Research Report

TELECOMMUNICATIONS IN REGIONAL AUSTRALIA

Prepared by Anna Coster and Cassie Govan
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METHODOLOGY AND RESEARCH DESIGN
AIM OF THE RESEARCH

Broadly, the aim of this research was to delve into the minds of regional Australians to explore how they felt about mobile phone coverage, internet access, plans, providers, and policies. This included profiling their current telecommunications behaviour, exploring the preferences for other offerings, and seeing what they knew about the NBN.

The fieldwork was conducted in January 2014.

WHO WE TALKED TO…

1000 regional Australians – and we only surveyed those living in regional or rural centres in Australia with a population of 100,000 or less.

750 surveys completed online

250 surveys completed by telephone
### MOBILES ARE A MUST HAVE... JUST UNDER HALF HAVE A STANDARD MOBILE AND 71% HAVE SMARTPHONES

<table>
<thead>
<tr>
<th>Device Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Laptop Computer</td>
<td>78%</td>
</tr>
<tr>
<td>Fixed Line Phone</td>
<td>77%</td>
</tr>
<tr>
<td>Smartphone</td>
<td>71%</td>
</tr>
<tr>
<td>Desktop Computer</td>
<td>62%</td>
</tr>
<tr>
<td>Fixed Line Home Internet</td>
<td>60%</td>
</tr>
<tr>
<td>Mobile Phone without Smartphone Capabilities</td>
<td>49%</td>
</tr>
<tr>
<td>Tablet</td>
<td>47%</td>
</tr>
</tbody>
</table>

#### Internet Connection Types
- ADSL: 60%
- Mobile broadband (3G/4G): 35%
- Satellite: 7%
- Cable: 3%
- Dial-up: 1%

2% did not have any internet connection.
If you had to choose which of the following is MOST important to you, which would it be?

- Mobile: 52%
- Fixed: 48%
THE LESS REMOTE, 
THE MORE RELIANCE ON MOBILE PHONE

There is a spread in the usage patterns across mobile and fixed lines…

…but there were statistically significant differences in usage depending on population density…

Those living in MORE POPULATED areas used their MOBILE for calls more than those who live in less populated areas

Those living in LESS POPULATED areas used their LANDLINE for calls more than those who live in more populated areas
...but they expect they will rely on their mobile more in the future...

FOR PHONE CALLS

59% agreed they expect to use their mobile more than their fixed line in the next 5-10 years

64% agreed that mobiles will be more essential than fixed line in the next 5-10 years

...I will use mobile services more than fixed line services to make calls

- Strongly agree: 30%
- Somewhat agree: 29%
- Neither agree nor disagree: 22%
- Somewhat disagree: 11%
- Strongly disagree: 8%

...mobile services will be more essential than fixed to make calls

- Strongly agree: 32%
- Somewhat agree: 32%
- Neither agree nor disagree: 23%
- Somewhat disagree: 7%
- Strongly disagree: 6%
...but they expect they will rely on their mobile more in the future...

**FOR INTERNET**

- 41% agreed that they will use mobile services more than fixed line services to access the Internet in the next 5-10 years.

- 46% agreed that mobile broadband services will be more essential than fixed line when it comes to accessing the Internet in the next 5-10 years.

**...I will use mobile broadband (3G/4G) services more than fixed line services to access the internet**

- Strongly disagree: 11%
- Somewhat disagree: 16%
- Neither agree nor disagree: 32%
- Somewhat agree: 25%
- Strongly agree: 16%

**...mobile broadband (3G/4G) services will be more essential than fixed to access the internet**

- Strongly disagree: 8%
- Somewhat disagree: 12%
- Neither agree nor disagree: 35%
- Somewhat agree: 28%
- Strongly agree: 18%
Regional Australians want **CHOICE** and **Coverage** with their mobiles

- 59% agreed that they would change providers if another provider offered the same or better coverage
- 80% agreed that competitive pricing is the most important aspect of a mobile provider
- 83% agreed that being able to choose their mobile provider is important
### Good Coverage = Consistently Reliable

Respondents defined good coverage as coverage across the whole of Australia, no dropped calls or black spots, consistently high signal strength, and the ability to communicate with others at all times. Many respondents also used Telstra as their benchmark for ‘good coverage’.

<table>
<thead>
<tr>
<th>Quote</th>
<th>Demographic Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>“I have worked in remote communities in education and it would be better for all members of the community to feel connected to the rest of Australia and to give them opportunities.”</td>
<td>(50-59, female, NT, remote centre population &gt;5K, phone survey)</td>
</tr>
<tr>
<td>“Accessible/cheap and with good service; Telstra doesn’t have good service/ but they are the only ones with good coverage; but I’d really like to see them have some competition.”</td>
<td>(50-59, female, NSW, other remote area population &lt;5K, phone survey)</td>
</tr>
<tr>
<td>“To me it’s good when you never need to check if you have coverage because it’s always there.”</td>
<td>(18-29, female, VIC, remote centre population &gt;5K, online survey)</td>
</tr>
<tr>
<td>“A system that works; being able to connect who I want to, when I want, wherever I am at a reasonable price/quickly.”</td>
<td>(70+, female, NSW, rural centre &lt;10K population, phone survey)</td>
</tr>
<tr>
<td>“Consistently receiving greater than 75% of signal strength, inside my home as well as on the nature strip 30 metres down from my home (which is where I have to go now).”</td>
<td>(70+, male, NSW, small rural centre population 10-25K, online survey)</td>
</tr>
<tr>
<td>“The ability to connect the mobile network more consistently in regional areas.”</td>
<td>(50-59, male, NT, large rural centre population 25-99K, phone survey)</td>
</tr>
<tr>
<td>“For voice, no dropouts from poor bandwidth of cell tower spacing, for data consistent reasonable speed rather than spasmodic fast speed.”</td>
<td>(30-39, male, VIC, large rural centre population 25-100K, online survey)</td>
</tr>
<tr>
<td>“Service covering populated areas and major highways, with 4G service areas increasing rapidly. Mobile service isn’t just about voice calls any more data is essential.”</td>
<td>(18-29, female, WA, large rural centre population 25-100K, online survey)</td>
</tr>
<tr>
<td>“Needing to use your phone, and being able to. No lack of signal. No congested mobile network. No dropouts. A product that works the way you want it to, when you want it to.”</td>
<td>(18-29, female, QLD, small rural area population 10-25K, online survey)</td>
</tr>
<tr>
<td>“The coverage should be consistent; not in and out all the time. Clarity. Availability/ that you can always get a connection. No black spots.”</td>
<td>(60-69, female, TAS, other remote area population &lt;5K, phone survey)</td>
</tr>
<tr>
<td>“Having access in all capital cities and major regional centres, plus rural areas surrounding regional centres.”</td>
<td>(30-39, female, VIC, small rural area &lt;10K population, online survey)</td>
</tr>
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<td>“Accessible/cheap and with good service; Telstra doesn’t have good service/ but they are the only ones with good coverage; but I’d really like to see them have some competition.”</td>
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<td>“A system that works; being able to connect who I want to, when I want, wherever I am at a reasonable price/quickly.”</td>
<td>(70+, male, NSW, rural centre population &gt;5K, phone survey)</td>
</tr>
<tr>
<td>““Being able to walk around my house and not lose signal. I live out of town and I have no access to a fixed line so mobile coverage is very important to me, if there is an emergency I want the security of knowing my coverage is reliable.”</td>
<td>(30-39, female, VIC, small rural area population 10-25K, online survey)</td>
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<td>“Accessible/ cheap and with good service; Telstra doesn’t have good service/ but they are the only ones with good coverage; but I’d really like to see them have some competition.”</td>
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</tr>
</tbody>
</table>
When asked how they would prioritise the use of funding for the NBN (improve mobile coverage or home coverage or choice of provider) their favoured option was one that addressed mobile coverage and home coverage and choice of provider. They want it all and they want the NBN to deliver.

80% want the NBN fixed wireless service to also deliver a mobile solution.

“I have worked in remote communities in education and it would be better for all members of the community to feel connected to the rest of Australia and to give them opportunities.
(50-59, female, NT, remote centre >5K, phone survey)

“I consider all these areas equally important because people are accessing these services consistently in and out of the home so improved home service alone is not enough. Choice of provider keeps the market competitive as otherwise it leads to complacency and poor customer service if one provider monopolizes the market.
(40-49, female, QLD, large rural 25K100K, online survey)
When asked how important a variety of service options were, an “I want it all” mentality emerged. They want the NBN to deliver on all fronts.

77% believed it was very/extremely important that Government funding should be provided to both fixed and mobile coverage.

If you were in charge of advising the Government on prioritizing the use of funding, how important are each of the following options?

- **Improved broadband services to the home:**
  - Not at all important: 19%
  - Somewhat important: 35%
  - Moderately important: 9%
  - Very important: 17%
  - Extremely important: 36%

- **Improved mobile phone coverage and choice of provider:**
  - Not at all important: 17%
  - Somewhat important: 37%
  - Moderately important: 6%
  - Very important: 39%

- **Both improved broadband services to the home and improved mobile phone coverage and choice of provider:**
  - Not at all important: 17%
  - Somewhat important: 33%
  - Moderately important: 5%
  - Very important: 39%
  - Extremely important: 44%
When asked specifically how best to distribute $100m in government funding to address lack of coverage in regional Australia, respondents preferred the option that benefitted customers of ALL providers. The option in which only one provider can offer its customers better coverage was very unappealing.

82% believe the Federal Government $100m black-spot program should be used to deliver a mobile solution for customers of ALL providers.

72% did NOT agree with the idea of government funding to only one mobile provider.

$100m in government funds is provided to help build towers to reduce mobile "blackspots" in regional areas and expand coverage. All mobile providers can use this mobile network to provide services to their customers.

The $100m is provided to the NBN Co to build towers to reduce mobile "blackspots" in regional areas. Customers of ALL mobile providers can access the new towers and get the benefits of better mobile coverage.

One mobile provider is chosen to access $100m in government funds to help build towers to reduce mobile "blackspots" in regional areas. However, ONLY their customers can access the new towers and get the benefits of better mobile coverage.

- Extremely unappealing: 22%
- Somewhat unappealing: 18%
- Neither appealing nor unappealing: 28%
- Somewhat appealing: 48%
- Extremely appealing: 3%
Survey respondents were given four brief descriptions of NBN Policy options:

**THESE TWO WERE PREFERRED:**

- A policy within the scope of the current NBN project; the NBN allows for access to its infrastructure which would allow more mobile carriers to operate throughout regional Australia. This would give people within these areas more choice when it comes to selecting a mobile service provider and improve mobile coverage.

- Within the same overall construction budget, a policy where in addition to building a fixed-line broadband network the NBN also builds a mobile network which all mobile providers could access, improving coverage and giving customers increased choice of provider.

**THIS ONE WAS “OK”:**

- A policy in which the Government provides funding to telcos to build one set of mobile infrastructure (towers, transmitters etc.). All mobile operators could use this infrastructure (paying for usage) which would improve coverage and give residents increased choice of provider.

**THIS ONE WAS REJECTED:**

- A policy in which the Government provides funding to telcos for them to build more towers to deliver better mobile coverage to regional households. However, this funding would only serve to benefit ONE mobile provider and its customers exclusively, but these customers would have improved, consistent coverage.

For too long Telstra BigPond has had more or less a monopoly. They’re always saying they have the greatest coverage, but my own personal experience is that “that statement is rubbish” in certain areas. They’re really only interested in city areas, and where NBN is being rolled out is in the cities. What about people in the bush and regional areas? City folk already have good coverage, but as usual the attitude “bugger the country people” is still adopted. By the way I’m actually a city born and bred person, though I’ve seen people in country areas suffer.

(60-69, female, NSW, Small rural centre population 10-25K, online survey)
Within the same overall construction budget, a policy where in addition to building a fixed-line broadband network the NBN also builds a mobile network which all mobile providers could access, improving coverage and giving customers increased choice of provider.

<table>
<thead>
<tr>
<th>Extremely unappealing</th>
<th>Somewhat unappealing</th>
<th>Neither appealing nor unappealing</th>
<th>Somewhat appealing</th>
<th>Extremely appealing</th>
</tr>
</thead>
<tbody>
<tr>
<td>5%</td>
<td>9%</td>
<td>21%</td>
<td>34%</td>
<td>32%</td>
</tr>
</tbody>
</table>

A policy within the scope of the current NBN project; the NBN allows for access to its infrastructure which would allow more mobile carriers to operate throughout regional Australia. This would give people within these areas more choice when it comes to selecting a mobile service provider and improve mobile coverage.

<table>
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<th>Neither appealing nor unappealing</th>
<th>Somewhat appealing</th>
<th>Extremely appealing</th>
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<tbody>
<tr>
<td>6%</td>
<td>8%</td>
<td>21%</td>
<td>36%</td>
<td>30%</td>
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</tbody>
</table>

A policy in which the Government provides funding to telcos to build one set of mobile infrastructure (towers, transmitters etc). All mobile operators could use this infrastructure (paying for usage) which would improve coverage and give residents increased choice of provider.

<table>
<thead>
<tr>
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<th>Somewhat unappealing</th>
<th>Neither appealing nor unappealing</th>
<th>Somewhat appealing</th>
<th>Extremely appealing</th>
</tr>
</thead>
<tbody>
<tr>
<td>6%</td>
<td>12%</td>
<td>25%</td>
<td>34%</td>
<td>24%</td>
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</tbody>
</table>

A policy in which the Government provides funding to telcos for them to build more towers to deliver better mobile coverage to regional households. However, this funding would only serve to benefit ONE mobile provider and its customers exclusively, but these customers would have improved, consistent coverage.

<table>
<thead>
<tr>
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<th>Somewhat unappealing</th>
<th>Neither appealing nor unappealing</th>
<th>Somewhat appealing</th>
<th>Extremely appealing</th>
</tr>
</thead>
<tbody>
<tr>
<td>36%</td>
<td>27%</td>
<td>20%</td>
<td>12%</td>
<td>6%</td>
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</tbody>
</table>
Thank You
## DEMOGRAPHICS

### GENDER

<table>
<thead>
<tr>
<th>Gender</th>
<th>n</th>
<th>%</th>
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<tbody>
<tr>
<td>Male</td>
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<td>50</td>
</tr>
<tr>
<td>Female</td>
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<td>50</td>
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### AGE

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<th>Age Range</th>
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<tr>
<td>30-39</td>
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<tr>
<td>40-49</td>
<td>187</td>
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<td>50-59</td>
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<td>60-69</td>
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<td>18</td>
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<tr>
<td>70+</td>
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<td>9</td>
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### RELATIONSHIP STATUS

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<td>Single</td>
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<td>19</td>
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<tr>
<td>In a relationship but not married</td>
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<td>19</td>
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<tr>
<td>Married</td>
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<td>53</td>
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<td>Divorced</td>
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<td>4</td>
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<td>Widowed</td>
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<td>Other</td>
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<tr>
<td>Refused</td>
<td>21</td>
<td>2</td>
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### CHILDREN U/18

<table>
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<tbody>
<tr>
<td>Yes</td>
<td>276</td>
<td>28</td>
</tr>
<tr>
<td>No</td>
<td>722</td>
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### STATE

<table>
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<tr>
<th>State</th>
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<tbody>
<tr>
<td>VIC</td>
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<td>19</td>
</tr>
<tr>
<td>NSW</td>
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<tr>
<td>QLD</td>
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<tr>
<td>WA</td>
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<tr>
<td>Tas.</td>
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</tr>
<tr>
<td>ACT</td>
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<tr>
<td>NT</td>
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<td>SA</td>
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### LOCATION

<table>
<thead>
<tr>
<th>Location</th>
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<tbody>
<tr>
<td>Large rural centre</td>
<td>353</td>
<td>35</td>
</tr>
<tr>
<td>Small rural centre</td>
<td>265</td>
<td>27</td>
</tr>
<tr>
<td>Other rural centre</td>
<td>188</td>
<td>19</td>
</tr>
<tr>
<td>Remote centre</td>
<td>65</td>
<td>7</td>
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<tr>
<td>Other remote area</td>
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## DEMOGRAPHICS

### EDUCATION

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<tr>
<th>Education</th>
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<tbody>
<tr>
<td>Some high school</td>
<td>136</td>
<td>14</td>
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<tr>
<td>Completed high school</td>
<td>226</td>
<td>23</td>
</tr>
<tr>
<td>TAFE/trade certificate</td>
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<td>22</td>
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<tr>
<td>TAFE Diploma</td>
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<td>13</td>
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<tr>
<td>University undergraduate degree</td>
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<td>18</td>
</tr>
<tr>
<td>University post graduate degree</td>
<td>86</td>
<td>9</td>
</tr>
<tr>
<td>Refused</td>
<td>24</td>
<td>2</td>
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### EMPLOYMENT

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<thead>
<tr>
<th>Employment</th>
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<tbody>
<tr>
<td>Student</td>
<td>46</td>
<td>5</td>
</tr>
<tr>
<td>Work – full time</td>
<td>294</td>
<td>29</td>
</tr>
<tr>
<td>Work – part time</td>
<td>173</td>
<td>17</td>
</tr>
<tr>
<td>Stay-at-home parent/partner</td>
<td>90</td>
<td>9</td>
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<tr>
<td>Self employed</td>
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<tr>
<td>Unemployed</td>
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<tr>
<td>Other</td>
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<td>22</td>
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<tr>
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### INCOME

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</tr>
</thead>
<tbody>
<tr>
<td>Less than $40,000</td>
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<td>27</td>
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<tr>
<td>$40,001 - $60,000</td>
<td>190</td>
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<td>$60,001 - $80,000</td>
<td>138</td>
<td>14</td>
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<tr>
<td>$80,001 - $100,000</td>
<td>126</td>
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<td>$100,001 - $120,000</td>
<td>65</td>
<td>7</td>
</tr>
<tr>
<td>$120,001 - $140,000</td>
<td>46</td>
<td>5</td>
</tr>
<tr>
<td>$140,001 - $160,000</td>
<td>52</td>
<td>5</td>
</tr>
<tr>
<td>$160,001 or more</td>
<td>56</td>
<td>6</td>
</tr>
<tr>
<td>Refused</td>
<td>56</td>
<td>6</td>
</tr>
</tbody>
</table>
Q1.11 Which of the following do you have in your household?
Q2.1 What type of internet connection do you currently use?

- ADSL: 60%
- Mobile Broadband internet (3G/4G): 35%
- Satellite Internet: 7%
- Cable: 3%
- Dial-up: 1%
- None: 2%
- Unsure: 5%
Q2.2 How often do you make phone calls on your fixed line compared with your mobile (or smartphone)?

**Current Phone Call Use – Mobile vs. Fixed**

- **Total (n=744)**:
  - 22% Almost always fixed line
  - 20% Fixed line more than mobile
  - 19% About the same
  - 22% Mobile more than fixed line
  - 18% Almost always mobile

- **Large or small rural centre (n=618)**:
  - 17% Almost always fixed line
  - 18% Fixed line more than mobile
  - 20% About the same
  - 25% Mobile more than fixed line
  - 19% Almost always mobile

- **Remote rural area (n=382)**:
  - 29% Almost always fixed line
  - 22% Fixed line more than mobile
  - 17% About the same
  - 17% Mobile more than fixed line
  - 16% Almost always mobile
Q2.3 How often do you access the internet on your smartphone via a WiFi connection compared with your mobile broadband (3G/4G) connection?
Q2.4 How often do you access the internet on your tablet via a WiFi connection compared with your mobile broadband (3G/4G) connection?
Q2.5 If you had to choose which of the following is MOST important to you, which would it be?

- My mobile service
- My fixed service

48% for My mobile service and 52% for My fixed service.
Q2.6 Thinking about your **phone calls** in the next 5-10 years, how much do you agree with the following statements?

**Future of phone calls – will fixed or mobile be used more frequently?**

* ...I will not change the way in which I use fixed line and mobile services to make calls
  - Strongly disagree: 12%
  - Somewhat disagree: 21%
  - Neither agree nor disagree: 26%
  - Somewhat agree: 23%
  - Strongly agree: 19%

* ...I will use mobile services more than fixed line services to make calls
  - Strongly disagree: 8%
  - Somewhat disagree: 11%
  - Neither agree nor disagree: 22%
  - Somewhat agree: 30%
  - Strongly agree: 29%

* ...I will use fixed line services more than mobile services to make calls
  - Strongly disagree: 30%
  - Somewhat disagree: 24%
  - Neither agree nor disagree: 24%
  - Somewhat agree: 24%
  - Strongly agree: 12%
Q2.6 Thinking about your phone calls in the next 5-10 years, how much do you agree with the following statements?

- Fixed line services will be more essential than mobile to make calls
  - Strongly disagree: 29%
  - Somewhat disagree: 29%
  - Neither agree nor disagree: 25%
  - Somewhat agree: 8%
  - Strongly agree: 9%

- Mobile services will be more essential than fixed to make calls
  - Strongly disagree: 6%
  - Somewhat disagree: 7%
  - Neither agree nor disagree: 23%
  - Somewhat agree: 32%
  - Strongly agree: 32%
Q2.7 Thinking about your internet use in the next 5-10 years, how much do you agree with the following statements?

- I will not change the way in which I use fixed line and mobile broadband (3G/4G) services to access the internet
  - Strongly disagree: 10%
  - Somewhat disagree: 22%
  - Neither agree nor disagree: 35%
  - Somewhat agree: 20%
  - Strongly agree: 12%

- I will use mobile broadband (3G/4G) services more than fixed line services to access the internet
  - Strongly disagree: 11%
  - Somewhat disagree: 16%
  - Neither agree nor disagree: 32%
  - Somewhat agree: 25%
  - Strongly agree: 16%

- I will use fixed line services more than mobile broadband (3G/4G) services to access the internet
  - Strongly disagree: 14%
  - Somewhat disagree: 23%
  - Neither agree nor disagree: 33%
  - Somewhat agree: 19%
  - Strongly agree: 11%
Q2.7 Thinking about your internet use in the next 5-10 years, how much do you agree with the following statements?

**Predicted Future Importance – Internet**

...fixed line services will be more essential than mobile broadband (3G/4G) to access the internet

- Strongly disagree: 15%
- Somewhat disagree: 26%
- Neither agree nor disagree: 36%
- Somewhat agree: 13%
- Strongly agree: 10%

...mobile broadband (3G/4G) services will be more essential than fixed to access the internet

- Strongly disagree: 8%
- Somewhat disagree: 12%
- Neither agree nor disagree: 35%
- Somewhat agree: 28%
- Strongly agree: 18%
Q4.3 How would you describe ‘good mobile coverage’?
DEFINITION OF ‘GOOD COVERAGE’

Q4.3 How would you describe ‘good mobile coverage’?

“Consistently receiving greater than 75% of signal strength, inside my home as well as on the nature strip 30 metres down from my home (which is where I have to go now).”
(70+, male, NSW, small rural centre 10-25K population, online survey)

“A system that works; being able to connect who I want to, when I want, wherever I am at a reasonable price/ quickly.”
(70+, female. NSW, rural centre <10K population, phone survey)

“Being able to walk around my house and not lose signal. I live out of town and I have no access to a fixed line so mobile coverage is very important to me, if there is an emergency I want the security of knowing my coverage is reliable.”
(30-39, female, VIC, small rural area, 10-25K population, online survey)

“Accessible/ cheap and with good service; Telstra doesn’t have good service/ but they are the only ones with good coverage; but I’d really like to see them have some competition.”
(50-, female, NSW, remote area <5K population, phone survey)

“Having access in all capital cities and major regional centres, plus rural areas surrounding regional centres.”
(30-39, female, VIC, small rural area <10K population, online survey)

“The ability to connect the mobile network more consistently in regional areas.”
(50-59, male, NT, large rural centre 25-99K population, phone survey)
### POLICY PREFERENCES

**POLICY OPTION 1:** A policy within the scope of the current NBN project; the NBN allows for access to its **infrastructure** which would allow more mobile carriers to operate throughout regional Australia. This would give people within these areas more choice when it comes to selecting a mobile service provider and improve mobile coverage.

**POLICY OPTION 2:** Within the same overall construction budget, a policy where **in addition** to building a fixed-line broadband network the NBN also builds a mobile network which all mobile providers could access, improving coverage and giving customers increased choice of provider.

**POLICY OPTION 3:** A policy in which the Government provides funding to telcos to build one set of mobile infrastructure (towers, transmitters etc). **All** mobile operators could use this infrastructure (paying for usage) which would improve coverage and give residents increased choice of provider.

**POLICY OPTION 4:** A policy in which the Government provides funding to telcos for them to build more towers to deliver better mobile coverage to regional households. However, this funding would only serve to benefit ONE mobile provider and its customers exclusively, but these customers would have improved, consistent coverage.

Q3.5 Please rate each of the proposed policy options below according to how appealing or unappealing.
Q4.4 In some cases in regional areas it is not economically viable for commercial providers to invest in improving internet and mobile services due to the vast distances that are needed to cover and the size of population. In these cases the Government may play a role and provide funding. If you were in charge of advising the Government on prioritizing the use of funding, how important are each of the following options?
**Q4.5 Please rank those same options from your highest priority (1) to lowest priority (3).**

- **Improved broadband services to the home**
  - 24% First
  - 30% Second
  - 46% Third
  - "Internet is essential for modern business whether in city or country. Essential for educating our children. Usually mobile phone dropout is a temporary inconvenience." (70+, female, QLD, other remote area <5K population, online survey)

- **Improved mobile phone coverage and choice of provider**
  - 28% First
  - 44% Second
  - 28% Third
  - "The ability to make an emergency phone call can mean the difference between life and death. Not being able to access the TV guide though your broadband is annoying.” (30-39, female, NSW, large rural centre, 25-100K, online survey)

- **Both improved broadband services to the home and improved mobile phone coverage and choice of provider**
  - 49% First
  - 25% Second
  - 26% Third
  - "I have worked in remote communities in education and it would be better for all members of the community to feel connected to the rest of Australia and to give them opportunities.” (50-59, female, NT, remote centre >5K, phone survey)
Q4.7 Which of the following scenarios is MOST appealing?

- A fibre to the node broadband that would deliver a typical speed of 25mbps to the home
- A wireless broadband solution that would deliver a typical speed of 25mbps to the home and would also deliver mobile network

PREFERENCE FOR HOME VS. HOME + MOBILE

- 80% for Home
- 20% for Home + Mobile
Q4.9 The current federal government has a policy of providing $100m to increase mobile coverage in regional areas and address mobile “blackspots” (where there is no mobile coverage). Thinking about how to use those funds most effectively, how appealing or unappealing do you find each of the following options?

**Preferred allocation of $100m in Government funds**

1. $100m in government funds is provided to help build towers to reduce mobile “blackspots” in regional areas and expand coverage. All mobile providers can use this mobile network to provide services to their customers.
   - Extremely unappealing: 22%
   - Somewhat unappealing: 14%
   - Neither appealing nor unappealing: 36%
   - Somewhat appealing: 22%
   - Extremely appealing: 46%

2. The $100m is provided to the NBN Co to build towers to reduce mobile “blackspots” in regional areas. Customers of ALL mobile providers can access the new towers and get the benefits of better mobile coverage.
   - Extremely unappealing: 4%
   - Somewhat unappealing: 18%
   - Neither appealing nor unappealing: 28%
   - Somewhat appealing: 48%
   - Extremely appealing: 4%

3. One mobile provider is chosen to access $100m in government funds to help build towers to reduce mobile “blackspots” in regional areas. However, ONLY their customers can access the new towers and get the benefits of better mobile coverage.
   - Extremely unappealing: 50%
   - Somewhat unappealing: 22%
   - Neither appealing nor unappealing: 18%
   - Somewhat appealing: 7%
   - Extremely appealing: 3%