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# Consumers, Citizens, Charity and Content: Attitudes Toward Teleservices

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## Final Report

**The Information Policy Institute**

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# Table of Contents

## Page

Introduction .....	1
Research Objectives.....	1
Executive Summary .....	3
Conclusions.....	5
Policy Implications.....	8
Detailed Analysis.....	10
Frequency of Contact.....	10
Products or Services Acquired Via Telephone.....	15
Frequency of Product or Service Acquisition.....	15
Information Pertaining to Products or Services Acquired .....	20
Likelihood of Future Product or Service Acquisition via Telephone .....	22
Government Regulation of Telephone Solicitation .....	25
Legislative Support of Proposed Regulations .....	25
“Do Not Call” Lists .....	29
Study Methodology.....	33
Sample Distribution and Research Approach .....	33
Sample Size and Tolerances .....	34
Sample Size.....	34
Completion Results.....	35
Appendices	
Appendix A: Study Questionnaire	

## Introduction

Corporate Research Associates, Inc. (CRA) was retained by the Information Policy Institute to conduct the 2002 Telephone Issues Study. This research examined public opinion concerning various telephone-related topics, including product and service telephone solicitation, product and service acquisition habits over the telephone, satisfaction with recent telephone-based transactions, as well as opinions and household experience concerning state “Do Not Call” (DNC) lists.

The 2002 Telephone Issues Study consisted of 1,000 telephone interviews conducted with a random, representative sample of adults 18 years of age and older residing in Connecticut, Florida, Georgia, Indiana, Kentucky, or New York. These states were selected so as to ensure opinions were gathered from residents of states that have disparate “Do Not Call” telephone solicitation laws.

The survey was administered by telephone in mid-late May, 2002. The interviews required approximately 11 minutes to complete, on average.

## Research Objectives

Among various other goals, the 2002 Telephone Issues research project aimed to:

1. Determine the incidence of recently being contacted by telephone concerning commercially available products and services;
2. Determine the incidence of recently acquiring by telephone commercially available products and services;
3. Determine the types of commercially available products and services acquired by telephone;
4. Determine the average amount recently spent on “over the telephone” purchases of commercially available products;
5. Determine consumer satisfaction with recent “over the telephone” purchases of commercially available products and services;
6. Determine the likelihood in the near future of consumer “over the telephone” purchases of commercially available products and services;

7. Determine the reasons why it is likely/unlikely that consumers will/will not make “over the telephone” purchases in the near future of commercially available products and services;
8. Determine public attitudes concerning government regulations of organizations that call into households for commercial reasons;
9. Determine if residents have taken certain actions in support of their beliefs concerning organizations that call into households for commercial reasons;
10. Determine public awareness of state DNC lists;
11. Determine the incidence of utilizing state DNC lists; and
12. Determine the perceived effectiveness of state DNC lists.

To accomplish these objectives, CRA consulted with Information Policy Institute executives and colleagues to develop an effective survey instrument. The questionnaire was pre-tested on a small sample of residents of states being examined, to ensure that any questionnaire wording difficulties were identified. A more complete description of the methodology utilized to conduct the 2002 Telephone Issues Study is provided at the back of this report.

After the survey questionnaires were collected, field supervisors carefully edited them. Responses to open-ended questions were coded into conceptually meaningful categories (based on the results from at least 50 different respondents), prior to being incorporated into the database. All project activities were conducted in-house by CRA supervisors and staff.

The report begins with an executive summary of the research results, followed by a set of conclusions drawn from an analysis of the study findings. Finally, a detailed analysis of the study is presented in which each of the survey questions is examined across key sub-groups important to the research. In particular, results are broken down by various demographic (e.g., gender, age, income) and regional (e.g., state, region of the country) variables, as well as whether or not households are registered on the state “Do Not Call” list. Furthermore, results are investigated with respect to differences between states based on the extent to which “Do Not Call” list services are currently actively promoted in those states. Specifically, in the states of New York, Indiana, and Kentucky, household registration on such DNC lists is actively promoted. In contrast, the states of Connecticut, Georgia, and Florida offer such DNC lists, but they are not promoted to the same extent as in the three states mentioned previously.

Appended at the back of the report is a copy of the survey questionnaire (Appendix A).

## Executive Summary

In terms of overall telephone contact from any company offering products or services (local or national, existing business relationship or not), results show that the majority of respondents have been contacted at least once in the past two weeks, with most being contacted three or more times. Results further demonstrate that telephone contact for the purpose of product sales is lessened for residents who have registered on a state “Do Not Call” (DNC) list. Of interest, when directly asked about the effectiveness of registering on the state DNC list, the vast majority believe that the number of telephone sales calls to their household has been reduced since joining the list.

**Consumers Respond to Telephone Solicitations:** The survey also determined the frequency with which residents acquire products (e.g., newspaper renewals, home maintenance products) or services (e.g., switching telephone companies, lawn care services), donated to a charity or nonprofit organization, or contributed to a politician as a result of being contacted by telephone in their home.

- ▶ More than eight in ten residents say they have acquired a product or service, given their voting support, or made a donation at least once over the past year as a result of a call to their household.
- ▶ Results demonstrate that one-half of respondents have acquired at least one product or service, with 30 percent acquiring three or more in the past year from any company (local or national, existing business relationship or not) that has telephoned.
- ▶ One in seven respondents said they have given their voting support over the telephone to a political campaign at least once during the past year.
- ▶ Four in ten respondents indicated they have given financial assistance to a charity that sought their support over the telephone in the past year.

**Consumers Buying Content:** The most commonly acquired products or services among those who have done so via telephone in the past year are magazine or newspaper subscriptions (20%), followed closely by long distance or telephone services (18%). Interestingly, computer and Internet-related services (5%) was cited as often as more mature products traditionally marketed over the telephone such as credit cards (6%), cleaning or repair services (5%), and lawn care services (5%).

**Consumers Spend Lavishly Over Telephone:** Analysis indicates that there is considerable variation in the expenditures on products (not services) by those who have acquired a product or service over the telephone in the past year, with the median amount of money spent on products being \$50. Significantly, nearly 20 percent spent more than

\$250, with almost 10 percent spending more than \$500 on products as a result of calls to the household.

**Telephone Sales Yield High Level of Customer Satisfaction:** Respondents report a high level of satisfaction with telephone shopping experiences in the past year, with seven in ten of those who have acquired a product or service over the telephone satisfied with the shopping experience.

**Consumers Cite “Need to See Product” Not “Privacy” as Reason Unlikely to Buy in Future:** Only one in seven of those surveyed believe they will make a purchase in response to a call to their household in the near future. Respondents offered as explanatory reasons the fact that they prefer to see what they purchase (23%), they dislike sales calls (19%), or they do not make purchases over the telephone (19%). Interestingly, very few respondents (7%) cited privacy concerns – telephone calls are intrusive -- as a reason they were unlikely to buy a product or service over the telephone in the future.

**Citizens Support Nuanced Approaches to Do Not Call Registry:** The survey also sought to assess public attitudes toward government regulations concerning organizations that telephone people at home by type and relationship.

▶ One-half of those surveyed support a regulation that would allow **local or community-based organizations** to call, but only during a limited number of hours during the day. As well, slightly less than one-half of respondents support legislation that would allow calls, but only from local or community-based organizations with whom they have an existing relationship.

▶ Regulations affecting telephone calls from **national companies** are not viewed as favorably as those affecting local companies, as four in ten residents of the states surveyed support a regulation that would allow national organizations to call, but only during a limited number of hours during the day. Four in ten respondents also support legislation that would allow calls, but only from national organizations with whom the respondent has an existing relationship.

**Concern with Teleservices May Be Overstated:** For example, only one in seven respondents report having contacted a politician or other official to voice their opinion about organizations that call them at home. As well, less than one in ten residents report voting for a political candidate because of his or her position on telephone solicitations. Further, while four in ten respondents say they frequently ask individual organizations not to call them at home, an equal number say they rarely or never take this initiative, with the remainder doing so “from time to time.”

**High Awareness of State DNC Lists:** Of the six states surveyed, all have existing legislation involving a DNC list on which residents can register their household to reduce telephone solicitation from specific types of organizations. Overall, a slight majority of residents in the six states surveyed are aware that their state has such a DNC list.

**Varying Participation Rates:** One out of every five households surveyed reported having registered on a state DNC list. Registration is by far the highest in Indiana, where nearly one-half of all households are on the state DNC list. Three in ten of all households in New York, Kentucky, and Connecticut are on the DNC lists in those states. However, very few households in Georgia, and virtually no households in Florida, are on the DNC list. Variation in the participation rates likely stems from different practices concerning the promotion of and registration on state DNC lists.

## Conclusions

The following study conclusions are based on the detailed analysis presented below:

- **One-half have purchased a product or service over the telephone in the past year, while one-third have purchased 3 or more during the past year.**

Many organizations seek product or service sales, voter support, or charitable donations by telephoning into households. Results confirm that this is both a popular and effective form of solicitation. For example, three in four households have been contacted at least once in the past two weeks by organizations seeking to sell specific products or services. These efforts have been effective, as one-half of the households surveyed have acquired at least one product or service over the telephone in the past year, and telephone fundraising efforts by charitable organizations have been particularly effective. Moreover, of the one-half of residents who have purchased products or services via inbound telephone solicitation in the past year, the majority have done so three or more times suggesting that these purchasing experiences have been useful and rewarding.

- **State “Do Not Call” registries effectively reduce calls. Households on state DNC lists continue to buy from companies they know.**

Results also indicate that telephone sales contacts, and to a lesser extent telephone purchases, are greatly affected by legislation involving “Do Not Call” lists. In particular, residents of states that currently actively promote their DNC list services are less likely than residents of states who offer, but do not promote, such services to have been recently contacted via telephone about products or services, and less likely to have

acquired a product or service as a result. Similarly, as would be expected, households that are on the state DNC list indicate a reduction in the number of telephone sales calls received and the number of times they have acquired a product or service compared to households that are not on the state DNC list. Although reduced, it should be pointed out however that a significant minority of those respondents on a state DNC list report acquiring at least one product or service over the past year.

- **While the majority express satisfaction with their telephone shopping experiences, few say they are likely to again purchase items by telephone in the near future.**

It is evident that organizations solicit political support, product or service sales, and charitable donations via the telephone because it is a popular and effective method for transactions. Moreover, people who, for example, purchase products or services over the telephone say they are pleased with these transactions. On the other hand, there appears to be a “disconnect” in that few residents say it is likely they will again purchase items by telephone in the near future. That is, in the collective mind of the general public, just because a past practice has proven satisfying, does not suggest that it will be utilized again in the future.

This scenario implies that while members of the general public say one thing, they proceed to do another. Regardless of whether this result is reflective of a stigma regarding the perceived odious nature of vending over the telephone, or because of a failure to envision the types of products about which they might be contacted in the future, it is evident that the public nonetheless embraces the activity in practice, if not in theory.

- **Despite fewer calls, consumers are far more likely to have acquired a product or service from a company with which they have done business.**

Results indicate that, at both the local and national level, companies with whom respondents did not otherwise do business are more likely than companies with whom respondents have an existing relationship to have telephoned in the past two weeks for the purpose of selling products or services. Nevertheless, despite the greater frequency of contact from these companies, their efforts are less successful than those with whom respondents have an existing relationship. That is, it is evident that certain factors associated with being the client of a company, such as trust and/or familiarity, translate into a greater likelihood of success from telephone solicitation by these companies.



- **While “Do Not Call” lists are popular among residents who are aware of them, few have taken steps in support of government regulation of consumer telephone sales.**

Just over one-half of residents are aware their state has a “Do Not Call” list, although the incidence of inclusion on the list differs greatly across the six states surveyed. Approximately one-half of those residing in Indiana, New York, Kentucky, or Connecticut who are aware their state has a DNC list say their household is on the list, while relatively fewer Georgia or Florida residents are on it. One can speculate that differences in the incidence of household inclusion on state DNC lists are affected both by the registration procedures required and the extent to which such DNC services are promoted in those states. For example, households in states that actively promote DNC list membership are three times as likely to have registered their household on the state DNC list as households in states that offer, but do not promote, the state DNC list. Additionally, Florida and Georgia, which have by far the fewest households on DNC lists, both require yearly fees for registering. In contrast, in the other states surveyed, registration is free of charge.

Finally, there is some evidence to suggest that the stigma regarding telephone solicitation is not as great it may appear on the surface. Although the majority of residents support some form of regulation on calls from organizations into their households, relatively few have taken any action in this regard, either by contacting or voting for a politician based on “Do Not Call” list considerations. Moreover, the frequency with which respondents report taking the initiative to ask individual organizations not to call them at home is lower than might be expected based on common perceptions of telemarketing. Indeed, a significant minority of residents says they never or rarely ask individual organizations not to call them at home.

## Policy Implications

The following policy implications are based on IPI interpretation of the detailed analysis presented below:

- **No clear mandate for national “Do Not Call” registry.**

The presumed overwhelming support for a blanket DNC collapses when probed. When offered the possibility of a tiered approach toward regulating calls to the household, many consumers expressed a preference for only partial or qualified restrictions for local businesses and for companies with whom they have an existing business relationship. In other words, consumers prefer to limit some of the calls to their household, but not all.

The data in this study indicate strong support for permitting local organizations (irrespective of the existence of a prior business relationship) and national organizations with a prior business relationship to call consumers with very few restrictions. The fact that 50 percent of those surveyed support proposals that would permit local organizations to call them, but only during limited hours, represents a reduction of support for restricting all calls from local organizations by nearly 50 percent. Similarly, that 50 percent of respondents to the IPI survey expressed support for permitting local companies with which they have a prior business relationship to call them – even without time of day restrictions – also represents a 50 percent retrenchment in support for the universal DNC registry.

- **Opinion and Consumer Behavior Support Existing Business Relationship Exemption.**

Given that there is no clear majority in favor of restricting calls to the household from all local organizations and national organizations that have an existing business relationship with a consumer, that failure to exempt existing business relationships from “do not call” requirements is not supported by public opinion. Further, inasmuch as the existence of a business relationship increases the probability that a consumer will respond to a telephone solicitation by more than 400 percent, consumer behavior reveals a predilection toward doing business with companies that they already know. Revealingly, the IPI study confirms that consumers spend more, donate more, and provide higher levels of support to familiar organizations.

Taken together, the sizeable support for proposals permitting local and national organizations that have an existing relationship with a consumer and the demonstrated consumer preference for doing business with known entities provides both public opinion and behavioral support for an existing business relationship exemption.

- **Restricting Content Providers Not in Public Interest.**

Given the evident trend toward ever greater concentration in the media and communications industries – radio, cable television, print publishing – along with the alarming reduction in local content in those sectors, it is imperative that content providers be exempted from rules restricting the use of the telephone as a marketing medium.

During the 20<sup>th</sup> Century, every significant piece of federal legislation governing the media and communications industries was structured to encourage the creation and dissemination of a diversity of perspectives. Indeed, ownership restrictions, limitations on cross-media ownership, and public service requirements were intended to have the collective effect of ensuring that freedom of speech was protected through the provision of myriad points of access to the national communications network.

However, recent modifications to the body of laws governing the media and communications industries have substantially reduced the number of voices reaching the general public. Indeed, local programming and local news reporting on radio are quickly becoming a thing of the past. In addition, newspapers and magazines with local content have been hard hit lately, and are suffering concurrent reductions in subscription and advertising revenues. This has forced many local newspapers out of the market during the recent past. Given the trend toward concentration in this segment as well, still more local newspapers are likely to suffer the same fate.

As a result of these developments, many communities are left with no local newspaper and no local radio programming – including local news. Those radio stations, newspapers and magazines that have managed to survive now face incredible adversity in a down market. Subscription rates and advertising revenues have been preserved by creative and efficient marketing and administrative practices. Central to these efforts has been the responsible use of the telephone as a marketing instrument.

Any measure that would impede the ability of content providers to reach the general public – whether or not they are existing subscribers or customers – would have the effect of further reducing the diversity of perspectives in the marketplace of ideas. An ill-informed, or an under-informed society is decisively not in the public interest.

The link between public interest and diversity of content makes content different. It is for this reason that lawmakers and regulators must carefully consider the full range of potential consequences from restricting the ability of content providers from reaching the public. As more than 25 percent of all products and services purchased by the respondents to the IPI survey were content-related (newspapers, magazines, Web and Internet-based products), the failure to exempt content providers from restrictive regulations (national DNC list, excepted from B2B exemption, no exemption for existing business relationships) would likely harm the general public.

## Detailed Analysis

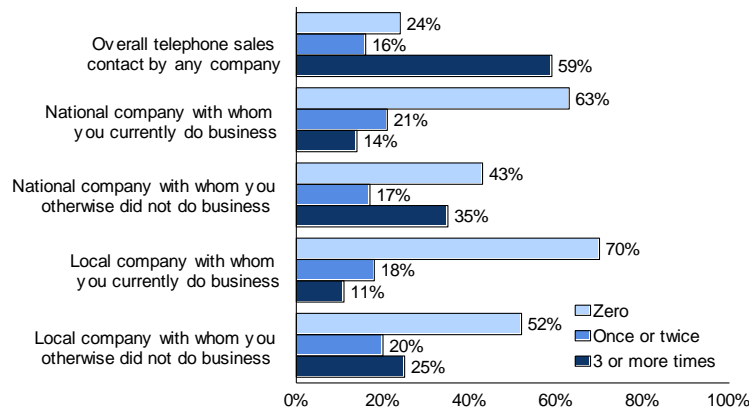
### Frequency of Contact

*The majority of those surveyed have been contacted recently by companies selling products or services, with more frequent contact made by companies with whom the respondent otherwise did not do business.*

To understand the frequency with which individuals in the six states surveyed are contacted by telephone at home, respondents were asked the number of times they receive calls from various types of organizations.

With respect to organizations telephoning into homes for the purpose of selling products or services, it is evident that individuals are contacted more frequently by companies with whom they otherwise did not do business. Specifically, one-half of respondents say they have been contacted by telephone at least once in the past two weeks by a **national company with whom they otherwise did not do business**. In contrast, one-third of those surveyed have been contacted at least once during the past two weeks by a **national company with whom they currently do business**. (Tables 4a, 4b)

### Frequency of Telephone Contact in Past Two Weeks About Products, Services, or Discount Sales



Further analysis indicates that residents of New York, Kentucky, or Georgia are most likely to have been contacted by telephone in the past two weeks about products or services by a national company with whom they currently do business. Residents of Indiana are least likely to have been contacted by such companies. In addition, respondents with a higher level of education as well as those with higher household incomes report more frequent contact by national companies with whom they currently do business. Of note, there is no difference between households who are on their state’s “Do Not Call” (DNC) list (36%) and those who are not (36%) in terms of the likelihood of being contacted in the past two weeks by a national company with whom the respondent has an existing business relationship. The lack of difference between these two groups is potentially related to the fact that telephone solicitation regulations typically permit companies to call clients with whom they have an existing business relationship regardless of whether or not that household is on a DNC list. (Table 4a)

As for national companies with whom residents do not do business, the frequency of telephone contact about products and services varies considerably across several key variables. Notably, residents of Florida, Kentucky, or Georgia report the most frequent contact in this regard over the past two weeks, while residents of Indiana or New York are contacted least often. Telephone contact by companies with whom residents do not do business is strongly linked to promotion of DNC list services, with residents of states that do not actively promote such services being more likely to have been contacted in the past two weeks about products and services than those residing in states that do actively promote such DNC services. Furthermore, additional analysis shows that residents who are on their state’s DNC list (37%) are much less likely than those not on the DNC list (56%) to have been contacted in the past two weeks by national companies with whom

they otherwise did not do business. Across other demographic subgroups, the likelihood of being contacted by telephone during the past two weeks by a national company with whom they do not do business is greatest among respondents with a higher educational background, as well as those from higher income households. (Table 4b)

Among residents of the six states surveyed, telephone contact concerning products and services is slightly less frequent from local or community-based companies. Just more than four in ten of those surveyed report being contacted about products and services at least once in the past two weeks by **local companies with whom they otherwise did not do business**. Three in ten respondents say they were telephoned about products and services at least once during the past two weeks by **local companies with whom they currently do business**. (Tables 4c, 4d)

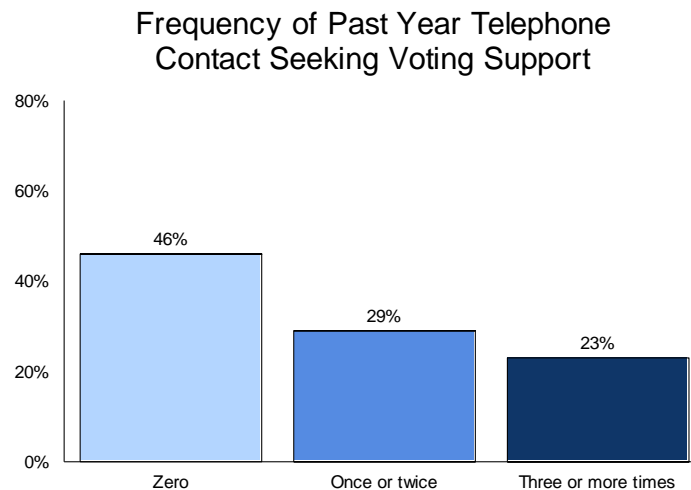
Additional analysis reveals little variation across key sub-groups in terms of the frequency of telephone contact about products and services by local companies with whom residents currently do business. Moreover, residents on state DNC lists (20%) are slightly less likely than those not on such a list (29%) to have been contacted in the previous two weeks from local companies with whom they currently do business. (Table 4c)

There is strong variation among states regarding recent telephone contact about products or services by local companies with whom residents did not otherwise do business. Results reveal that residents of Connecticut, Georgia, or Florida, states that do not actively promote DNC list registration, have been contacted more frequently within the past two weeks than have residents of New York or Indiana, both states that do actively promote DNC list services. The effectiveness of DNC list regulations are again evident in the finding that residents from households not on their state DNC list (52%) are nearly twice as likely as those on the DNC list (28%) to have been contacted in the past two weeks by a local company with whom they did not otherwise do business. Respondents from higher income households, Southern states, and those who live within 10 miles of a shopping mall, also report more frequent telephone contact by these companies. (Table 4d)

In terms of overall telephone contact with any company offering products or services (local or national, existing business relationship or not), results indicate that three in four of those surveyed have been contacted at least once in the past two weeks, with a majority being contacted three or more times. Reported telephone contact by companies about products or services is highest in the southern states of Georgia and Florida, and is generally higher in states that do not actively promote DNC list services as opposed to those that do actively promote DNC list registration. Further analysis indicates that residents on state DNC lists are less likely to have received telephone sales contacts in the past two weeks (66%) compared with residents who are not on the state DNC list (79%). In addition, overall telephone contact from any company offering products or

services is more frequent among those from higher income households. (Table 4 total sales contacts)

Respondents were also queried about the frequency of telephone calls from **political campaigns seeking voting support**. Overall, just over one-half of those surveyed across the six states report having received at least one telephone call in the past year seeking voting support for a political campaign. (Table 4e)

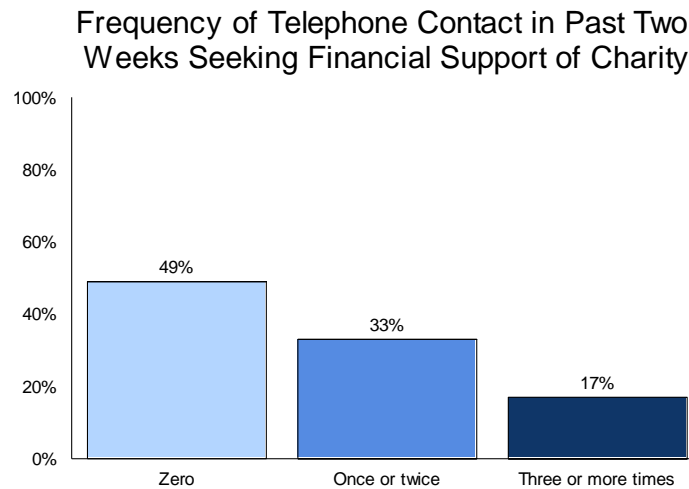


Telephone contact seeking voting support within the past year varies only slightly across the six states, with residents of New York reporting more frequent contact compared with residents of the other states. Also, there is virtually no difference between those who are (56%) and those who are not (53%) on their state DNC list with regard to the likelihood of being contacted for voting support. The fact that results do not differ dramatically either by state, or based on the extent to which DNC list registration is promoted, is perhaps not surprising given that political organizations are often exempt from legislation regarding telephone solicitation.

Elsewhere, results indicate that respondents with a higher level of education or income, as well as older respondents, are more apt to have received telephone contact within the past year from a political campaign seeking voting support. As might be expected, residents whose political orientation aligns with one of the two major parties, Democratic or Republican, are also more likely to report telephone contact over the past year asking for their voting support.

Finally, residents of the six states surveyed were questioned as to the frequency of telephone contact within the past two weeks by **charities or not-for-profit agencies seeking financial support**. Overall, one-half of respondents report receiving a telephone

call from a charity or not-for-profit agency seeking financial support at least once during the past two weeks. (Table 4f)

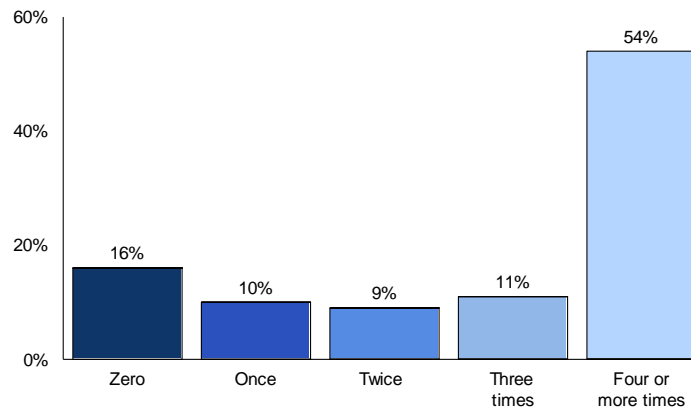


Given that charitable organizations are often exempt from legislation involving telephone solicitation, it is perhaps understandable that the frequency of telephone contact by charities and not-for-profit agencies shows only minimal variation either by state, or by the extent to which DNC list services are promoted. Nonetheless, there is some variation concerning the level of telephone contact by charities and not-for-profit agencies. Of particular interest, results show that those respondents on state DNC lists (43%) report a reduced likelihood of such telephone contacts in the past two weeks relative to respondents who are not on such lists (54%).

To gain a more comprehensive understanding of the frequency of telephone contact from any organization, results were compiled across all companies or charitable organizations that called into respondent's homes during the past two weeks for the purpose of selling products or services or seeking donations. Results demonstrate that more than eight in ten residents of the six states surveyed have been contacted at least once in the past two weeks by an organization seeking to sell products or secure donations. Moreover, most residents report frequent contacts, with over one-half of respondents indicating they have been contacted four or more times in the past two weeks for such purposes. (Table 4 overall)



### Overall Frequency of Telephone Contact in Past Two Weeks Seeking Product Sales or Charitable Donations



Overall telephone solicitation within the past two weeks varies somewhat across the six states surveyed, with residents of Kentucky or Florida most likely to have been contacted, and residents of Indiana or New York least likely to have been contacted. Indeed, overall telephone solicitation appears to be lessened in states that actively promote their DNC list services. Notably, those residents who are on the state DNC list (85%) are slightly less likely than those not on the DNC list (92%) to have been contacted in the past two weeks for the purpose of purchasing a product or making a donation to a charitable organization.

## Products or Services Acquired Via Telephone

### Frequency of Product or Service Acquisition

*One-half of respondents have acquired a product or service in the past year as a result of a telephone sales call, with companies having existing business with the respondent being more successful in their sales attempts.*

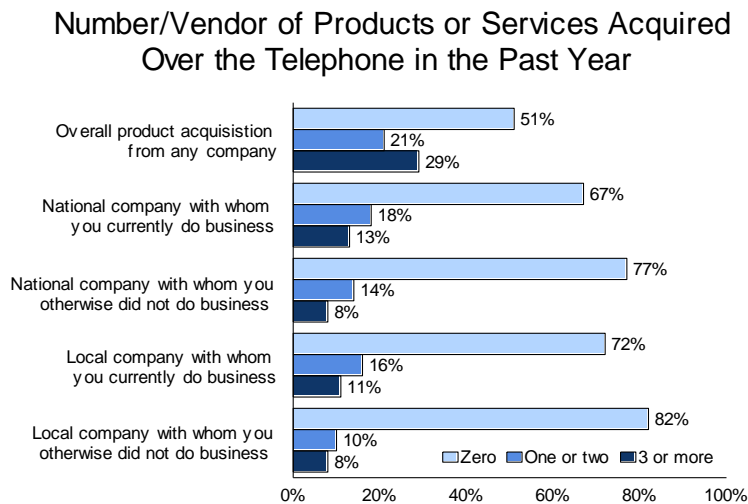
The survey also sought to determine the frequency with which residents acquire products (e.g., newspaper renewals, home maintenance products, health care or beauty products, and so on) or services (e.g., switching telephone companies, lawn care services, obtaining a credit card, stocks or bonds, travel packages, and so on) as a result of being contacted by telephone in their home.

Overall, results reveal that three in ten residents have acquired a product or service over the telephone during the past year from a **national company with whom they currently do business**. Across the six states surveyed there is only minimal variation, with residents of Kentucky, Georgia, or New York most likely to have acquired a product or

service over the telephone from such a company during this time period, and those living in Indiana or Connecticut least likely to have done so.

Furthermore, there is a slightly lower likelihood of purchase acquisition for those on a state DNC list (30%) compared with those not on a state DNC list (36%).

Demographically, respondents from higher income households are more apt than others to have acquired a product or service as a result of receiving a telephone call at home from a national company with whom they currently do business. (Table 5a)



Acquisition of products or services is slightly less likely when residents are contacted by telephone by a **national company with whom they did not otherwise do business**. Overall, only two in ten residents report acquiring a product or service within the past year as a result of a telephone call from a national company with whom they did not otherwise do business. These results are interesting given that, as previously mentioned, respondents report more telephone contact from companies with whom they did not otherwise do business, as opposed to companies with whom they do currently conduct business. Apparently, for national companies, being an existing customer of a company translates into a greater affinity for acquiring products or services over the telephone from that company, despite the less frequent telephone contacts made by such companies. Of note, the acquisition of products or services as a result of telephone solicitation from a national company with whom the respondent did not otherwise do business is slightly reduced for households who are on (16%) versus not on (24%) a state DNC list. (Table 5b)

Across the key sub-groups, there is little variation in product acquisition by state, region, or by the extent to which DNC list services are promoted. Analysis of demographic information also reveals only minor variation with the exception of age, for which younger respondents report a greater likelihood of acquiring products or services over the past

year as a result of a telephone call from national companies with whom they did not otherwise do business.

Moving along, one-quarter of respondents have acquired a product or service over the telephone during the past year from a **local or community-based company with whom they currently do business**. Across the six states surveyed, acquisition of a product or service as a result of a telephone call from such a company is relatively consistent. Likewise, there is virtually no variation in product acquisition among any of the other key sub-groups examined in this study. Nevertheless, there is a slight decline in purchase likelihood from local companies with whom residents do currently have an existing relationship for those on the state DNC list (22%) compared with those not on such a list (29%). (Table 5c)

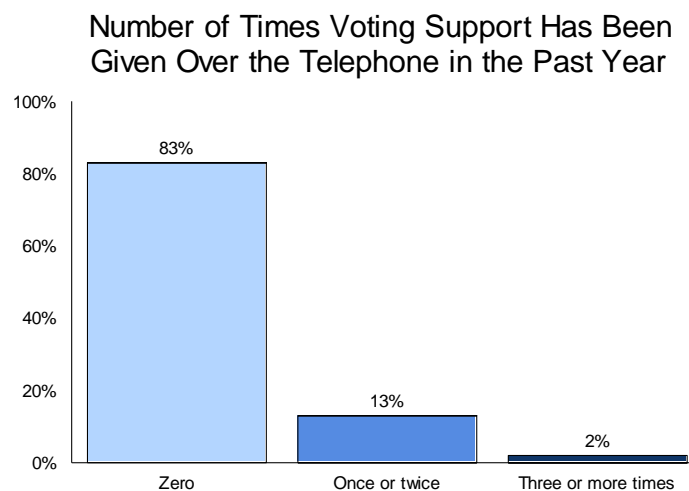
As was the case with national companies, there is a diminished likelihood of acquiring a product or service when residents are contacted by telephone by a **local or community-based company with whom they did not otherwise do business**. Overall, only one in six respondents report acquiring a product or service within the past year as a result of a telephone call from a local company with whom they did not otherwise do business. Once again, it is evident that being an existing customer of a company translates into a greater probability of acquiring products or services over the telephone from that company, despite the less frequent telephone contacts made by such companies. Moreover, households who are on a state DNC list (12%) again show reductions relative to those who are not on such a list (20%) in terms of the number of times a product or service has been acquired as a result of telephone solicitation from local companies in the past year. Across the key sub-groups, there is little variation in the acquisition of products or services from local companies in the past year. (Table 5d)

With respect to the acquisition of products or services in the past year from any company (local or national, existing business relationship or not) that has telephoned, results demonstrate that one-half of respondents have acquired at least one product or service. Importantly, the majority of those who have acquired a product or service as a result of inbound telephone solicitation in the past year have done so three or more times. The fact that many residents have made multiple purchases provides implicit evidence that such purchasing experiences are by and large pleasant and useful. (Table 5 total purchases)

Product acquisition from companies that have telephoned in the past year is highest in Georgia, although it is consistent across states that do or do not actively promote DNC list services. Not surprisingly, there is a strong relationship between the frequency of telephone contact in the past year from any company selling products or services and the likelihood of acquiring a product or service in the past year. That is, while only one-third of those who have not been contacted in the past two weeks have acquired a product or

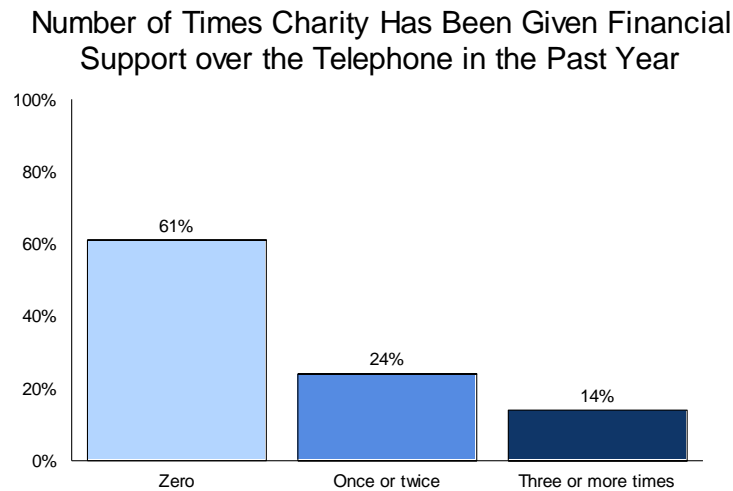
service in the past year, this figure increases to more than one-half for those who have been contacted in the past two weeks. Consistent with the previous result, those on state DNC lists (41%) report a lower level of product or service acquisition from any company in the past year relative to those who are not on a state DNC list (53%). Demographically, overall product acquisition from any company telephoning in the past year is more frequent among younger residents, as well as those from higher income households. (Table 5 overall)

Turning to offering voting support over the telephone, one in seven respondents say they have given their voting support to a political campaign at least once during the past year. Voting support varies somewhat by state, with residents of the northeastern states of New York or Connecticut most likely in the past year to have given their voting support over the telephone. In contrast, residents of Georgia, Indiana, or Kentucky are least likely to have given their voting support over the telephone to a recent political campaign. In addition, results indicate that the likelihood of giving voting support over the telephone in the past year is actually slightly higher for households on the state DNC list (22%) compared with those not on the state DNC list (16%). Older respondents, as well as those from higher income households, are more likely than others to have offered their voting support over the telephone in the past year. (Table 5e)

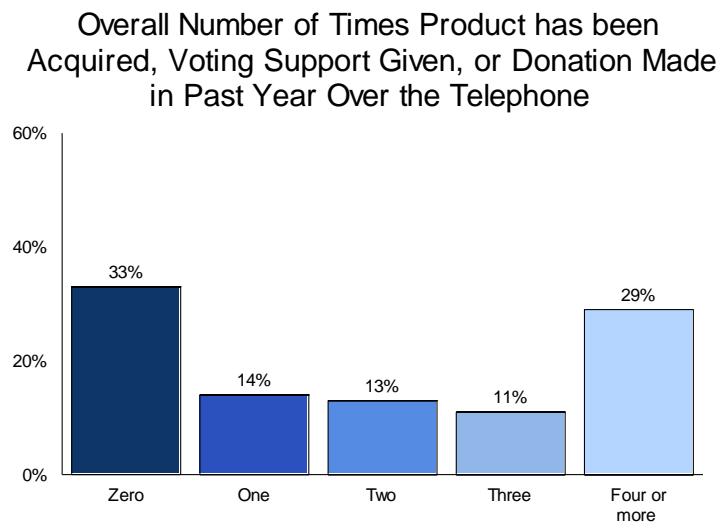


Of the various forms of telephone solicitation examined in this study, financial support of charities or not-for-profit agencies is the most successful. Four in ten respondents say they have given financial support to a charity that sought their support over the telephone in the past year. While financial support of charitable organizations is consistent across the six states surveyed, it should be noted that older respondents as well as those from higher income households are most inclined to have offered financial support to a charity within the past year. Also, evidence suggests that donations to charitable organizations in the past year as a result of telephone solicitation are slightly less likely to have been made

from households on the state DNC list (32%) compared with those not on the state DNC list (40%). (Table 5f)



Overall, telephone solicitation appears to be very effective as two-thirds of those surveyed report at least one instance during the past year in which they have either acquired a product or service, given their voting support, or donated to a charitable organization as a result of an inbound telephone call. In fact, four in ten residents state that they have done so at least three times over the past year. (Table 5 overall)



Of importance, there is very little difference among the six states surveyed in terms of the overall likelihood of making a purchase, donation, or giving political support within the past year as a result of telephone solicitation. Furthermore, residents of states who actively promote state DNC list services do not show any reduction in the frequency of overall

purchase likelihood as a result of calls seeking product sales, voting support, or charitable donations. It is the case however, that residents on state DNC lists (63%) are slightly less likely overall than residents not on such lists (69%) to have acquired a product, given their voting support, or made a donation as a result of a call to their home. (Table 5)

## Information Pertaining to Products or Services Acquired

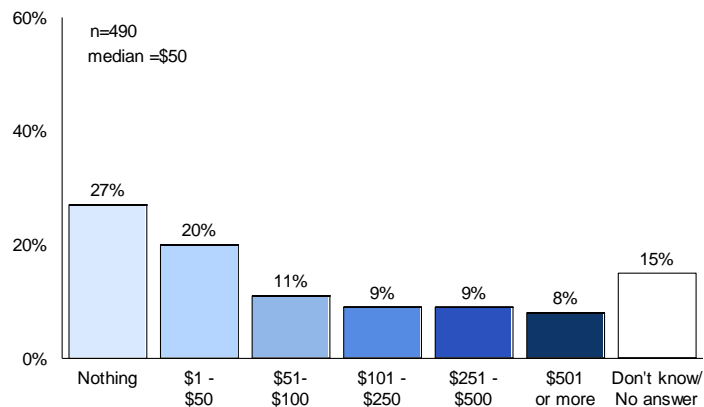
*Residents express a high degree of satisfaction with the experience of acquiring a product or service as a result of a recent telephone sales call.*

Among those residents who have acquired a product or service over the telephone in the past year (n=490), the most commonly acquired items are magazine or newspaper subscriptions (20%), followed closely by long distance or telephone services (18%). Other products or services acquired include credit cards (6%), cleaning or repair services (5%), computer or Internet-related services (5%), or lawn care services (5%). (Table 6)

Expenditures on products by those who have acquired a product or service over the telephone varies considerably, with a plurality saying they spent \$50 or less on the products they have acquired. Still, two in ten say they spent between \$50 and \$250, while a similar number spent more than \$250. The remaining one in seven respondents is unable to provide a definite answer in terms of the amount spent.

Analysis indicates that, among those who have acquired a product or service via the telephone over the past year, the median amount of money spent on products is \$50. It is important to underscore the fact that this figure likely underestimates the true value of telephone solicitation among this population for two reasons. First off, the expenditures assessed in this study only involved the products that were acquired via inbound telephone calls and not the services. Thus, respondents who acquired only services are likely to have a zero value for expenditures. Furthermore, it is sometimes difficult to place a dollar value on services that may be acquired as a result of a telephone call (e.g., credit card debt transfers). (Table 7)

### Spending on Products Acquired Over the Telephone in the Past Year Of Those Who Have Acquired a Product or Service

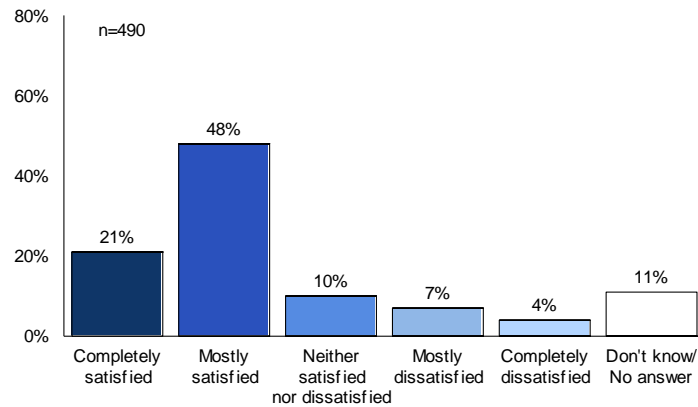


Across the six states surveyed, spending on products varies considerably. Results reveal that residents of New York and Indiana tend to spend more than residents of other states, with Floridians spending the least. Of interest, spending appears to be slightly higher in states that actively promote DNC list membership, compared with states that offer, but do not actively promote, such DNC services. Demographically, those spending the most on products acquired over the telephone include males, older residents, and those from higher income households.

Generally speaking, there is a high level of satisfaction with telephone shopping experiences in the past year. Seven in ten respondents who have acquired a product or service over the telephone in the past year say they were completely or mostly satisfied with the shopping experience, while only one in ten were mostly or completely dissatisfied. The remaining two in ten respondents did not provide a definitive answer to the question. (Table 8)

### Satisfaction with Products or Services Acquired Over the Telephone in the Past Year

Of Those Who Have Acquired a Product or Service



Regionally, satisfaction with recent telephone shopping experiences is highest among New Yorkers and Georgians, with residents of Kentucky or Connecticut least likely to be satisfied with recent experiences of acquiring products or services over the telephone. The level of satisfaction with telephone shopping experiences in the past year is generally consistent across the other key sub-groups examined, although results suggest that satisfaction increases with household income.

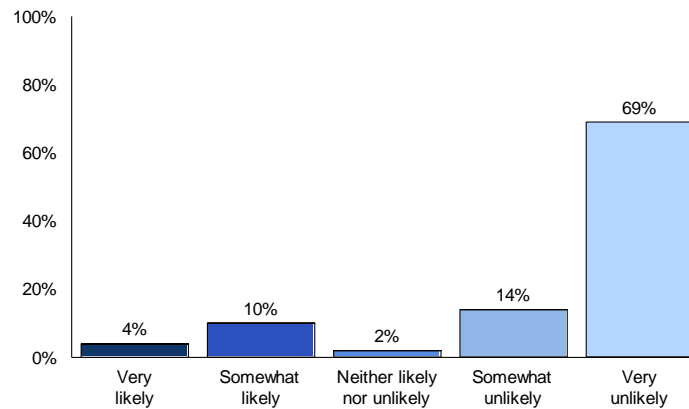
### Likelihood of Future Product or Service Acquisition via Telephone

*Relatively few residents believe they will acquire a product or service in the future as a result of telephone solicitation, although prior purchase history suggests they likely underestimate the extent to which they will do so.*

Regardless of whether or not a respondent has acquired a product or service during the past year as a result of a telephone call from a company, all persons surveyed were asked concerning the likelihood of doing so in the near future. Of interest, although 49 percent of respondents have acquired a product or service in the past year via telephone, only one in seven of those surveyed believe they will do so in the near future. This finding is indeed noteworthy given that, as noted above, satisfaction with recent purchases was quite high. Specifically, seven in ten of those surveyed say they are very unlikely to acquire something over the telephone in the near future as a result of someone calling to sell them a product or service. This result, together with other data collected in this study, suggests that while residents of these six states say they are unlikely to acquire products or services due to telephone sales calls, experience suggests that there may be a greater likelihood of doing so than they foresee. (Table 9)



### Likelihood of Acquiring Product or Service Over the Telephone in the Near Future

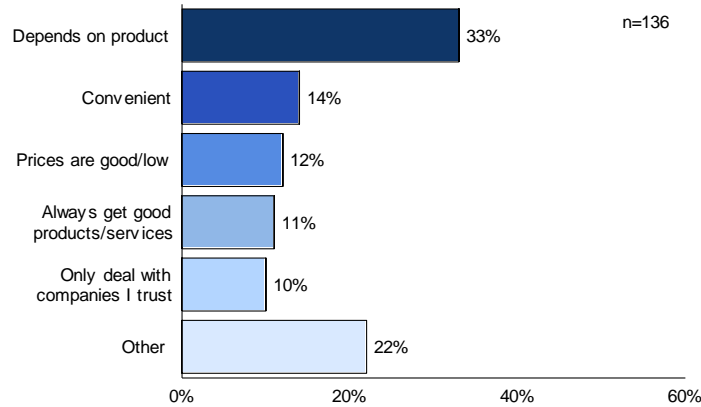


Additional analysis confirms the likelihood of acquiring products or services via telephone in the near future is related to the frequency of such behavior in the past. Only 5 percent of those who have not acquired any products or services over the telephone during the past year believe they are likely to do so in the near future. In contrast, 9 percent of those who have acquired one or two products or services in the past year report they are likely to do so in the near future, and this figure increases to 33 percent for those who have acquired at least three products or services in the past year.

Those few respondents (n=136) who say they are likely to acquire a product or service in the near future as a result of a telephone sales call mention that the main reason for doing so depends on the product and that they will do so if it is something they need. Convenience, low prices, and product quality are also mentioned frequently as explanatory factors. Of interest, one in ten who are likely to acquire products or services over the telephone in the future say they will do so because they only deal with companies they trust. (Table 10a)

### Why are You Likely to Acquire Product or Service Over the Telephone in the Near Future?

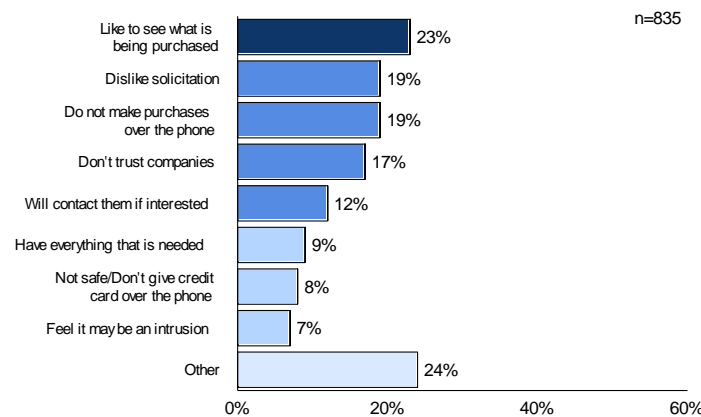
Of Those Likely to Acquire



Those respondents (n=835) who say they are unlikely to acquire a product or service in the near future as a result of a telephone sales call offer as explanatory reasons the fact that they prefer to see what they purchase, or that they dislike sales calls, or that they do not make purchases over the telephone. Other commonly identified reasons for not being likely to acquire a product or service over the telephone include a mistrust of companies that solicit their business by telephone, or the fact that they would prefer to initiate the contact. (Table 10c)

### Why are You Unlikely to Acquire Product or Service Over the Telephone in the Near Future?

Of Those Unlikely to Acquire



## Government Regulation of Telephone Solicitation

### Legislative Support of Proposed Regulations

*The vast majority of those surveyed support some form of legislation regulating telephone solicitation by various organizations.*

To gauge attitudes toward government regulations concerning organizations that telephone people at home, respondents were asked the extent to which they support such regulatory regimes.

Of interest, there appears to be relatively strong support for strict legislation that would **create a “Do Not Call” list prohibiting calls from all organizations, regardless of whether they know the respondent or not.** Specifically, three-quarters of respondents are either completely (52%) or mostly (21%) in favor of a “Do Not Call” list of this type. Although residents of all states support the creation of a “Do Not Call” list, support is slightly lower among residents of Georgia relative to residents of the other five states. Demographically, support for the creation of a list is greatest among those with higher levels of education, those under 65 years of age, and those with a household income of at least \$35,000. (Table 11e)

Not surprisingly, those surveyed who are dissatisfied with the telephone shopping experiences they have had over the past year offer more support for the creation of a DNC list prohibiting calls from all organizations. Similarly, respondents who have not acquired any products or services in the past year as a result of a telephone solicitation also voice slightly more support for the creation of such a DNC list.

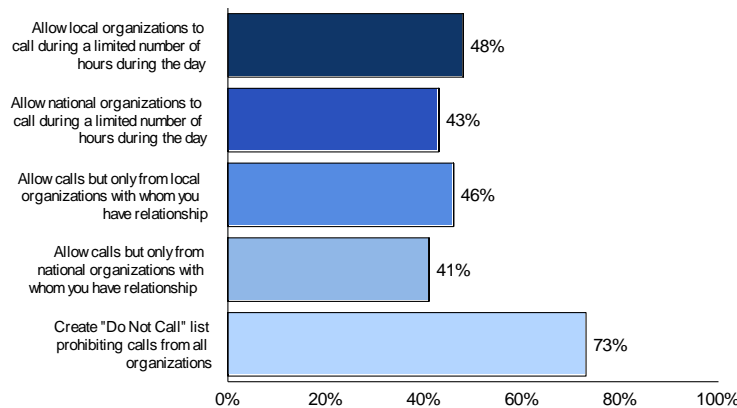
The survey also attempted to ascertain the level of support for more specific forms of legislation aimed at various types of organizations. Overall, one-half of those surveyed support a regulation that would **allow local or community-based organizations to call, but only during a limited number of hours during the day.** Two in ten residents offer their complete support of such legislation, and another three in ten say they mostly support it. Backing of this regulation is consistent across each of the six states surveyed, although it should be noted that support declines sharply with age. Specifically, whereas six in ten of those aged 18 to 34 support a regulation that would allow limited calling time for local organizations, only one-third of those over the age of 64 share this view. (Table 11a)

Results are very similar concerning regulations allowing calls but only from local organizations that have an existing relationship with the person being telephoned. Again, one-half of respondents support legislation that would **allow calls, but only from local or**

**community-based organizations with whom they have an existing relationship.**

Support of such legislation does not vary across the six states surveyed. Across the demographic sub-groups, those with less than a high school education, those aged 18 to 34, and those from higher income households offer the greatest backing for a regulation that would allow calls from local organizations with whom they have an existing relationship. (Table 11c)

Support for Legislation Concerning Organizations That Call You at Home



Government regulations affecting telephone calls from national companies are not viewed as favorably as those affecting local companies. Four in ten residents of the states surveyed support a regulation that would **allow national organizations to call, but only during a limited number of hours during the day**. Two in ten respondents offer their complete support of such legislation, and a similar number indicate they mostly support it. This regulation receives consistent backing across each of the six states surveyed, although it should be noted that once again support declines greatly with age. That is, whereas one-half of those aged 18 to 34 support a regulation that would allow limited calling time for local organizations, only three in ten of those in the oldest age bracket hold this opinion. (Table 11b)

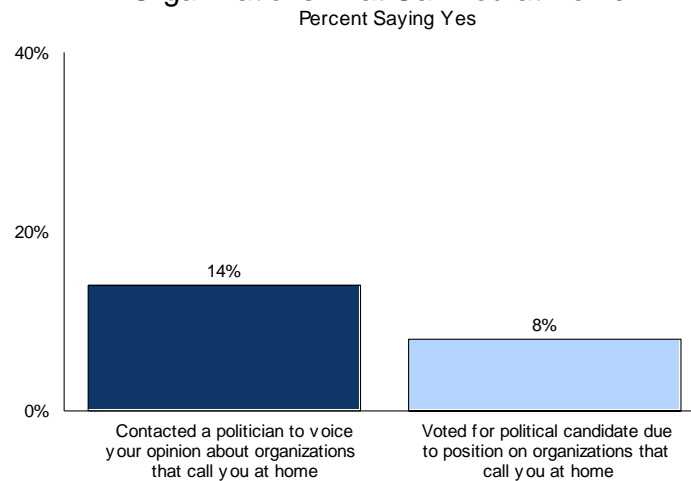
Similar results are obtained concerning a regulation that would allow calls, but only from national organizations with whom the person being telephoned has an existing relationship. In particular, four in ten respondents support legislation that would **allow calls, but only from national organizations with whom the respondent has an existing relationship**. Across the six states, there is only minor variation in support of such a regulation. Results indicate that support is higher, however, among younger respondents as well as those from middle-income households. (Table 11d)

At first blush, there appears to be strong support across the six states for blanket legislation restricting all telephone solicitation, although a closer examination of the data collected permits a finer-grained interpretation. Specifically, while the majority of the public will endorse an “all or nothing” regulatory regime involving DNC lists when offered this option, results also reveal that more limited marketing restrictions also have considerable, albeit somewhat less, public appeal.

Although the majority of residents support some form of regulation on calls from organizations into their households, it is noteworthy that relatively few have taken any action in this regard. Results reveal that one in seven residents of the six states surveyed have contacted a politician or other official to voice their opinion about organizations that call them at home. There is significant variation by state, with residents of the southern states of Georgia and Florida least likely to report taking such action. Of interest, residents of states that actively promote DNC list registration are twice as likely to have contacted a politician to voice their opinion about organizations calling into their home, compared with residents in states that offer, but do not promote, such DNC list services. As might be expected, contacting politicians over concerns about telephone solicitation are linked to satisfaction with and future likelihood of telephone purchases. Specifically, those who are dissatisfied with prior inbound telephone shopping experiences are nearly three times as likely as those who are completely satisfied to have contacted a politician or other official to voice their opinion on telephone solicitation. Similarly, those who say they are very unlikely to purchase a product in the future as a result of an inbound telephone sales call report contacting politicians more than twice as often as those who say they are likely to purchase products over the telephone in the future.

Demographically, respondents in households with an annual income of at least \$75,000, as well as those aged 50-64, are also more likely than others to have taken such action. (Table 12a)

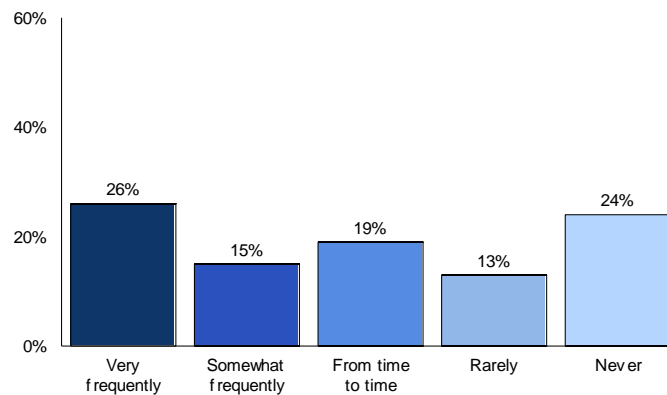
### Actions Taken Based on Your Position on Organizations That Call You at Home



Overall, very few respondents say they have voted for a political candidate based at least partly on his or her position on organizations that call into people's homes. Specifically, less than one in ten residents of the six states surveyed report voting for a political candidate because of his or her position on telephone solicitation. Across the states, residents of Georgia or Florida are less likely than residents of the other four states to have voted for a political candidate at least partly because his or her views regarding organizations that call people at home. In addition, residents of states that actively promote DNC list services are more than twice as likely as residents of states that do not promote such services to have voted for a political candidate for this reason, although the incidence of taking such action must still be termed infrequent. Finally, residents aged 18 to 34 are less likely to have taken such action compared with older respondents. (Table 12b)

Residents were also asked the extent to which they take the initiative to ask **individual** organizations not to call them at home. Overall, the frequency of this action varies strongly, with four in ten residents reporting that they very or somewhat frequently ask individual organizations not to call them at home, and three in ten saying that they do so either from time to time or rarely. Notably, one-quarter of those surveyed say they never ask individual organizations to refrain from calling them at home. (Table 16)

### Frequency of Asking Individual Organizations Not to Call You at Home



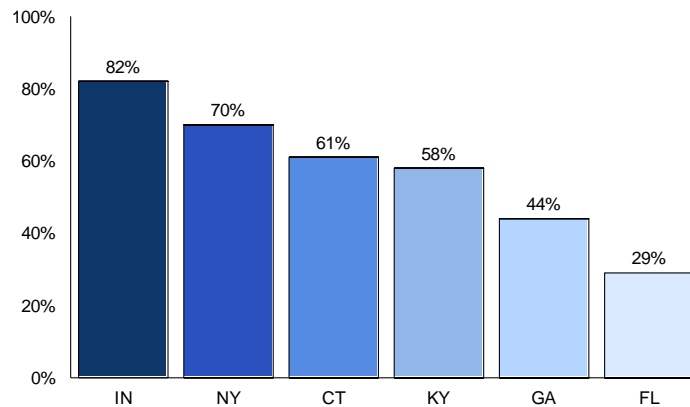
Further analysis reveals the likelihood of asking individual organizations not to call at home to be consistent across each of the six states surveyed. However, older residents, as well as those residents from lower income households, are less inclined than others to ask individual organizations not to call at home.

### “Do Not Call” Lists

*Awareness of, and inclusion on, “Do Not Call” lists varies greatly from state to state, with those registering on such lists convinced of their effectiveness in reducing the frequency of telephone solicitation.*

**Awareness.** Each of the six states surveyed has legislation creating a “Do Not Call” (DNC) list on which residents can register their household to reduce telephone solicitation from **specific** types of organizations. Overall, a slim majority of residents are aware that their state has such a DNC list, while the remainder either do not believe their state has such a list (16%), or are unable to offer a definitive response (30%). (Table 13)

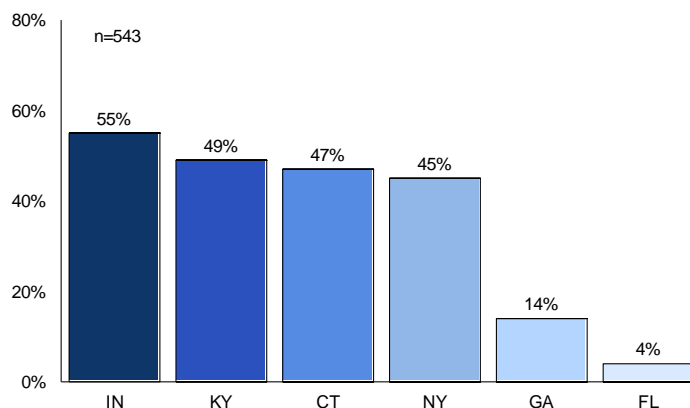
Awareness of "Do Not Call" Lists  
Percent Aware, by State



Awareness of DNC lists varies significantly by state. Residents of Indiana exhibit a much greater awareness of their state’s DNC list than do residents of the other states, while those in Florida are particularly likely to be unaware that their state has such as list. Among other key sub-groups, residents demonstrating the greatest awareness of their state’s DNC list are those in the Northeastern and Midwestern states, those in states that actively promote DNC list registration, and those from higher income households.

**Inclusion.** Those respondents aware that their state has a DNC list (n=543) were subsequently queried concerning whether or not their household is on the list. Results reveal that of those residents aware of their state’s DNC list, four in ten (37%) say their household is on the list, while just over one-half (57%) are not on the list. The remaining 6 percent are unsure as to whether their household is on the DNC list or not. (Table 14)

Is Your Household on the State "Do Not Call" List?  
Percent Saying Yes, of Those Aware of the State DNC list

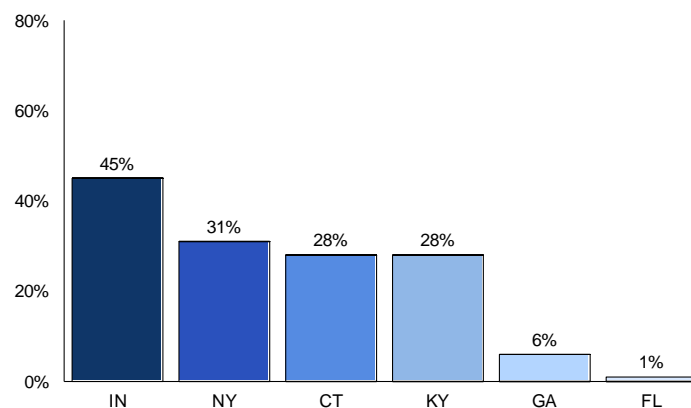




The incidence of inclusion on the state DNC list differs greatly across the six states surveyed. More than one-half of those residing in Indiana who are aware their state has a DNC list say their household is on the list, while slightly less than one-half of aware New York, Kentucky, and Connecticut households are on their state's DNC list. In contrast, relatively fewer Georgia or Florida residents aware of the state DNC list say they have placed their name and telephone number on it. Not surprisingly, households in states that actively promote DNC list services are three times as likely as those in states that do not promote such services to belong to the state DNC list. Likewise, inclusion on a state DNC list is higher among those respondents who have not acquired any products or services via telephone in the past year, those dissatisfied with recent telephone shopping experiences, and those who support regulations prohibiting calls from all organizations.

It is useful to consider the percentage of **all households** on a state DNC list. Overall, residents in one in five households across the six states surveyed have placed their name and telephone number on the state DNC list. Registration is by far the highest in Indiana, where close to one-half of all households are on the state DNC list. Three in ten of all households in New York, Kentucky, and Connecticut are on the DNC lists in those states. However, very few households in Georgia, and virtually no households in Florida, are on those states' DNC lists.

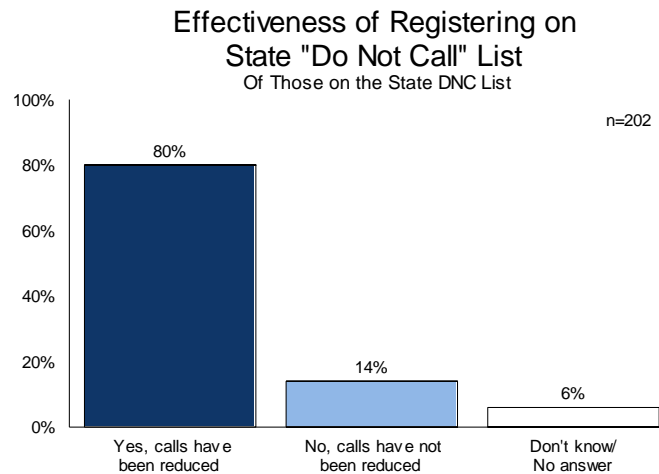
Percentage of All Households  
on State "Do Not Call" Lists



Differences in terms of the incidence of household inclusion on state DNC lists are potentially affected by the registration procedures and promotion of the DNC list services in each of the six states surveyed. Again, states that actively promote DNC list services (Indiana, New York, and Kentucky) are clearly more effective in enlisting registration on such lists. Moreover, the states of Florida and Georgia, which by far have the fewest households on DNC lists, both require yearly fees for registering a household on the DNC list. In contrast, in the other four states surveyed, registration is free of charge. That Connecticut, a state that does not actively promote registration on their DNC list, receives

the same level of participation as other states that do actively promote such DNC lists is perhaps reflective of the fact that it uses a more well established DNC list that has been in operation for a greater period of time.

Respondents whose household is on a state DNC list (n=202) believe that registering their household on the DNC list generally has been effective. Eight in ten of those surveyed say the number of calls from organizations into their home has been reduced since they have placed their name and telephone number on the state DNC list. (Table 15)



Perceived effectiveness of DNC list registration is relatively consistent across the key sub-groups. While those residing in Kentucky or Florida are less likely to believe that telephone solicitation has been reduced as a result of placing their name on the list, interpretation of these results is tenuous due to the small sample size associated with this question.

## Study Methodology

### Sample Distribution and Research Approach

The 2002 Telephone Issues study was conducted by Corporate Research Associates, Inc. on behalf of the Information Policy Institute. The study consisted of 1,000 telephone interviews conducted with a random, representative sample of adults 18 years of age and older residing in Connecticut, Florida, Georgia, Indiana, Kentucky, and New York. These states were selected so as to ensure opinions were gathered from residents of states that have disparate “Do Not Call” telephone issues laws.

The data collection methodology was designed to over-sample so-called “small states” (i.e., those with smaller populations), to ensure the total number of completed interviews from each state was sufficiently large to permit informed commentary at the state level. The following table details the total number of unweighted interviews per state, and the attendant margin of error at the state level, as well as the overall margin of error for 1,000 interviews:

#### Sample Distribution

State	Sample	Margin of Error*
Connecticut	171	+7.5%
Florida	168	+7.6%
Georgia	164	+7.7%
Indiana	160	+7.8%
Kentucky	165	+7.6%
New York	172	+7.5%
<b>Total</b>	<b>1,000</b>	<b>+3.1%</b>

\*At the 95% confidence level (19 in 20 samples).

In addition to quotas at the state level, other quotas were established for the age and gender dimensions at the outset of the data collection process. While the unweighted data set of 1,000 interviews closely matched the actual distribution of adults along these demographic dimensions, the final set nonetheless was weighted by age, gender, as well as state adult population to match the exact adult population in the six states surveyed, based on data from the 2000 census.

The questionnaire was designed by personnel from Corporate Research Associates, in consultation with Information Policy Institute executives and colleagues. The survey was administered by telephone from May 14 to 23, 2002. The interviews required approximately 11 minutes to complete, on average. All interviews were conducted by fully

trained and supervised interviewers, with ten percent of all interviews verified by a field supervisor either through callbacks or monitoring.

After the survey questionnaires were collected, field supervisors carefully edited them. Responses to open-ended questions were coded into conceptually meaningful categories (based on the results from at least 50 different respondents), prior to being incorporated into the database. All project activities were conducted in-house by CRA supervisors and staff.

In the accompanying banner tables, the survey results are broken out by various demographic dimensions (e.g., age, gender, household income, and so on), as well as other key sub-groups (e.g., state, region, and so on). For the purposes of this report, the banner point identified as “Northeast” under the heading “Region” comprises respondents from Connecticut and New York; the banner point identified as “Midwest” under the heading “Region” comprises respondents from Indiana and Kentucky; and the banner point identified as “South” under the heading “Region” comprises respondents from Georgia and Florida.

As well, for the purposes of this report, the banner point identified as “Promoted” under the heading “DNC Service” comprises respondents from Indiana, Kentucky, and New York, while the banner point identified as “Offered” under the heading “DNC Service” comprises respondents from Florida, Georgia, and Connecticut. “Promoted” and “Offered” refer to labels characterizing the extent to which registration on the state “Do Not Call” list is actively promoted in those states. “Promoted” refers to states in which DNC lists are offered and actively promoted, whereas “Offered” refers to states in which DNC lists are offered but not actively promoted.

## Sample Size and Tolerances

As noted, a sample of 1,000 respondents produces a sampling error of  $\pm 3.1$  percentage points in 19 out of 20 samples. As suggested above, margins of error for various sub-samples and proportions will vary. Therefore, a selection of sampling tolerances is presented in the following table:

Sample Size	Proportion				
	90%/10%	80%/20%	70%/30%	60%/40%	50%/50%
50	8.3%	11.1%	12.7%	13.6%	13.9%
100	5.9%	7.8%	9.0%	9.6%	9.8%
150	4.8%	6.4%	7.3%	7.8%	8.0%
200	4.2%	5.5%	6.3%	6.8%	6.9%

300	3.4%	4.5%	5.2%	5.5%	5.7%
400	2.9%	3.9%	4.5%	4.8%	4.9%
500	2.6%	3.5%	4.0%	4.3%	4.4%
600	2.4%	3.2%	3.7%	3.9%	4.0%
700	2.2%	3.0%	3.4%	3.6%	3.7%
800	2.1%	2.8%	3.2%	3.4%	3.5%
900	2.0%	2.6%	3.0%	3.2%	3.3%
1,000	2.0%	2.4%	2.8%	3.0%	3.1%

## Completion Results

Among all eligible respondents contacted, the completion rate was 11 percent. Completion rate is calculated as the number of completed interviews (1,000), divided by the total number of eligible telephone numbers called (19,348) minus those respondents that could not be reached during the interview period (10,603). The final disposition of all telephone numbers called is shown below.

<b>A. Total Numbers Attempted</b>	<b>24,113</b>
Not in Service	3,535
Fax/Modem/Blocked Number	713
Cell Phone/Pager	16
Incorrect Number/Address/Business number	490
Duplicates	11
<b>B. Total Eligible Numbers</b>	<b>19,348</b>
Busy	198
Answering Machine	4,936
No Answer	3,214
Call Backs	1,461
Language Problem	359
Illness, Incapable	234
Selected/Eligible Respondent Not Available	560
<b>C. Total Asked</b>	<b>8,386</b>
Gatekeeper Refusal	2,153

Respondent Refusal	4,625
Terminated	230
<b>D. Co-operative Contacts</b>	<b>1,378</b>
Disqualified (Age, Non-business owner)	202
Complete (Active Young Entrepreneurs)	176
Complete (Junior Achievers)	1,000
<b>Completion Rate</b>	<b>11%</b>