International Training Program 2014

ResearchACMA

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# Why the ACMA undertakes research

Evidence base

- to inform regulatory decision-making and provision of advice to government
  - > essential where ACMA must have regard to 'community standards', e.g. BSA

- informing discussion on regulatory settings through periodic reviews

- advice to support program design (e.g. Cybersmart)

- to make information available to the public
  - > transparency
  - > better-informed citizens and consumers
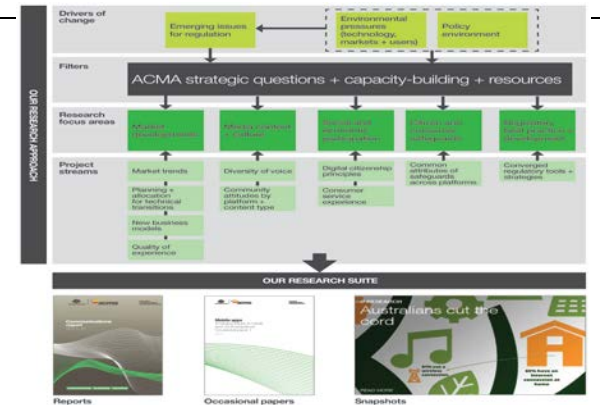
Why the ACMA undertakes research

Reputation and influence

- staying relevant – identifying the important issues and facilitating contemporary regulatory or non-regulatory responses

- demonstrating an understanding of changes in the communications and media environment and implications for regulatory settings

ACMA's research approach
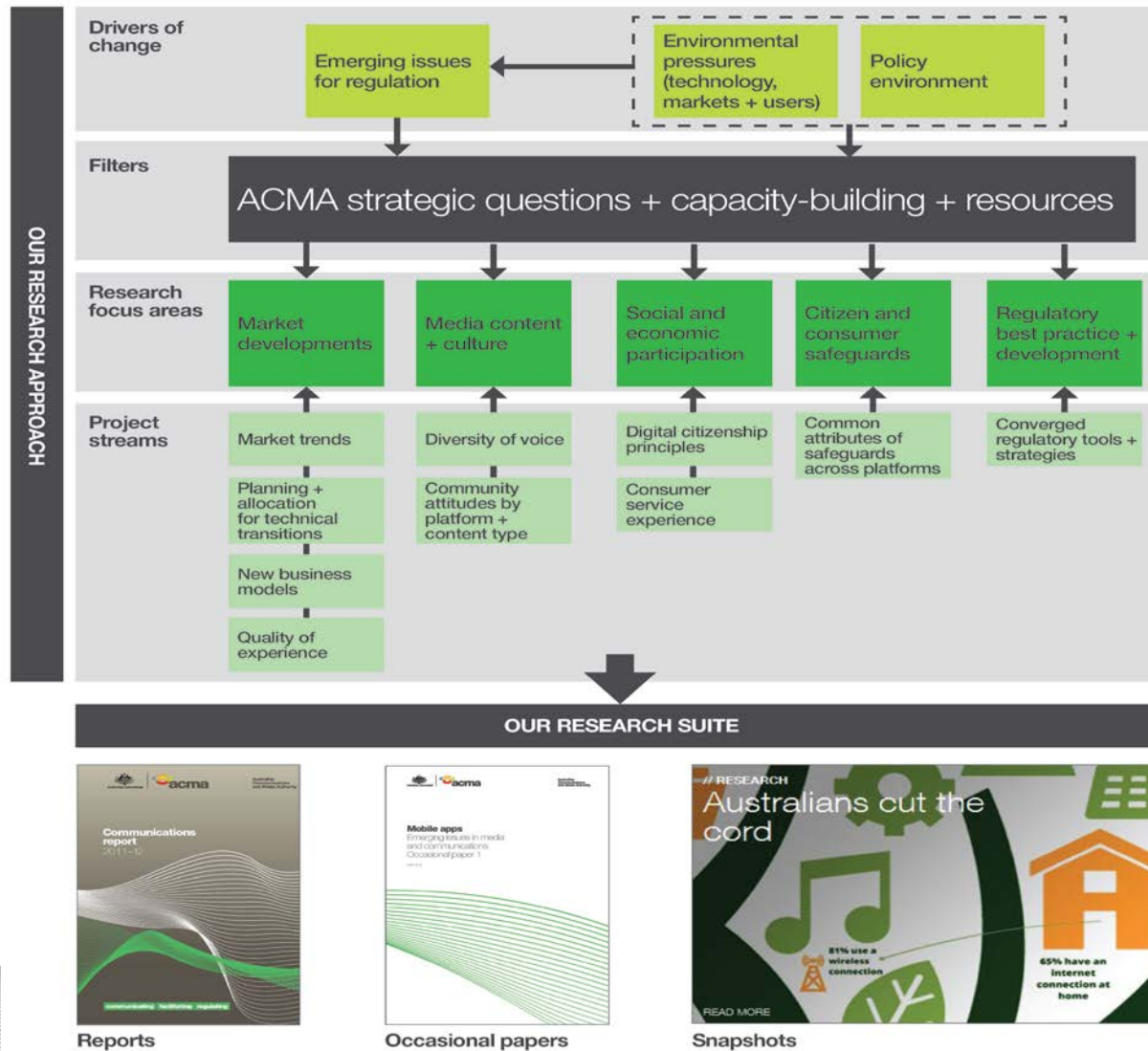
Planning

Project priorities and research issues informed by

- Policy environment changes
  - > deregulation agenda
  - > children's e-safety commissioner
  - > NBN delivery model flows through to telecommunications regulation

- Tracking environmental changes
  - > Technology
  - > Industry structures
  - > Citizen and consumer
  - > Institutional structures

Reconnecting the Customer research

bill shock. *consumers find spend management tools and alerts useful*

1 in 3 Aussie telco bill-payers experienced bill shock in the 12 months to May 2013

→ 34% of post-paid bill payers received a higher than expected bill for one of their telco products

→ 33% of pre-paid mobile phone customers ran out of credit sooner than expected

Despite increases in the number of services in operation and changes in consumer usage behaviours, this figure has remained stable since 2012 when 34% of post-paid mobile phone users and 33% of pre-paid moblie mobile users reported experiencing billshock in the 12 months to May 2012.

Consumers accessing data on their post-paid mobile phone were more likely to have experienced bill shock in the 12 months to May 2013 (37%) compared with those not accessing data (21%).

Main causes of bill shock

→ Using the service more than usual (48%)

→ Difficulty monitoring usage or spend (31%)

→ Not understanding their plan or the way they were charged (27%)

Magnitude of bill shock

2x Around half (47%) of those who experienced bill shock reported that their most recent high bill was at least double their normal bill.

Consumers find spend management tools and alerts useful

While 31% of consumers reported having difficulty monitoring their usage or spend, consumers who reported using spend management tools and/or alerts in the 12 months to May 2013, found these to be useful.

Top tools and alerts used in 2013   **% find it useful**

→ SMS alerts when using a certain amount of pre-paid credit (58%)   93%

→ Having broadband speed reduced when data limit is reached (52%)   63%

→ Check usage on provider website (38%)   88%

→ Receive email alert when used certain amount of data (32%)   89%

→ Mobile app to check usage (28%)   92%

→ Provider warnings before using more expensive services (26%)   92%

New complaints to the TIO decrease

New complaints to the TIO about mobile services fell 25.6% between the 2011/12 and 2012/13 financial years.
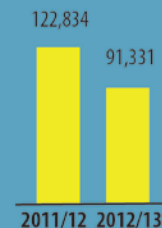
The total number of complaints to the TIO across all service types decreased by 18% over this period. From 193,702 complaints in 2011/12 down to 158,652 in 2012/13.

122,834
91,331

2011/12   2012/13

Source: ACMA Reconnecting the Customer; Tracking Consumer Outcomes (2014); ACMA Telco customers - credit management and financial harship (2012); TIO 2012-2013 Annual Report (2013)

Regional Australians' access to local content research

local content. **Attitudes and use in regional Australia**

Nine in ten regional Australians say:
→ Local content is important (91%)
→ They have access to all the local content they would like (91%)

95% of regional Australians access local content
On average they have access to six different sources, such as:

- Commercial TV
- Commerical & community radio
- Social media with local content
- Local print newspapers
- Websites
- ABC local radio and website

Different sources are used to access different types of content

Commercial TV is the main source for local news - used by 56%

Websites are the main source for local weather - used by 49%

Local print newspapers are the main source for local community events and local sport - used by 66%

Younger regional Aussies use a mix of traditional and online sources to access local content. Older adults rely more heavily on traditional media.

Around 70% of 18-34s use social media to access local content at least once a week

Around 60% of adults 50 years+ watch local content on commercial TV every day

ACMA analysis of regional Australian TV news audiences found that local news services are especially popular with those aged 65yrs+, wihere they reach highs of:

→ 46% of the potential target audience in Southern New South Wales (Prime local news)
→ 32% in Western Australia (Golden West local news)
→ 27% in regional Victoria (Prime local and WIN local news)
→ 27% in regional Queensland (Seven local news)

The report also found that, in general, local news services were more popular with regional Australians than metro news services.

Source: ACMA Regional Australians' access to local content; Community research (2014); ACMA Regional Australian television news; Audiences across regional evening news services, 2003-2013 (2014)

Cybersafety research

kids online. **connected, social, mobile**

92% used a computer/laptop

In 2013, 34% of 8-11s used a tablet to go online

13% used a mobile phone

10% used a games console

3% used a smart TV

17% used an ipod

Kids used the internet at home and on the go in 2013:

	Home	School	A friends house
8-9s	93%	64%	9%
10-11s	94%	72%	25%

Kids love social

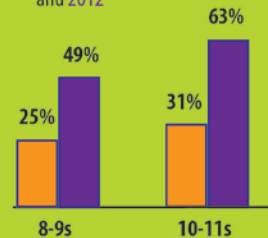36% of 8-9s used social media in 2013. Up from 23% in 2012

55% of 10-11s used social media in 2013. Up from 23% in 2012

From the Roy Morgan Research Young Australians survey, half (53%) of 6-13s owned or used a tablet in 2013. Up from 33% in 2012.
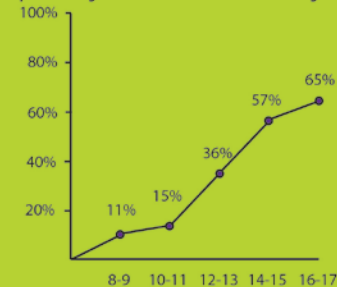
2x The proportion of kids who say the internet is very important doubled between 2009 and 2012

Kids and mobiles

In 2013, 11% of 8-9s and 15% of 10-11s used a mobile phone to go online. This increases with age.

33% — 2012
53% — 2013

25% / 49% — 8-9s
31% / 63% — 10-11s

11%, 15%, 36%, 57%, 65% — 8-9, 10-11, 12-13, 14-15, 16-17

Source: ACMA Connected parents in a cybersafety age (2014); Roy Morgan Research Young Australians Survey; ACMA Like, Post, Share: Young Australians' experience of social media (2013); ACMA Click and Connect - Young Australians' use of social media (2009)
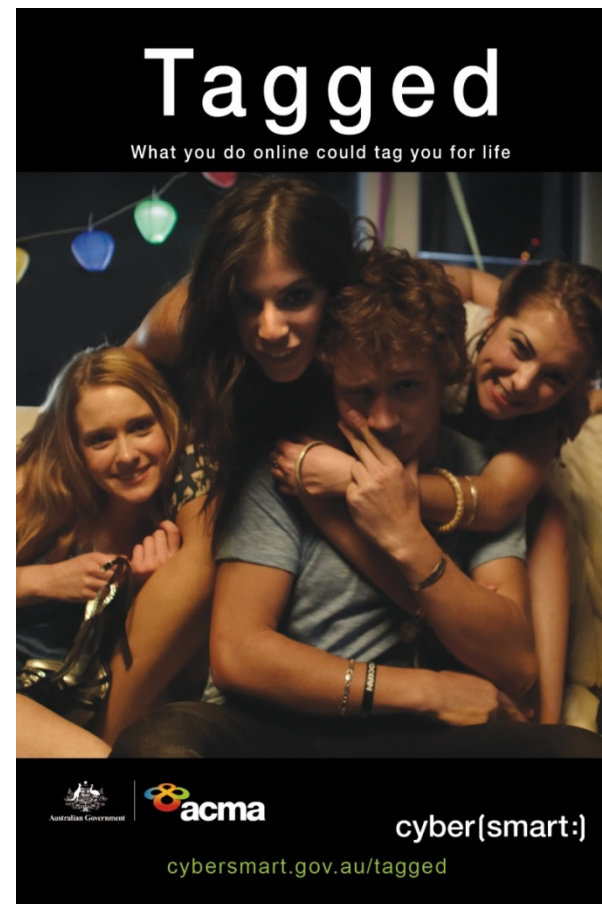
What are the main cybersafety issues?

- Cyberbullying

- Sexting

- Digital reputation

- Digital citizenship

Creating educational resources

- Looking at the evidence

- Being clear about the aims

- Preferred format

- Consultation

Be Deadly Online: Indigenous cybersafety resources

Research Publications

> Aussie teens online, July 2014

> mCommerce: Mobile transactions in Australia, June 2014

> The mobile business, May 2014

> Reconnecting the Customer – Tracking Consumer Outcomes', April 2014

> Regional Australians' access to local content, April 2014

> Community research informing the *Contemporary community safeguards inquiry*, March 2014

> Connected parents in the cybersafety age, February 2014

> http://www.acma.gov.au/theACMA/Library/researchacma

Questions

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Thank you

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