



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 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. This presentation summarises some of those findings.






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How do we define Regional Australia



Regional Australians were defined by postcode using ranges specified by the Australian Bureau of Statistics (ABS) using Remoteness Areas (RAs).



ASGS Region	% of population *	Example	Unweighted sample base (n=)**	Net Regional / Metro split
Major Cities	71%	Melbourne VIC 	5,644	n=4,418
Inner Regional	18%	Orange NSW 	3,498	
Outer Regional	9%	Cairns QLD 	871	
Remote	1%	Houpeton VIC 	42	
Very Remote	1%	Morvden QLD 	7	

<http://www.abs.gov.au/websitedbs/D3310114.nsf/home/Frequently+Asked+Questions>

* Source 3218.0 Regional Population Growth, Australia (2014)

** Note, excludes some cases where region could not be determined due to missing or invalid postcode

Generational View



Where of interest, results have been compared across age groups – although they don't match generational age cohort ranges exactly, the following age ranges have been used to approximate generally accepted generational boundaries.

	Boomers and Silent Generation	Gen X	Gen Y (Millennials)	Gen Z
Age ranges used	55 and over	35-54	25-34	18-24
Base (n=)	4,318	4,019	1,470	565
% of sample	42%	39%	14%	5%



Key Points



The study found that on average;

- Australians not connected to services over the **nbn™** network are **less satisfied** with their internet experience than they were two years ago
- **nbn™ network connected consumers are more satisfied** with their internet experience regardless of location than unconnected consumers and are significantly more satisfied than the average consumer two years ago
- **nbn™** connected people in metro areas spend more time online than those in regional areas.
- People with kids are the biggest users of the internet and online multi-tasking is now the norm
- **nbn™** network brings metro level job productivity to regional areas
- Gen-Y and Gen-X are the most active online
- People in regional areas use the internet to connect locally - local providers, read local community papers and engage with groups more so than metro users

nbn™ network helps to bridge the digital divide by bringing a positive internet experience to Australians



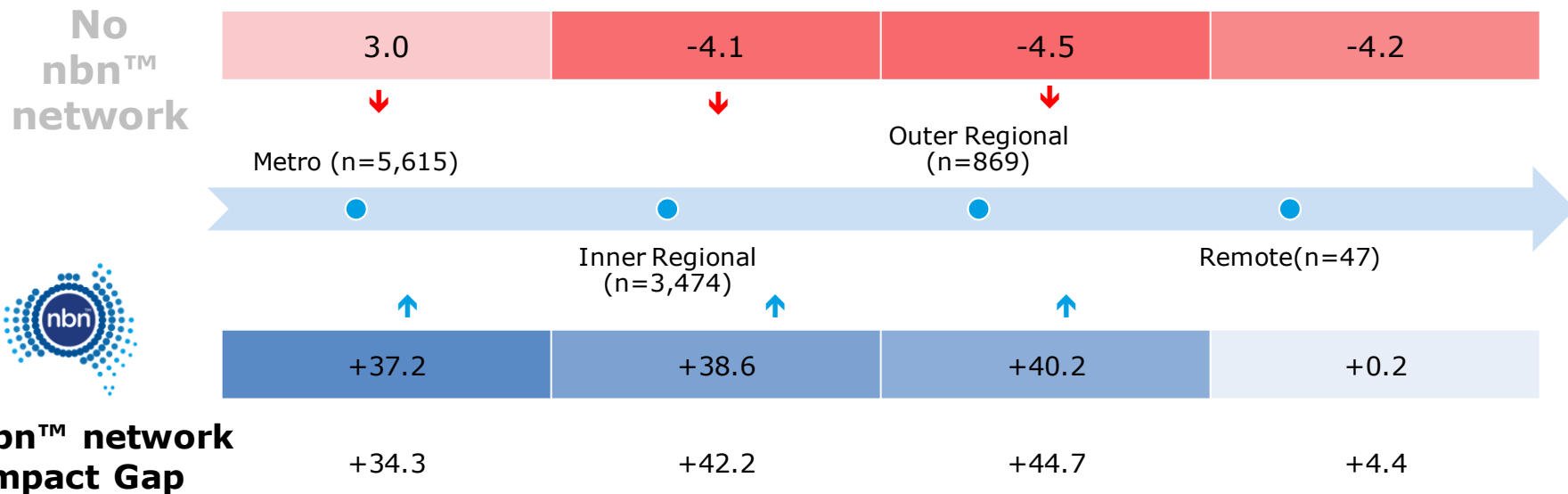
Unconnected Australians in both regional and Metro areas have lower index scores than **nbn™** network connected consumers. Moreover, the gap in index scores seen between metro and regional **unconnected consumers** is not apparent when comparing metro and regional connected consumers.



nbn™ network drives a stronger connected experience across regional areas of Australia



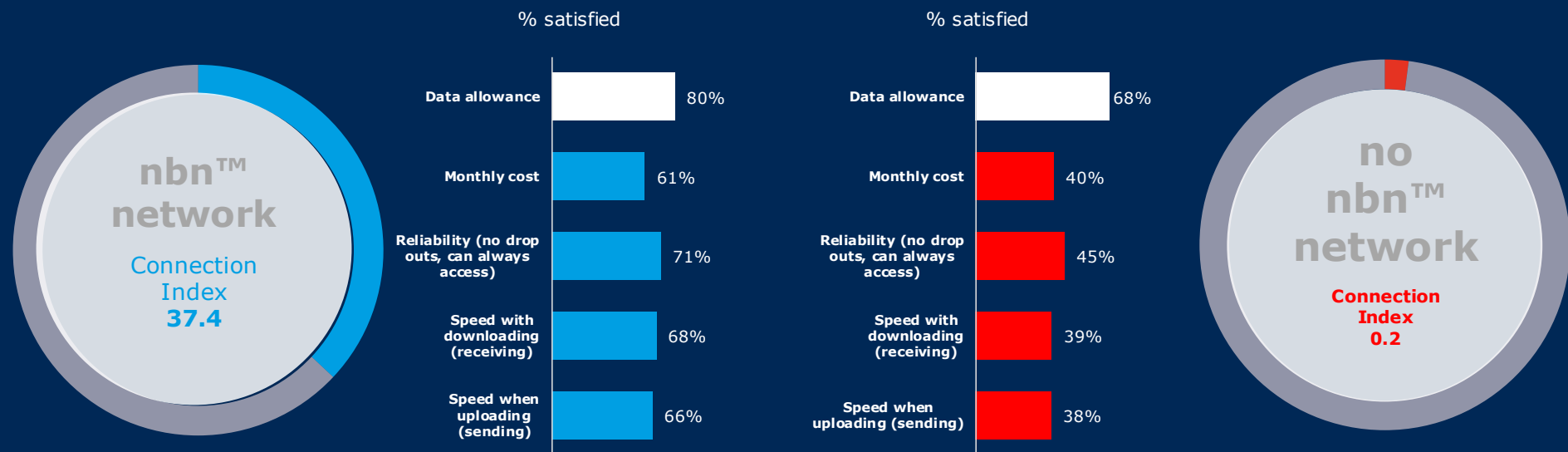
In both inner and outer Regional areas, **nbn™** network connected users are more satisfied with their home internet experience.



The **nbn**TM network is creating a better internet experience



The **nbn**TM network is keeping pace with increasing online demands of Australians and delivering a level of performance that meets increasing consumer demands.



Metropolitan Australians spend more time online than their regional counterparts



This is the case both during the week and on the weekend. Overall **nbn™** network connected consumers spend more time online than unconnected consumers.

	Today 2016		2 years ago (2014)	Change	
Metro	Average hours per day spent by current nbn™ connected consumers online	Weekday 6.0 🕒🕒🕒🕒🕒🕒 Weekend 6.5 🕒🕒🕒🕒🕒🕒🕒	Metro consumers spend more time online than regional both nbn™ network connected and unconnected	Weekday 4.6 🕒🕒🕒🕒🕒 Weekend 5.0 🕒🕒🕒🕒🕒	+1.4 hours +1.5 hours
	Average hours per day spent by unconnected consumers online	Weekday 5.8 🕒🕒🕒🕒🕒🕒 Weekend 5.9 🕒🕒🕒🕒🕒🕒		Weekday 4.4 🕒🕒🕒🕒🕒 Weekend 4.7 🕒🕒🕒🕒🕒	+1.4 hours +1.2 hours
Regional	Average hours per day spent by current nbn™ connected consumers online	Weekday 5.6 🕒🕒🕒🕒🕒🕒 Weekend 5.8 🕒🕒🕒🕒🕒🕒	nbn™ network Connected consumers spend comparatively more time online on weekends	Weekday 3.9 🕒🕒🕒🕒 Weekend 4.2 🕒🕒🕒🕒	+1.7 hours +1.6 hours
	Average hours per day spent by unconnected consumers online	Weekday 5.4 🕒🕒🕒🕒🕒🕒 Weekend 5.3 🕒🕒🕒🕒🕒🕒		Weekday 4.0 🕒🕒🕒🕒 Weekend 4.1 🕒🕒🕒🕒	+1.4 hours +1.2 hours

Time online by **nbn**TM network connected consumers has increased more since 2014 than time spent by unconnected consumers



This is particularly the case in regional areas where **nbn**TM network connected consumers are spending an equivalent of 20 minutes more online a day than unconnected consumers.

Change in time spend online (hours 2016 versus hours 2014)

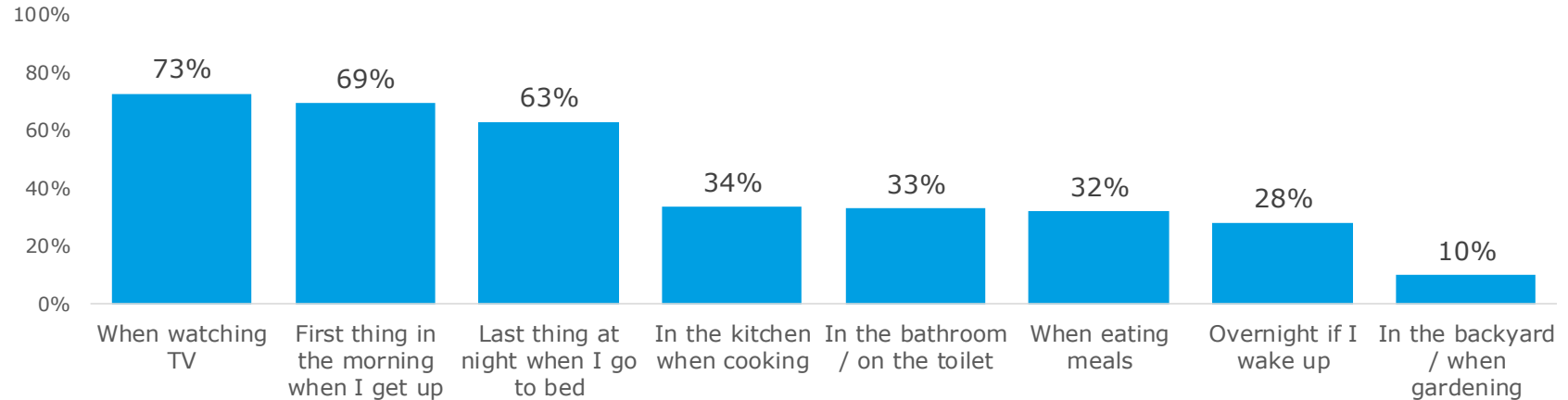
		GAP	Weekday	Weekend
Metro	nbn TM network Connected		+1.4 hours per day	+1.5 hours per day
	Unconnected		+ 1.4 hours per day	+ 1.2 hours per day
		GAP	Weekday	Weekend
Regional	nbn TM network		+1.7 hours per day	+1.6 hours per day
	Unconnected		+1.4 hours per day	+1.2 hours per day

Online multi-tasking is the new normal with most Australians online whilst watching TV



Most of us are online at home at the start and end of the day. Even late at night - a quarter of us hit the internet when we can't get to sleep.

When and where Australians access the internet at home



How we communicate is changing across generations



Gen-Z are the *instant chat* generation while older generations prefer more traditional means to communicate online. Email has become less used by each succeeding generation

One way



Two Way

Generation	Gen-Z (n=564)	Gen-Y (n=1,466)	Gen-X (4,002)	Builders and Boomers (n=4,304)
Email/ online calendar	★★★ (72%)	★★★★ (83%)	★★★★★ (90%)	★★★★★★ (94%)
File Sharing	★★ (38%)	★★ (44%)	★★ (39%)	★ (30%)
Social Media	★★★★★ (93%)	★★★★★ (91%)	★★★★★ (87%)	★★★ (68%)
Instant messaging	★★★★★ (84%)	★★★★ (74%)	★★★ (60%)	★★ (43%)
Video Calling	★★ (46%)	★★★ (54%)	★★ (49%)	★★ (47%)

The top-10 things each generation does online...



	Gen-Z (n=564)	Gen-Y (n=1,466)	Gen-X (4,002)	Builders and Boomers (n=4,304)
Number 1	Social Media	Social Media	Email or online calendar	Email or online calendar
Number 2	Buy online at an online retailer	Pay bills	Pay bills	Researching travel
Number 3	Use online banking	Email or online calendar	Use online banking	Email with family members or friends
Number 4	Email or online calendar	Buy online at an online retailer	Social Media	Use online banking
Number 5	Non-subscription video site	Use online banking	Buy online at an online retailer	Pay bills
Number 6	Pay bills	Researching travel	Researching travel	Buy online at an online retailer
Number 7	Online music services	Non-subscription video site	Price Checking and looking for deals	Price Checking and looking for deals
Number 8	Keep in touch via Instant messaging	Buy event or movie tickets online	Look up events and activities	Look up events and activities
Number 9	Online video subscription service	Price Checking and looking for deals	Buy event or movie tickets online	Use the internet for search/research for your work
Number 10	Buy event or movie tickets online	Communicate with others for work	Email with family members or friends	View online catalogues

The top-10 things each generation does **more of** online than other generations



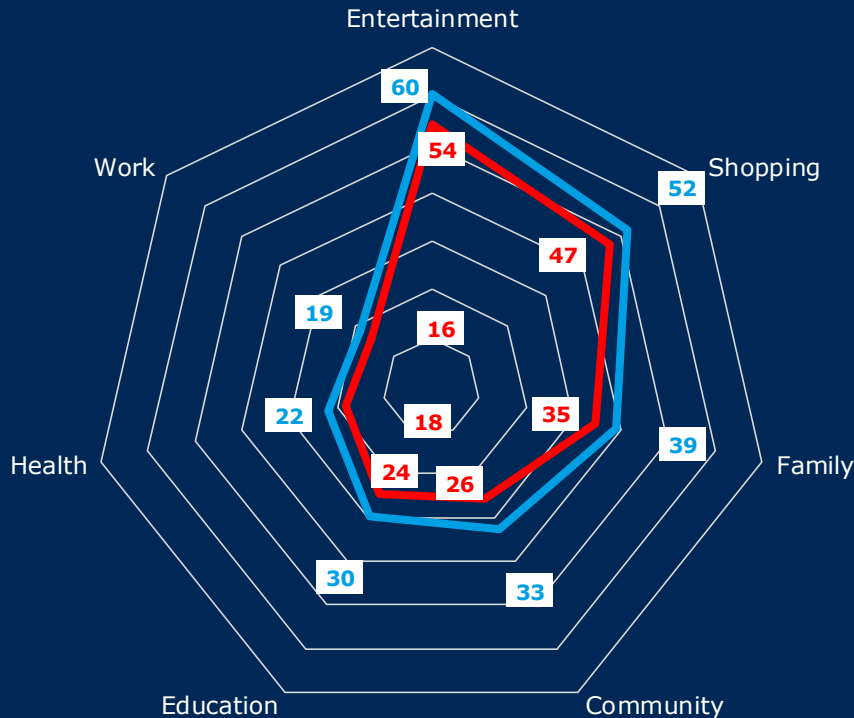
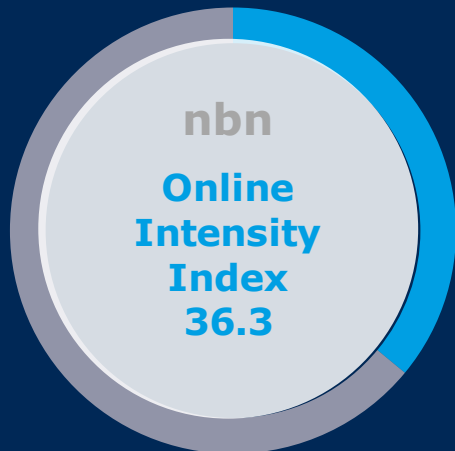
	Gen-Z (n=564)	Gen-Y (n=1,466)	Gen-X (4,002)	Builders and Boomers (n=4,304)
Number 1	Manage your course requirements, submit course work	Online gaming	Have a child or dependent use the internet for study purposes	Email with family members or friends
Number 2	Engage with other students studying a course	Online video subscription service	Use online applications to keep kids entertained	Send digital greeting cards for special occasions
Number 3	Study course content online	Upload or share content online	Access intranet for a school, university or other educational institution	Use local government/local council websites
Number 4	Research or search about a course, school or university	Access parenting or relationship advice online	Research or search for content for an assignment or project	Researching travel
Number 5	Keep in touch via instant messaging	Share email to get discounts	Buy online at an auction site	Email or online calendar
Number 6	Online video subscription service	Organise events or party on social media	Spend time with family on online activities	Download books to an e-reader
Number 7	Online music services	Spend time with family on online activities	Look at an online comparison site	Use the internet to sell a product or service for your business
Number 8	Online gaming	Discuss fitness or sport with others online	Study course content online	Look up events and activities
Number 9	Organise events or party on social media	Online music services	Manage your course requirements, submit course work	View online catalogues
Number 10	Access intranet for a school, university or other educational institution	Social Media	Search online classifieds	Use the internet for search/research for your work

nbn™ network connected consumers are more involved online, particularly with **community engagement** and **education**



INDEX SCORES

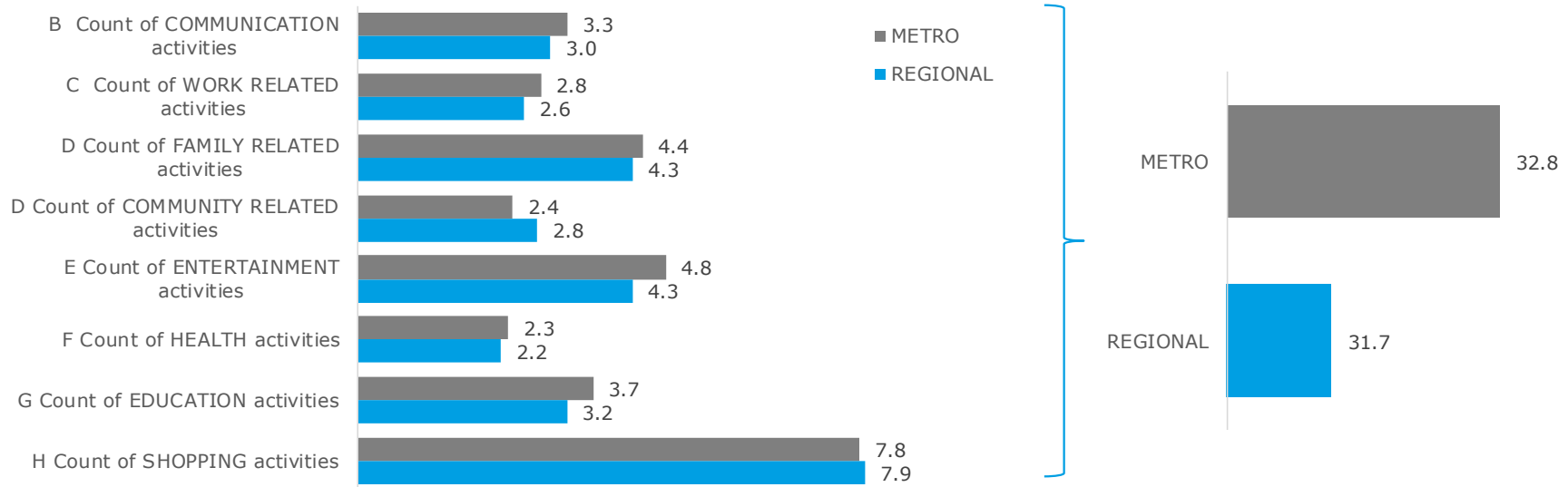
— nbn connected users — Not Connected to nbn



Regional Australians are less active online across most online domains except community and shopping



Metro Australians have more diverse internet behaviours particularly in entertainment and education.



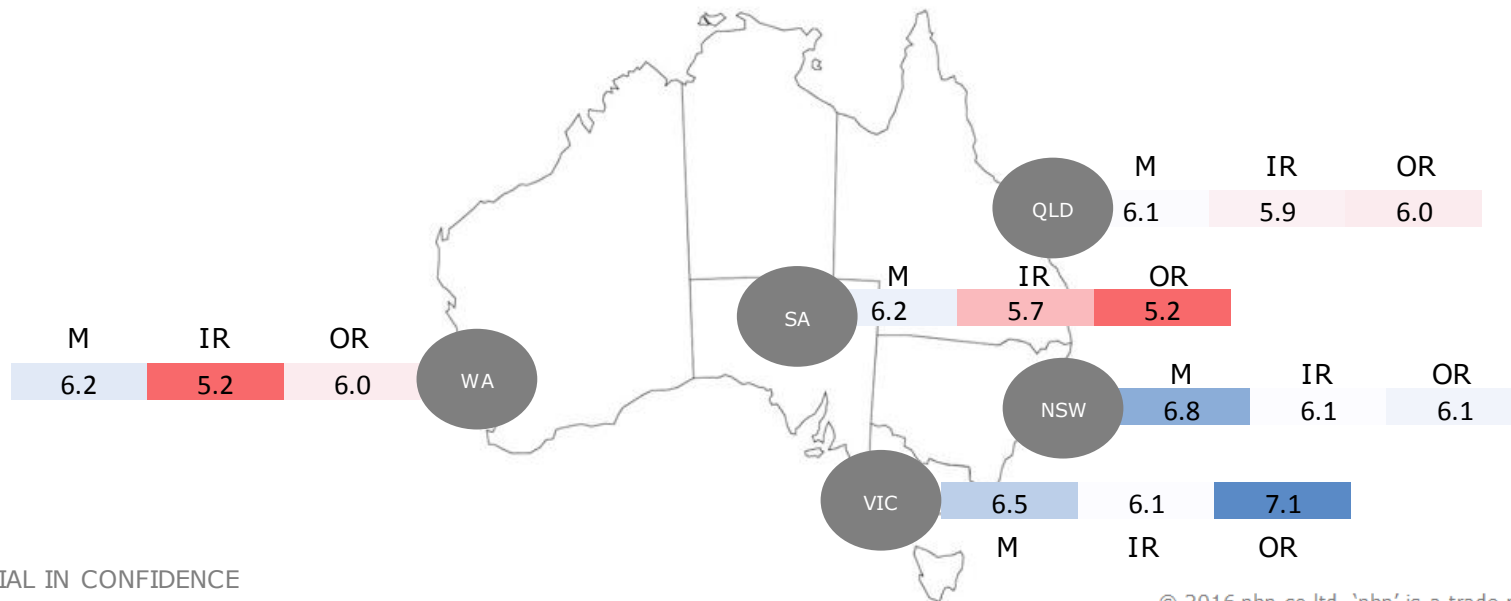
Where are unconnected Australian employees most let down by the internet for work?



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')

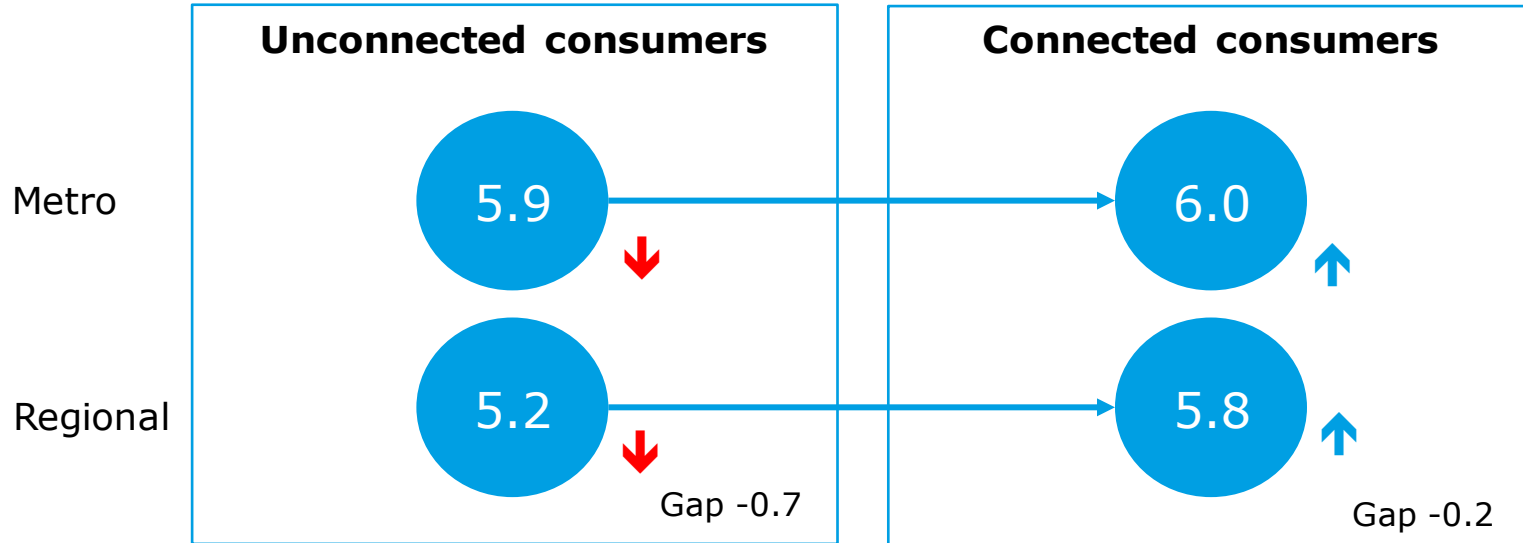


nbn™ network brings metro level job productivity to regional areas



...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')



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



Regional nbn™ network connected consumers 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 do working **Regional** Australians do more of when connected to the nbn™ network

C1 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 consumers doing more of than 2 years ago

C3 Doing activity base (n=484/632)	Unconnected	Connected
Use the internet for search/research for your work	41%	52%
Communicate with others for work (emails, instant messaging, Skype etc)	41%	48%
Accessing the work server remotely	20%	28%
Using social media to network / career development (e.g. LinkedIn)	19%	24%
Looking for work online at job sites	13%	11%
Other online activity that earns you money	12%	6%
Using the internet to sell a product or service for your business	3%	5%
Searching for tender or work opportunities for your business online	2%	3%
Advertising accommodation at your property online	3%	3%

The biggest impact of the nbn™ network for regional consumers is efficiency and productivity in their job



Whilst comparative gains in other areas are relatively modest, it is clear that nbn™ network connected consumers have a high increase in productivity.

	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	
How I relate to and engage with my family	5.9	5.9	0.0	5.5	5.6	0.1	-0.5	-0.3	0.2	-0.3	
How engage with friends and social groups	5.7	5.8	0.1	5.5	5.9	0.4	-0.3	0.1	0.3	0.2	
My professional development	5.2	5.3	0.1	4.4	4.6	0.3	-0.9	-0.7	0.2	-0.6	
My ability to be creative	5.0	5.0	0.0	4.6	4.5	-0.1	-0.4	-0.5	-0.1	-0.5	
Being entrepreneurial / making money	4.4	4.3	-0.1	3.7	3.4	-0.3	-0.7	-0.9	-0.2	-1.0	
My ability to be politically active and engaged	4.1	3.8	-0.3	3.0	3.2	0.2	-1.1	-0.6	0.5	-0.8	
Finding new relationships and love	3.1	2.5	-0.6	1.8	1.5	-0.3	-1.3	-1.1	0.2	-1.6	
My faith and religious involvement	2.8	2.5	-0.3	2.0	1.6	-0.4	-0.8	-0.9	0.0	-1.2	

Metro nbn™ network connected consumers say the internet has greater impact to most areas of their life except religious involvement

Comparatively less impact from nbn™ network in regional areas except for impact on productivity in job increases to above the metro value

Connection to the nbn™ network does not change the pattern of responses – Metro see more impact from internet both connected to nbn or not. The exception is job efficiency

The biggest gaps for unconnected regional consumers vs metro consumers are social networking and instant messaging



The activities connected consumers are most likely to be doing more of are related to work, DIY at home and communicating with local friends and service providers

Biggest gaps in Metro vs Regional behaviour amongst unconnected consumers

	Metro (n=1,940)	Regional (n=1,017)	GAP
Instant messaging (skype etc)	59%	44%	-15%
Social media for network / career development	36%	26%	-9%
Online video subscription service	38%	30%	-9%
Keep in touch via Instant messaging	43%	35%	-8%
Engage with other students studying a course	20%	12%	-8%
Access intranet for a school, university etc	28%	20%	-7%
File sharing sites	28%	20%	-7%
Manage course requirements, course work	26%	19%	-7%
Organise events or party on social media	30%	23%	-7%
Access the work server remotely	34%	27%	-7%
Look for work online at job sites	25%	18%	-7%

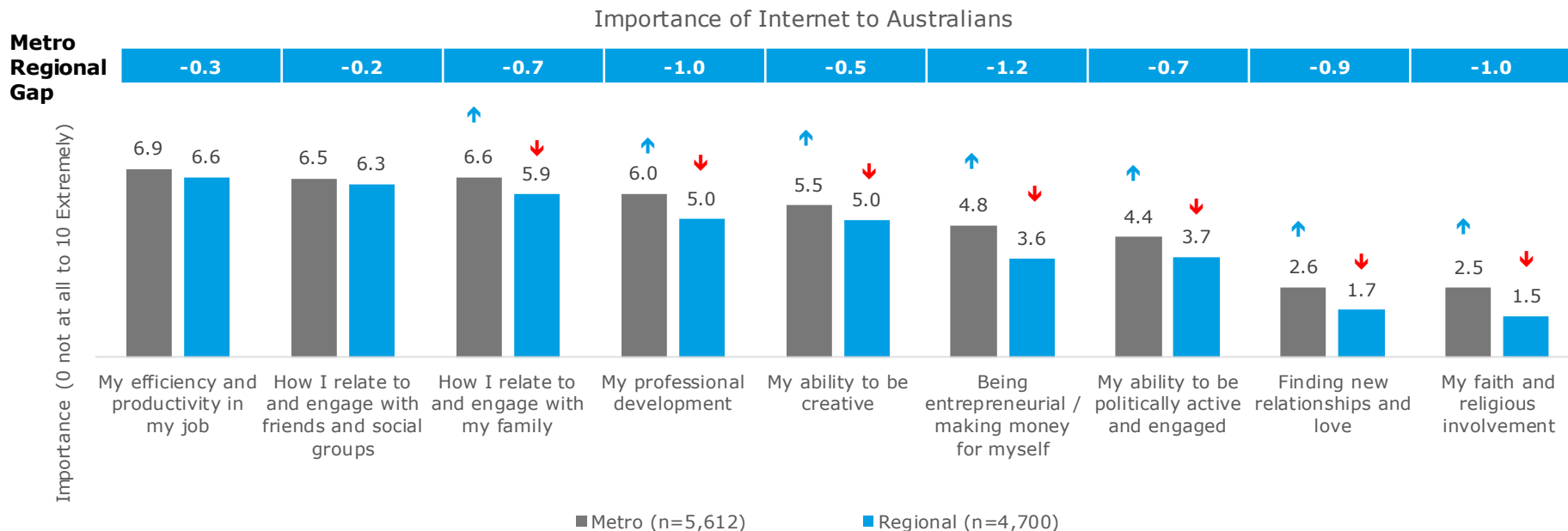
nbn™ network connected Regional Consumers most likely to do versus unconnected Regional Consumers

	Un- connected (n=1,013)	Connected (n=1,125)	GAP
Use internet for search/research for your work	53%	68%	15%
Learn how to make/fix/DIY something	48%	62%	14%
Email with family members or friends	63%	75%	12%
Look for a local service provider	52%	64%	12%
Research content for an assignment or project	26%	37%	11%
Communicate with others for work	53%	63%	10%
online applications for family content	28%	38%	10%
Manage course requirements, course work	19%	29%	9%
Download info to decide on course or study	21%	30%	9%
Watch educational videos online – informal	24%	33%	9%
Pay bills (e.g. Electricity, phone, council rates)	77%	86%	9%
Read a local community paper online	30%	38%	9%

Metro Australians see the internet as more important to aspects of their life than Regional Australians



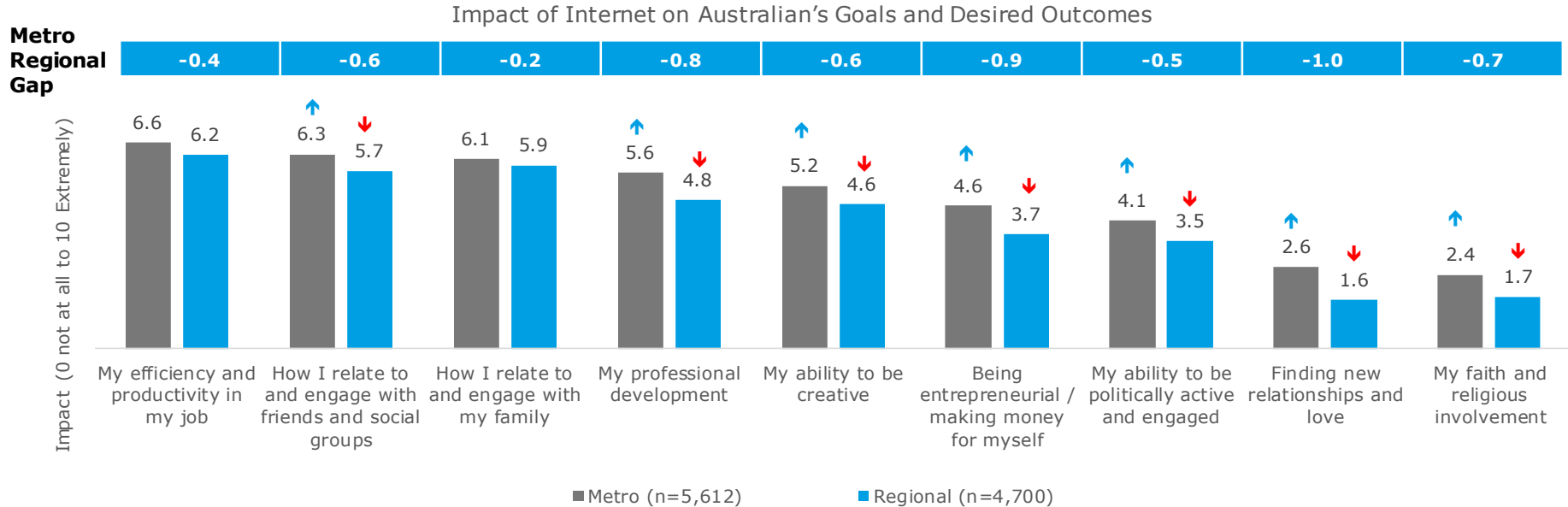
This is particularly true of **professional development, being entrepreneurial, faith and finding a partner** (biggest gap in scores)



Metro Australians also feel the internet supports their life goals to a greater degree than Regional Australians



The internet is particularly important to all Australians for **job productivity, engaging socially** and **family connections**. The biggest gaps between impact on metro and regional consumers, are in the areas of finding relationships, being entrepreneurial and professional development.

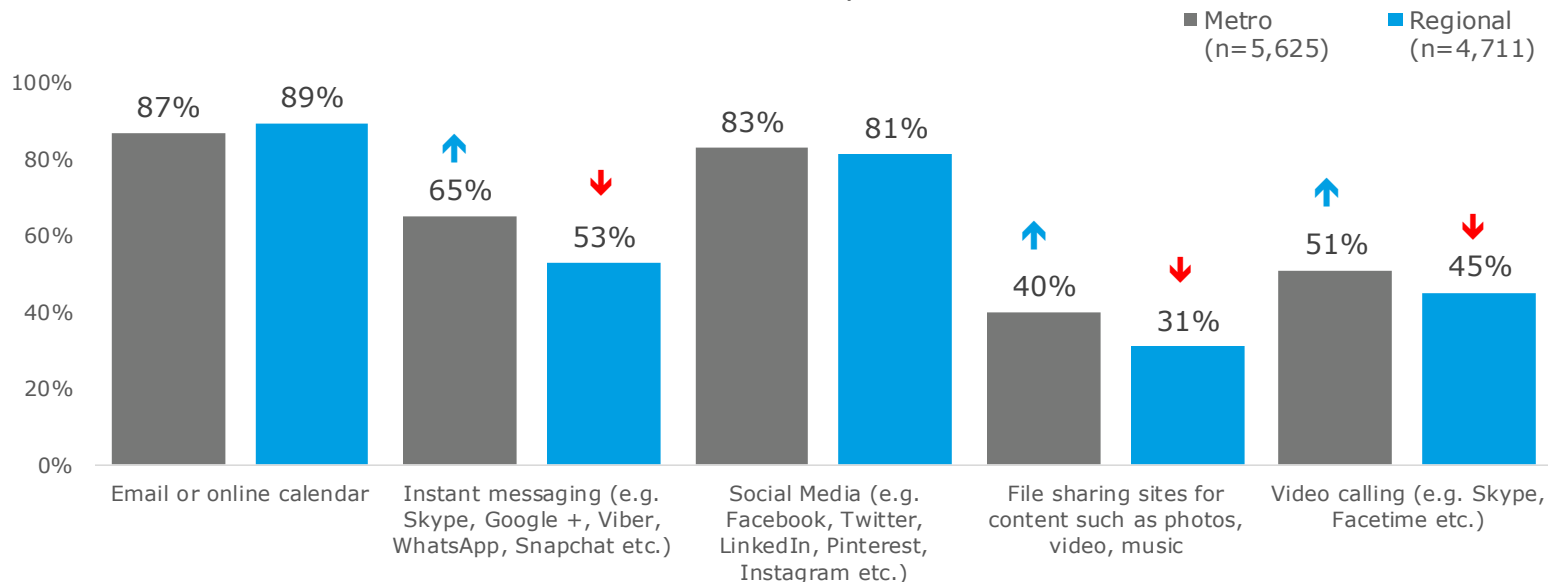


When communicating online, Metro Consumers are more likely to use instant messaging, file sharing and video calling



There are no significant differences in the use of email or social media, which are fairly ubiquitous across locations.

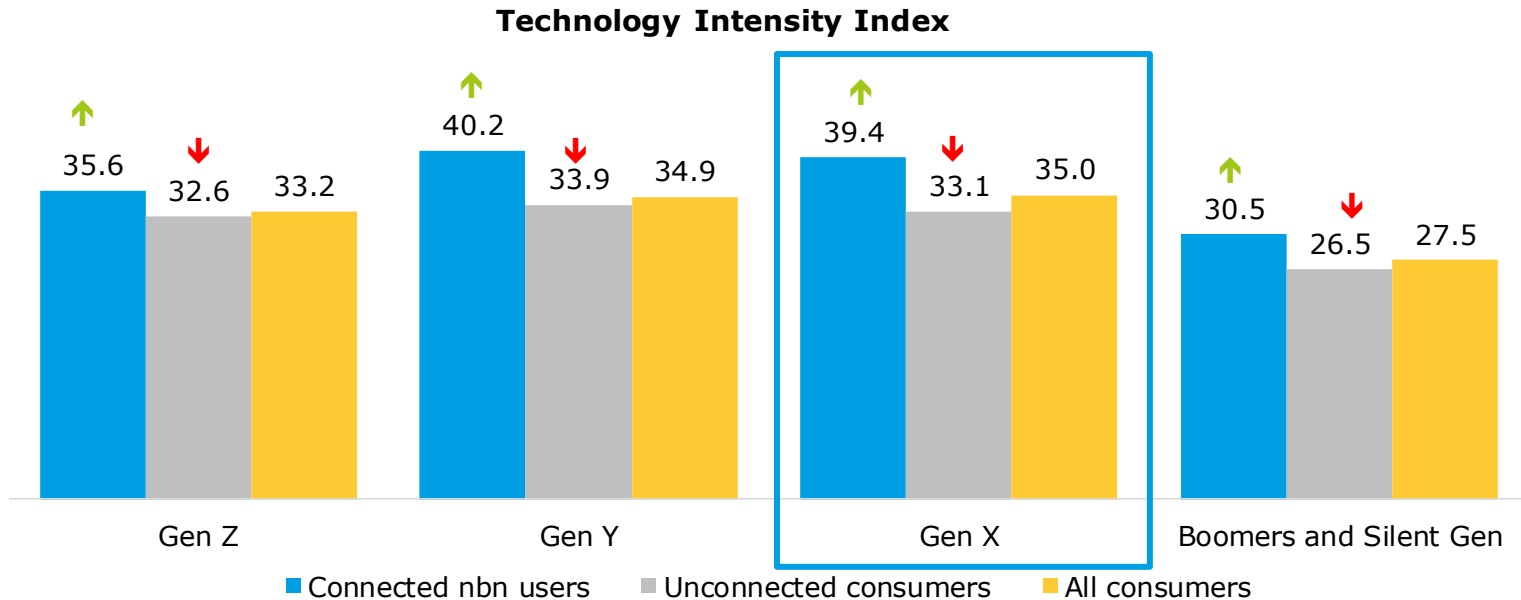
Communication activity and location



Gen-Y and Gen-X are the most active online generations



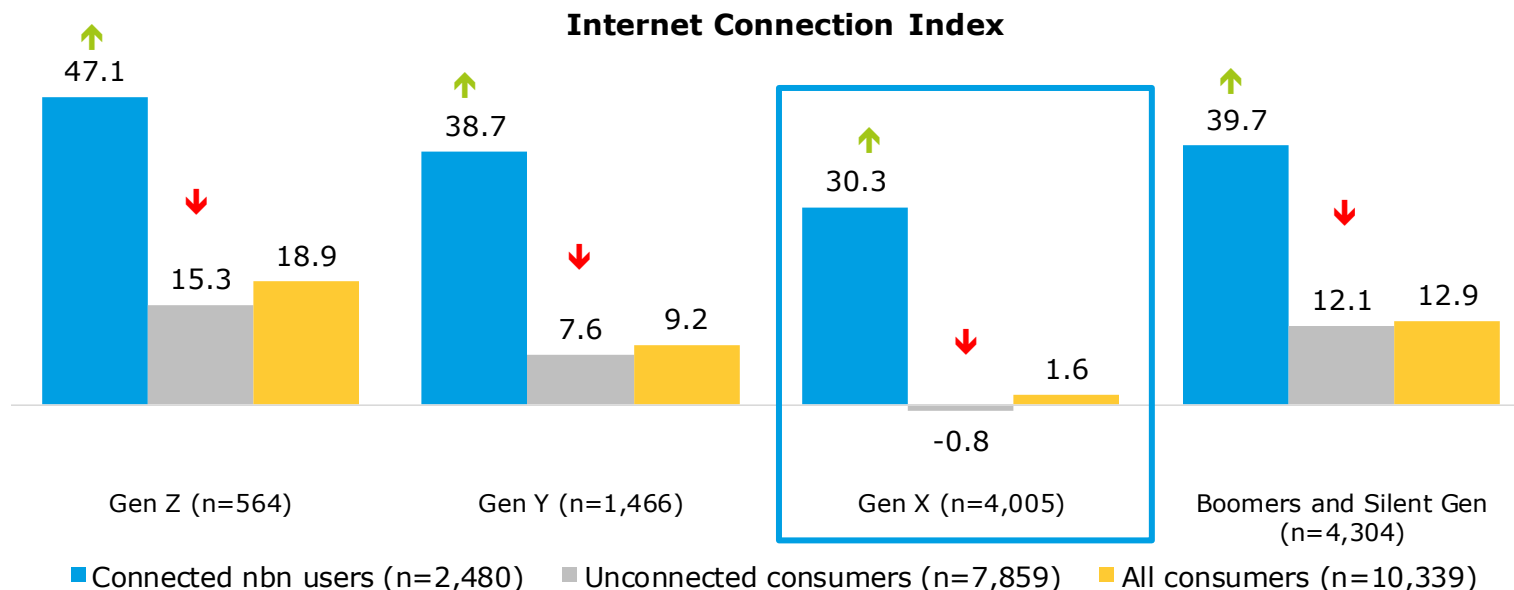
This is true of both connected and unconnected consumers.





Generation X are Australia's least satisfied internet users

Gen-X on **nbn**™ network have a positive experience overall, even if lower than other generations, while those not on the **nbn**™ network are the only generation with a negative Connection index score, indicating very high dissatisfaction.



The activities consumers use to keep in touch with family and friends is also related to lifestage



Boomers use more basic and 'longstanding' activities such as email and greeting cards whereas the younger Gen Z generation uses newer, more immediate activities such as instant messaging

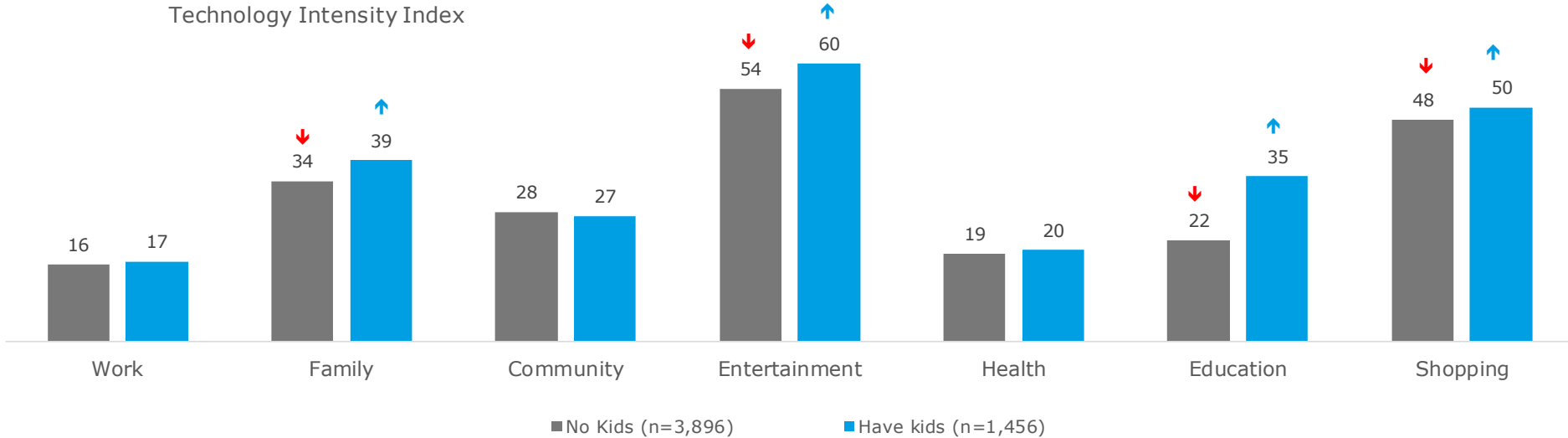
	Gen-Z (n=564)	Gen-Y (n=1,466)	Gen-X (4,002)	Builders and Boomers (n=4,304)
Keep in touch via social media	75%	75%	76%	62%
Email with family members or friends	40%	59%	75%	87%
Organise and book for social activities	47%	52%	51%	48%
Keep in touch via Instant messaging	65%	56%	51%	38%
Use online applications to store, share or access family content	33%	45%	47%	47%
Have a video call	31%	39%	43%	41%
Spend time with family on online activities	41%	49%	47%	22%
Use online applications to keep kids entertained	20%	34%	42%	19%
Send digital greeting cards for special occasions	12%	17%	28%	41%
Access parenting or relationship advice online	16%	27%	20%	5%
None of these	8%	6%	4%	3%

Driving this result is that having children in the household increases most aspects of online usage intensity



The biggest increase is in the intensity of family engagement, entertainment and shopping. The education domain has the greatest disparity in index scores between people with and without kids.

Technology Intensity Index



Older consumers are using the internet to engage in activities that support their local economy and community



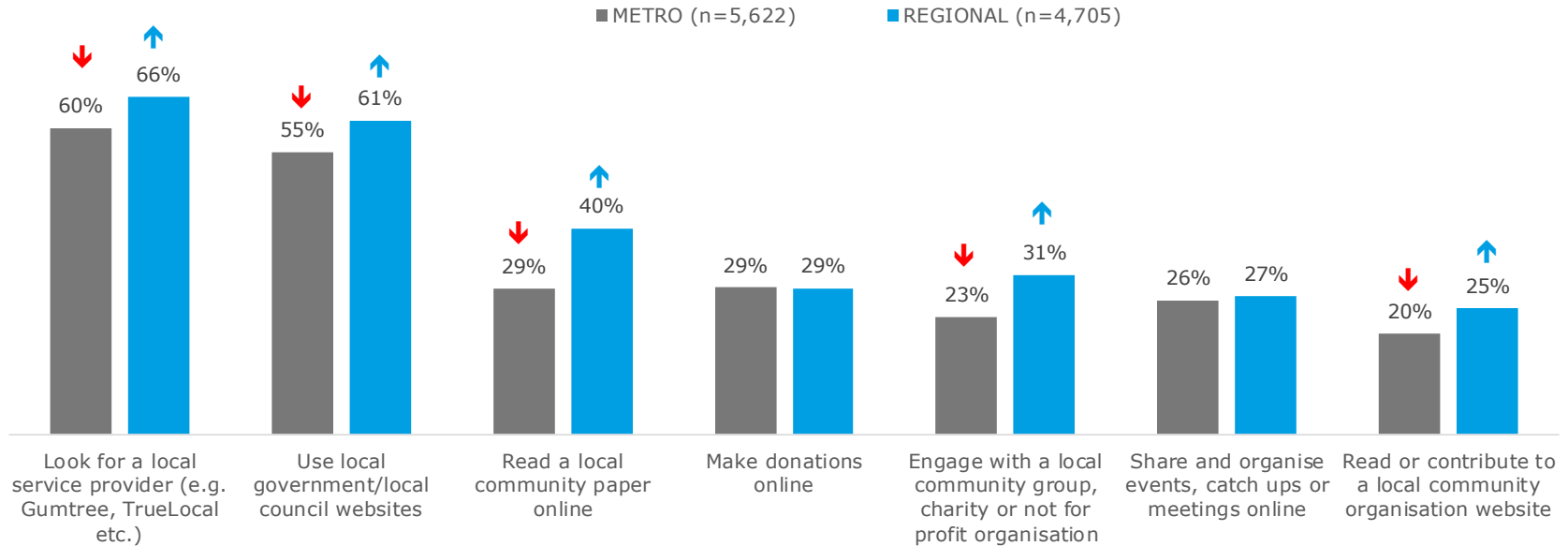
Boomers and Gen X are significantly more likely to use the internet to seek local services and engage with local government. Boomers are also significantly more likely to be reading local community papers online.

	Gen-Z (n=564)	Gen-Y (n=1,466)	Gen-X (4,002)	Builders and Boomers (n=4,304)
Look for a local service provider (e.g. Gumtree, TrueLocal etc.)	48%	59%	66%	66%
Use local government/local council websites	29%	50%	61%	70%
Read a local community paper online	25%	28%	35%	37%
Make donations online	21%	22%	32%	33%
Engage with a local community group, charity or not for profit organisation	24%	25%	27%	26%
Share and organise events, catch ups or meetings online	22%	31%	25%	28%
Read or contribute to a local community organisation website	17%	21%	22%	22%
None of these	31%	19%	16%	12%

Regional consumers are using the internet to engage in their local community more fully than their metro counterparts



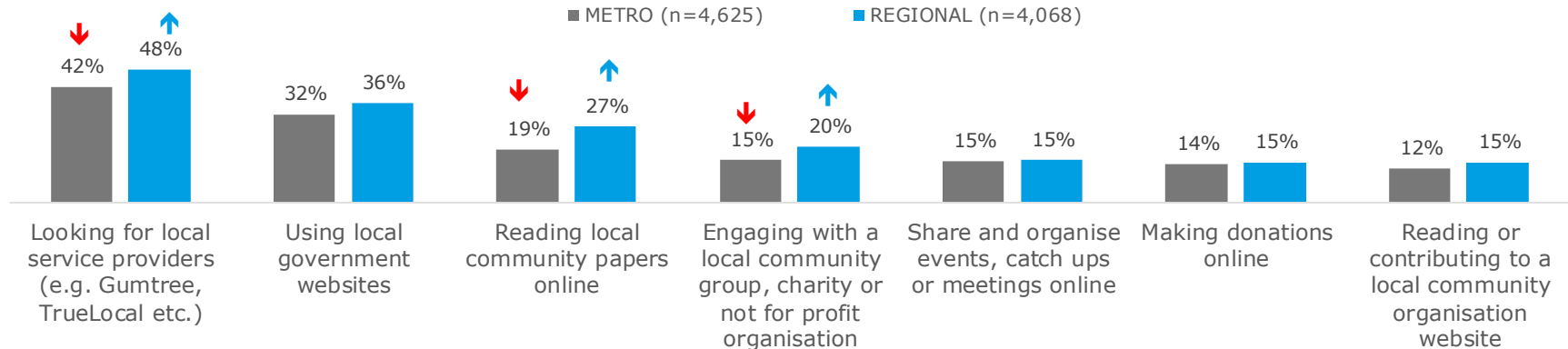
Use is significantly higher across all activities except for making donations and organising events online.



Regional consumers have also expanded some of the community activities they are engaging in online over time



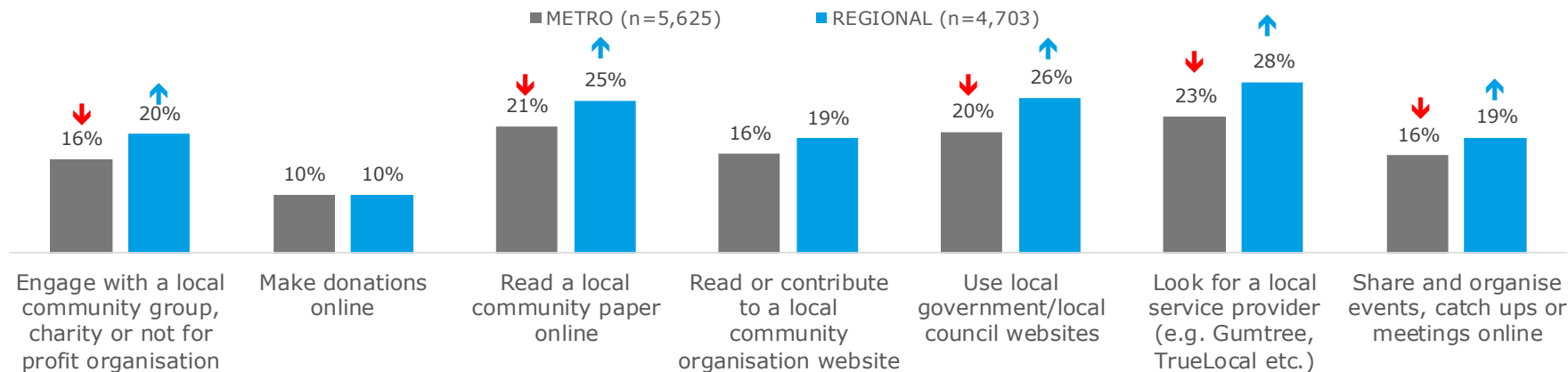
Compared to two years ago, regional consumers are significantly more likely to be using the internet to look for local providers, read local community papers and engage with local community groups.



While regional consumers are engaging more with their community online, their activity is constrained by internet quality



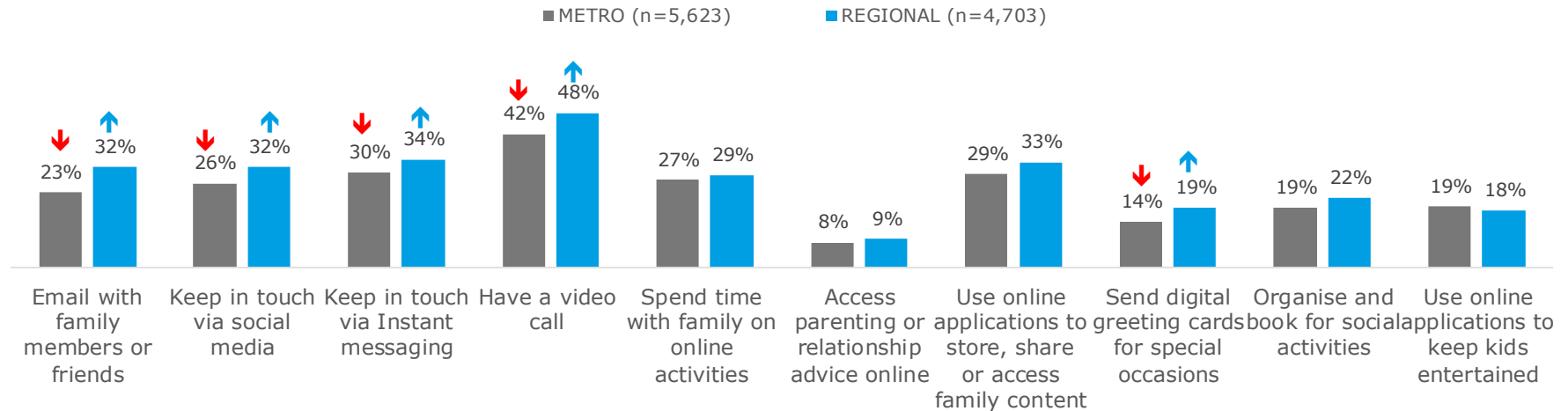
Regional consumers are statistically more likely to say they'd **engage more** in a number of activities if they had access to better internet - including organising events online.



Regional consumers' ability to engage with family and friends online is also hampered by poorer internet



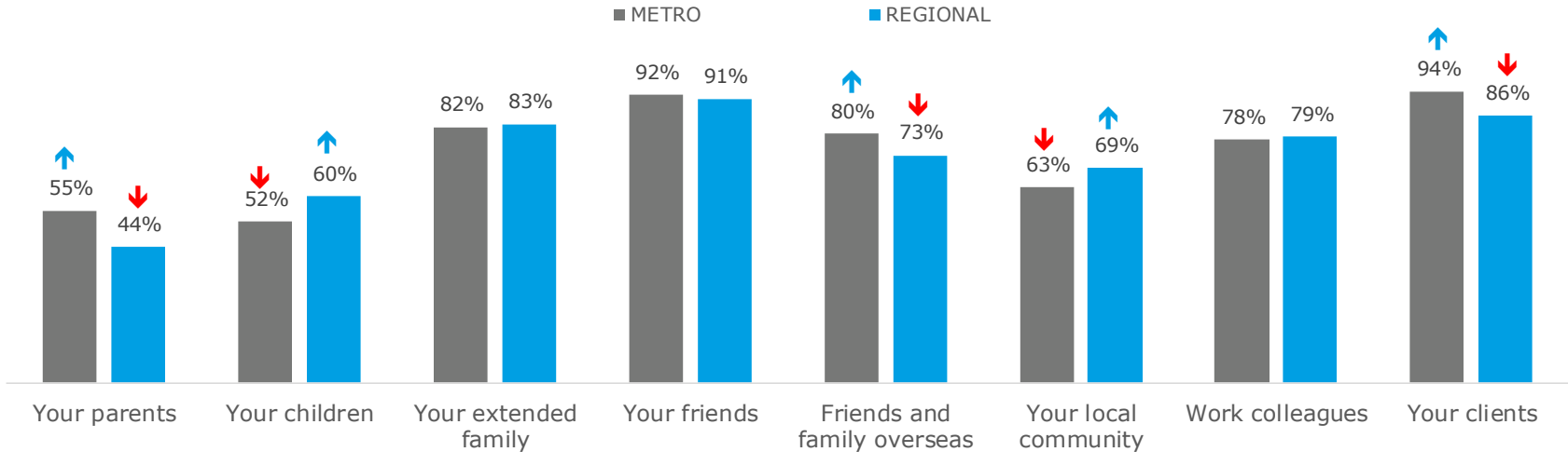
Regional consumers are statistically more likely to say they'd engage in a range of social activities online with access to better internet,- including using video calling to connect along with doing more of the more basics such as email, social media and messaging



Regional consumers generally are more likely to rate the internet as vital/important in communications with their kids



They're also significantly more likely to rate it as vital/important for communications with local community, less so with parents and friend & family overseas (compared to metro counterparts)

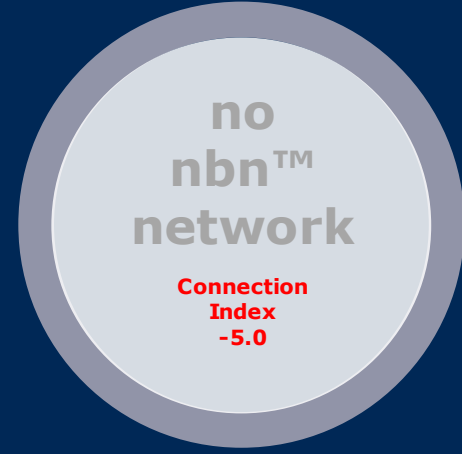
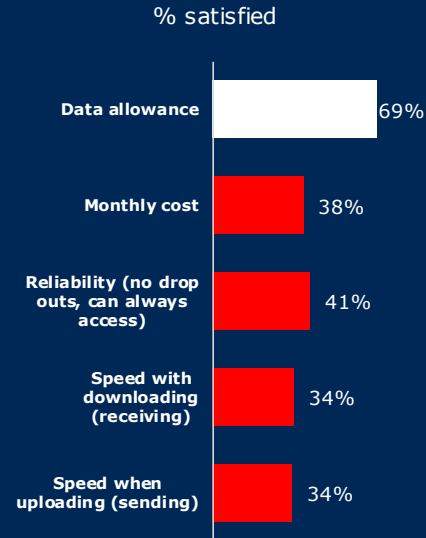
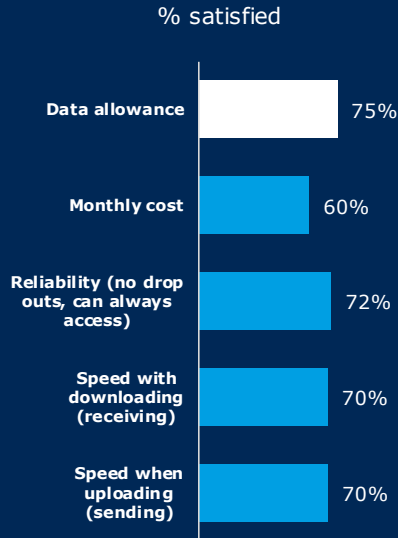
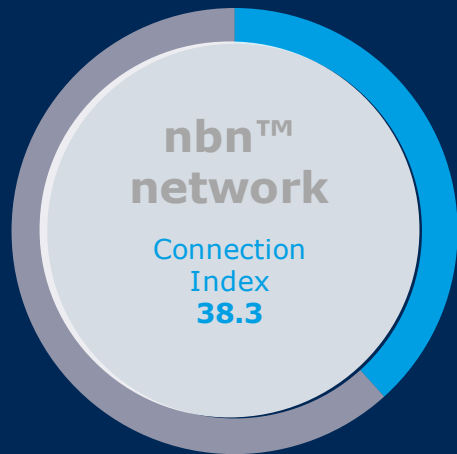




State / Territory Breakdown

nbn™ network Connection Index

New South Wales / Australian Capital Territory



COMMERCIAL IN CONFIDENCE

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Base: All Respondents (n=637 connected / n=2,501 unconnected)

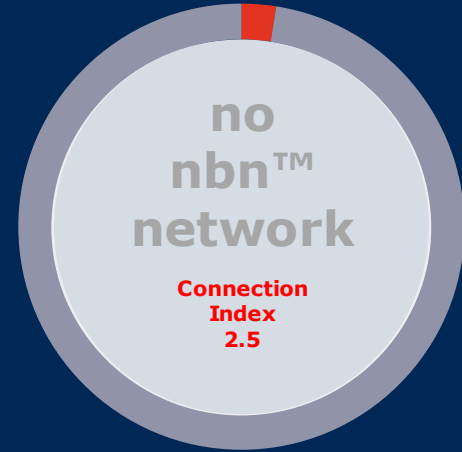
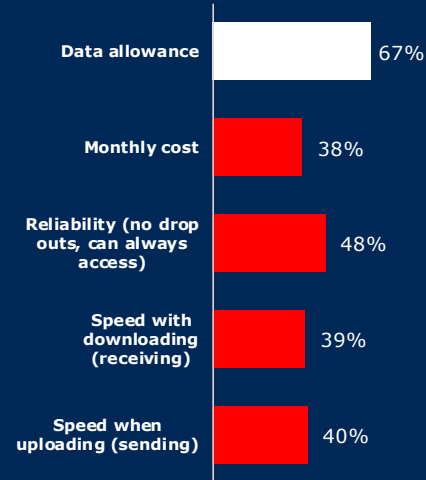
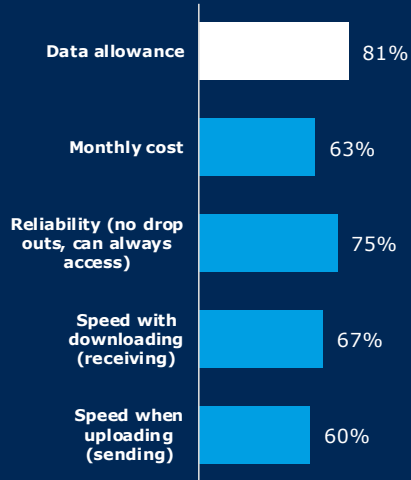
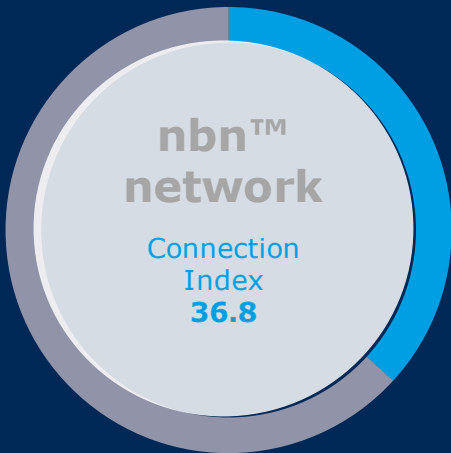
nbn™ network Connection Index

Victoria



% satisfied

% satisfied



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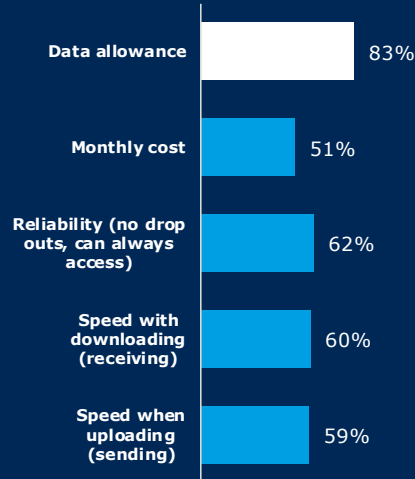
Base: All Respondents (n=555 connected / n=1,456 unconnected)

nbn™ network Connection Index

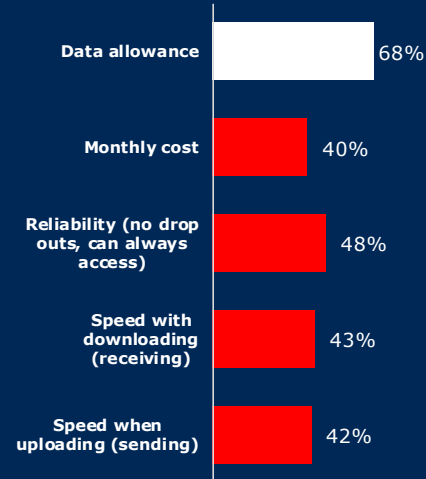
Queensland



% satisfied



% satisfied



nbn™
network

Connection
Index
34.4

no
nbn™
network

Connection
Index
4.5

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Base: All Respondents (n=509 connected / n=1,595 unconnected)

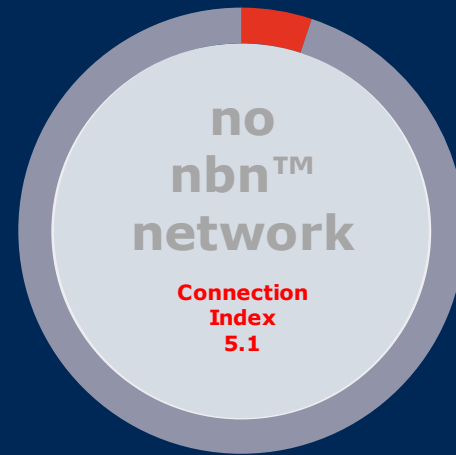
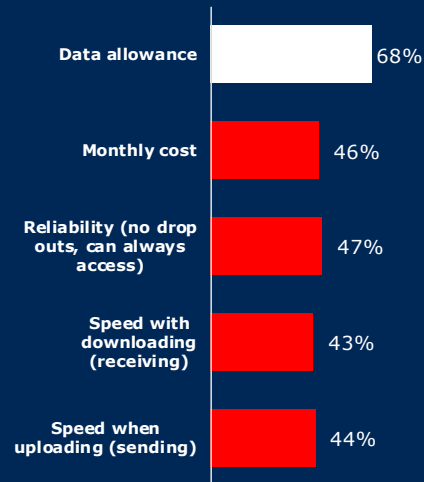
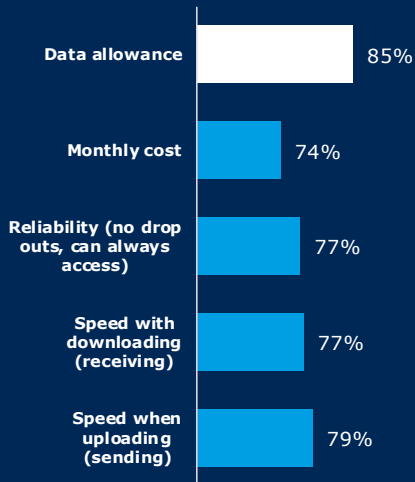
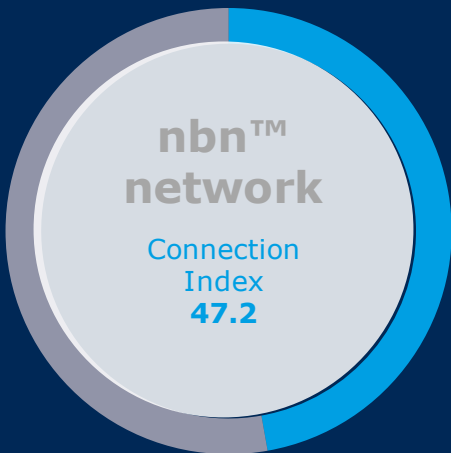
nbn™ network Connection Index

South Australia / Northern Territory



% satisfied

% satisfied



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Base: All Respondents (n=347 connected / n=1,173 unconnected)

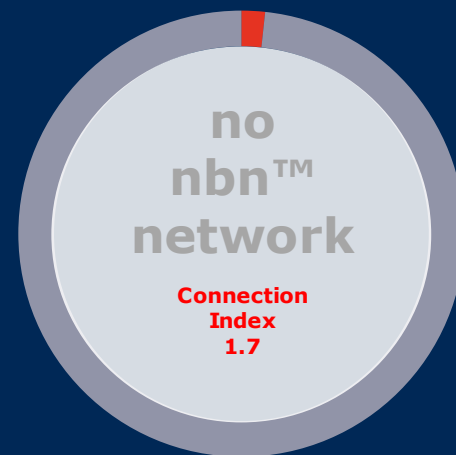
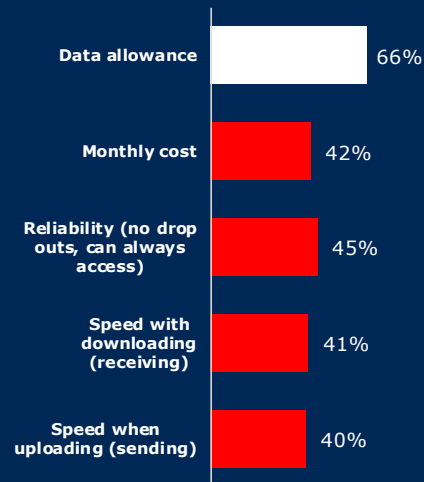
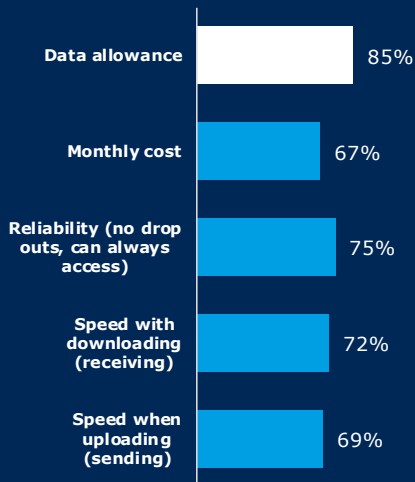
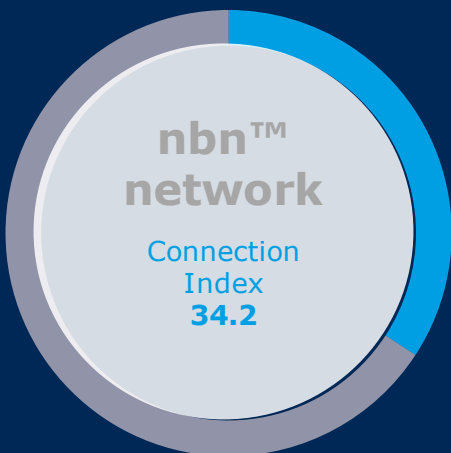
nbn™ network Connection Index

Western Australia



% satisfied

% satisfied



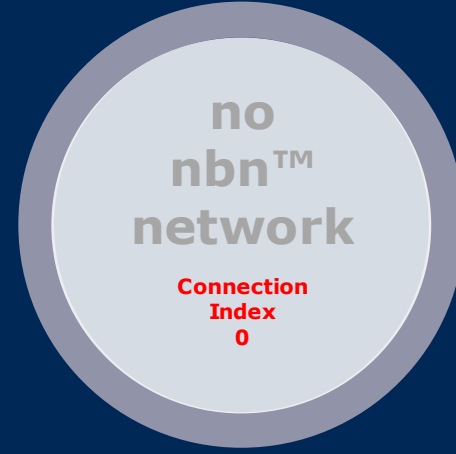
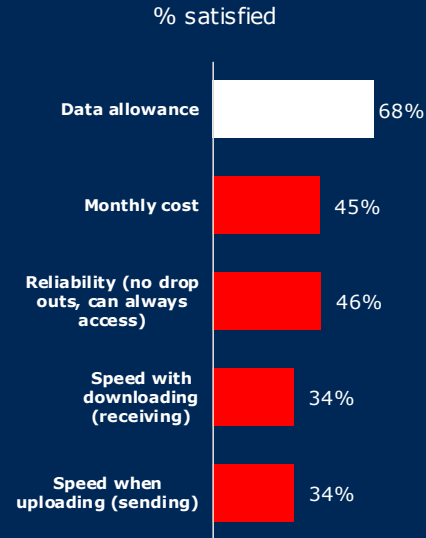
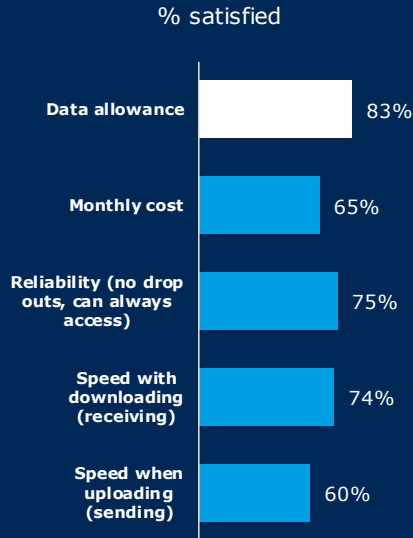
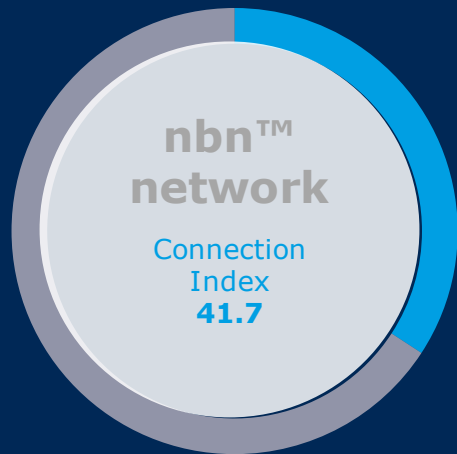
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Base: All Respondents (n=246 connected / n=778 unconnected)

nbn™ network Connection Index

Tasmania



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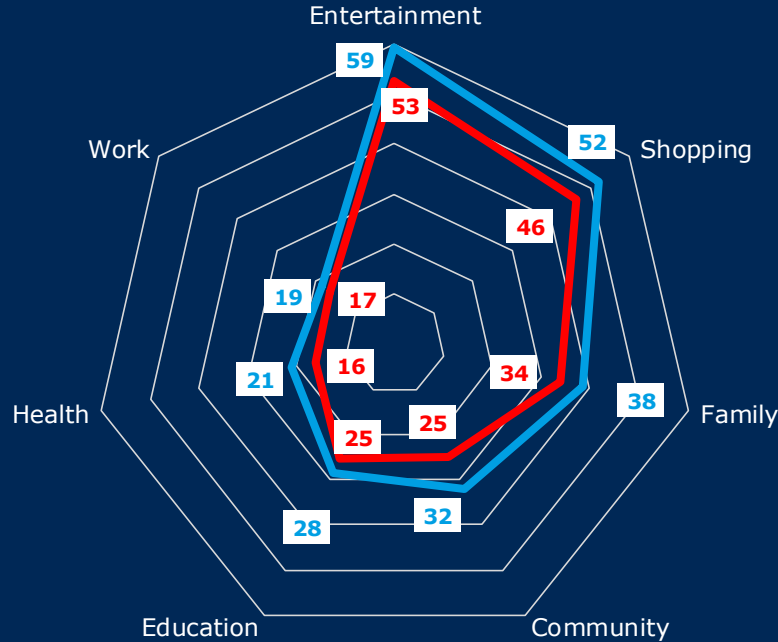
nbn™ Online Intensity Index

New South Wales / Australian Capital Territory



INDEX SCORES

— nbn connected users — Not Connected to nbn



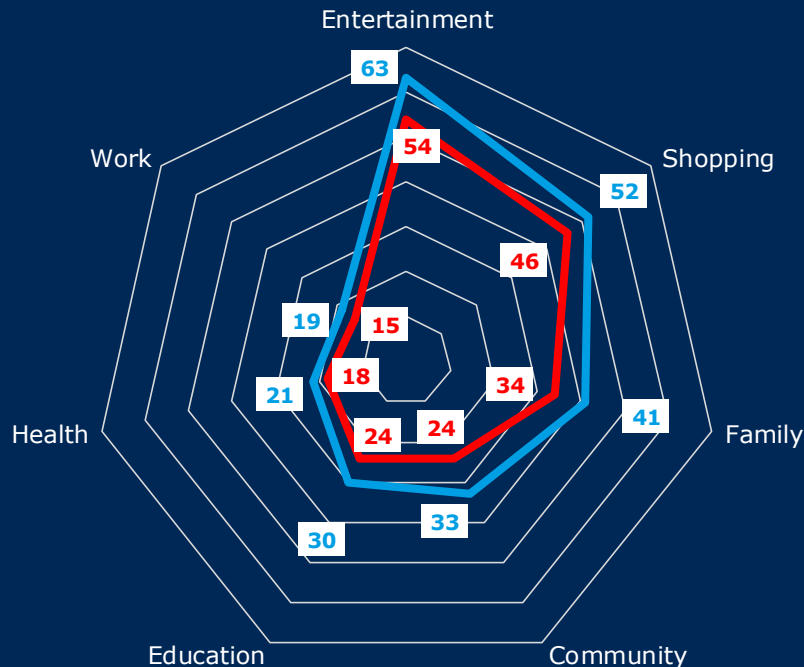
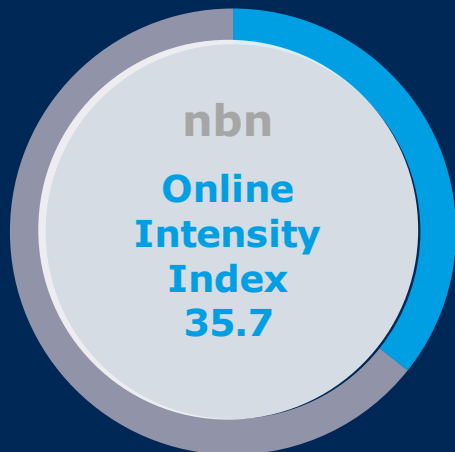
COMMERCIAL IN CONFIDENCE

nbn™ Online Intensity Index Victoria



INDEX SCORES

— nbn connected users — Not Connected to nbn



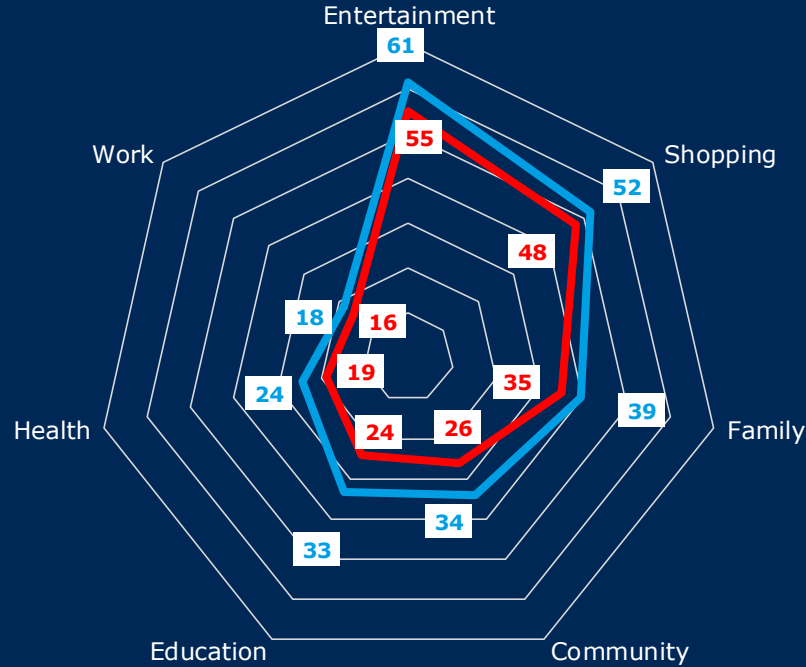
COMMERCIAL IN CONFIDENCE

nbn™ Online Intensity Index Queensland



INDEX SCORES

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COMMERCIAL IN CONFIDENCE

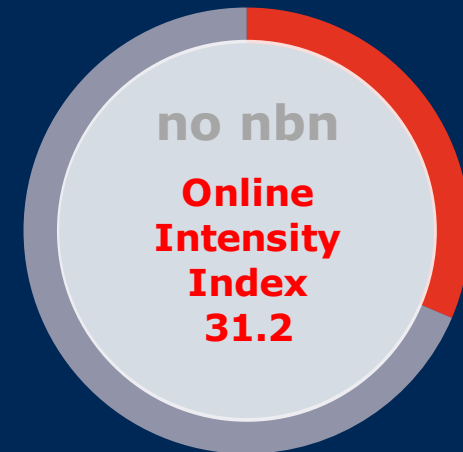
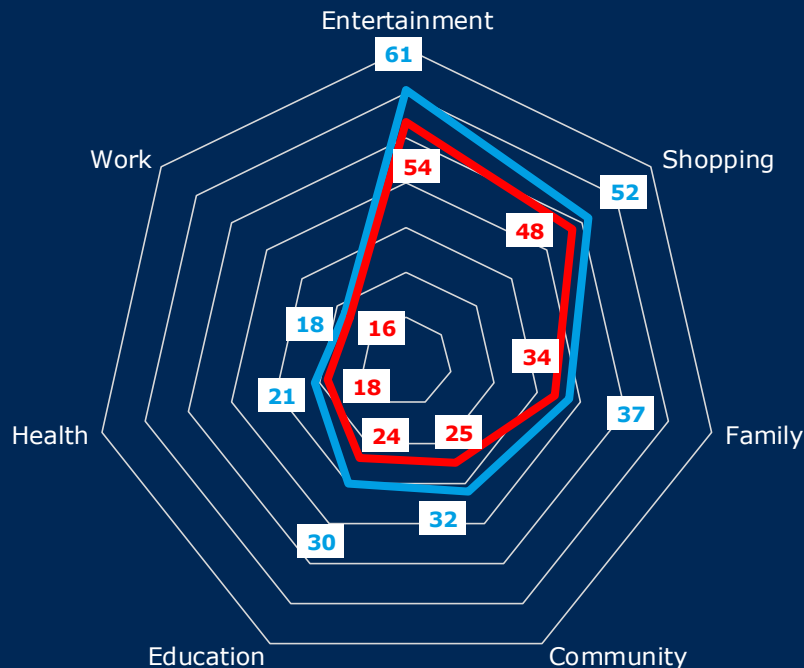
nbn™ Online Intensity Index

South Australia / Northern Territory



INDEX SCORES

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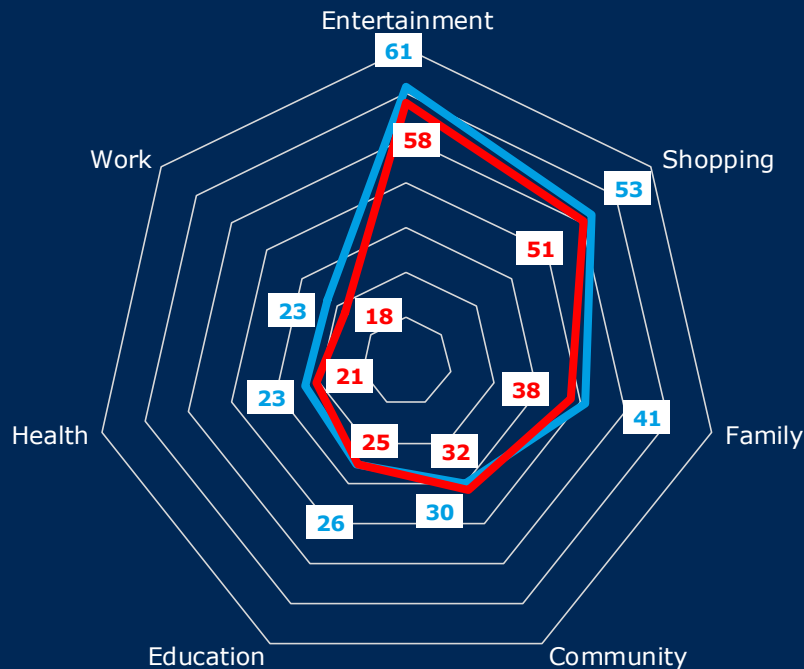
COMMERCIAL IN CONFIDENCE

nbn™ Online Intensity Index Western Australia



INDEX SCORES

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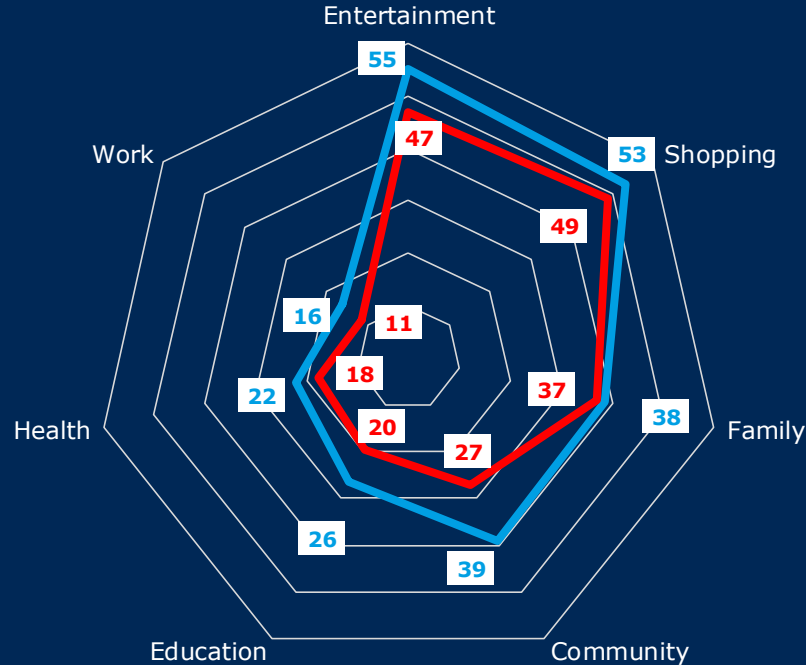
COMMERCIAL IN CONFIDENCE

nbn™ Online Intensity Index Tasmania



INDEX SCORES

— nbn connected users — Not Connected to nbn



COMMERCIAL IN CONFIDENCE