



AUSTRALIAN COMPETITION  
& CONSUMER COMMISSION

# Internet activity report

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Australian Competition and Consumer Commission  
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# Introduction

The Internet Activity Report provides information on the number of services in operation (SIO) and the volume of data downloaded across retail NBN, retail non-NBN fixed and mobile services.

This report covers the initial impacts of the COVID-19 pandemic as the volume of data downloaded is for the three month period from 1 April to 30 June 2020.

The 13 carriage service providers currently required to report under this Record Keeping Rule (RKR) are Aussie Broadband, Australian Private Networks, Dodo, Harbour ISP, iiNet, IPStar Australia, MyRepublic, Primus, Singtel Optus, SkyMesh, Telstra, TPG and Vodafone Hutchison Australia. Reports are provided on a biannual basis.

The retail NBN SIO information contained within this report is collected from the 13 carriage service providers subject to the RKR, not NBN Co directly. Therefore, it differs to wholesale SIO information released by the ACCC under its [NBN Wholesale Market Indicators Report](#) and wholesale SIO information published by NBN Co. The following should also be considered before directly comparing these other information sources with this report:

- A carriage service provider can purchase NBN services from another carriage service provider, which could mean that the purchaser's retail SIO may exceed its wholesale SIO information.
- Conversely, a carriage service provider can also resell NBN services to another carriage service provider, which may mean the reseller's wholesale SIO information exceeds its retail SIO information.
- The Internet Activity Report collects retail SIO information and usually reflects individual Access Seeker/carriage service provider information. Under the ACCC's NBN Wholesale Market Indicators Report, SIO information is often set out by NBN Access Seeker Groups<sup>1</sup>, which may include information from individual Access Seekers not subject to the RKR.
- A service provider may also purchase a wholesale NBN service with a certain wholesale speed tier from NBN Co but may, through shaping, sell this service to retail end users at a lower speed tier.

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<sup>1</sup> 'NBN Access Seeker Group' means two or more Access Seekers which are acquiring Network Access Services and that are related to each other at the end of the relevant calendar quarter.

# Key statistics

## All services

### Total volume of data downloaded increased by 38 per cent

The COVID-19 pandemic has led to a greater demand for data driven by working and schooling from home as well as increased usage of video and gaming streaming services.

The total volume of data downloaded for retail NBN and retail non-NBN fixed and mobile services (post-paid mobile, prepaid mobile and mobile broadband) in the three months to 30 June 2020 was 8.2 million Terabytes (TB) (figure 1). This reflects a 38 per cent increase from the same period last year (6 million TB).

Across the three service types (retail NBN, retail non-NBN fixed and mobile), retail NBN services showed the greatest increase in data downloaded, up 80 per cent from the June 2019 reporting period. Mobile services experienced a modest increase of 18 per cent over the same period, while data downloaded on retail non-NBN fixed services declined by 37 per cent.

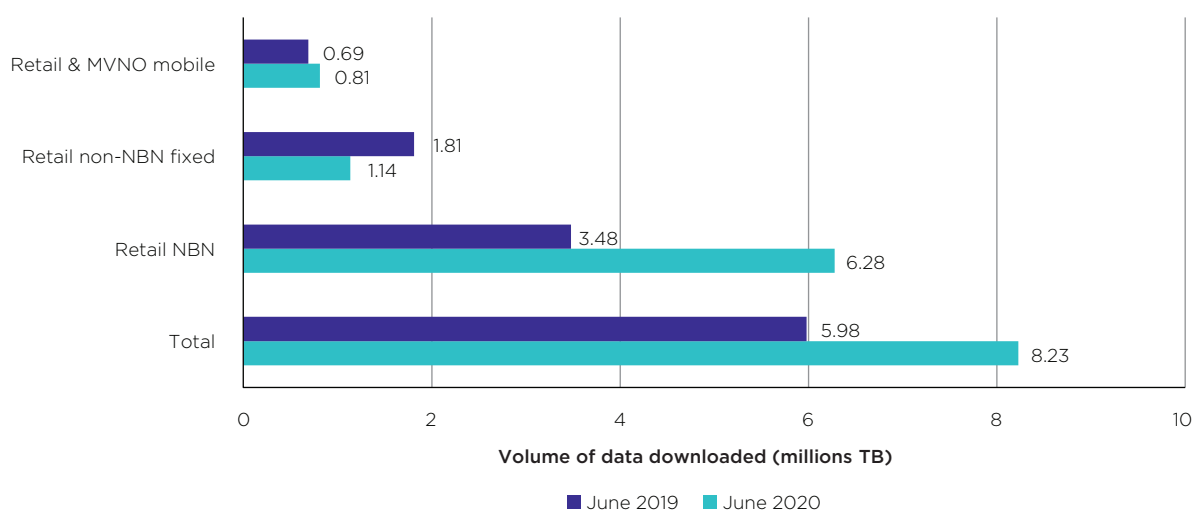
Despite the increase in data downloaded through mobile services, fixed line services, particularly those over the NBN, dominated the total volume of data downloaded. For the three months to 30 June 2020, retail NBN services contributed 76 per cent of total volume of data downloaded, up from 58 per cent in the June 2019 reporting period (figure 2).

To support this need for more data there has been an increase in the number of no data limit plans.

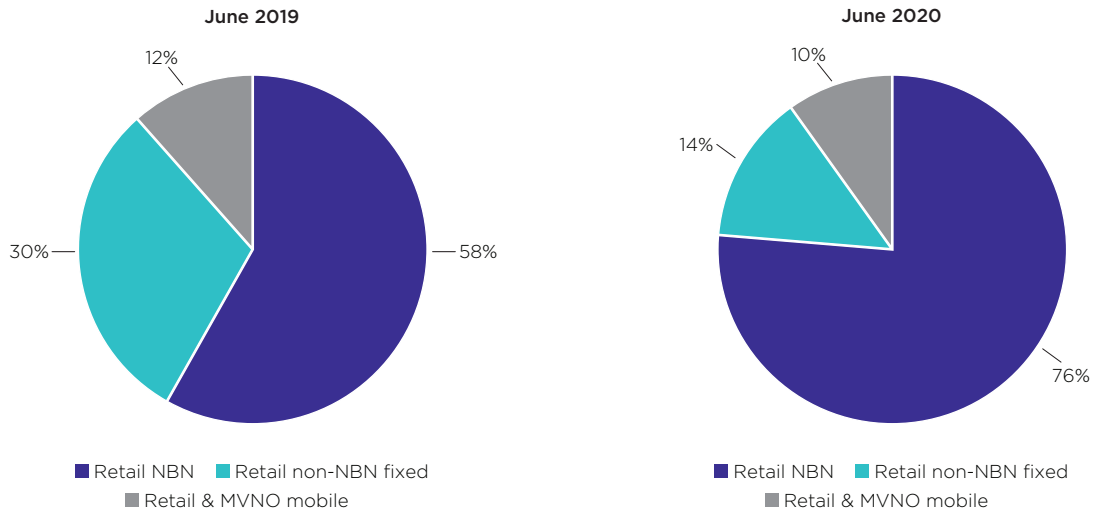
As at 30 June 2020, 76 per cent of retail NBN SIO had no data limit, an increase from 72 per cent of services in June 2019. Conversely, 65 per cent of retail non-NBN fixed services had no data limit, down from 70 per cent in June 2019 (figure 3).

This fall for non-NBN fixed line services is likely caused by the reduction in DSL and HFC/cable SIO. 'No data limit plans' for these access technologies were common place. However, non-NBN fibre plans which may have replaced some of these services can have data allowance limits.

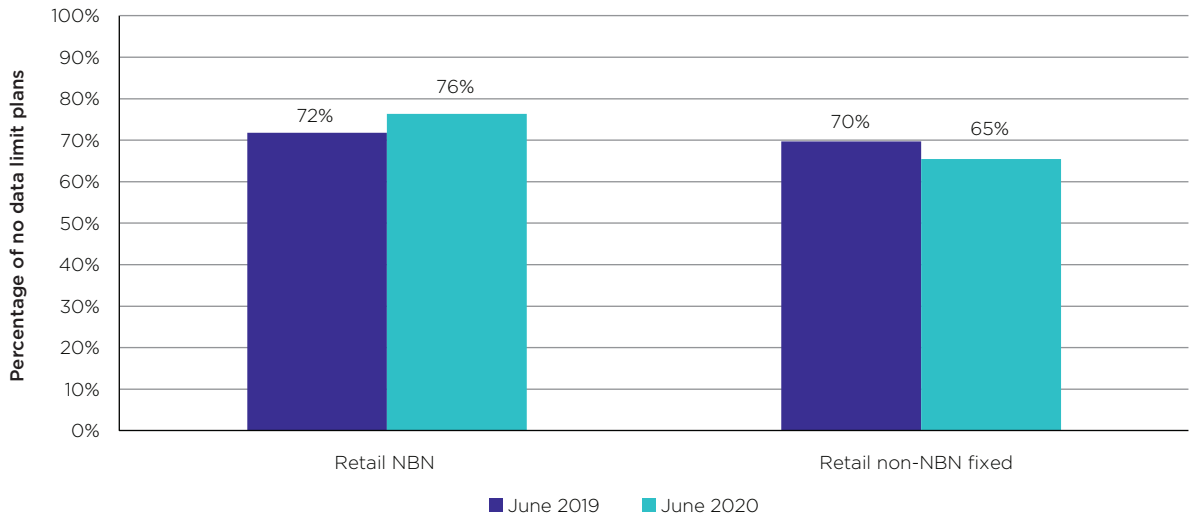
**Figure 1: Total volume of data downloaded for retail NBN, retail non-NBN fixed and mobile services**



**Figure 2: Proportion of total volume of data downloaded for retail NBN, retail non-NBN fixed and mobile services**



**Figure 3: Proportion of retail NBN and retail non-NBN fixed services with no data limit**



## NBN and non-NBN fixed services

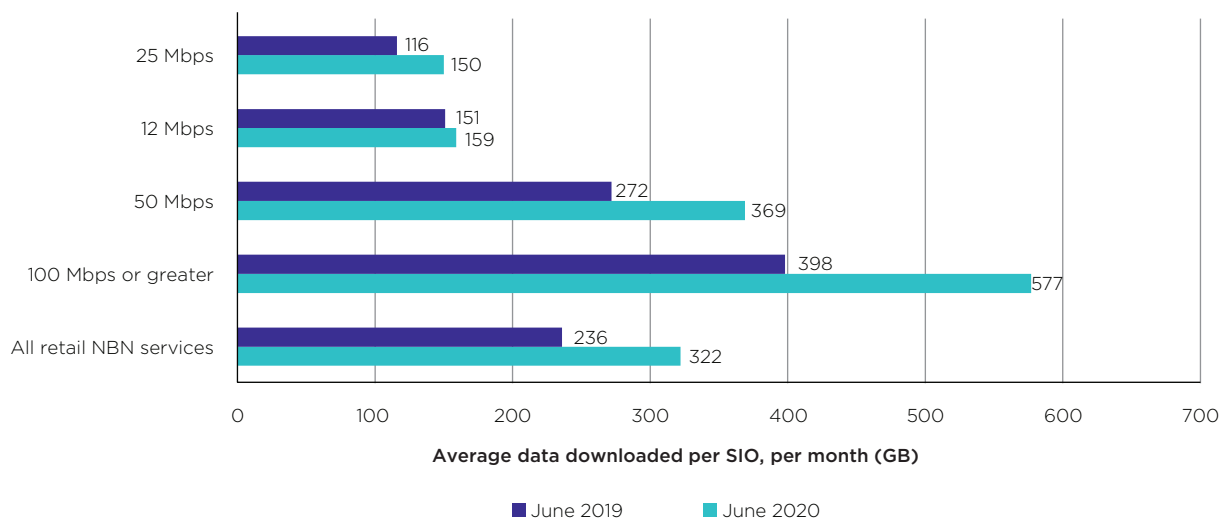
### Monthly average data downloaded for retail NBN services increased to 322 GB

The average volume of data downloaded for retail NBN services in the three months ended 30 June 2020 was 322 Gigabytes (GB) per SIO, per month, a 36 per cent increase from the June 2019 reporting period (236 GB). Retail end users with wholesale speeds of 100 Mbps or greater downloaded the most data, 577 GB (up 45 per cent from June 2019) (figure 4).

The average volume of data downloaded in this '100 Mbps or greater' speed tier category is expected to continue to increase especially as some retail service providers begin to offer NBN Co's new higher speed wholesale products to retail end users<sup>2</sup>.

Retail end users with wholesale speeds of 25 Mbps downloaded, on average, the least amount of data per month (150 GB, up 29 per cent from June 2019).

**Figure 4: Average volume of data downloaded by retail NBN wholesale speed tier**



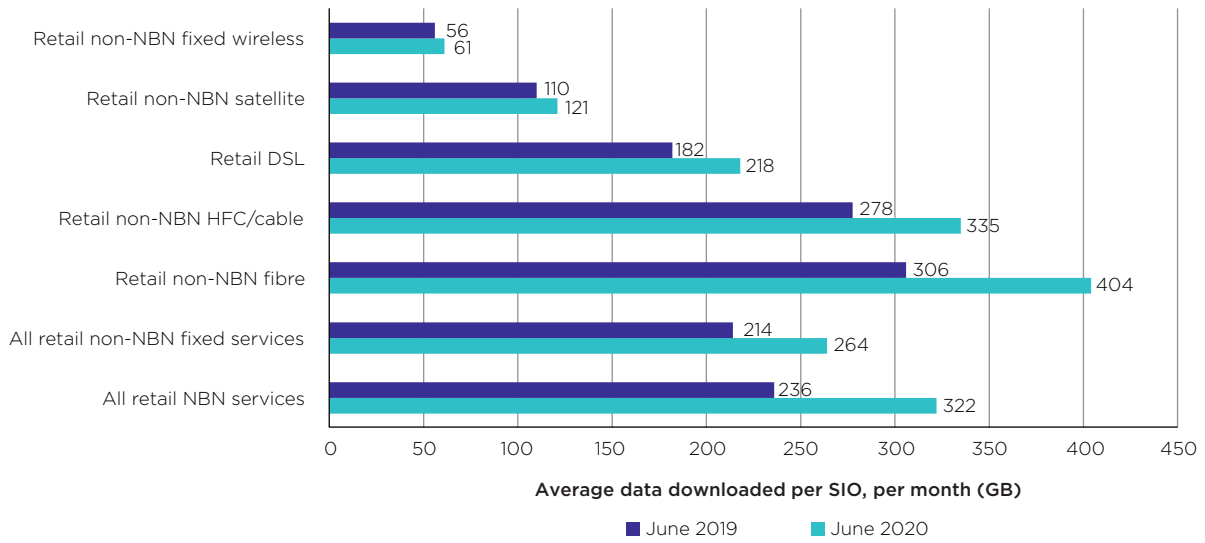
## End users with retail non-NBN fixed services on average downloaded 264 GB per month up from 214 GB

The average volume of data downloaded for retail non-NBN fixed services in the three months to 30 June 2020 was 264 GB per SIO, per month, below the average for retail NBN services (322 GB) but up 23 per cent from the June 2019 reporting period (214 GB). Retail end users with non-NBN fibre services downloaded the most data (404 GB) (figure 5).

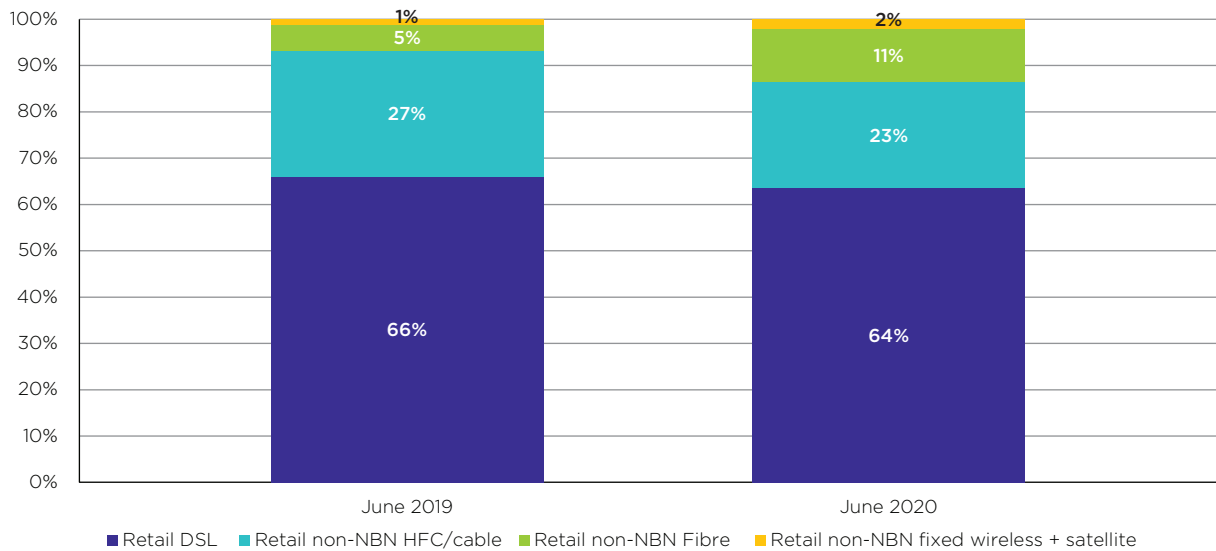
Retail DSL SIO made up the majority (64 per cent) of all retail non-NBN fixed SIO as at 30 June 2020, down 951 000 SIO since June 2019. HFC/cable services made up 23 per cent of all retail non-NBN fixed SIO and experienced a decrease of 445 000 SIO since June 2019 (figure 6).

<sup>2</sup> More information is available here: <https://www.nbnco.com.au/corporate-information/media-centre/media-statements/nbn-launches-three-new-residential-wholesale-higher-speed-tiers>

**Figure 5: Average volume of data downloaded by retail non-NBN fixed access technology**



**Figure 6: Proportion of retail non-NBN fixed SIOs by access technology**



## Mobile services

### Significant growth in MVNO prepaid and post-paid mobile services

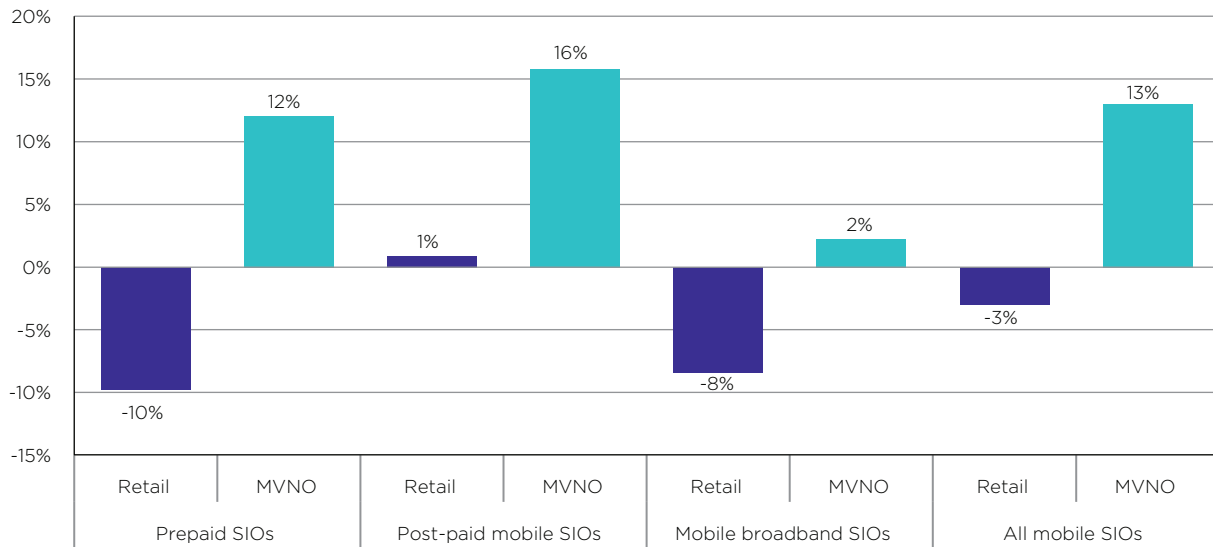
Retail mobile services information under the RKR is collected from Optus, Telstra and Vodafone, also known as Mobile Network Operators (MNOs). Wholesale information reflects the total wholesale customers of these MNOs, also known as Mobile Virtual Network Operators (MVNOs). Examples of MVNOs include Amaysim, Boost and TPG.

The number of MVNO prepaid mobile SIO rose by 12 per cent between 30 June 2019 and 30 June 2020. Conversely, retail prepaid mobile SIO fell by 10 per cent in the same period. Similarly for mobile broadband services, retail SIO decreased by 8 per cent while MVNO SIO experienced a marginal increase of 2 per cent (figure 7).

However, the largest growth in MVNO SIO for mobile services was in post-paid mobile, up 16 per cent from June 2019. This suggests that some post-paid mobile customers are seeking out alternative plans on offer from MVNOs, some of which are offering comparable or larger data allowances and/or comparable or lower prices to those of the MNOs.

As a consequence of the trends discussed above, MVNOs have increased their market share across all mobile service types (prepaid mobile, post-paid mobile and mobile broadband) between June 2019 and June 2020.

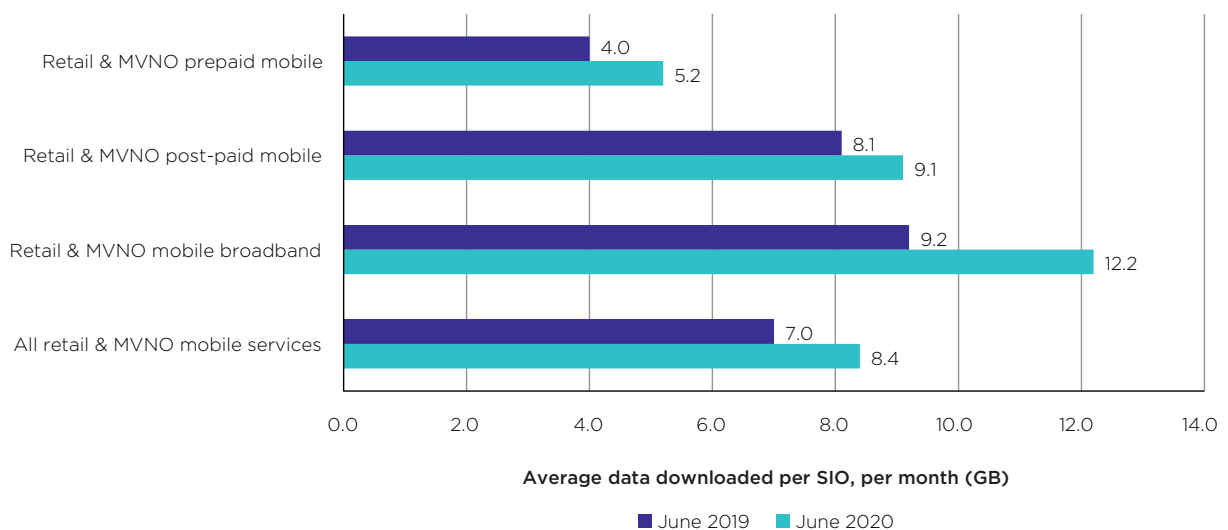
**Figure 7: Percentage change in SIOs by type of mobile service – June 2019 to June 2020**



## Monthly average data downloaded across all mobile services increased by 20 per cent

The average volume of data downloaded for all mobile services (MVNO and retail for post-paid mobile, prepaid mobile and mobile broadband) in the three months ended 30 June 2020 was 8.4 GB per SIO, per month, up from 7.0 GB in the June 2019 reporting period, a 20 per cent increase over the period. Mobile broadband services had the highest average download volume at 12.2 GB, while pre-paid mobile services had the lowest (5.2 GB) (figure 8).

**Figure 8: Average volume of data downloaded by type of mobile service**







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