

researchacma
Evidence
that informs

Mobile calls to 13 numbers

Research report

JULY 2014



communicating
facilitating
regulating

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Introduction

Research objectives

The purpose of this research is to contribute to the evidence base around consumers' use of communications services to assist the Australian Communications and Media Authority (the ACMA) in its consideration of the charging arrangements for calls from mobile phones to 13 numbers. In particular, this research is designed to provide evidence on the use of and potential concerns surrounding calls to 13 numbers from mobile phones. It does not investigate calls to 13 numbers from landlines.

13 and 1300 numbers are widely used by businesses, government agencies and community organisations to provide a single number for callers across Australia. Examples include Centrelink, Medicare, banks, insurance companies, electricity providers, telecommunications providers and charities. This research will assist the ACMA in better understanding consumers' use of these numbers.

Methodology

The ACMA commissioned Roy Morgan Research to undertake the quantitative research using a computer-aided telephone interview (CATI) facility. The questionnaire was in the field in October 2013.

A dual frame design was used to obtain the sample of 3,151 mobile phone users, with 2,510 recruited from random digit dialling of landline numbers and 641 recruited from mobile-only households sourced from Roy Morgan's Single Source database.

The sample sought to closely match the population of adult Australians aged 18 years and over, with the exception that a broad quota was applied to ensure approximately 50 per cent of respondents came from households with a combined income of \$50,000 or less per annum. The data was weighted back to reflect ABS household income proportions for analysis purposes.

Differences that are statistically significant at a 95 per cent confidence level are discussed in this report.

The full text of the questionnaire is in Appendix 1.

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The 13 number community research is part of ACMA's research program, **researchacma**, which identifies communications and media matters of continuing significance to society, markets and government.

researchacma has five broad areas of interest:

- > market developments
- > media content and culture
- > digital society
- > citizen and consumer safeguards
- > regulatory best practice and development.

This research contributes to the ACMA's regulatory best practice and development research theme.

Key findings

Summary

The majority of Australian mobile users:

- > were on a postpaid plan (72 per cent compared with 28 per cent on prepaid)
- > had been on their current plan more than two years (54 per cent)
- > had called a 13 number in the past year from their mobile (59 per cent). Just over a third had called a 13 number from their mobile within the last month (35 per cent)
- > who have ever called a 13 number, call 13 numbers around four times a year (every three months) or less (57 per cent)
- > didn't know or didn't correctly identify how calls to 13 numbers are charged from mobiles, with only one-third (34 per cent) answering they are charged as time-based calls
- > reported not being on, or not knowing whether they were on, a 13-friendly plan (75 per cent)
- > who report being on 13-friendly plans, believe it is quite important or very important that 13 calls are part of their plan's included value (54 per cent)¹
- > who report not being on a 13-friendly plan, believed it was not very important or not at all important to be on a plan that has 13 numbers as part of its included value in the future (73 per cent).

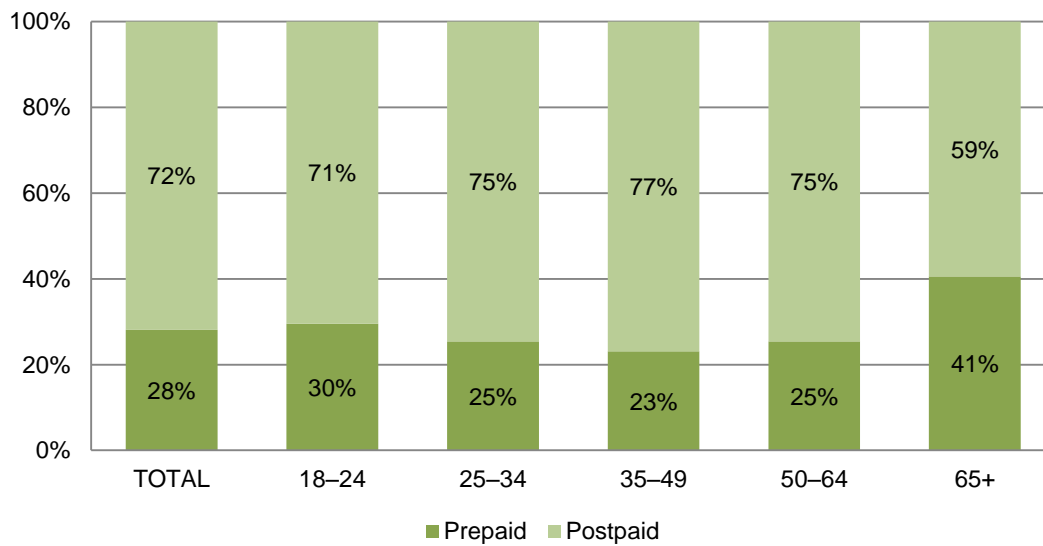
One-third (32 per cent) of Australian mobile users have had the experience in the past year of wanting to make a 13 call from their mobile but not doing so because of concern about call costs.

Prepaid or postpaid

Figure 1 shows the majority of mobile users were on postpaid plans (72 per cent). The proportion on prepaid was 28 per cent, but for those 65 years and over the proportion on prepaid was 41 per cent.

¹ The term '13-friendly plan' is used in this report to refer to mobile plans that include calls to 13 or 1300 numbers as part of the included value in the plan.

Figure 1 Plan type by age

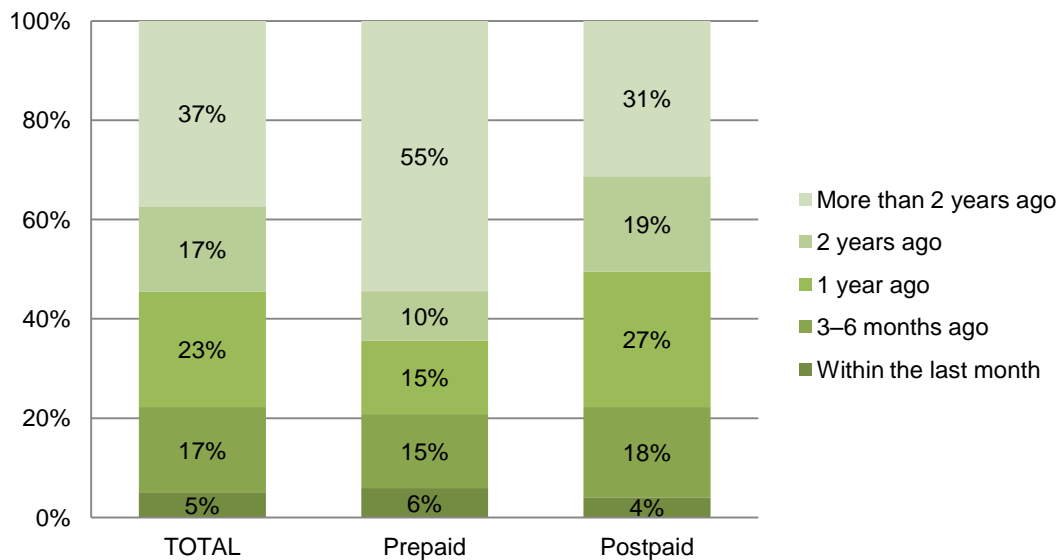


N=3,151

Length of time on current plan

More than half of mobile users (54 per cent) had been on their current mobile plan for two years or more. This was significantly higher for those on prepaid plans (65 per cent). Ten per cent of prepaid consumers reported they had been on their current plan for about two years and a further 55 per cent on their current plan for more than two years. Figure 2 refers.

Figure 2 Length of time on current mobile plan, by plan type



N=3,151

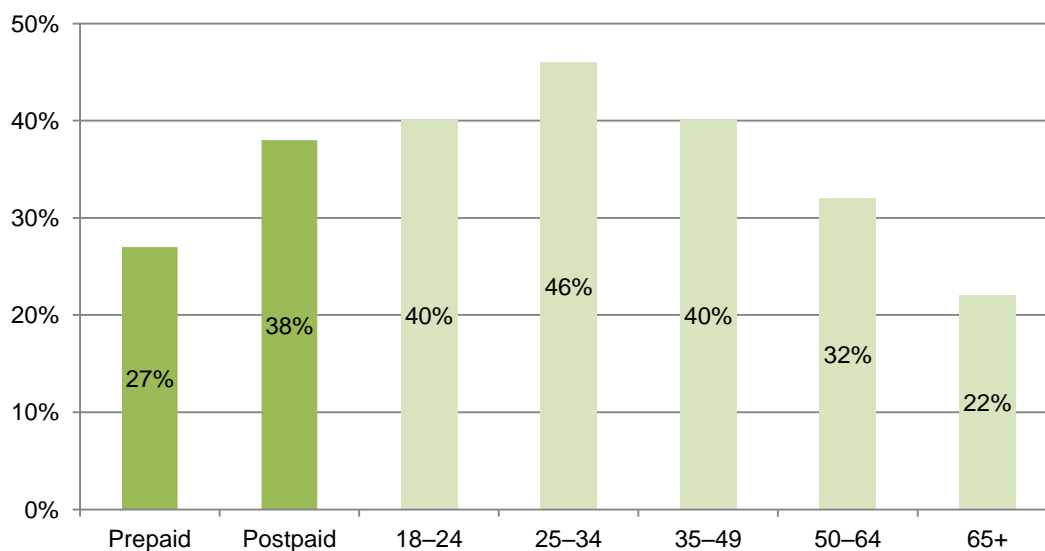
Calls to 13 numbers

The majority of Australian mobile users (59 per cent) had called a 13 number from their mobile in the past year. Only a minority of mobile users who had called a 13 number from their mobile did so weekly or more often (15 per cent).

Most recent call to a 13 number

Just over a third (35 per cent) of mobile users had called a 13 number from their mobile within the last month. Older Australians (65 years and over) were less likely to have called a 13 number in the last month (22 per cent) as shown in Figure 3. Prepaid customers (27 per cent) were less likely than postpaid customers (38 per cent) to have called a 13 number from their mobile in the last month.

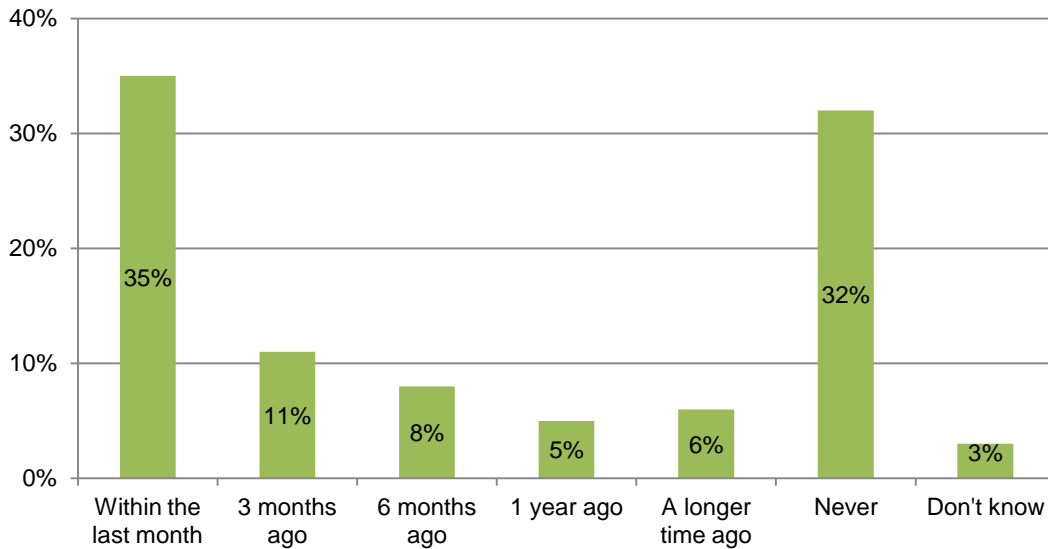
Figure 3 Called a 13 number in the last month, by plan type and age



n=1,079

A further 19 per cent had called a 13 number from their mobile between three and six months ago. One in ten (11 per cent) had called a 13 number about a year or longer ago from their mobile, but not since (Figure 4).

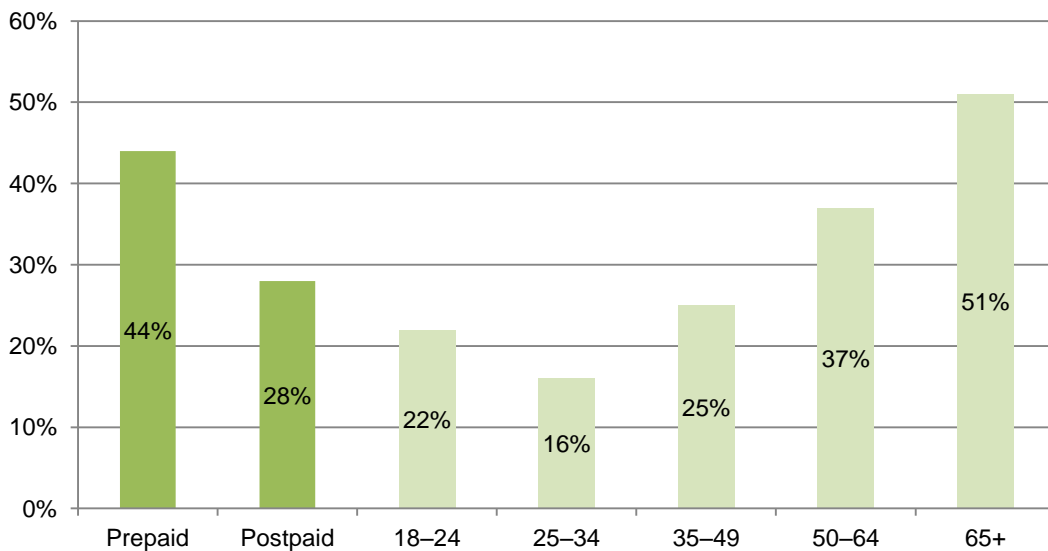
Figure 4 Most recent call to a 13 number from mobile



N=3,151

Just under a third (32 per cent) of mobile users had never called a 13 number from their mobile. As shown in Figure 5, prepaid mobile users were more likely to have never called a 13 number from their mobile (44 per cent). Half (51 per cent) of mobile users 65 years and over had never called a 13 number from their mobile, and 37 per cent of mobile users aged 50 to 64 had not. Of those 25 to 34 years old, only 16 per cent had never called a 13 number from their mobile.

Figure 5 Never called a 13 number from mobile



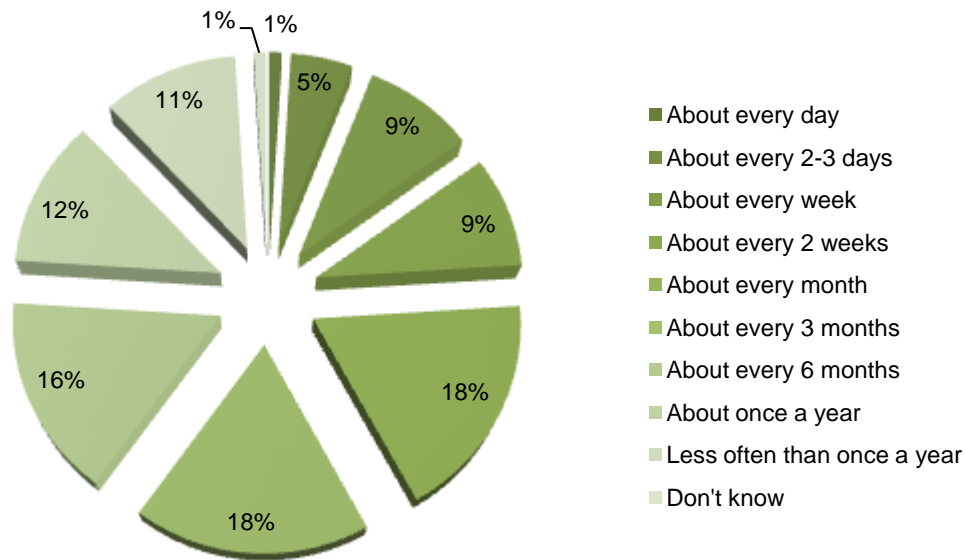
n=1,043

Frequency of calling 13 numbers

Of mobile users who had called a 13 number from their mobile, only one per cent reported they did so daily (Figure 6). A further 14 per cent called every two to three days or weekly, and another nine per cent called 13 numbers fortnightly from their mobiles. Over a third (36 per cent) called monthly or every three months. Thirty-nine

per cent of mobile users called a 13 number from their mobile every six months or less often.

Figure 6 Frequency of calling 13 numbers, if ever called from mobile

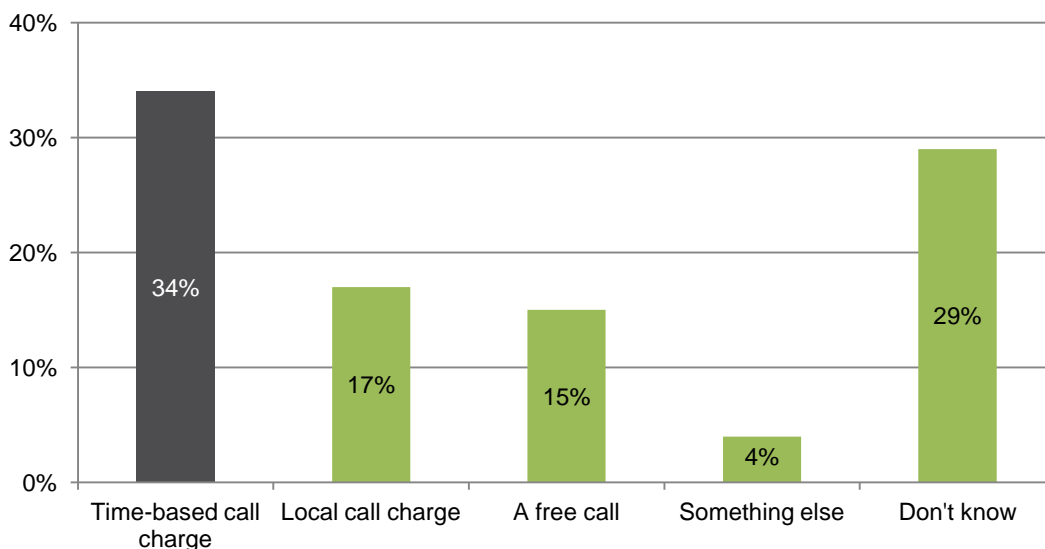


n=2,024

Charging of calls to 13 numbers

Just over a third of mobile users indicated correctly that phone calls from their mobile phone to a 13 number were charged as time-based calls. Seventeen per cent believed 13 numbers were charged as local calls from their mobiles, and 15 per cent believed they are free calls. Twenty-nine per cent of mobile users did not know how they were charged for 13 numbers from their mobiles (Figure 7).

Figure 7 How calls to 13 numbers are charged



N=3,151

Of the 15 per cent who said that calls to 13 numbers were free from their mobile:

- > 43 per cent believed they were free for everyone
- > 18 per cent said they were free for them based on their plan
- > 22 per cent said they were free for them as part of the included value on their plan
- > three per cent responded with 'other'
- > 14 per cent didn't know.

Of those who indicated they were on an included-value plan, a fifth (20 per cent) said 13 numbers were included in their plan value and 45 per cent said they were not part of their included value. Over a third (35 per cent) did not know whether the included value on their mobile plans covered 13 numbers or not.

13-friendly plans

Mobile users who reported being on a mobile plan that covered 13 numbers as part of their current plan's included value are referred in this report as being on 13-friendly plans.

The following analyses exclude respondents who replied that calls to 13 numbers are 'free for everyone', 'don't know' and 'other' (n=290). The base for these analyses is therefore n=2,861.

More than half (56 per cent) of mobile users who were not on a 13-friendly plan correctly understood that calls to 13 numbers from mobiles were charged as time-based calls. This compared with 24 per cent of those who were on included value plans and 25 per cent of those who did not know whether they were on a 13-friendly plan or not. This could be attributed to a greater awareness of call charging arrangements by those for whom the cost would not be part of their regular bill amount.

Three-quarters (75 per cent) of those respondents who did not know if 13 numbers were included in their plan, or who reported 13 numbers were not part of their mobile plan's included value, were not aware that plans were offered by phone providers that included calls to 13 numbers from mobiles.

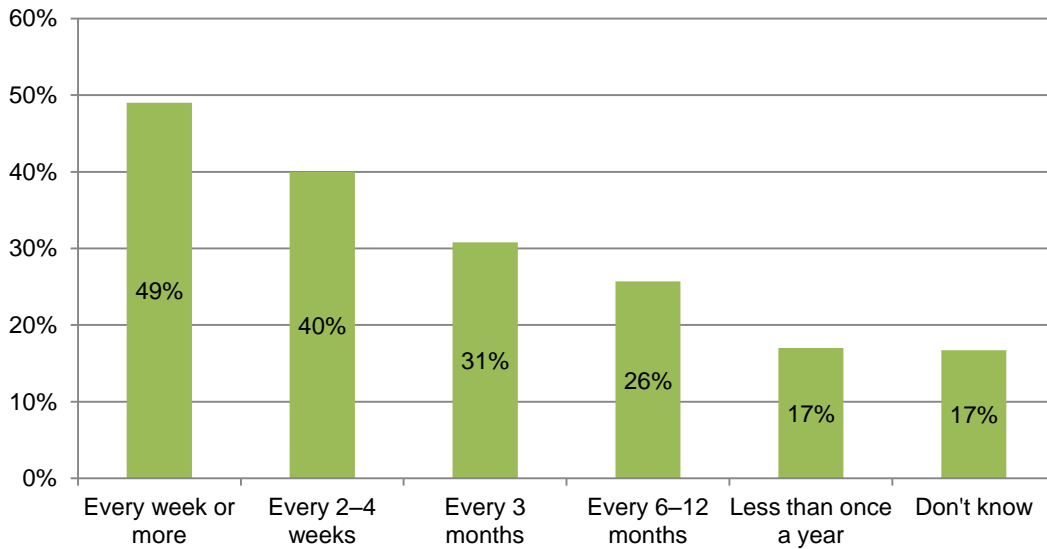
Likelihood of being on a 13-friendly plan

A quarter (25 per cent) of respondents reported being on a 13-friendly plan. Mobile users who started their current plan within the last year were more likely to report being on a 13-friendly plan (30 per cent). Those who had been on their current plan more than two years were less likely to be on an included value plan (19 per cent).

The proportion that reported being on a 13-friendly plan increased to 33 per cent for those who had called a 13 number from their mobile.

Almost half (49 per cent) of mobile users who called 13 numbers from their mobile about every week or more reported they were on a 13-friendly plan. Figure 8 shows that as frequency of calling 13 numbers declines, so does the likelihood of reporting to be on a 13-friendly plan.

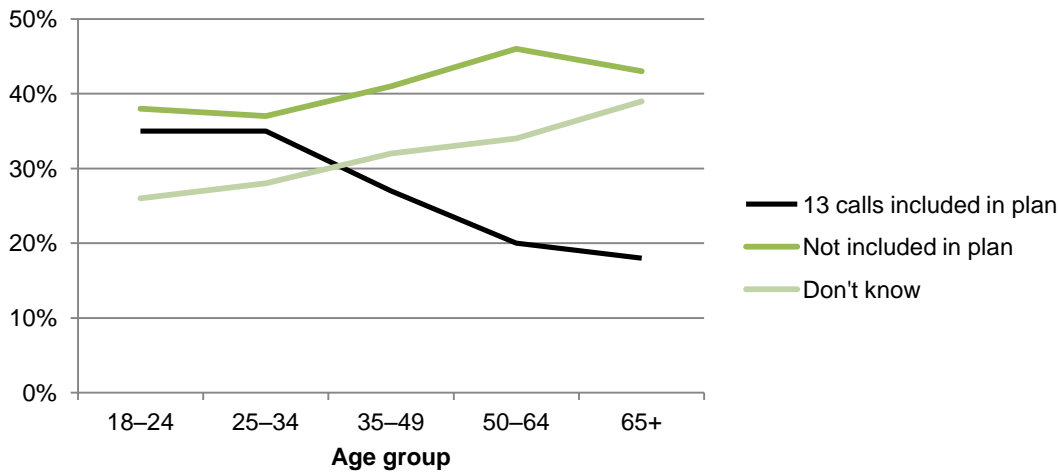
Figure 8 On a 13-friendly plan, by frequency of calling 13 numbers



n=1,850

Younger mobile users were significantly more likely to report being on 13-friendly plans than older age groups (Figure 9).

Figure 9 Whether mobile plan includes calls to 13 numbers, by age



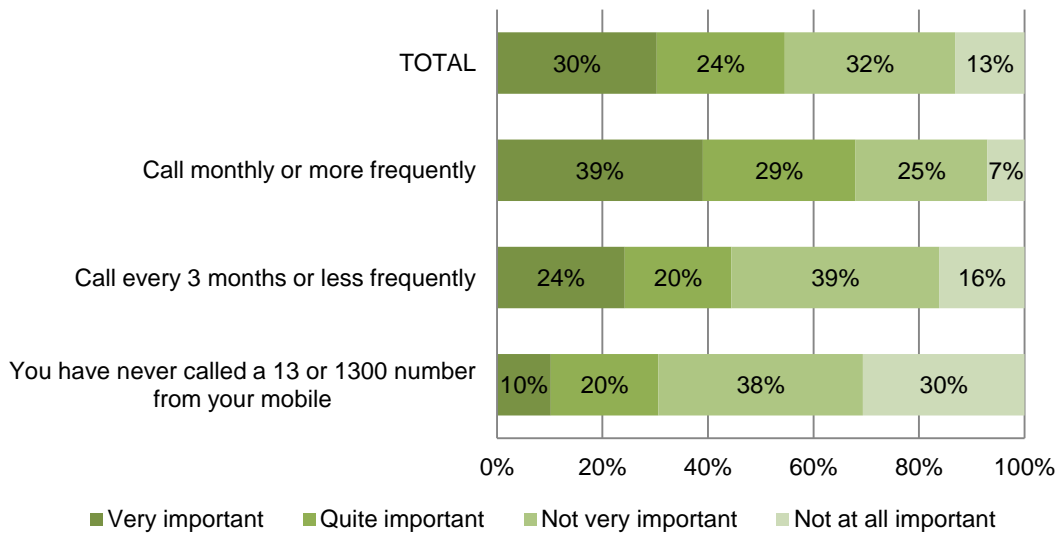
n=2,861

Importance of being on 13-friendly plans—currently on a 13-friendly plan

Over half (54 per cent) of mobile users on 13-friendly plans believed it was quite important or very important that these calls were part of the included value on their mobile plan.

Two-thirds (68 per cent) of those on 13-friendly plans who call 13 numbers monthly or more frequently think this is an important feature of a mobile plan (Figure 10).

Figure 10 Importance of currently being on a 13-friendly plan, by frequency of calling 13 numbers



n=701.

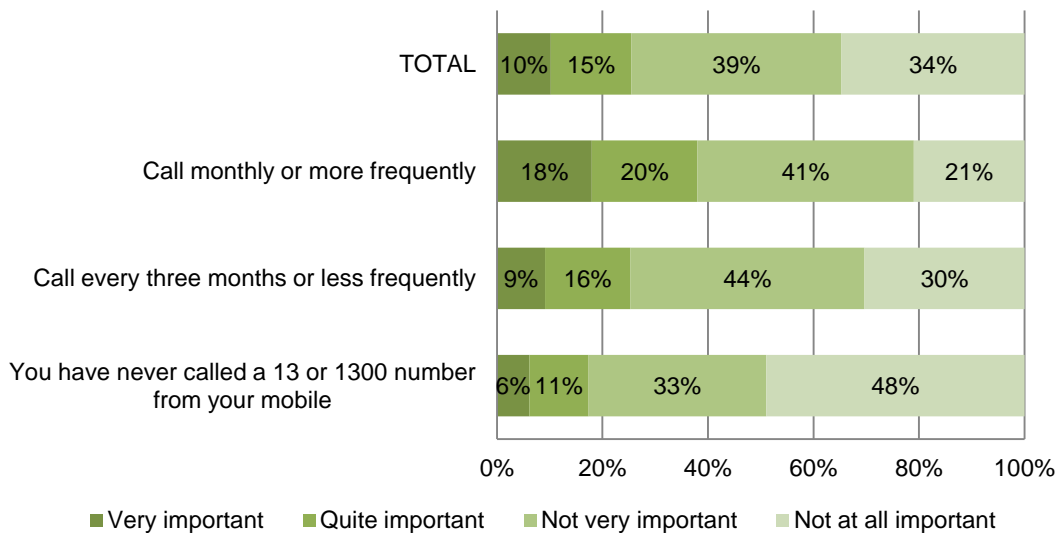
Responses of those who said Don't know (<1 per cent) are not shown.

Importance of being on 13-friendly plans in the future—not currently on a 13-friendly plan

The importance of being on a 13-friendly plan was valued considerably less by those not currently on a 13-friendly plan. Only a quarter (25 per cent) of respondents not on a 13-friendly plan felt it would be important in the future to be on a plan that has 13 numbers as part of its included value. Compare Figure 11 with Figure 10.

Of those who are not currently on a 13-friendly plan, it was more important to those who call 13 numbers more often to be on a 13-friendly plan in the future.

Figure 11 Importance of being on a 13-friendly plan in the future, by frequency of calling 13 numbers



n=1,200.

Responses of those who said Don't know (<1%) are not shown.

The relationship of the importance of 13-friendly plans to the frequency of calling 13 numbers was indicated by a further question. Those who reported not being on a 13-friendly plan', and who thought it was not very important or not at all important to have 13 numbers as part of their included value in the future, were asked why they responded in this way.

The main reasons given were:

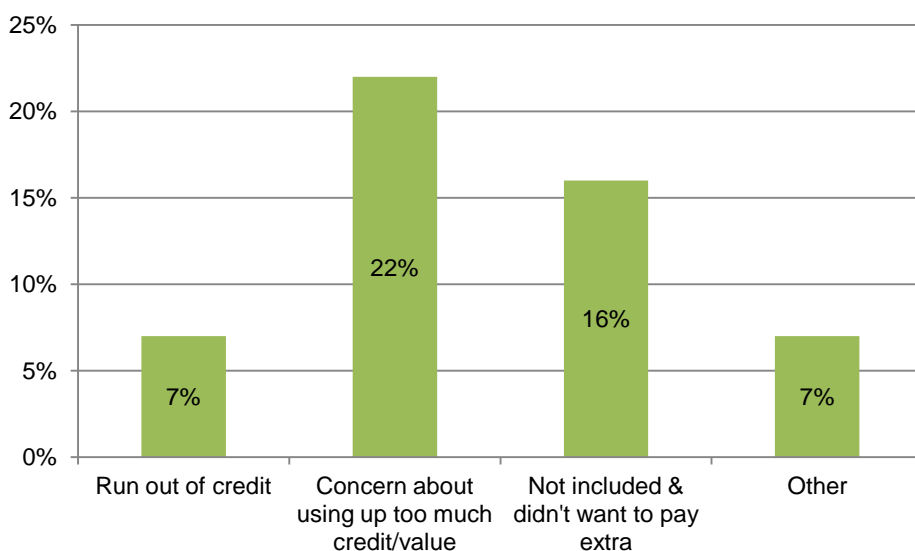
- > 75 per cent rarely or never called these numbers from their mobile
- > seven per cent only make short calls to these numbers from their mobile
- > seven per cent were not concerned about the cost of calling these numbers
- > five per cent would prefer to be on a less expensive plan
- > a fifth gave another reason.

Barriers to making calls to 13 numbers

In the last 12 months, a third (32 per cent) of Australian mobile users reported wanting to make a 13 call from their mobile but not doing so because of concerns about call costs.

Figure 12 shows that a fifth of users (22 per cent) held back from making a 13 call because they were concerned about the cost of the call using up too much credit or included value on their plan. Plans that did not include 13 calls, and not wanting to pay extra, were barriers to making a 13 call for 16 per cent of users. For prepaid users, in the past year, 17 per cent had experienced a time in the past year when they had wanted to make a 13 call but couldn't because they had run out of credit.

Figure 12 Barriers to making calls to 13 numbers



N=3,151.

Multiple response.

13-friendly plans

Those who reported not being on a 13-friendly plan were significantly more likely not to have made a 13 call in the past year from their mobile. This is because they were more concerned about running out of credit than those on a 13-friendly plan (10 per cent compared with seven per cent). They were also more likely not to have called because:

- > they were worried about the cost of the call using up too much credit on their plan (33 per cent compared with 17 per cent)
- > they didn't want to pay extra (28 per cent compared with eight per cent).

Level of inconvenience

Mobile users who had wanted to call a 13 number in the past year but didn't were asked to rate how much of a problem this was for them on a scale of 1 (no problem at all) to 10 (a very big problem).²

For those who couldn't call a 13 number because they had run out of credit, a fifth (19 per cent) perceived this as a very big problem (a rating of 10). The mean rating was 6.18 suggesting that not being able to call a 13 number on this occasion was a significant problem for this group.

The means were slightly lower for the other reasons—concern about using up too much credit or included value (5.63) and not wanting to pay extra for these calls as they were not part of their plan's included value (5.82).

The results suggest that this was more than just a minor inconvenience for many of the third of mobile users who reported wanting to call a 13 number from their mobile but not being able to call. Around a third of the users who had had this experience—34 per cent of those who didn't call due to concern about using up too much credit or included value and 30 per cent who did not call due to not wanting to pay extra for these calls as they were not part of their plan's included value, rated it as a problem with a rating of 8 to 10.

² The questions concerned did not define the scale, except to ask (Q14a-b) 'On a scale of 1 to 10, where 1 is "no problem at all" and 10 is "a very big problem", how much of a problem was it for you that you didn't call because ... [reason]?'

Household income

Summary

Those who reported lower household incomes (under \$50,000) were:

- > more likely to be on a prepaid mobile plan—41 per cent of those reporting a household income of less than \$50,000 compared with 20 per cent of those with household incomes of \$50,000 and over
- > more likely to have been on their current plan for more than two years (44 per cent compared with 34 per cent)
- > less likely to have called a 13 number from their mobile in the last month (30 per cent compared with 38 per cent)
- > more likely to have never made a call to a 13 number from their mobile (40 per cent compared with 27 per cent)
- > less likely to make frequent calls to 13 numbers from their mobile
- > less likely to report having an included value mobile phone plan (21 per cent compared with 27 per cent)
- > just as aware of included value mobile phone plans as most other household income groups.

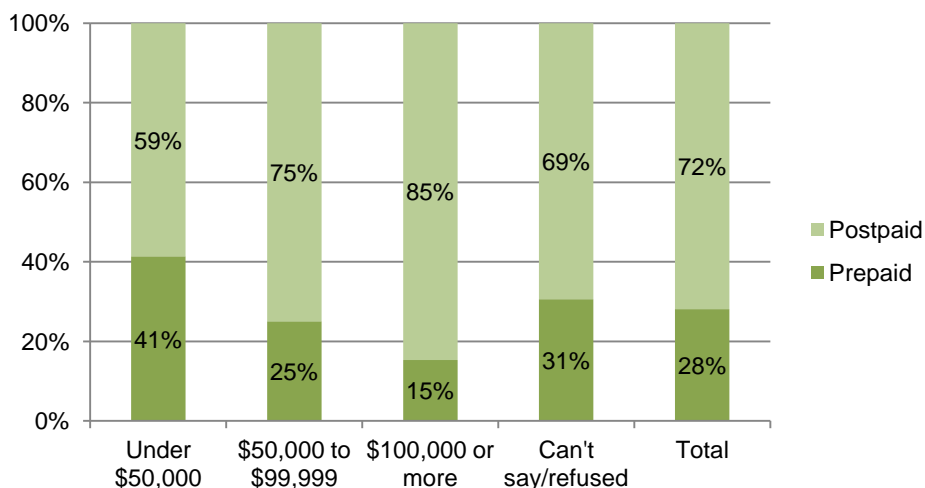
Note

This analysis looks at differences in responses by household income. Those who indicated they couldn't say what their household income was (n=102) and those who refused to answer this question (n=98) are included.

Prepaid or postpaid

Respondents who reported a lower household income were more likely to be on a prepaid mobile plan—48 per cent with an income under \$25,000 and 37 per cent with an income between \$25,000 and \$49,999 are on prepaid plans (Figure 13). Combining household income groups together, those with a household income under \$50,000 are significantly more likely to be on a prepaid plan than those with a household income of \$50,000 or greater (41 per cent compared with 20 per cent).

Figure 13 Plan type by household income

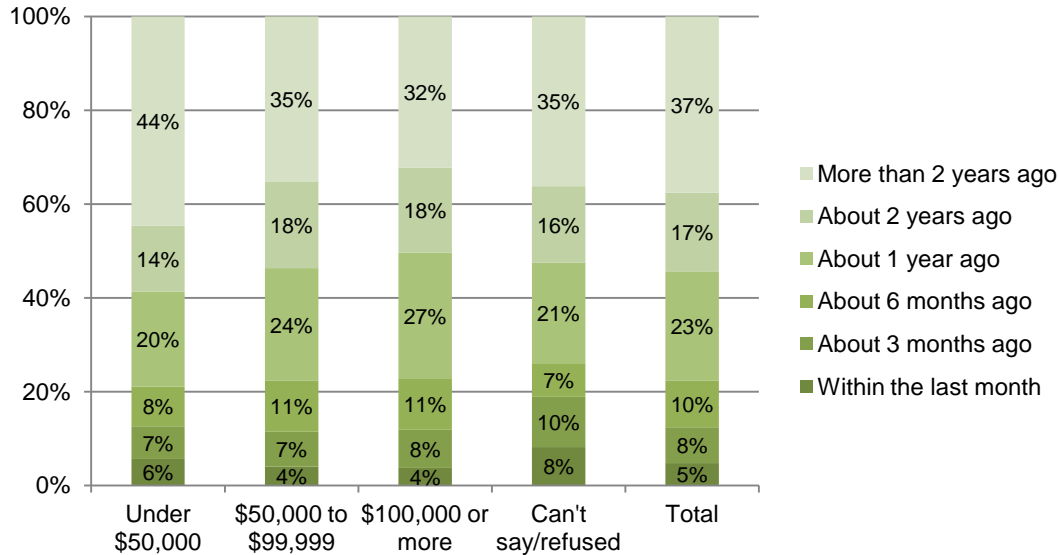


N=3,151

Length of time on current plan

Respondents who reported lower household incomes were also more likely to have been on their current plan for more than two years (Figure 14).

Figure 14 Length of time on current plan, by household income



N=3,151

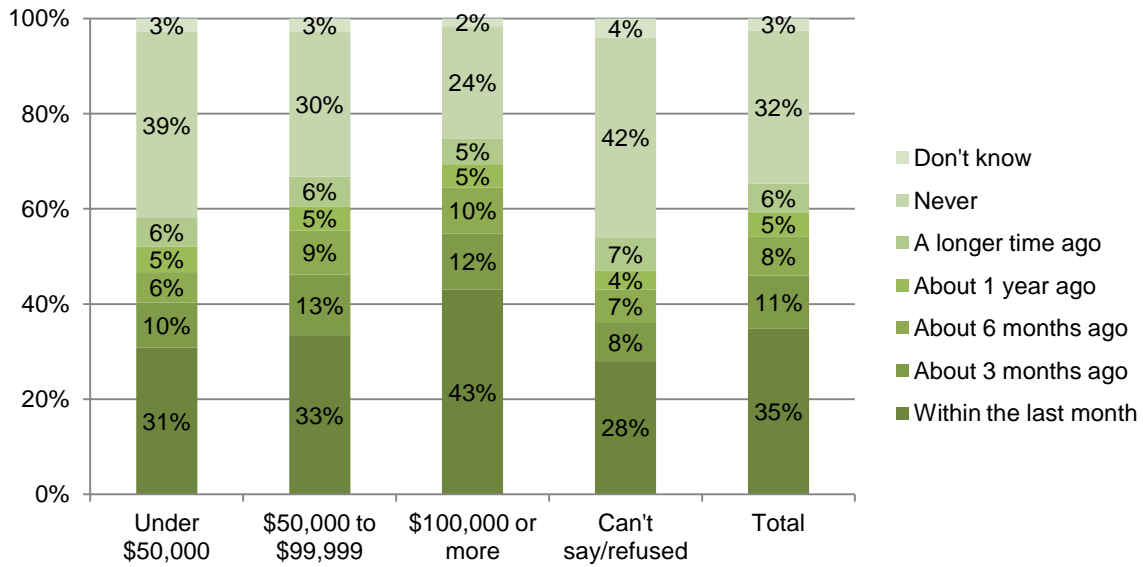
Calls to 13 numbers

Mobile users with lower household incomes were significantly more likely to say they had never made a call to a 13 number from their mobile.

Thirty-nine per cent of respondents with a household income of under \$50,000 had never made a call to a 13 number, compared with 27 per cent with a household income of over \$50 000.

Those with lower household incomes were also less likely to report having made a call to a 13 number from their mobile in the last month than those reporting higher household incomes (Figure 15).

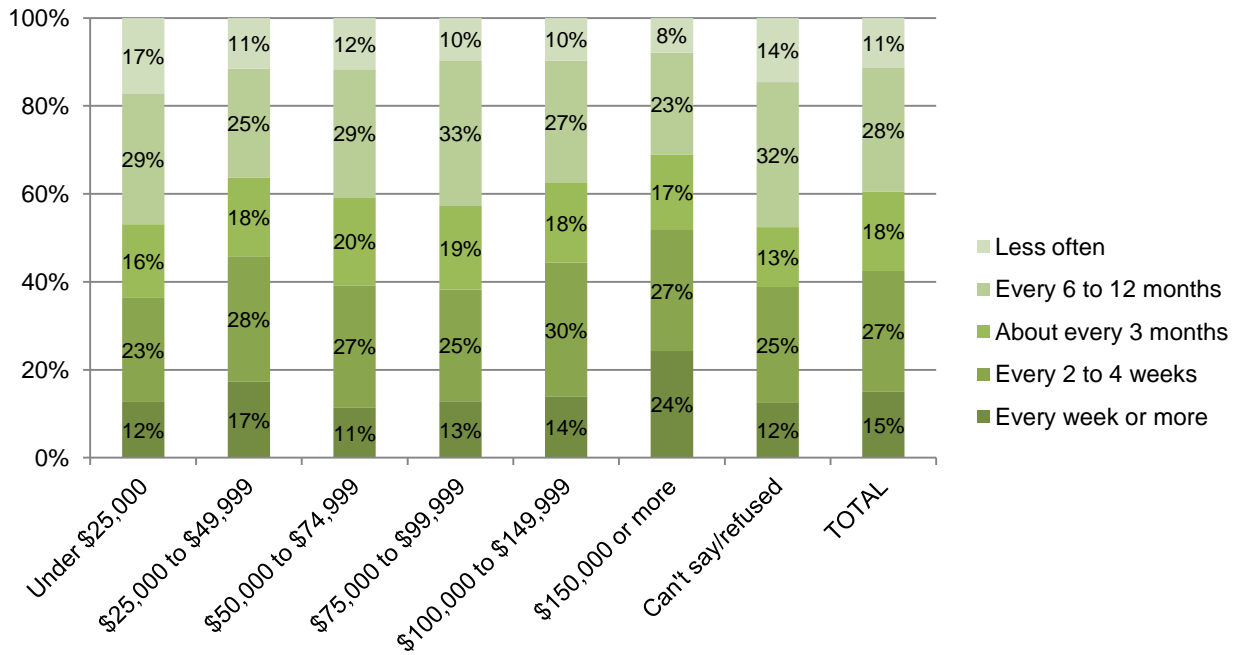
Figure 15 Last time called 13 number, by household income



N=3,151

Respondents with a household income of under \$25,000 who have ever called a 13 number were more likely to say they made calls to 13 numbers from their mobile about every six months or less (46 per cent compared with 39 per cent overall). Figure 16 refers.

Figure 16 Frequency of calls to 13 numbers, by household income

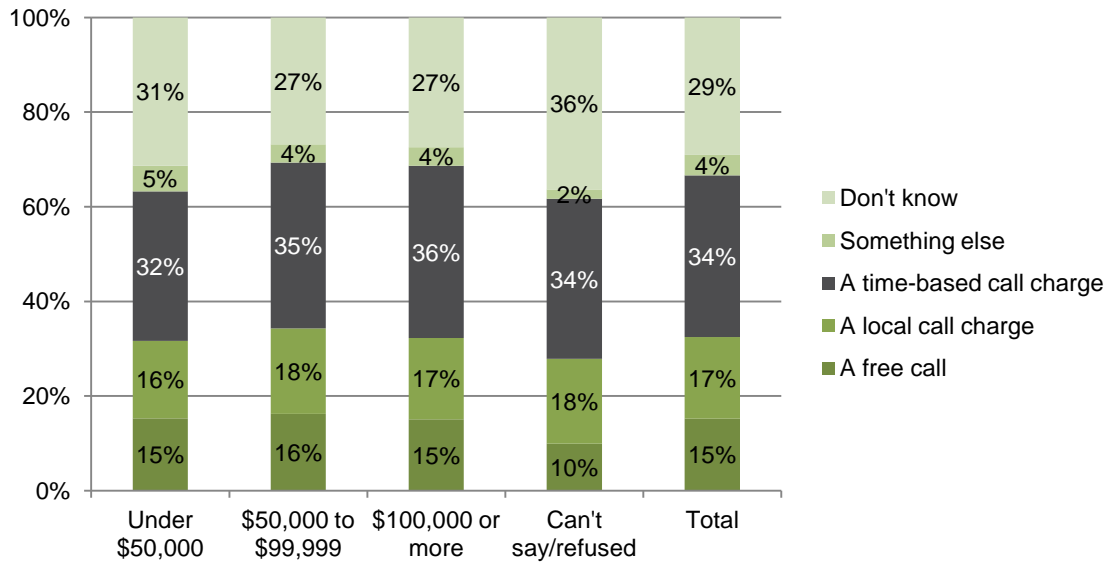


n=2,024

Understanding of charging arrangements

Understanding the way calls to 13 numbers from a mobile phone are charged was similar across household income groups, with the exception of those reporting a household income of under \$50,000. This income group was slightly more likely to say they didn't know how these calls were charged and also slightly less likely to say that these calls were charged on a timed basis (Figure 17).

Figure 17 Understanding cost of 13 calls, by household income

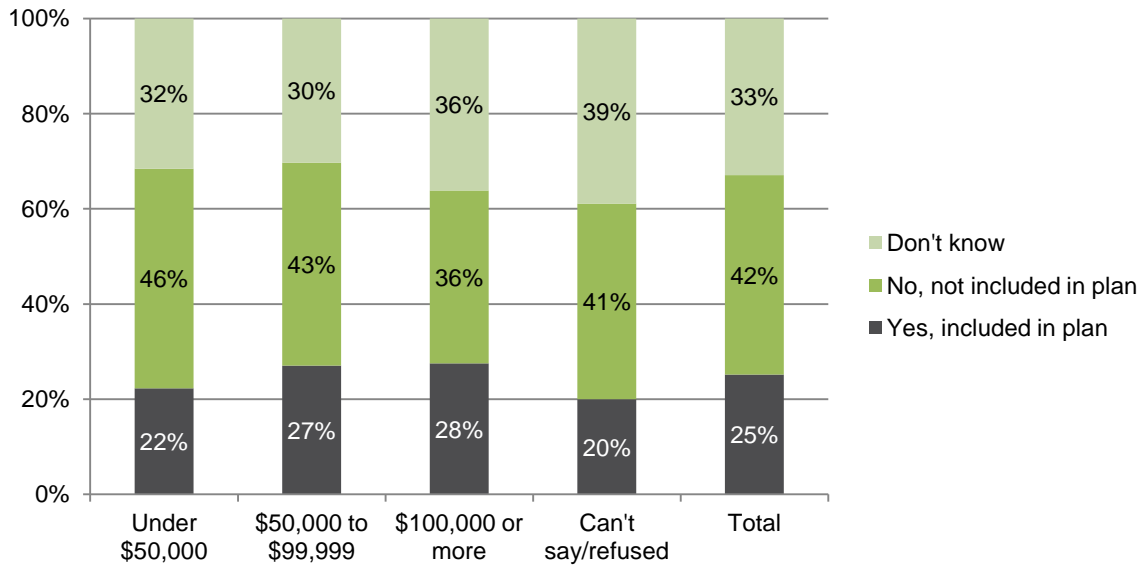


N=3,151

Included value or 13-friendly plans

Respondents from households with lower incomes were less likely to report that their current mobile was on an included value plan that covered calls to 13 numbers without extra cost. Only 22 per cent of those with household incomes of less than \$50,000 said they were on an included value plan, compared with 27 and 28 per cent of those with household incomes from \$50,000 to \$99,999 and \$100,000 or more (Figure 18). This also corresponds with the finding that lower income groups were more likely to have been on their current plan for more than two years.

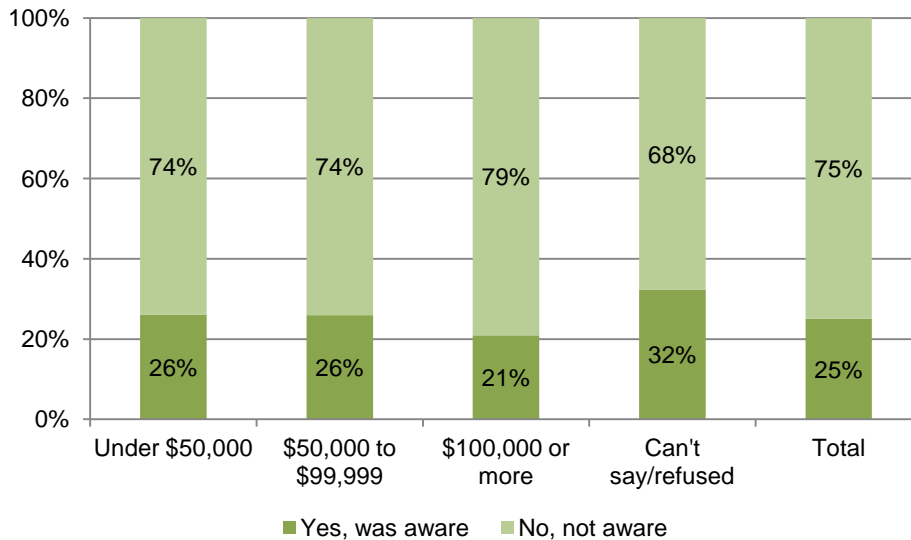
Figure 18 Whether 13 numbers included in mobile plan, by household income



n=2,861

While fewer respondents from lower income households reported being on an included value plan, awareness across different income groups was similar, although those in higher household income groups (over \$100,000) were slightly less aware of these plans (Figure 19).

Figure 19 Awareness of included value plans, by household income



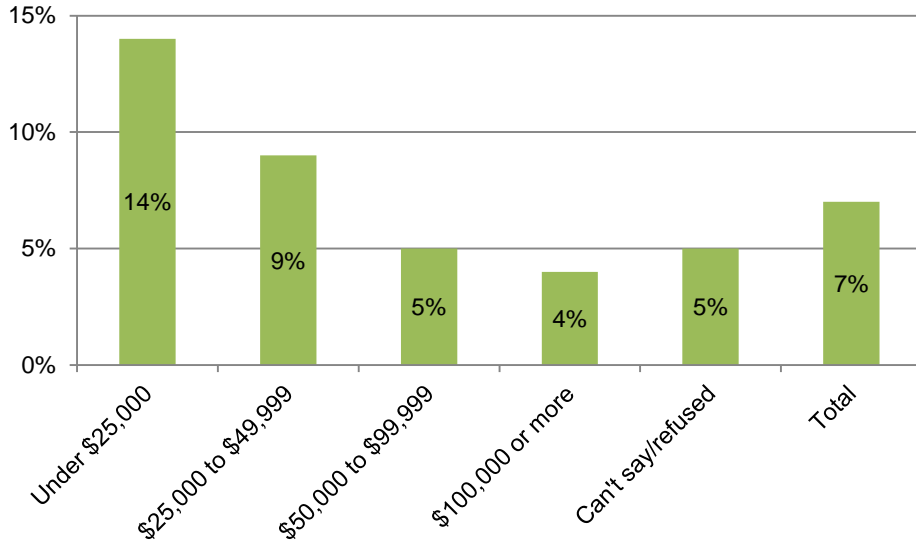
n=2,155

Reported barriers to making calls

Respondents living in lower income households were more likely to report that they hadn't made a call to a 13 number because of cost factors—either because of running out of credit, or because of the perceived cost of the call. Those with household incomes of under \$50,000 were significantly more likely to report both running out of credit and concerns about the cost of calls using too much credit or included value as

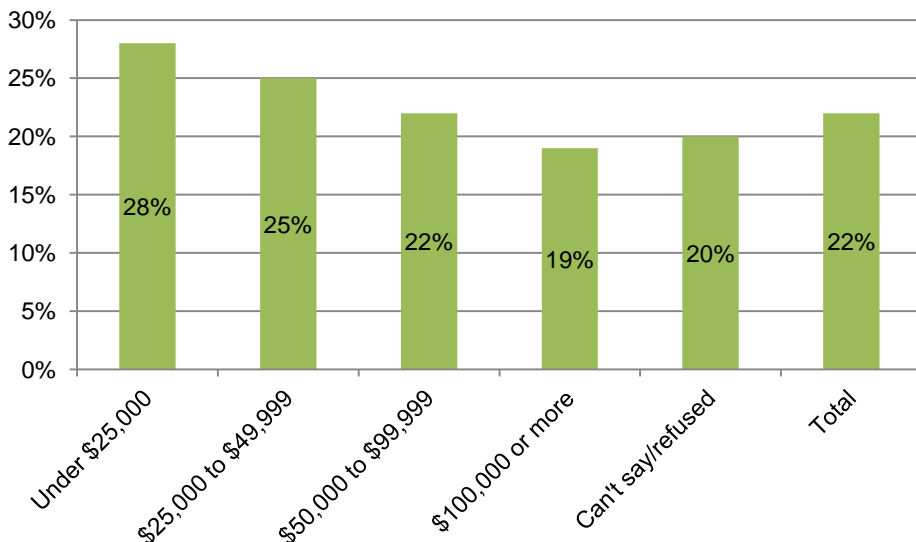
barriers than those on incomes over \$50,000 (Figure 20 and Figure 21). This is particularly apparent for those on incomes under \$25,000, who are also much more likely than to be on a prepaid plan.

Figure 20 Occasion in last 12 months where wanted to make a 13 call from mobile but didn't because ... had run out of credit, by household income



N=3,151

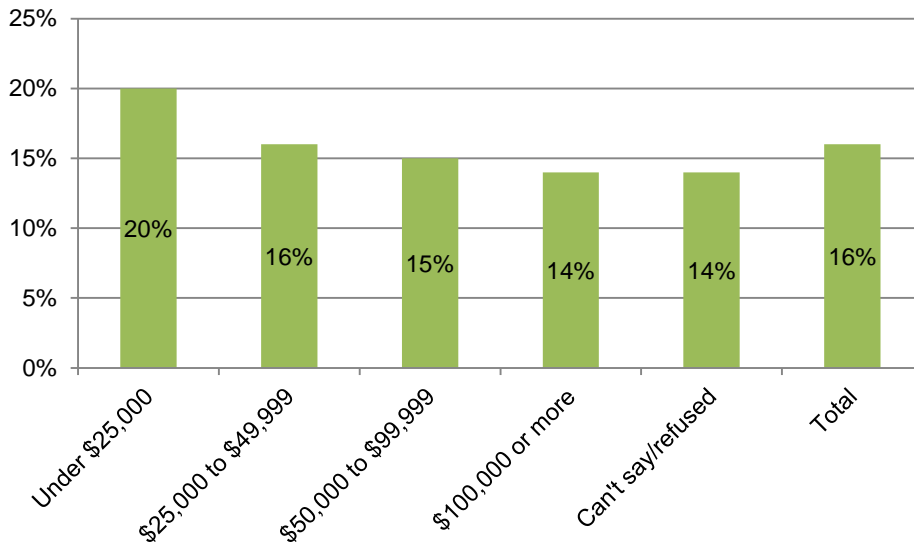
Figure 21 Occasion in last 12 months where wanted to make a 13 call from mobile but didn't because ... worried about the cost of the call using up too much credit or included value on plan, by household income



N=3,151

Where the cost of the call was not included in a plan and the respondent did not want to pay extra, there was no significant difference between households with incomes under and over \$50,000 in avoiding calls to 13 numbers (Figure 22).

Figure 22 Occasion in last 12 months where wanted to make a 13 call from mobile but didn't because ... not included in plan and didn't want to pay extra, by household income



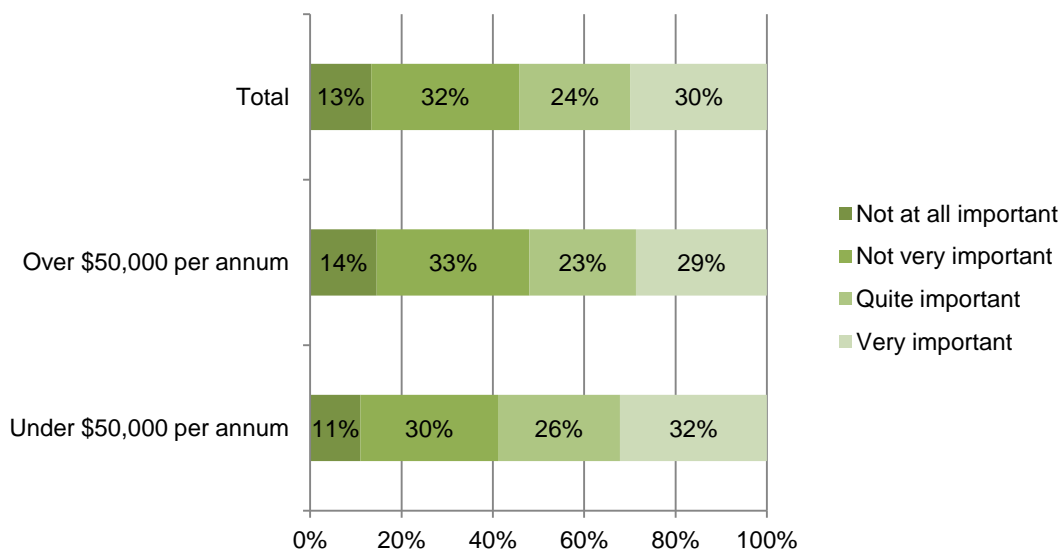
N=3,151

Importance of including 13 numbers in mobile plans

Respondents were asked about the importance of including 13 numbers in their mobile plan. Those who reported having a plan that included calls to 13 numbers (n=701) were asked how important this was to them.

Included 13 calls were considered important or very important by a slightly larger proportion of those with household incomes under \$50,000 than those with higher household incomes (58 per cent compared with 52 per cent). See Figure 23.

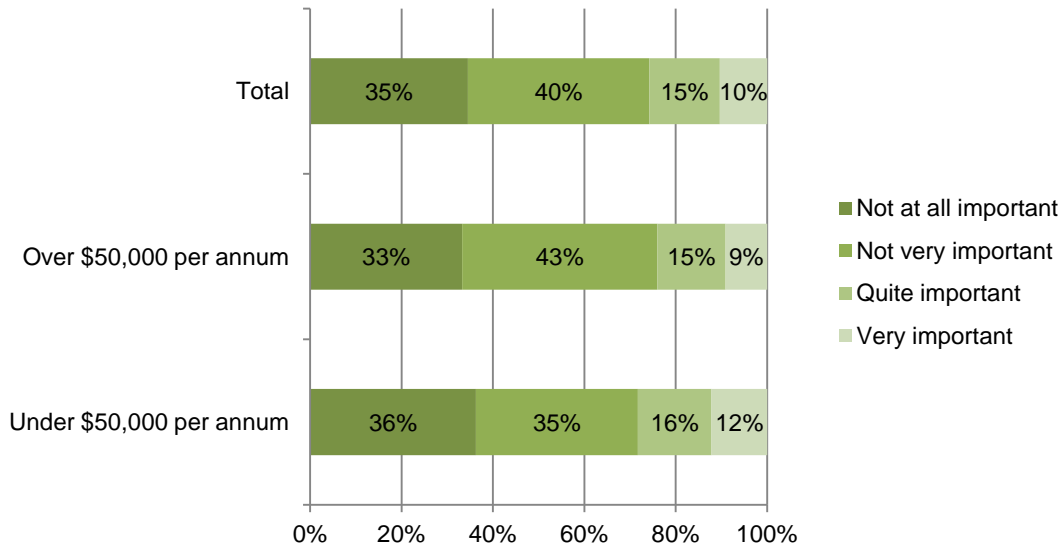
Figure 23 Importance of including 13 numbers in current plan, by income



n=701

Respondents who weren't currently on a mobile plan that included calls to 13 numbers (n=1,200) were asked how important this would be to them in the future.

Figure 24 Importance of including 13 numbers in the future, by income



n=1,200

Those who indicated a household income of under \$50,000, but were not currently on a mobile plan that included calls to 13 numbers, were slightly more likely to indicate this feature was important or very important to them than those with higher household incomes (28 per cent compared with 24 per cent). See Figure 24.

Mobile-only households

Summary

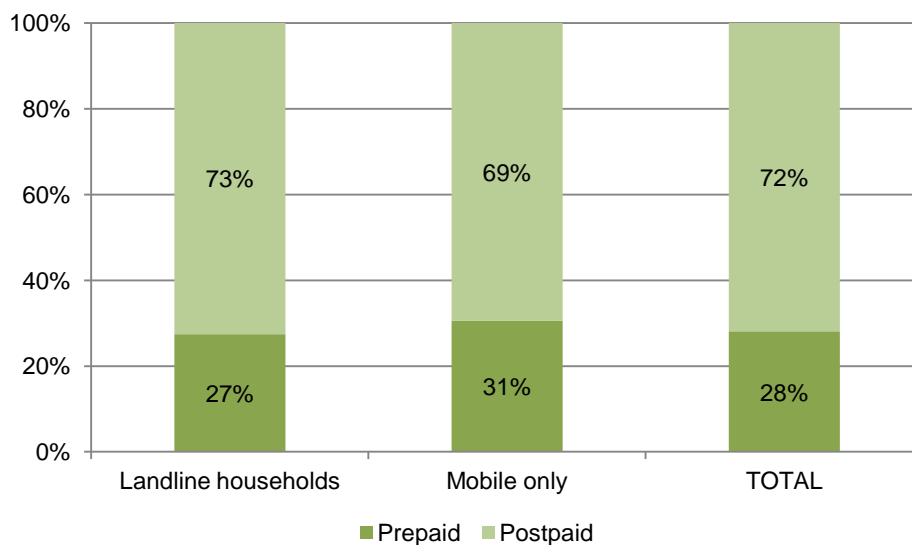
Those who live in mobile-only households were:

- > As likely to be prepaid as postpaid compared with those who had both a landline and mobile.
- > Much more likely to have called a 13 number from their mobile in the last month (52 per cent versus 31 per cent), although there was no difference in how many times they had called compared with households with a landline and mobile.
- > Much more likely to have called a 13 number from their mobile in the last year (80 per cent versus 54 per cent).
- > More likely to have made a 13 number call at least monthly (47 per cent compared with 40 per cent of those with a landline as well).
- > Less likely to have never called a 13 number from their mobile (11 per cent compared with 38 per cent of those with a landline and mobile).
- > Similar in their level of understanding of charging arrangements for 13 calls to those from households with a landline as well as a mobile.
- > More likely to report being on an included value 13-friendly plan (34 per cent compared with 22 per cent of those with a landline and mobile).
- > More likely to believe it is important to be on a plan that includes calls to 13 numbers as part of included value than households with a landline when on 13-friendly plans.

Prepaid or postpaid

The proportion of those in mobile-only households on prepaid or postpaid plans was similar to those in households with a landline (Figure 25).

Figure 25 Prepaid or postpaid plan by household type

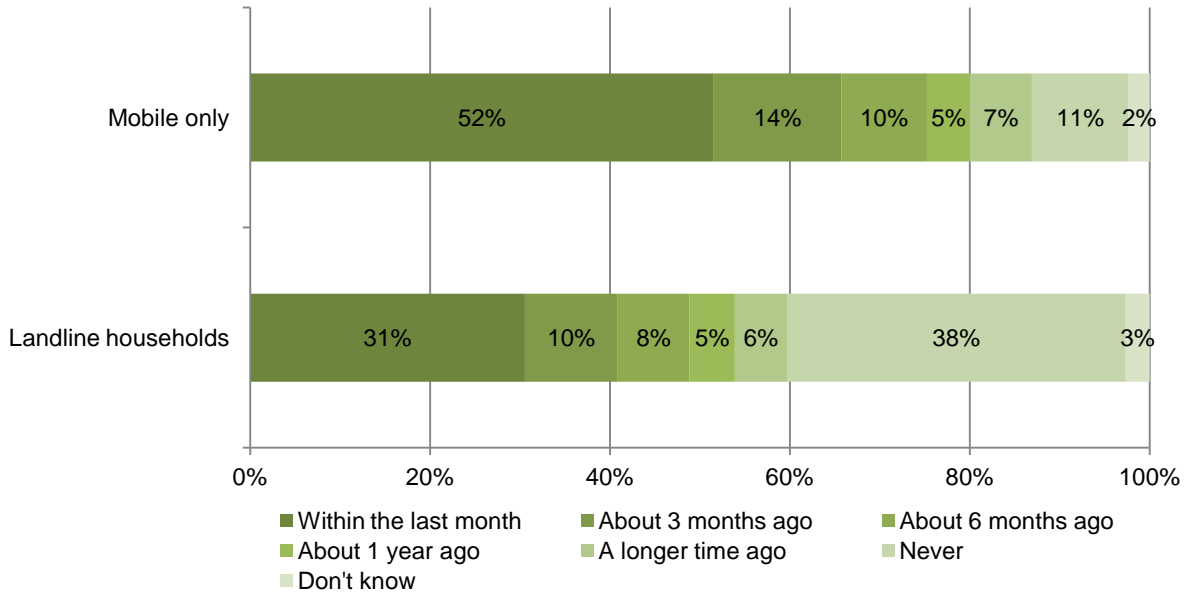


N=3,151

Calls to 13 numbers

Mobile-only respondents were more likely to have recently or ever called a 13 number than those with a landline (Figure 26).

Figure 26 Last time called 13 number, mobile-only and landline households

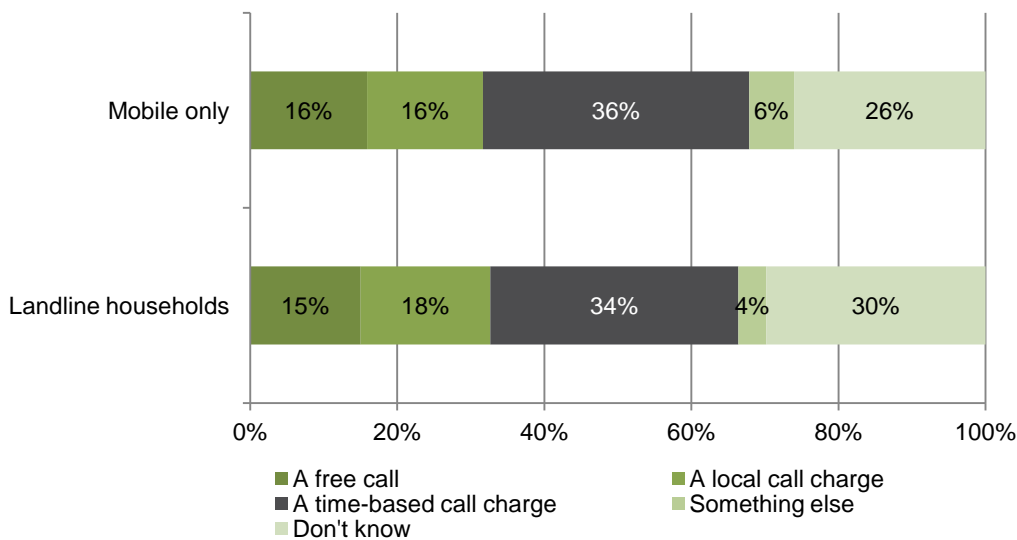


N=3,151

Understanding of charging arrangements

Although mobile-only respondents made calls more often, there were very few differences in respondents' understanding of charging for 13 number calls from a mobile phone (Figure 27).

Figure 27 Understanding of charging arrangements for 13 calls, mobile-only and landline households

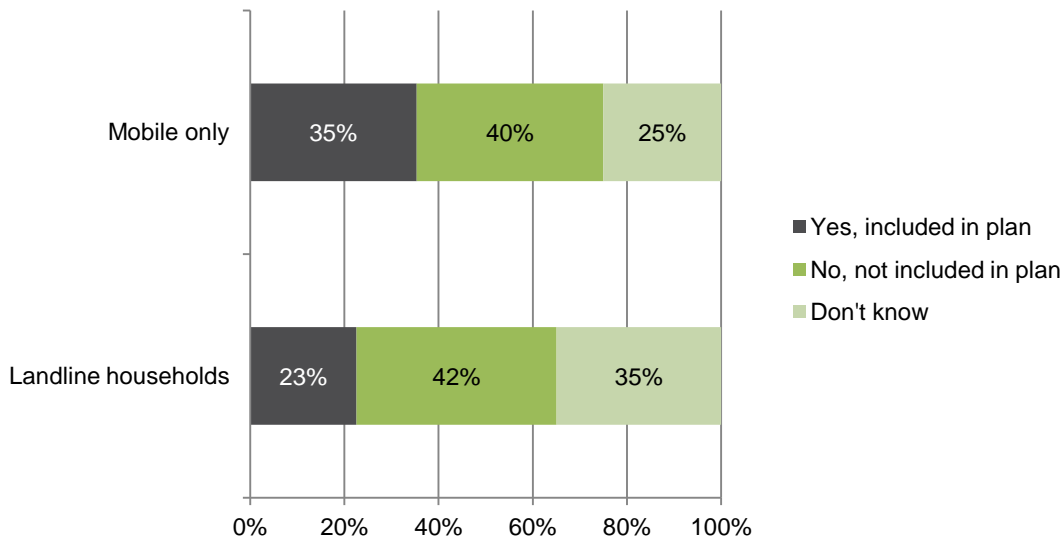


N=3,151

Included value or 13 friendly plans

Thirty-five per cent of respondents from mobile-only households reported being on a 13 friendly plan, compared with 23 per cent of those with a landline (Figure 28).

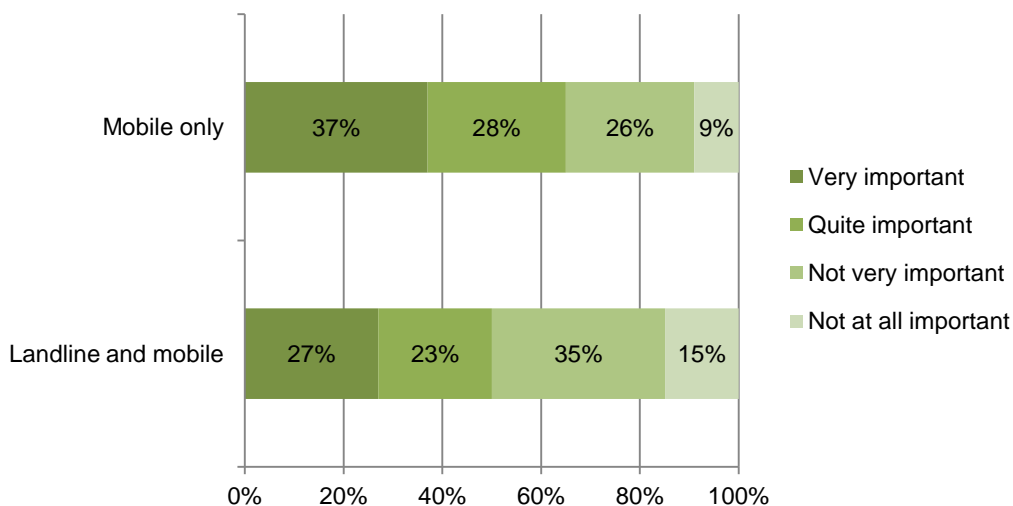
Figure 28 Whether 13 numbers included in mobile plan, mobile-only and landline households



n=2,861

Mobile-only respondents on an included value plan were also more likely to indicate that this was 'very important' or 'quite important' (65 per cent) than respondents on an included value plan who also had a landline (50 per cent). Figure 29 refers.

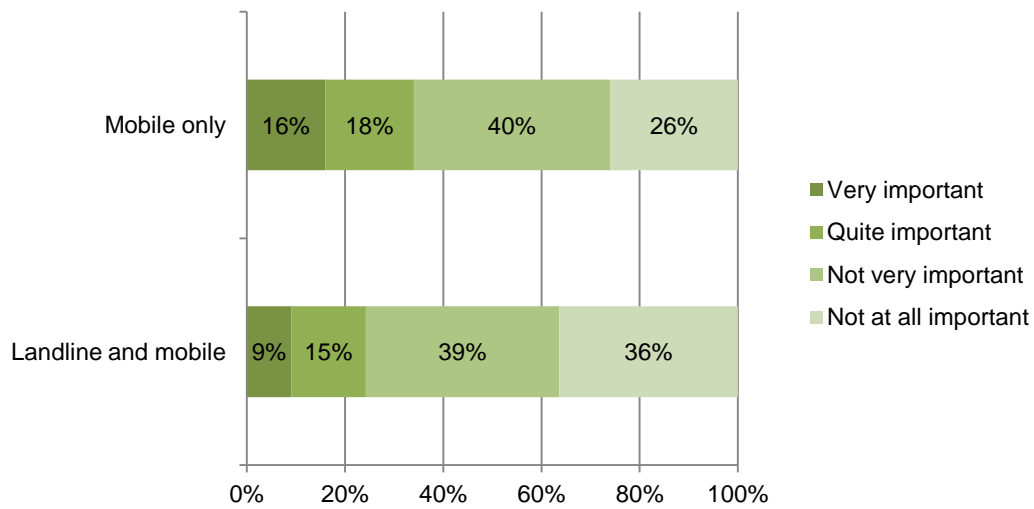
Figure 29 Importance of included value plans, mobile-only and landline households on an included value plan



n=701

When asked about the importance of having 13 numbers as part of an included value plan in the future, a higher proportion of mobile-only households—compared with those with a landline not currently on such a plan—indicated that it would be 'quite important' or 'very important' (Figure 30).

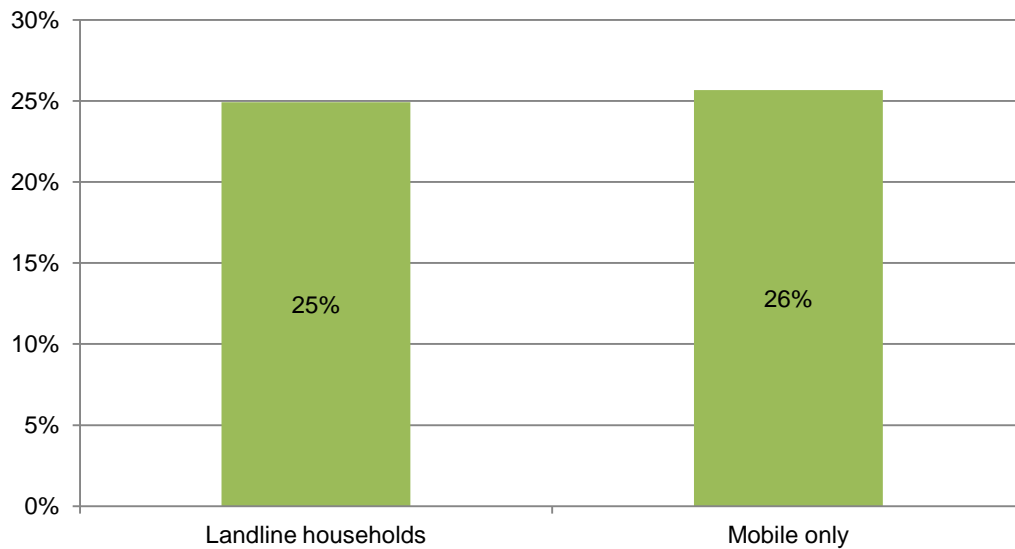
Figure 30 Future importance of included value plans, mobile-only and landline households not currently on an included value plan



n=1,200. Excludes those who said Don't know (<1 per cent)

However, awareness of included value plans was no different between the two household types (Figure 31).

Figure 31 Awareness of included value plans, mobile-only and landline households

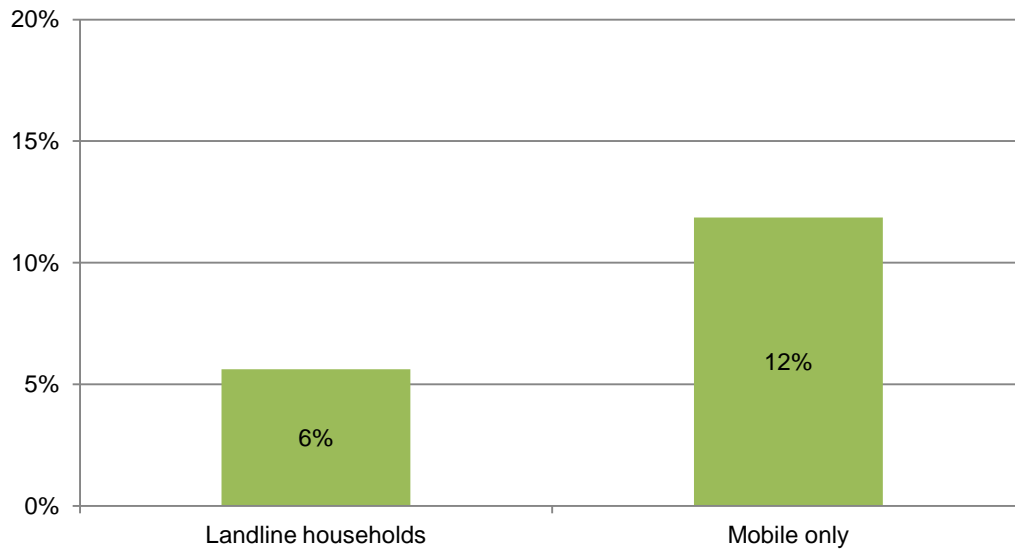


n=2,155

Reported barriers to making calls

'Running out of credit' was the only barrier to making a 13 call where there was a difference between mobile-only households and those with a landline (Figure 32).

Figure 32 Occasion in last 12 months where wanted to make a 13 call from mobile but didn't because ... had run out of credit, mobile-only and landline households



N=3,151

There were no apparent differences in avoiding calls to 13 numbers where the cost of the call using up too much credit, or because the cost was not included in the plan, were cited.

Conclusions

- > A significant proportion of mobile users surveyed said they hadn't called a 13 number—32 per cent had never called a 13 number from their mobile.
- > Of those who had called a 13 number, the majority (57 per cent) called 13 numbers around four times a year (every three months) or less.
- > Mobile users who called 13 numbers more frequently, and those who had no landline access at home, were more likely to be on a 13-friendly plan, and to say it was important to be on this type of plan.
- > Three-quarters (74 per cent) of mobile users not on a 13-friendly plan didn't think it was important to be on one in the future, largely because they never or rarely called 13 numbers.
- > Understanding of how 13 calls are charged was low, with only 34 per cent overall correctly indicating that they are charged as timed calls. However, more than half of mobile users not on 13-friendly plans (56 per cent) knew 13 calls from mobiles attract time-based charges. Therefore, those who 'need to know' about 13 call costs are probably more likely to be aware.
- > More than half of the mobile users surveyed (54 per cent) had been on their current plan for two years or more. These users may not have been exposed to more recent regulatory changes and may not be aware of their options, such as plans that include 13 calls as part of the included value.
- > A third of Australians (32 per cent) have had an experience in the past year where they have wanted to call a 13 number but didn't due to a range of concerns relating to call costs for 13 calls.
- > Given the general lack of awareness about how calls to 13 numbers are charged, for a number of these people barriers may be perceived rather than real. There is a role for educating consumers to increase their awareness of the availability of 13 friendly plans and the charging arrangements for calls to 13 numbers.

Appendix A: Questionnaire

RDD INTRODUCTION:

Good [Morning/ Afternoon/ Evening]. My name is [SAY NAME] from Roy Morgan Research. We are conducting a survey on behalf of the ACMA, the Australian Communications and Media Authority, which is the Federal Government telecommunications regulator. Could I please speak to the youngest male at home who is aged 18 or over?

IF NO MALES AVAILABLE ASK: Can I please speak to the youngest female at home who is aged 18 or over?

IF NECESSARY RE-INTRODUCE.

The ACMA is conducting important research about the use of 13 and 1300 telephone numbers. You don't need to have called one of these numbers to complete the survey.

IF NECESSARY, ADD: 13 and 1300 numbers are widely used by businesses, government agencies and community organisations to provide a single number for callers across Australia. Examples include Centrelink, Medicare, banks, insurance companies, electricity providers, telecommunications providers and charities. This research will assist the ACMA in better understanding consumers' use of these numbers.

IF NECESSARY, ADD: To ensure a representative sample of Australians it is very important to include people like you in the survey.

IF NECESSARY: The survey will take approximately 8 minutes.

IF NECESSARY: Your answers will be used for research purposes only. Your answers will remain strictly confidential. You will not be identified in any way in the results. Your answers will be combined with the information from hundreds of other participants across Australia.

IF QUERIED ABOUT HOW NAME OR NUMBER WAS SOURCED (E.G UNLISTED NUMBER) SAY: We are contacting people from all over Australia. A computer has randomly generated numbers for us to phone.

RDD1. Would you like to participate?

1	Yes	CONTINUE
2	NO	TERMINATE

IF NECESSARY, SAY: Is now a good time or would it be more convenient if I made an appointment to speak to you at another time?

IF NECESSARY, MAKE AN APPOINTMENT.

SS SAMPLE INTRODUCTION:

Good [Morning/ Afternoon/ Evening]. My name is [SAY NAME] from Roy Morgan Research. May I please speak to [SAY NAME]?

IF NECESSARY, RE-INTRODUCE

We really appreciate your assistance by taking part in our National Consumer Poll survey some time ago, and would greatly appreciate your help again. We are conducting a social survey on behalf of the ACMA, the Australian Communications and Media Authority, which is the Federal Government telecommunications regulator.

The ACMA is conducting important research about the use of 13 and 1300 telephone numbers. You don't need to have called one of these numbers to complete the survey.

IF NECESSARY, ADD: 13 and 1300 numbers are widely used by businesses, government agencies and community organisations to provide a single number for callers across Australia. Examples include Centrelink, Medicare, banks, insurance companies, electricity providers, telecommunications providers and charities. This research will assist the ACMA in better understanding consumers' use of these numbers.

IF NECESSARY, ADD: To ensure a representative sample of Australians it is very important to include people like you in the survey.

IF NECESSARY: The survey will take approximately 8 minutes.

IF NECESSARY: Your answers will be used for research purposes only. Your answers will remain strictly confidential. You will not be identified in any way in the results. Your answers will be combined with the information from hundreds of other participants across Australia.

SS1. Would you like to participate?

1	Yes	CONTINUE
2	NO	TERMINATE

IF NECESSARY, SAY: Is now a good time or would it be more convenient if I made an appointment to speak to you at another time?

IF NECESSARY, MAKE AN APPOINTMENT.

SCREENERS:

S0. RECORD SAMPLE TYPE

- 1 RDD Landline
- 2 SS Recontact Mobile

IF SS RECONTACT ONLY (MOBILE ONLY SAMPLE), ASK:

[Single]

S1 Can I ask you if you have a landline number?

- 1 Yes
- 2 No

IF RESPONDENT HAS A LANDLINE NUMBER (CODE 1 ON S1), TERMINATE:

Thank you for your time, but we have already spoken to enough people who have a land line number.

[Single]

ONLY ASK RDD LANDLINE SAMPLE

S2 Do you own a mobile phone that is for your personal use? (not for business use, but mainly personal use is fine)

- 1 Yes
- 2 No

IF NO(CODE 2 ON S2), TERMINATE: Thank you for your time, but for this research we only need to speak to people who have a mobile phone for personal use.

ASK ALL

[Single]

S3 Who usually pays for your mobile phone usage?

- 1 Pay for all myself
- 2 Pay for part myself
- 3 Someone else pays all

IF SOMEONE ELSE PAYS ALL (CODE 3 ON S3), TERMINATE: Thank you for your time, but we have already spoken to enough people who have all of their mobile phone usage paid for by someone else.

ASK ALL

[Numeric]

S4 Can you please tell me your postcode?

--	--	--	--	--

ASK SUBURB \ NEAREST TOWN AND STATE IF DON'T KNOW POSTCODE. IF REFUSED POSTCODE RECORD AS "REFUSED"

.....
IF GEO QUOTA FULL, TERMINATE: Thank you for your time and assistance but we have already spoken to enough people in your area.

[Single]

S5 RECORD SEX OF RESPONDENT

- 1 Male
- 2 Female

IF SEX QUOTA FULL, TERMINATE: Thank you for your time and assistance but we have spoken to enough males/females

[Single]

S6 Could you please tell me your approximate age? IF NECESSARY, READ OUT: Would you be aged:

- 1 18-19
- 2 20-24
- 3 25-29
- 4 30-34
- 5 35-39
- 6 40-44
- 7 45-49
- 8 50-54
- 9 55-59
- 10 60-64
- 11 65+
- 99 Refused **DO NOT READ**

IF UNDER 18 OR REFUSED, TERMINATE: Thank you for your time, but we can only speak to people in certain age groups.

IF AGE QUOTA FULL, SAY: Thank you for your time, but we only need to speak to people in certain age groups.

[Single]

S7 Could you tell me whether your annual total household income before tax would be over \$50,000 or under \$50,000 per year?

- 1 UNDER \$50,000 PER ANNUM
- 2 OVER \$50,000 PER ANNUM
- 3 CAN'T SAY
- 4 REFUSED

IF CAN'T SAY OR REFUSED, TERMINATE: Thank you for your time, but we need to speak to people in certain income groups.

IF INCOME QUOTA FULL, SAY: Thank you for your time, but we only need to speak to people in certain income groups.

SURVEY QUESTIONS

[Single]

Q1 Is your mobile phone a prepaid service or are you on a contract or plan for which you regularly receive bills? If you have more than one personal mobile phone, please answer the survey questions in response to your main mobile phone.

- 1 Prepaid
- 2 Postpaid Contract/Plan

[Single]

Q2. When did you start your current (prepaid or postpaid) plan (if query: when they last renewed)? Was it...READ OUT

- 1 Within the last month
- 2 About 3 months ago
- 3 About 6 months ago

- 4 About 1 year ago
- 5 About 2 years ago
- 6 More than 2 years ago
- 98 Don't know **DO NOT READ**

We are going to ask you a series of questions about your awareness and use of 13 & 1300 numbers. 13 & 1300 numbers are widely used by businesses, government agencies and community organisations to provide a single number for callers across Australia. Examples include Centrelink, Medicare, banks, insurance companies, electricity providers, telecommunications providers and charities.

(If asked the difference between 13 & 1300 numbers: There is no difference to the type of service provided. The 13 are a 6-digit number and the 1300 are 10-digit numbers.)

[Single]

Q3. When was the last time you called a 13 or 1300 number from your mobile? Your best guess is fine.

Was it...READ OUT

PROMPT FOR BEST GUESS IF "DON'T KNOW" RESPONSE

- 1 Within the last month
- 2 About 3 months ago
- 3 About 6 months ago
- 4 About 1 year ago
- 5 A longer time ago
- 6 You have never called a 13 or 1300 number from your mobile
- 98 Don't know **DO NOT READ GO TO Q6**

[Numeric]

IF WITHIN THE LAST MONTH (CODE 1 ON Q3), ASK:

Q4. How many times in the last month have you called a 13 and/ or 1300 number from your mobile?

Please include all of the different 13 and 1300 calls you have made, either to different organisations or if you have made more than one call to the one number..

--	--	--

[Single]

IF EVER CALLED 13 or 1300(ANY CODES 1-5 ON Q3), ASK:

Q5A. And how often would you say you typically call 13 and/or 1300 numbers from your mobile? Please include all of the different 13 or 1300 calls you have made, either to different organisations or if you have made more than one call to the one number.

Would it be.....READ OUT **ONLY READ CODES 1-4 IF CALLED WITHIN THE LAST MONTH (CODE 1 ON Q3)**

- 1 About every day
- 2 About every 2-3 days
- 3 About every week
- 4 About every 2 weeks
- 5 About every month
- 6 About every 3 months
- 7 About every 6 months
- 8 About once a year
- 9 Less often than once a year
- 98 Don't know **DO NOT READ**

[Numeric]

IF CALLED 13 or 1300 AT LEAST ONCE A YEAR(ANY CODES 1-8 ON Q5A), ASK:
Q5B. So, in total, how many times a year do you thinkcall 13 and/or 1300 numbers
from your mobile?

□□□

[Single]

ASK ALL:

Q6. IF CODES 1-5 AT Q3: When you make a phone call from your mobile phone to a
13 or 1300 number, how much does it cost?

IF CODES 6 OR 98 AT Q3: If you make a phone call from your mobile phone to a 13
or 1300 number, how much does it cost?

Would you say it is...READ OUT

PROMPT FOR BEST GUESS IF "DON'T KNOW" RESPONSE

- 1 A free call
- 2 A local call charge
- 3 A time-based call charge
- 4 Something else (specify).....
- 98 Don't know **DO NOT READ**

[Single]

IF 'A FREE CALL'(CODE 1 ON Q6), ASK:

Q7. Is this because calls to 13 and 1300 numbers from a mobile are: READ OUT

- 1 Free for everyone
- 2 Free for you on your plan
- 3 Part of your included value on your plan
(if necessary, free as long as it is within your included value
on your plan, but then charged if you exceed this value
- 4 Other (specify).....
- 98 Don't know **DO NOT READ**

[Single]

IF ANY CODE 2, 3,4,98 AT Q6, ASK:

Q8. Does your mobile phone plan include calls to 13 and 1300 numbers so that you
can make these calls without having to pay any extra? (if necessary, say: we mean, if
you make a call to a 13 or 1300 number, does it count toward the amount you can
spend on calls you can use and not pay extra)?

- 1 Yes, included in plan
- 2 No, not included in plan
- 98 Don't know **DO NOT READ**

[Single]

IF 'INCLUDED IN PLAN' (CODE 2 OR 3 AT Q7, OR CODE 1 AT Q8)ASK:

Q9. How important is it to you that 13 and 1300 numbers are included in your plan?
Would it be...READ OUT

ALTERNATE ORDER 1-4 AND 4-1 BETWEEN INTERVIEWS

- 1 Not at all important
- 2 Not very important
- 3 Quite important
- 4 Very important
- 98 Don't know **DO NOT READ**

[Single]

IF 'NOT INCLUDED IN PLAN' OR 'DON'T KNOW' (CODE 2 OR 98 AT Q8) ASK:
 Q10. Are you aware that there are many plans being offered by various phone providers which include calls to 13 and 1300 numbers from mobiles (in their included value)? ONLY READ IF NECESSARY

- 1 Yes, was aware
- 2 No, not aware

[Single]

IF 'NOT INCLUDED IN PLAN' (CODE 2 AT Q8) ASK:
 Q11. How important would it be to you in future to be on a mobile phone plan that includes calls to these numbers. Would it be...READ OUT
 ALTERNATE ORDER 1-4 AND 4-1 BETWEEN INTERVIEWS

- 1 Not at all important
- 2 Not very important
- 4 Quite important
- 5 Very important
- 98 Don't know **DO NOT READ**

[Multiple]

IF 'NOT AT ALL/NOT VERY IMPORTANT' (CODE 1 OR 2 AT Q11) ASK:
 Q12. Why do think it is not at all/not very important? Anything else? DO NOT PROMPT

- 1 I rarely/never call these numbers from my mobile
- 2 I only make short calls to these numbers from my mobile
- 3 I am not concerned about the cost of calling these numbers on my mobile
- 4 I would prefer to be on a less expensive plan
- 97 OTHER (SPECIFY).....
- 98 Don't know **DO NOT READ**

[Single] [Grid] [Do not randomise]

ASK ALL

Q13. In the last 12 months has there been an occasion where you have wanted to make a 13 or 1300 call from your mobile but didn't because...READ OUT EACH STATEMENT

	Yes	No
You had run out of credit	1	2
You were worried about the cost of the call using up too much credit or included value on your plan	1	2
They are not included in your plan and you didn't want to pay extra	1	2
Other (specify if "yes").....	1	2

[Single] [Grid] [Do not randomise]

ASK Q14a AND Q14b FOR EACH 'YES' (CODE 1) AT Q13

Q14a: On a scale of 1 to 10, where 1 is "no problem at all" and 10 is "a very big problem", how much of a problem was it for you that you didn't call because:

You had run out of credit	1	2	3	4	5	6	7	8	9	10
You were worried about the cost of the call using up too much credit or included value on your plan	1	2	3	4	5	6	7	8	9	10
They are not included in your plan and you didn't want to pay extra	1	2	3	4	5	6	7	8	9	10
Other (specify if "yes").....	1	2	3	4	5	6	7	8	9	10

[Open]

Q14b. Why do you say that? Any other reasons?

You had run out of credit

You were worried about the cost of the call using up too much credit or included value on your plan

They are not included in your plan and you didn't want to pay extra

Other (specify if "yes").....

.....

DEMOGRAPHICS

[Single]

D1 Which of the following best describes your current living arrangement?

- 1 Live alone
- 2 Partner and no children in household
- 3 Partner and children in household
- 4 Single parent with children in household
- 5 With parent/s
- 6 Shared household or group house
- 7 Boarder
- 97 OTHER (DO NOT READ OUT)

[Single]

D2 Which of the following best describe your current employment status?

- 1. Employed Full Time IF NECESSARY: 35 hours or more per week
- 2. Employed Part Time IF NECESSARY: less than 35 hours per week
- 3. Casual
- 4. Retired
- 5. Unemployed
- 6. Home Duties
- 7. Student
- 8. Prefer not to answer (DO NOT READ OUT)

[Single]

D3 Would you please tell me the highest level of education you've reached?

- 1 PRIMARY SCHOOL
- 2 SOME SECONDARY SCHOOL
- 3 COMPLETED SECONDARY SCHOOL
- 4 TAFE/TRADE CERTIFICATE
- 5 UNDERGRADUATE UNIVERSITY DEGREE/CAE DIPLOMA
- 6 POSTGRADUATE QUALIFICATION
- 7 CAN'T SAY

[Single]

D4 Which of the following ranges would your annual total household income before tax be in? (if necessary – your best guess is fine)

- 1 Under \$25,000
 - 2 \$25,000 to \$49,999
 - 3 \$50,000 to \$74,999
 - 4 \$75,000 to \$99,999
 - 5 \$100,000 to \$149,999
 - 6 \$150,000 or more
- 98 CAN'T SAY (DO NOT READ OUT)
- 99 REFUSED (DO NOT READ OUT)

COMPLETES CLOSE

OK, the interview is now finished. Thank you for your time and assistance. This market research is carried out in compliance with the Privacy Act and Telecommunications and Research Calls Industry Standard, and the information you provided will be used only for research purposes.

If you would like any more information about this project or Roy Morgan Research, you can phone us on 1800 337 332.

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