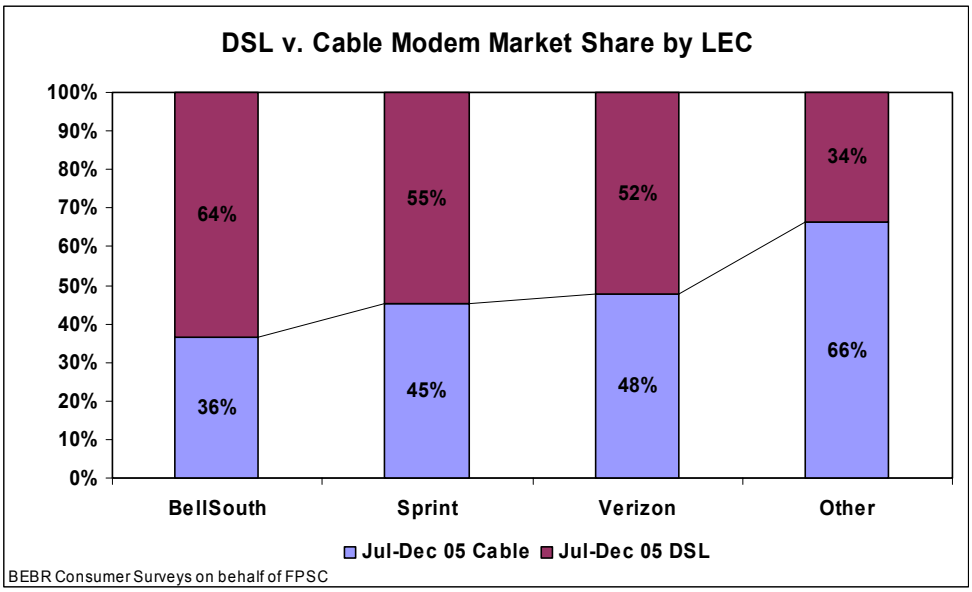


Figure 35, Florida Broadband Penetration – Urban v. Rural, analyzes broadband growth by the urban and rural markets for those customers who already have access to the Internet. The urban penetration rate increased from 52% in 2004 to 65% in 2005. The broadband penetration rate for rural customers increased as well, from 30% to 36%.

**Figure 35**

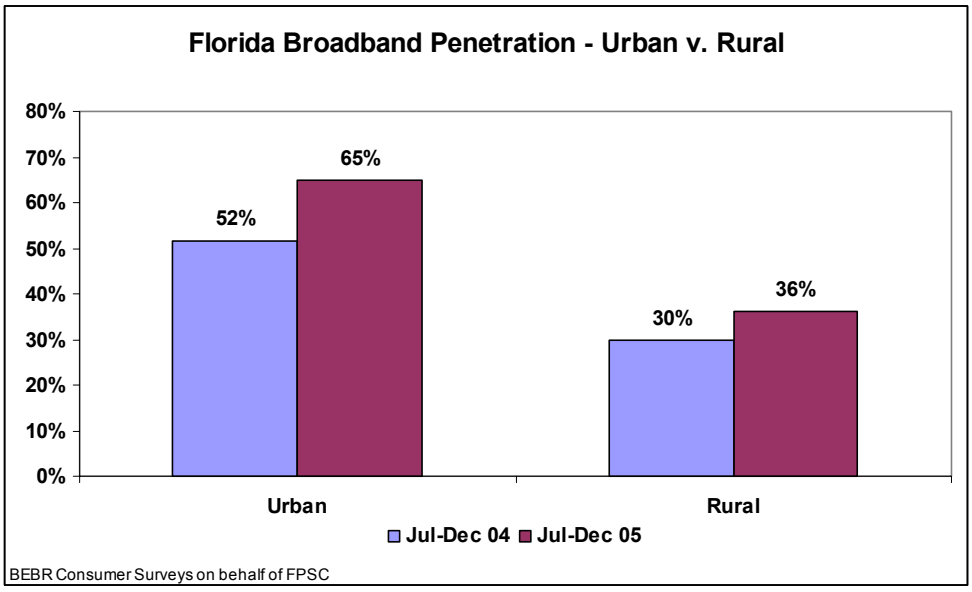


Figure 36, Florida Broadband Penetration by Age, shows that the highest broadband penetration is for those age groups between 18-60 years old. Between 2004 and 2005, each of these age groups saw a significant increase – at least ten percentage points – in the penetration rate. The largest percentage point increase in broadband penetration was for the 31-40 age group, from 51% to 70%. The 71 and above age group showed the smallest increase, from 38% to 39%, during the same time period.

**Figure 36**

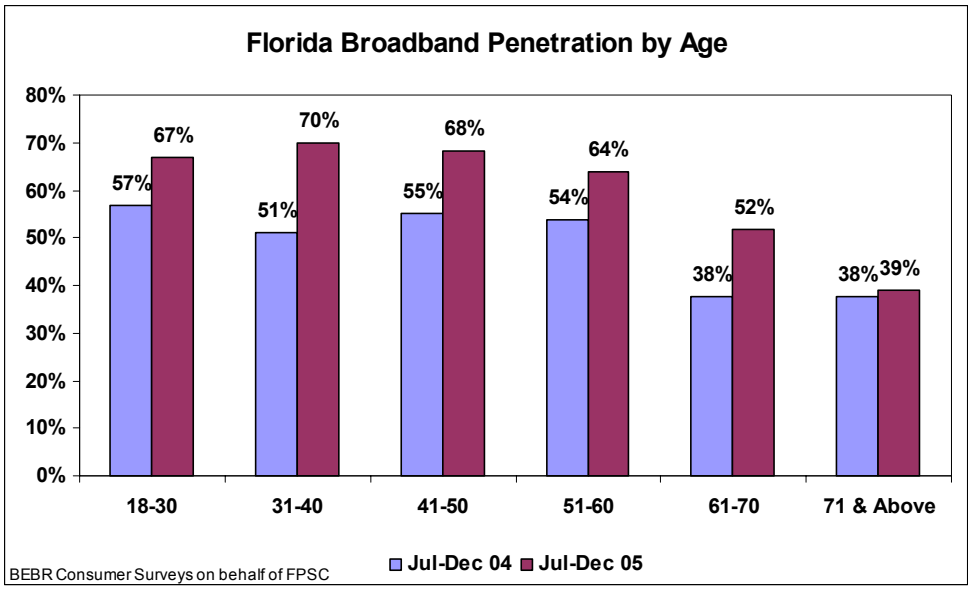


Figure 37, Florida Broadband Penetration by Income, shows that broadband penetration increases with income. Between 2004 and 2005, broadband penetration increased between 8 and 16 percentage points – a fairly significant increase – across all income levels. Especially noteworthy is that for those with incomes of less than $20,000, broadband penetration is 48%. As previously mentioned, this income group may include college students. Even with that caveat, the 48% indicates a strong demand for broadband service by those with the least income.

**Figure 37**

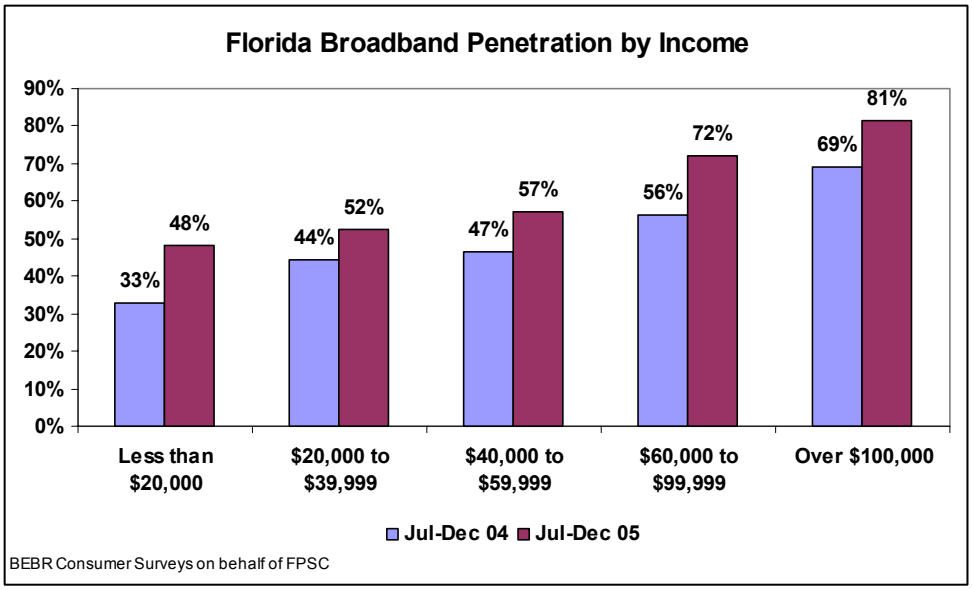


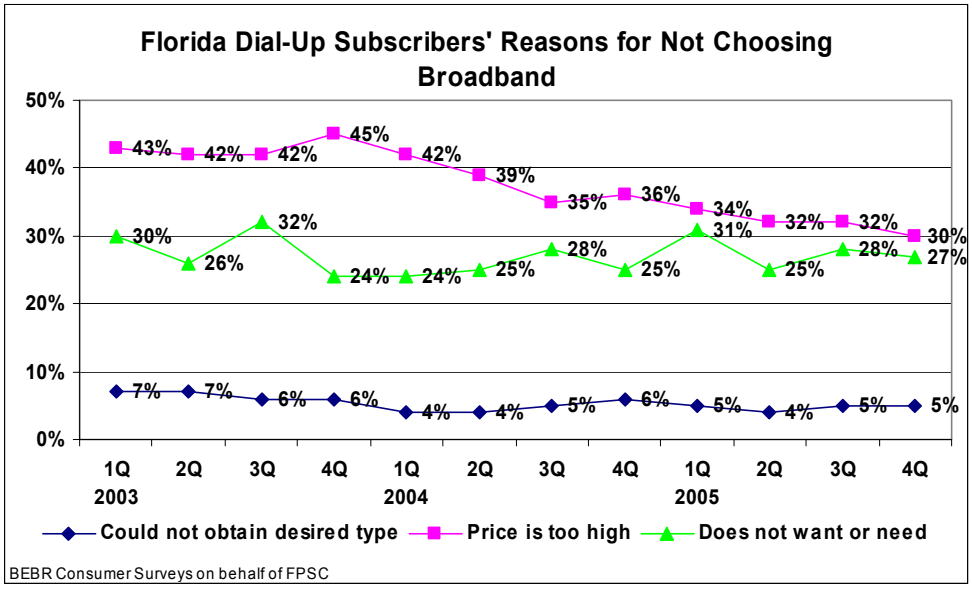
Figure 38, Florida Dial-Up Subscribers' Reasons for Not Choosing Broadband, displays the primary reasons dial-up customers are not choosing broadband, namely, price, lack of desire or need for broadband, and the inability to obtain the desired type.

- In 1Q 2003, 43% of respondents rejected broadband because the price was "too high." That percentage fell to 30% by the end of 2005.

- In 1Q 2003, 30% of respondents reported that they did not choose broadband because they did not want or need broadband. By the end of 2005, this percentage had decreased to 27%. This percentage has remained relatively constant, fluctuating between 32% and 24%. Still, this percentage is large enough to have implications for policies advocating ubiquitous broadband. At the same time, this percentage represents market share generally inaccessible to VoIP providers.

- A customer's inability to obtain the type of broadband desired decreased from 7% to 5% between the beginning of 2003 and the end of 2005.

**Figure 38**

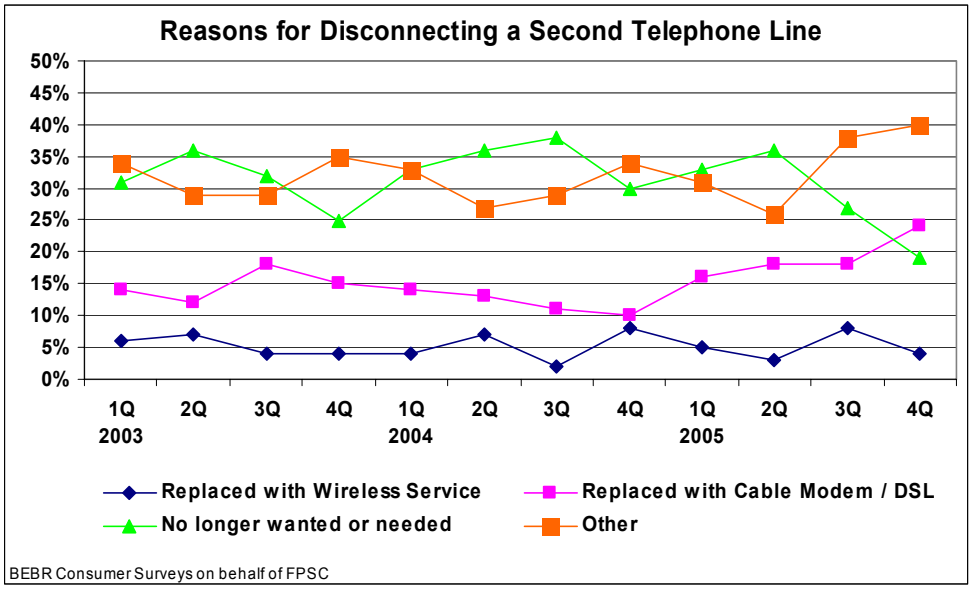



While Internet penetration in Florida has remained relatively flat during the last three years, those Internet users subscribing to broadband service has steadily increased to 63% of total Internet users surveyed. The increase of broadband users is present across all age levels and income groups and for both urban and rural customers. Price as a reason for not choosing broadband Internet access has declined.

## Consumer Preferences

The survey also provides information on a several consumer-related topics that do not fall under previously addressed topics. Beginning in 2002, there has been a decline in total wireline access lines in service statewide.[5] One suspected source of this decline is the possible substitution of broadband for second telephone lines devoted to home personal computers as well as the substitution of wireless as the second telephone. Figure 39, Reasons for Disconnecting of a Second Telephone Line, indicates that the two strongest reasons for disconnection were "Other" and "No longer needed or wanted" since 1Q 2003. The "Other" category ranges from approximately 27% to 40% peaking in 4Q 2005. A majority of responses in the "Other" category related to the respondent having moved within the survey period. The "No longer wanted or needed" response ranged from approximately 18% to 38% with the lowest result also occurring in 4Q 2005. The latter category declined by nearly ten percentage points in each of the last two quarters.

**Figure 39**




The results for wireless substitution for second telephone lines ranged from approximately 2% to a peak of approximately 8% in 3Q 2005. DSL and cable modem substitution combined to account for approximately 24% in 4Q 2005. The substitution of high speed Internet access for second telephone lines has been steadily increasing since a low of 10% in 4Q 2003.

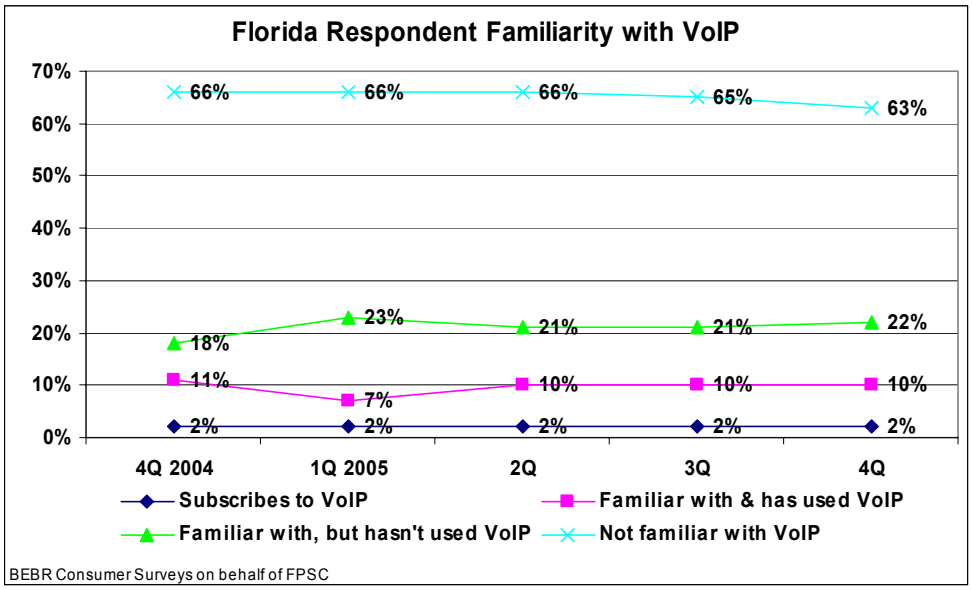
It is difficult to infer cause and effect from those categories accounting for the largest percentage of respondents that disconnected second telephone lines. However, substitution by newer technology has been a consistent explanatory factor. This lends some credence to the

[5] *Report on the Status of Competition in the Telecommunications Industry As of May 31, 2005*, Florida Public Service Commission, p. 15.

theory that the decline in wireline access lines can be explained, at least partially, by this substitution effect.

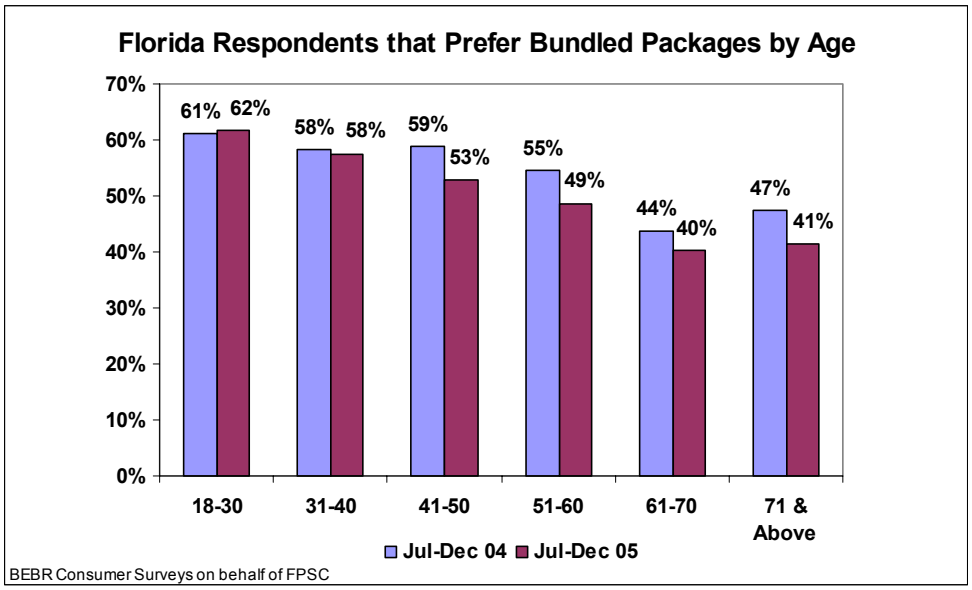
Figure 40, Florida Respondent Familiarity with VoIP, indicates that a significant portion of Florida respondents are not familiar with VoIP as a technology used for voice communications. Two-thirds of all respondents from October 2004 through June 2005 indicated they were not familiar with VoIP. This percentage dropped only slightly in the subsequent quarters to 63% in 4Q 2005. Only 2% of the respondents over that 15-month period indicated they subscribe to VoIP service. As noted previously, Figure 22 indicates that only 1% of respondents use the Internet to make long-distance calls. This would seem to support the finding that relatively few people currently subscribe to Internet or VoIP calling services. It is also possible that consumers currently subscribing to cable-provided voice telecommunications services are not aware that those services are provided using VoIP technology. In fact, when respondents were asked who provides their basic local telephone service, approximately 4% of all respondents in 4Q 2005 indicated that cable companies were their voice telecommunications provider. This result belies the 2% VoIP subscription rate reflected on Figure 40 and tends to confirm that some cable telephone subscribers are not aware that their service is provided through VoIP technology. The high percentage of those respondents indicating a lack of familiarity with VoIP may reflect a lack of awareness of technology rather than a lack of awareness of service providers using the technology.

**Figure 40**



Finally, Figure 41, Florida Respondents that Prefer Bundled Packages by Age, reflects the percentage of Florida respondents that prefer bundled pricing packages for their communications services. The graph compares the July - December 2004 period to the July - December 2005 period and an interesting result emerges. The preference for bundled packages declined in the most recent period for all age groups except those 30 years of age and younger. The decline in the most recent period is most significant in three of the four age brackets of those respondents 41 years of age or older.

**Figure 41**

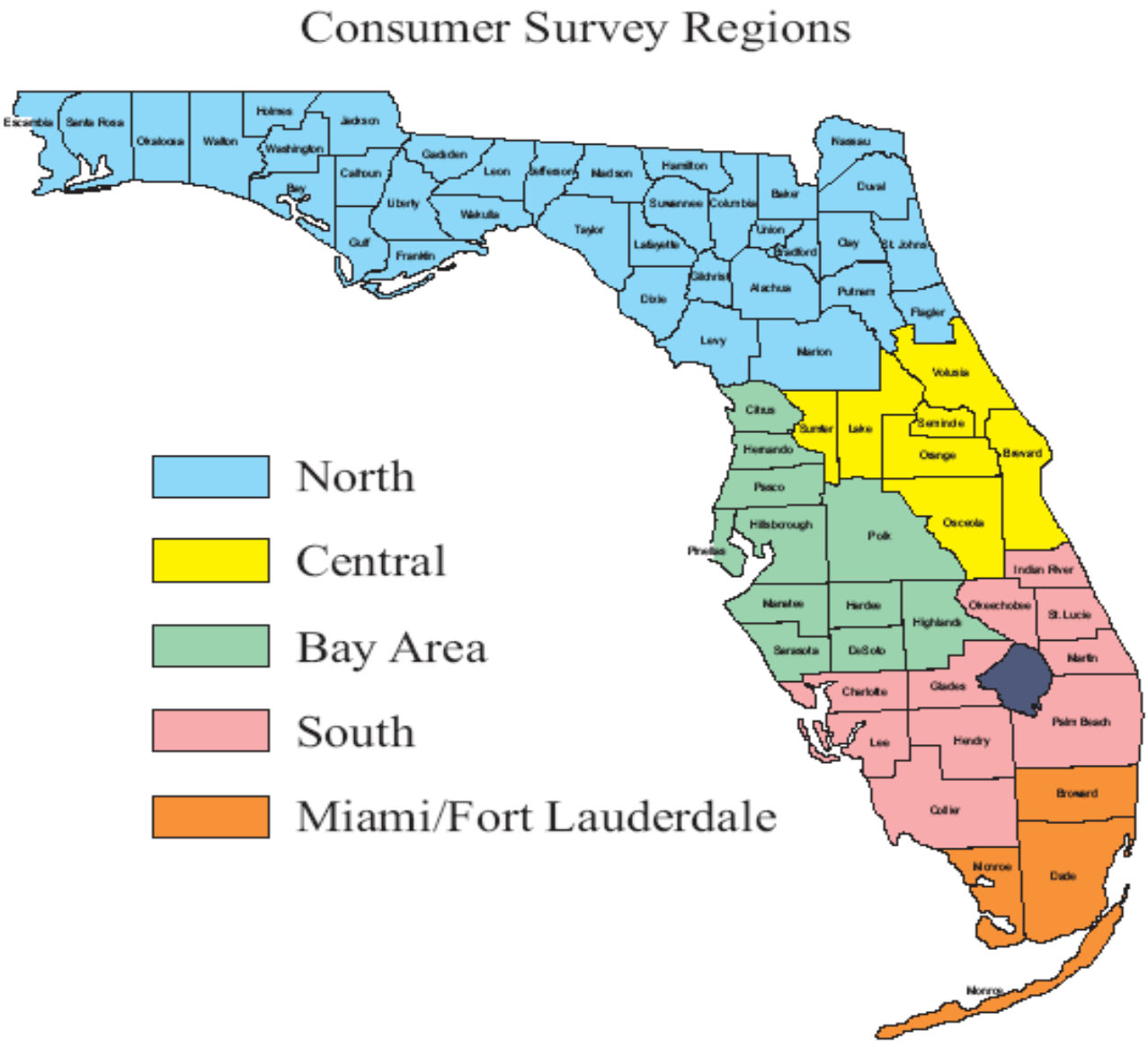



## Conclusion

The BEBR survey data continues to yield important information that the Commission can not obtain from other sources, either because the information is proprietary or, in the case of wireless and broadband data, the Commission lacks jurisdiction. In addition, analysis of Lifeline awareness allows the Commission to assess whether certain promotional efforts are likely to have a positive impact on Lifeline subscribership.

Survey data on VoIP awareness and subscription, Internet subscription, and wireless subscription help to fill in blanks regarding the degree of telecommunications competition in Florida. Without the survey data to supplement data provided directly by the industry, the Commission would only have a partial picture of telecommunications competition in Florida.

**Appendix A**




Source: Bureau of Economic and Business Research (BEBR)
Consumer Surveys conducted on behalf of the Florida Public Service Commission