



## About

The **nbn™ Broadband Index** is one of the most detailed and extensive studies of online behaviour ever conducted in Australia.

Undertaken on behalf of **nbn** by independent research agency Evolve Research in June 2016, 10,348 Australians responded to the survey across metropolitan, regional and remote areas including those connected to services over the **nbn™** network and those not connected.

The **nbn™ Broadband Index** examined online perceptions and experiences in detail including Communication, Work, Social interactions, Entertainment and Leisure, Health and Wellbeing, Education, Shopping and E-commerce and Personal Actuation.

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# Work Domain - Summary

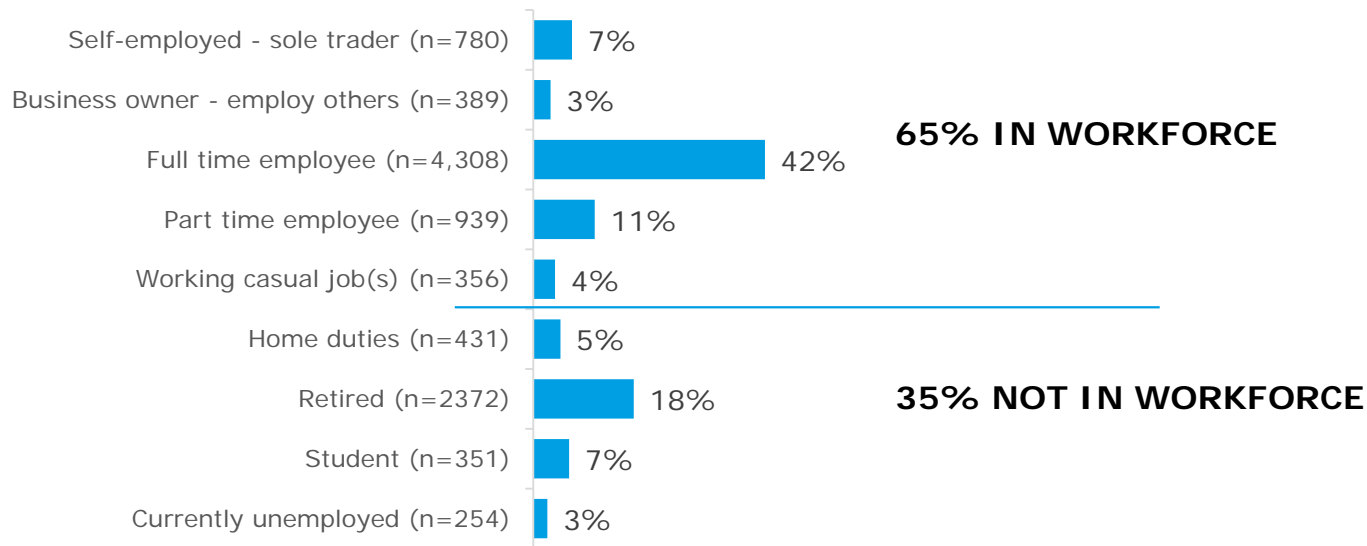


- The **nbn**<sup>™</sup> network brings regional Australia into line with metro when it comes to the impact of the internet for work and business. Regional **nbn**<sup>™</sup> network connected users are more likely to say the internet is vital to their job or business. They are more likely to be using their internet for work related functions
- **nbn**<sup>™</sup> network connected consumers rate their internet access significantly more **important** to achieving their occupational goals. In particular the impact on regional workers is substantial with the greatest impact seen in the area of efficiency and productivity on the job
- **nbn**<sup>™</sup> network connected Regional consumers find the internet a far more empowering tool for job productivity and professional development . In particular, the increases in how well their internet supports efficiency and productivity in their job increases significantly.
- For Regional Australians working online and not connected to the **nbn**<sup>™</sup> network, being online can be frustrating – 22% of these unconnected consumers have difficulty accessing their work server from home versus only 5% of regionally connected **nbn**<sup>™</sup> network users.

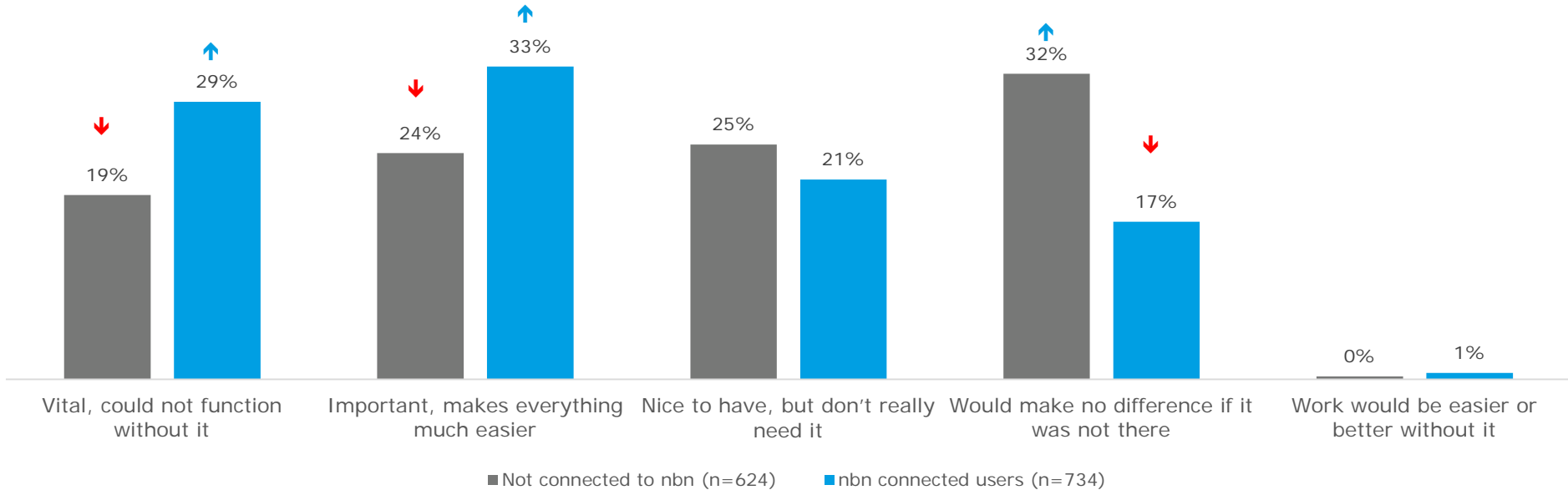


# Almost two thirds of the survey sample were in the workforce with just under half employed fulltime

1 in 10 of the survey respondents were business owners, either self employed or employing others



# Regional workers on nbn™ network rate the internet as more vital to their ability to work than those who aren't connected



4 **Base: All respondents** (BASE SIZES ABOVE)  
**C2 WORK DOMAIN – IMPACT**  
 How important is your home internet to your [S6a=3-5 "job"/S6a=1.2 "business"]?

↑↓ Statistically significant difference at  $p < .05$

# nbn™ network brings regional Australia into line with metro when it comes to the impact of the internet for work and business



Amongst connected consumers in both regional and metro areas, over a quarter of employed Australians said the internet was vital to their job or business

	Metro			Regional			Regional vs Metro GAP Analysis			
	Unconnected	nbn Connected users	Metro nbn Connected versus Unconnected	Unconnected	nbn Connected users	Regional nbn Connected versus Unconnected	Regional vs Metro vs unconnected	Regional versus Metro connected	Change in regional Metro Gap nbn connected vs Unconnected	Regional nbn connected vs Metro unconnected gap
	A	B	C = B Minus A	D	E	F = E minus D	G = D minus A	H = E minus B	I = F minus C	j = E minus A
Vital, could not function without it	22%	28%	6%	20%	29%	10%	-2%	1%	3%	7%
Important, makes everything much easier	27%	31%	4%	24%	33%	9%	-3%	2%	5%	6%
Nice to have, but don't really need it	28%	22%	-6%	24%	21%	-4%	-3%	-1%	2%	-7%
Would make no difference if it was not there	21%	19%	-2%	32%	17%	-15%	11%	-2%	-13%	-5%

Metro nbn™ network connected consumers are more likely to say the internet is vital to their job or business

Regional nbn™ network connected users are more likely to say the internet is vital to their job or business

nbn™ network brings regional into line with metro when it comes to the impact of the internet for work and business

# nbn™ network connected consumers in regional areas are more likely to be using their internet for work related functions



They are more likely than unconnected regional consumers to be searching the internet for work, communicating with colleagues and accessing the work server remotely – which are also the areas that consumers are more likely to be doing more of compared to 2 years ago

## What are working **Regional** Australians doing more of when connected to the nbn™ network

B1 Regional Workers (n=624/733)	Unconnected	Connected	GAP
Use the internet for search/research for your work	53% ↓	68% ↑	15%
Communicate with others for work (emails, instant messaging, Skype etc)	53% ↓	63% ↑	11%
Access the work server remotely	27% ↓	35% ↑	8%
Use social media to network / career development (e.g. LinkedIn)	26%	34%	7%
Use the internet to sell a product or service for your business	4% ↓	9% ↑	5%
Search for tender or work opportunities for your business online	3% ↓	7% ↑	4%
Advertise a property you own on Airbnb or other accommodation website	6%	5%	0%

## What are Regional **nbn™** network connected consumers doing more of than 2 years ago

B3 Doing more of Base (n=632)	Doing more of vs. 2 years ago
Using the internet for search/research for your work	52%
Communicating with others for work (emails, instant messaging, Skype etc)	48%
Accessing the work server remotely	28%
Using social media to network / career development (e.g. LinkedIn)	24%
Looking for work online at job sites	11%
Other online activity that earns you money	6%
Using the internet to sell a product or service for your business	5%
Searching for tender or work opportunities for your business online	3%
Advertising accommodation at your property online	3%

6 **Base: All respondents (BASE SIZES ABOVE)**  
**C1 WORK DOMAIN – ACTIVITIES**  
 When it comes to **work and business**, which of the following do you do at least sometimes using your **home internet**?

**Base: All respondents (BASE SIZES ABOVE)**  
**C3 WORK DOMAIN – DOING MORE OF**  
 Compared to this time 2-years ago, which of the following are you now doing more often online at home?

↑↓ Statistically significant difference at p<.05

# nbn™ network connected consumers rate their internet access significantly more **important** to achieving their occupational goals



In particular the impact on regional workers is substantial with the greatest impact seen in the area of efficiency and productivity on the job

	Metro			Regional			Regional vs Metro GAP Analysis			
	Unconnected	nbn Connected users	Metro nbn Connected versus Unconnected	Unconnected	nbn Connected users	Regional nbn Connected versus Unconnected	Regional vs Metro unconnected	Regional versus Metro connected	Change in regional Metro Gap nbn connected vs Unconnected	Regional nbn connected vs Metro unconnected gap
	A	B	C = B Minus A	D	E	F = E minus D	G = D minus A	H = E minus B	I = F minus C	j = E minus A
My efficiency and productivity in my job	6.3	6.6	0.3	5.5	6.3	0.8	-0.8	-0.3	0.5	0.0
My professional development	6.2	6.4	0.2	5.5	6.0	0.5	-0.7	-0.4	0.3	-0.2
My ability to be creative	5.7	5.6	-0.1	5.1	5.3	0.2	-0.6	-0.2	0.4	-0.4
Being entrepreneurial / making money for myself	5.2	5.0	-0.2	4.2	4.4	0.1	-1.0	-0.6	0.4	-0.8

Metro nbn™ network connected consumers say the internet supports their goals more strongly in efficiency and productivity and also professional development

People in Regional areas have particularly large increases in ratings for efficiency and productivity and professional development

Connection to the nbn™ network closes the gap in impact of the internet on all aspects of professional attuation, although there are still gaps present

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Base: Panel and Product Scorecards (n=5,382)

## I1 PERSONAL ACTUATION

In this section, we would like you to think about how you personally relate to the internet. Below are some different aspects of life which may be relevant to you. For each area, please indicate how important it is to you in your life.

↕ Statistically significant difference at p<.05

# nbn™ network connected Regional consumers find the internet a far more **empowering tool** for job productivity and professional development



In particular, the increase in how well their internet supports efficiency and productivity in their job increases significantly

	Metro			Regional			Regional vs Metro GAP Analysis			
	Unconnected	nbn Connected users	Metro nbn Connected versus Unconnected	Unconnected	nbn Connected users	Regional nbn Connected versus Unconnected	Regional vs Metro unconnected	Regional versus Metro connected	Change in regional Metro Gap nbn connected vs Unconnected	Regional nbn connected vs Metro unconnected gap
	A	B	C = B Minus A	D	E	F = E minus D	G = D minus A	H = E minus B	I = F minus C	j = E minus A
My efficiency and productivity in my job	5.9	6.0	0.1	5.2	5.8	0.6	-0.7	-0.2	0.5	-0.1
My professional development	5.8	5.9	0.0	5.2	5.6	0.3	-0.6	-0.3	0.3	-0.3
My ability to be creative	5.4	5.2	-0.1	4.9	4.9	0.0	-0.5	-0.3	0.2	-0.4
Being entrepreneurial / making money for myself	4.8	4.8	0.0	4.1	4.1	0.0	-0.7	-0.7	0.0	-0.7

Metro nbn™ network connected consumers have only moderate gains in how much the internet supports their professional goals

People in Regional areas who are connected rated the impact of the internet as much higher on efficiency and productivity in their job and also professional development

Connection to the nbn™ network closes the gap in impact of the internet on all aspects of professional actuation, although there are still gaps present

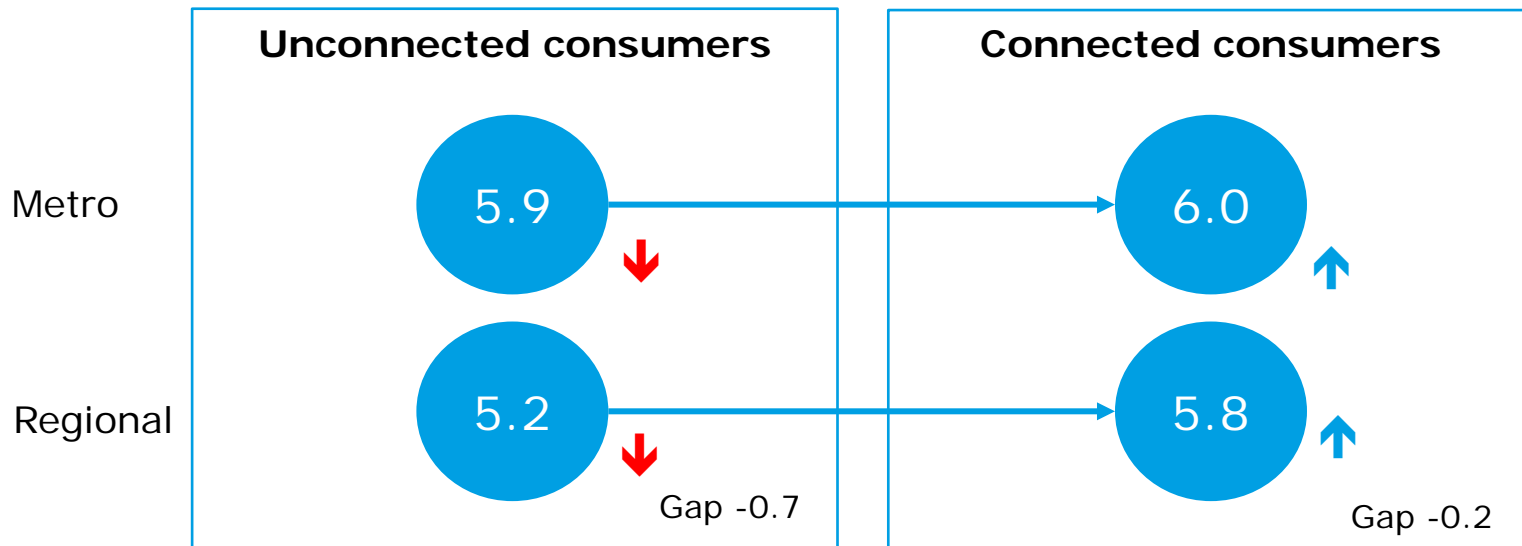


# nbn™ network helps bring metro level job productivity to regional areas



...how strongly the internet and related technology supports you in achieving your goals or desired outcomes

***My efficiency and productivity in my job***  
(0 'No impact at all' to 10 'Extremely strong impact')



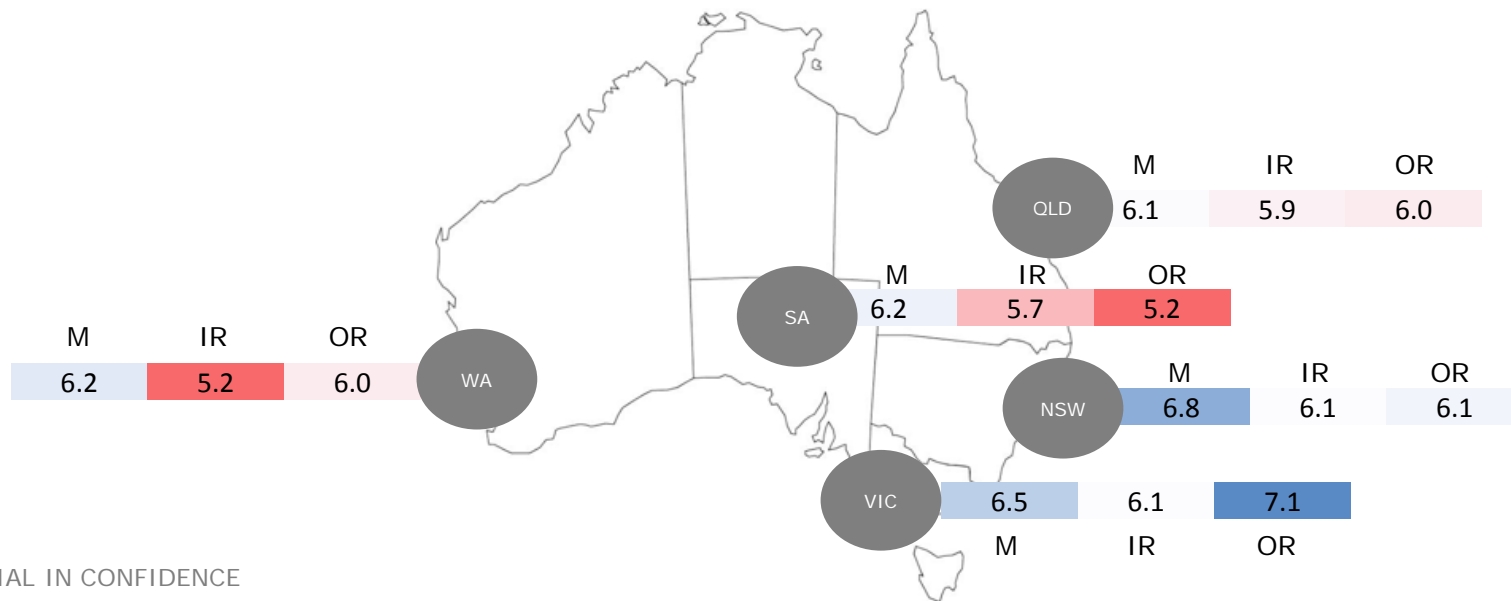
# Where are unconnected Australian employees most let down by the internet for work?



Metro (M)	Inner Regional (IR)	Outer Regional (OR)
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...how strongly the internet and related technology supports you in achieving your goals or desired outcomes

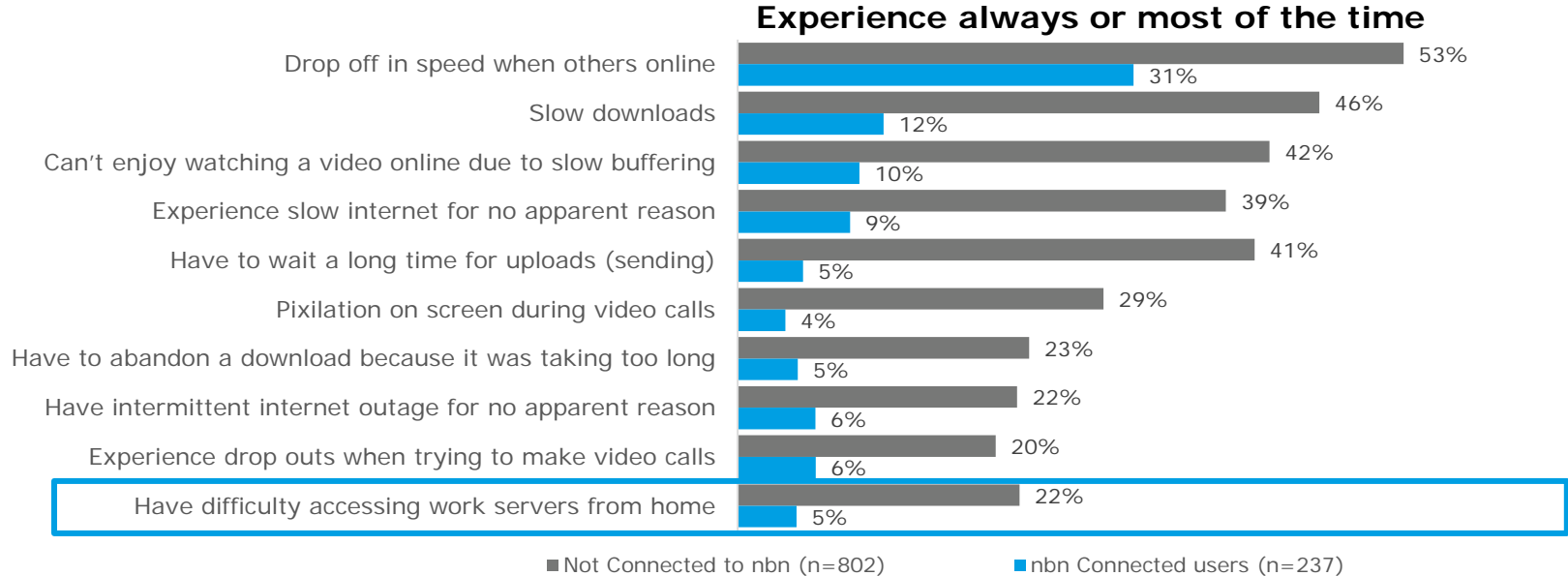
***My efficiency and productivity in my job***  
 (0 'No impact at all' to 10 'Extremely strong impact')



# For Regional Australians working online and not connected to the **nbn™** network, online experiences are frustrating



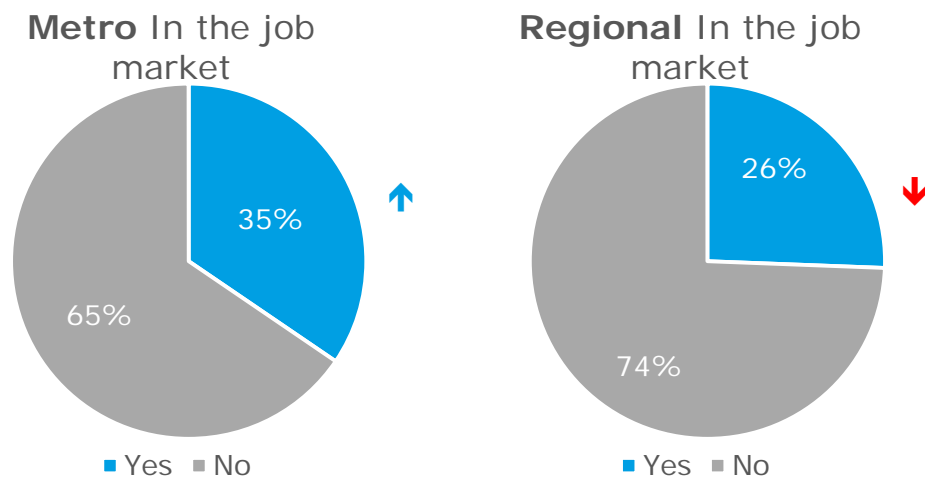
Incidence of performance issues for **nbn™** network connected Regional Australians is comparatively low compared to unconnected consumers



# Metro Australians are more likely to be on the look-out for a job than those in regional locations



Overall, 32% of Australian's in the survey were on the look-out for another job.



Base: All respondents in the workforce or looking for work (n=3,465 metro and n=2,393 regional)

S6b WORK STATUS

IF IN WORKFORCE Are you currently looking for alternative employment?

IF NOT IN WORKFORCE Are you currently looking for work

↑↓ Statistically significant difference at  $p < .05$

# Participants who are self-employed have the highest internet usage intensity and are least satisfied



Business owners in particular are dissatisfied with their experiences online

	Technology Index	Connection Index	
Self-employed - sole trader	38	-2	} Highest technology intensity and poorest internet experience
Business owner - employ others	38	-9	
Full time employee	34	7	} Expectation gap
Part time employee	34	16	
Working casual job(s)	35	15	
Home duties	29	13	
Retired	26	15	
Student	34	11	
Currently unemployed	27	14	

Base: All respondents (n=10,324)

S6a WORK STATUS

Which of the following best describes your personal situation?

C1 & C2, D1 & D7, E1 & E3, F2 & F4, G1 & G3, H1 & H3 ACTIVITIES

\*When it comes to [TOPIC], which of the following do you do at least sometimes using your home internet

How important is your home internet to your [TOPIC]

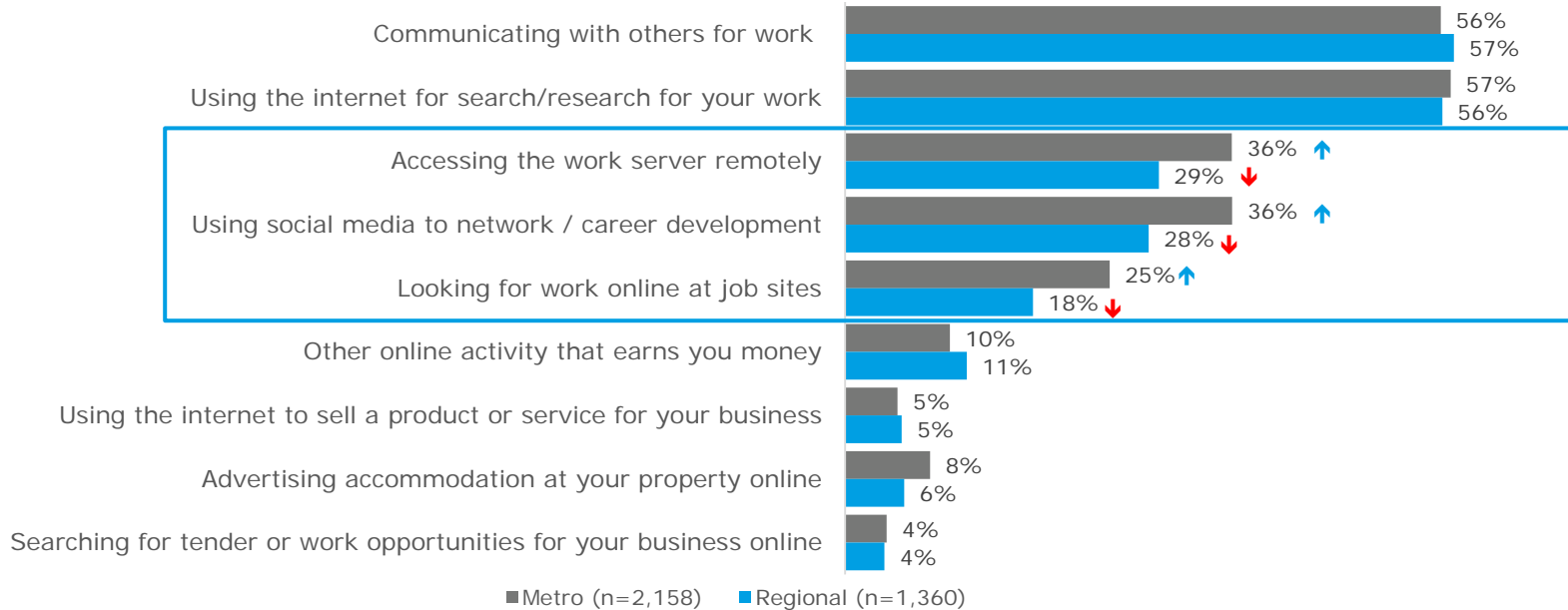
A2 SATISFACTION WITH HOME INTERNET EXPERIENCE

How satisfied are you with your internet experience at home in each area below?

# Metro and regional Australians have similar online work behaviours overall



People in metro areas are more likely to access the work server remotely, use social media for career purposes and look at online job sites



Base: Panel and product scorecards respondents working (n=3,465 metro and n=2,393 regional)

## C1 WORK DOMAIN – ACTIVITIES

When it comes to **work and business**, which of the following do you do at least sometimes using your **home internet**?

↑↓ Statistically significant difference at p<.05

# Regional nbn™ network connected users are twice as likely to be selling online or sourcing business opportunities online



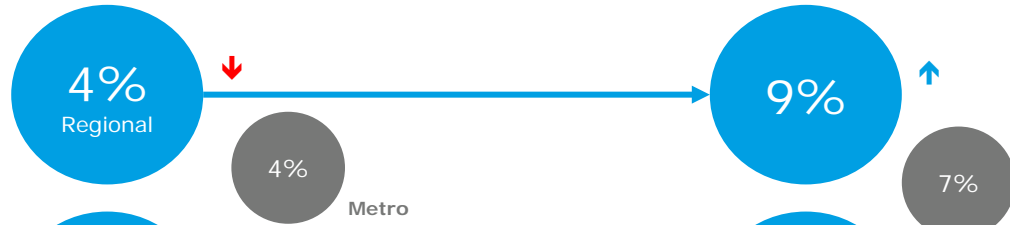
This level of increase was not evident in the same metro based comparison

Regional (n=1360) | Metro n=2,158

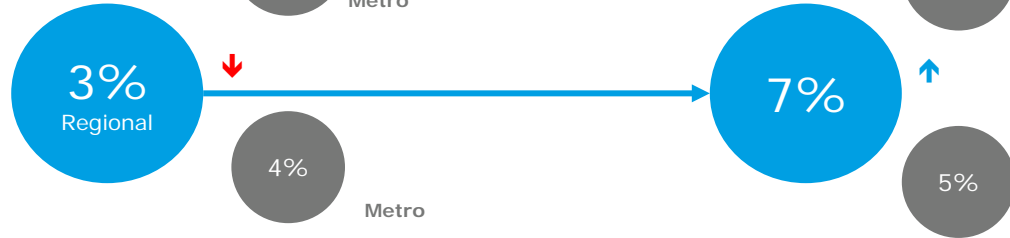
**Unconnected**

**nbn™ network Connected**

Use the internet to sell a product or service for your business



Search for tender or work opportunities for your business online



Base: Panel and product scorecards respondents working (n=3,465 metro and n=2,393 regional)

C1 WORK DOMAIN – ACTIVITIES

When it comes to **work and business**, which of the following do you do at least sometimes using your **home internet**?

↑↓ Statistically significant difference at  $p < .05$

# ...how does being online or the internet make your life better?



## Use the internet to sell a product or service for your business

*"1. Allows faster access to research of ideas, products, etc. 2. Brings my business to the world, allowing me to provide a living for my family."*

*"I live in the bush where I have a native wildlife refuge .I access all sorts of info and contact people online. I have an online store that makes me some pocket money and I also have a housemate with a chronic illness The phone line is sometimes out . We have no mobile ph access here. My life style would be impossible without the internet for a prolonged period of time. A few days is manageable although it impacts on various things"*

*"I am able to offer my time to my work and others via the use of internet and the services that are based on the internet. I am able to buy most things I need for my business or for my private use which are delivered to my home/office, since I live 50km away from the nearest rural little town, this makes internet very valuable tool and necessity."*

*"Being rural it is essential to us to communicate, shop, and run two small businesses."*

**Comments where:** Regional nbn connected consumer who indicate they 'Use the internet to sell a product or service for your business'

### **J4 CHANGED YOUR LIFE**

In a few words, please describe how does the being online or the internet make your life better



# ...how does being online or the internet make your life better?



Search for tender or work opportunities for your business online

*"Instant information on a wide range of topics."*

*"every business relies on it, so for me to be efficient in business i need the internet as fast as possible."*

*"Makes it efficient to be productive and make money."*

*"Able to complete many business tasks from home."*

**Comments where:** Regional nbn connected consumer who indicate they 'Search for tender or work opportunities for your business online'

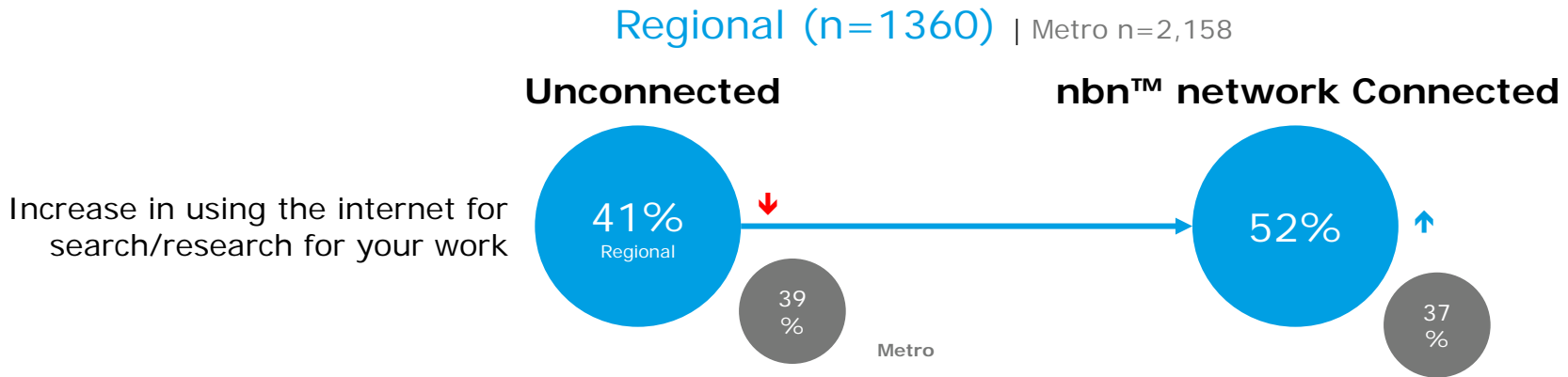
**J4 CHANGED YOUR LIFE**

In a few words, please describe how does the being online or the internet make your life better

# Regional nbn™ network connected consumers are significantly more likely to be **searching for work online now** than their unconnected counterparts



This level of increase versus two years ago was not evident in the same metro based comparison



Base: Panel and product scorecards respondents working (base sizes as above)

C3 WORK DOMAIN – DOING MORE OF

Compared to this time 2-years ago, which of the following are you now doing more often online at home?