



MOBILE PHONE POLL March 2010

- CLIENT:** Exceltium Ltd
- POLL DATES:** Thu 04 March 2010
- SAMPLE SIZE:** 400 respondents agreed to participate.
- SAMPLE SELECTION:** Random sampling of nationwide landline phone numbers, requesting an adult over 15 who owns a mobile phone. If more than one at home, the person who has the next birthday.
- SAMPLE ERROR:** Based on this sample of 400 respondents, the maximum sampling error (for a score of 50%) is +/- 5.0%, at the 95% confidence level.

Demographics

	Gender	
	Count	%
Female	217	54%
Male	183	46%
Total	400	100%

	Age Group	
	Count	%
15 - 30	87	22%
31 - 45	105	26%
46 - 60	128	32%
60+	80	20%
Total	400	100%

	Area	
	Count	%
Auckland	93	23%
Wellington	58	15%
Christchurch	53	13%
Provincial	102	26%
Rural	94	24%
Total	400	100%

Mobile Network

Which network is your mobile phone on? (If they have more than one phone, ask them for the network of their main phone)

	Network	
	Count	%
Vodafone	203	51%
Telecom	168	42%
2 degrees	23	6%
Other	3	1%
Don't Know	3	1%
Total	400	100%

Provider Satisfaction

And overall how satisfied are you with the service you get from that network provider, for the price you pay? Are you very unsatisfied, somewhat unsatisfied, somewhat satisfied, or very satisfied?

	Provider Satisfaction	
	Count	%
Very unsatisfied	34	9%
Somewhat unsatisfied	37	9%
Neither satisfied nor unsatisfied	29	7%
Somewhat satisfied	164	41%
Very satisfied	132	33%
Don't Know	4	1%
Total	400	100%

Overall 74% are satisfied with their mobile network provider.

	Gender		Age Group				Total
	Female	Male	15 - 30	31- 45	46 - 60	60+	
	Mean	Mean	Mean	Mean	Mean	Mean	Mean
Provider Satisfaction Av	.69	.72	.71	.67	.70	.74	.70

The average rating is calculated by assigning a score of 0 for very unsatisfied, 0.25 for somewhat unsatisfied, 0.5 for neither satisfied nor unsatisfied, 0.75 for somewhat satisfied and 1.00 for Very satisfied.

Over 60 users of mobile phones are slightly more satisfied than other users.

	Area					Total
	Auckland Mean	Wellington Mean	Christchurch Mean	Provincial Mean	Rural Mean	Mean
Provider Satisfaction Av	.73	.76	.60	.72	.68	.70

Satisfaction is highest in Wellington and lowest in Christchurch.

	Network				Total
	Vodafone Mean	Telecom Mean	2 degrees Mean	Other Mean	Mean
Provider Satisfaction Av	.72	.67	.82	.92	.70

Users of 2 degrees have the highest satisfaction and Telecom the lowest.

Propositions

I'm now going to read out a list of statements to you. For each statement can you tell me if you strongly disagree, somewhat disagree, somewhat agree, or strongly agree with the statement.

Mobile phone charges in New Zealand are higher than in similar countries

	NZ Mobile phone charges higher than overseas	
	Oct 09	Mar 10
Strongly Disagree	2%	1%
Somewhat Disagree	3%	2%
Neither agree nor disagree	5%	4%
Somewhat Agree	28%	26%
Strongly Agree	46%	42%
Don't Know	15%	25%
Refused	0%	0%
Total	100%	100%

68% (was 74%) of respondents agree that mobile phone charges are higher in New Zealand than in similar countries. Only 3% (was 5%) disagree.

New Zealanders are over-charged by Telecom and Vodafone

	NZers over-charged by Telecom & Vodafone	
	Oct 09	Mar 10
Strongly Disagree	1%	2%
Somewhat Disagree	4%	5%
Neither agree nor disagree	3%	4%
Somewhat Agree	29%	28%
Strongly Agree	55%	51%
Don't Know	7%	11%
Refused	0%	2%
Total	100%	100%

79% (was 84%) of respondents believe Telecom and Vodafone are over-charging and only 7% (was 5%) disagree.

It should cost about the same to call someone on a different mobile phone network as to call someone on my own network

	Should cost same to call on different network	
	Oct 09	Mar 10
Strongly Disagree	2%	2%
Somewhat Disagree	4%	2%
Neither agree nor disagree	4%	4%
Somewhat Agree	30%	32%
Strongly Agree	54%	53%
Don't Know	6%	9%
Refused	0%	2%
Total	100%	100%

85% (was 84%) of respondents agree that it should cost the same to call someone on a different mobile phone network, as it does to call someone on their own network.

I trust companies to lower their prices voluntarily

	Trust companies to lower prices voluntarily	
	Oct 09	Mar 10
Strongly Disagree	43%	33%
Somewhat Disagree	15%	26%
Neither agree nor disagree	3%	3%
Somewhat Agree	22%	18%
Strongly Agree	15%	16%
Don't Know	2%	4%
Refused	0%	33%
Total	100%	100%

34% (was 37%) of respondents said they trust companies to lower their prices voluntarily, while 59% (was 58%) do not.

	Gender		Age Group				Total
	Female	Male	15 - 30	31- 45	46 - 60	60+	
	Mean	Mean	Mean	Mean	Mean	Mean	Mean
Mobile charges higher in NZ Av	.85	.86	.88	.82	.85	.86	.85
NZers overcharged Av	.84	.85	.87	.83	.88	.78	.84
Should cost same to call on different network Av	.88	.84	.87	.85	.89	.82	.86
Trust companies to lower prices voluntarily Av	.40	.37	.44	.45	.33	.34	.39

Not a great deal of variation by gender or age on the first three propositions. Younger respondents tend to be more trusting than older respondents for companies to lower their prices voluntarily.

	Area					Total
	Auckland	Wellington	Christchurch	Provincial	Rural	
	Mean	Mean	Mean	Mean	Mean	Mean
Mobile charges higher in NZ Av	.83	.91	.93	.82	.81	.85
NZers overcharged Av	.84	.86	.88	.79	.88	.84
Should cost same to call on different network Av	.84	.88	.89	.84	.87	.86
Trust companies to lower prices voluntarily Av	.40	.33	.49	.39	.36	.39

Those in Christchurch are most likely to say New Zealanders are being overcharged for their mobile phone use, yet also most likely to trust companies to lower prices voluntarily.

	Network					Total
	Vodafone	Telecom	2 degrees	Other	Don't Know	
	Mean	Mean	Mean	Mean	Mean	Mean
Mobile charges higher in NZ Av	.85	.85	.84	1.00	1.00	.85
NZers overcharged Av	.85	.83	.82	1.00	.	.84
Should cost same to call on different network Av	.85	.88	.83	.92	.	.86
Trust companies to lower prices voluntarily Av	.36	.41	.39	.75	.42	.39

	Party Vote in 2008				Total
	National	Labour	Other	Not Vote/Can't Recall	
	Mean	Mean	Mean	Mean	Mean
Mobile charges higher in NZ Av	.87	.88	.86	.79	.85
NZers overcharged Av	.85	.84	.93	.81	.84
Should cost same to call on different network Av	.88	.85	.89	.83	.86
Trust companies to lower prices voluntarily Av	.43	.32	.33	.42	.39

National and Labour voters broadly agree on the first three propositions. On trusting companies to lower prices voluntarily, National voters are more agreeable, but still less than half agree.

Termination Rate Recommendation

The main point of this poll is to get your opinion on a major decision the government has to make shortly. The issue is the amount mobile phone companies charge when you call or text someone on a different network. Currently, the companies charge twice as much as it costs to connect a call.

The Government has two choices: Option 1 is to accept binding promises by Telecom and Vodafone to voluntarily reduce these charges over a number of years. Option 2 is to force them to lower the costs more quickly using regulations.

Do you think the Government should (1) accept Telecom and Vodafone's binding promises to make the prices lower or (2) introduce regulations to force them to more quickly make the prices lower?

Mobile Termination Rates	
%	
Accept binding promises	18%
Regulate	78%
Don't Know	4%
Refused	1%
Total	100%

Only 18% of respondents want the Government to accept the Commerce Commission recommendation to accept binding promises from Telecom and Vodafone, while 78% want regulations to force a lowering of prices more quickly.

		Gender		Age Group				Total
		Female	Male	15 - 30	31- 45	46 - 60	60+	
		Col %	Col %	Col %	Col %	Col %	Col %	Col %
Mobile Termination Rates	Accept binding promises	17%	19%	16%	19%	18%	19%	18%
	Regulate	79%	76%	79%	77%	78%	76%	78%
	Don't Know	3%	4%	3%	3%	4%	4%	4%
	Refused	1%	1%	1%	1%		1%	1%
Total		100%	100%	100%	100%	100%	100%	100%

Little variation by gender or age

		Area					Total
		Auckland	Wellington	Christchurch	Provincial	Rural	
		Col %	Col %	Col %	Col %	Col %	Col %
Mobile Termination Rates	Accept binding promises	23%	22%	8%	21%	14%	18%
	Regulate	72%	71%	91%	77%	81%	78%
	Don't Know	3%	5%	2%	2%	5%	4%
	Refused	2%	2%				1%
Total		100%	100%	100%	100%	100%	100%

Those in Christchurch, rural and provincial New Zealand are most in favour of regulation, but even in Wellington it is favoured by a more than 3:1 margin.

		Network					Total
		Vodafone	Telecom	2 degrees	Other	Don't Know	
		Col %	Col %	Col %	Col %	Col %	Col %
Mobile Termination Rates	Accept binding promises	19%	19%			67%	18%
	Regulate	76%	77%	100%	100%		78%
	Don't Know	4%	4%				4%
	Refused	1%				33%	1%
Total		100%	100%	100%	100%	100%	100%

		Party Vote in 2008				Total
		National	Labour	Other	Not Vote/Can't Recall	
		Col %	Col %	Col %	Col %	Col %
Mobile Termination Rates	Accept binding promises	17%	18%	20%	18%	18%
	Regulate	82%	79%	80%	68%	78%
	Don't Know	1%	3%		10%	4%
	Refused				3%	1%
Total		100%	100%	100%	100%	100%

No significant difference between National and Labour voters when it comes to a choice between accepting binding promises vs regulation.

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