

S.22

From: McIntyre, Duncan
Sent: Tuesday, 14 September 2010 6:17 PM
To: [redacted] S.47F
Cc: [redacted] S.22; Besgrove, Keith; [redacted] S.47F
Subject: LIMAC research, and the future of LIM [SEC=UNCLASSIFIED]
Importance: High
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S.47F

Thank you for an opportunity to input to LIMAC's research program. I understand you have had a discussion about this with [redacted] S.22 in my team.

We would see considerable value in analysing the "low-income market segment survey" in regional and rural areas more closely.

Changes in the general market towards use of mobiles, wireless broadband and content services are probably affecting the usage patterns of low-income consumers as well as the general population, particularly in rural and regional areas where dependence on those services could be greater. Affordability and access to suitable services in rural and regional areas is perhaps increasingly pertinent as these usage patterns change.

It appears that a segment analysis in rural and regional areas hasn't been completed by LIMAC to date.

If this general purpose seems useful at this time, topic areas could include for example:

- Mobile usage patterns, especially pre-paid and data downloads
- Percentage use for conducting work or finding work, vs. personal use
- Percentage use of mobile (pre-paid and post-paid) vs. landline (fixed and payphone) vs. internet (fixed, wireless and via mobile phone handset)
- Individual vs. shared access (since commonly pre-paid mobiles can be shared between users, is this also happening for wireless data access?)
- Effect of expiry dates on usefulness to low-income consumers
- Cost as a percentage of the user's overall budget (to identify the potential stress incurred by the costs)
- Impact of the age of respondent (to identify low-income elderly vs. low-income youth usage patterns)
- Strategies used for effective up-skilling (to identify the most effective methods for improving digital literacy amongst this group as LIMAC's 2008 literature review identified this as a key issue).

If we could make one further suggestion, there is also some value in looking at the re-introduced call centre for consumers in rural / regional areas, which would appear to be easily tacked onto this kind of study. It would be useful to know which consumers are calling, where are they calling from and what issues are being identified particular to those groups.

On a related note, we had a very useful chat with [redacted] S.47F today to discuss issues associated with the future policy direction for supporting low income users in the telecommunications sector and in particular, Telstra's programs and LIMAC. We would be keen to engage further on these issues over the coming months and I'd like to set up a time to continue our discussion. You may have an interest in being involved too. We'll be in touch about a time.

Cheers

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