



# Internet activity report

**For the period ending 31 December 2023**

August 2024

## Acknowledgment of country

The ACCC acknowledges the traditional owners and custodians of Country throughout Australia and recognises their continuing connection to the land, sea and community. We pay our respects to them and their cultures; and to their Elders past, present and future.

Australian Competition and Consumer Commission  
Land of the Ngunnawal people  
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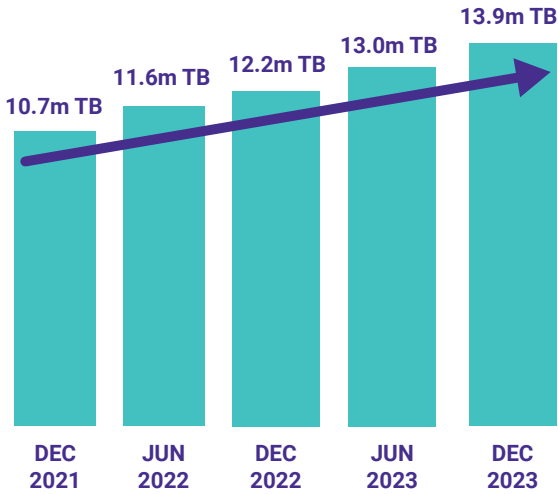
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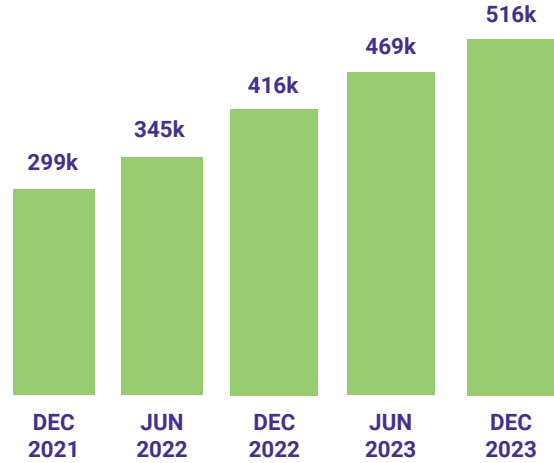
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# Data snapshot

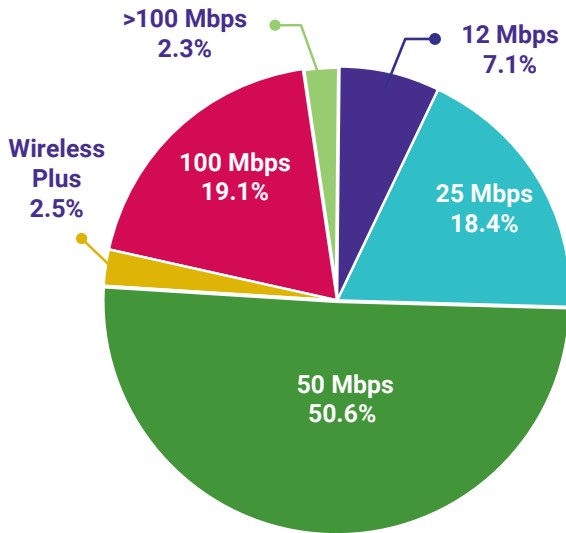
Total downloads went up 14% in the last year and 30% since December 2021



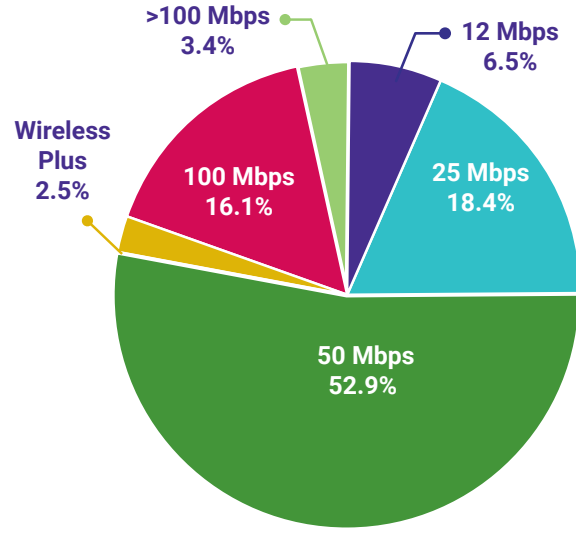
Home wireless broadband services have increased 73% in the last 2 years... although the growth is slowing



## NBN speed tier breakdown



June 2023



December 2023

## Average data usage – Gigabytes per service per month

	Dec-22	Dec-23	% annual change
<b>BROADBAND</b>			
NBN	452	497	▲10%
DSL	435	447	▲3%
Non-NBN HFC/cable	288	307	▲6%
Non-NBN Fibre	478	486	▲2%
Home wireless broadband	283	456	▲61%
<b>MOBILE</b>			
Pre-paid mobile	7.2	8.3	▲15%
Post-paid mobile	14.8	16.9	▲14%
Mobile broadband	11.5	11.0	▼4%

# About this report

The ACCC's bi-annual Internet Activity Report reports on the number of services in operation (SIOs) and the volume of data downloaded across NBN, non-NBN fixed internet and mobile services for retail services.<sup>1</sup> It also reports various metrics on wholesale mobile services.

Previously, the Australian Bureau of Statistics collected similar internet activity information under the [Internet Activity Survey](#). The ACCC took responsibility for this function and has been producing reports since 2018.

The retailers (i.e., 'record keepers') reporting under the [Internet Activity Record Keeping Rules](#) are Aussie Broadband, Australian Private Networks, Dodo, iiNet, IP Star Australia, Primus, Singtel Optus, SkyMesh, Superloop, Telstra, TPG and Uniti.

Readers should consider the following when comparing the range of publicly available information on the NBN and information provided in the Internet Activity Report:

- The Internet Activity Report reports retail NBN SIO information collected from a select number of retailers required to report under the record keeping rules.
- In contrast, the ACCC's [NBN Wholesale Market Indicators Report](#) only reports wholesale services directly acquired by service providers from NBN Co. NBN Co's report includes information on entities not included in the Internet Activity record keeping rules.
- In relation to NBN speed tiers, a retailer may buy a wholesale NBN service at a specific NBN speed tier but it may, through shaping or 'throttling' customer speeds on its network, market and sell this service to retail end users at a different retail speed tier.
- Given the above, there will be a divergence between the number of wholesale services reported under the NBN Wholesale Market Indicators Report and the number of retail services reported under the Internet Activity Report.
- Record keepers report information for both the current and previous reporting periods. Figures in the previous reporting period may be revised by respondents in later reports. For the most up to date data refer to the most recent report.

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<sup>1</sup> Information is collected for the June and December reporting periods. Reporting dates for the number of services in operation are 30 June for June reporting periods and 31 December for December reporting periods. The volume of data downloaded is reported for the 3 months preceding the end of the reporting period. For example, for the June reporting period this is April, May and June. For the December reporting period, this is October, November and December.

# Broadband markets

## Volume of data downloaded

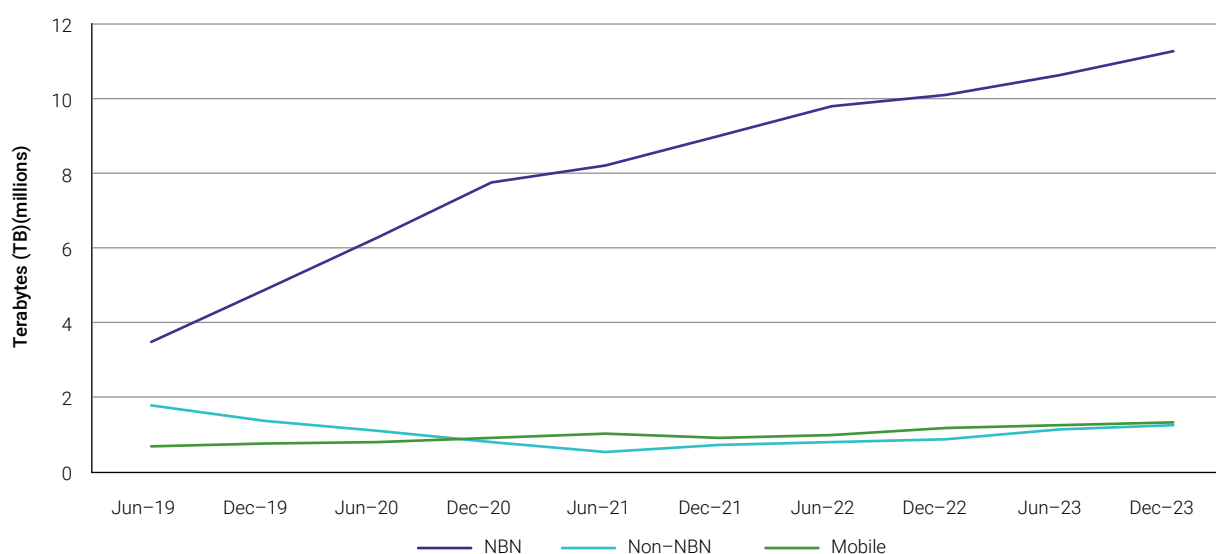
### Total download volumes continue to increase across all network types

The estimated total data downloaded reported by record keepers continued to rise across the NBN, non-NBN and mobile networks in this period.

There were 13.9 million Terabytes (TB) of data downloaded across retail broadband internet and mobile services in the 3 months from 1 October 2023 to 31 December 2023. This is an increase of 6.6% from the 13.0 million TB reported in the corresponding period in the June 2023 report.

Figure 1 shows that 81% of these downloads were attributed to NBN services, 10% to mobile services and 9% to non-NBN fixed services.<sup>2</sup>

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



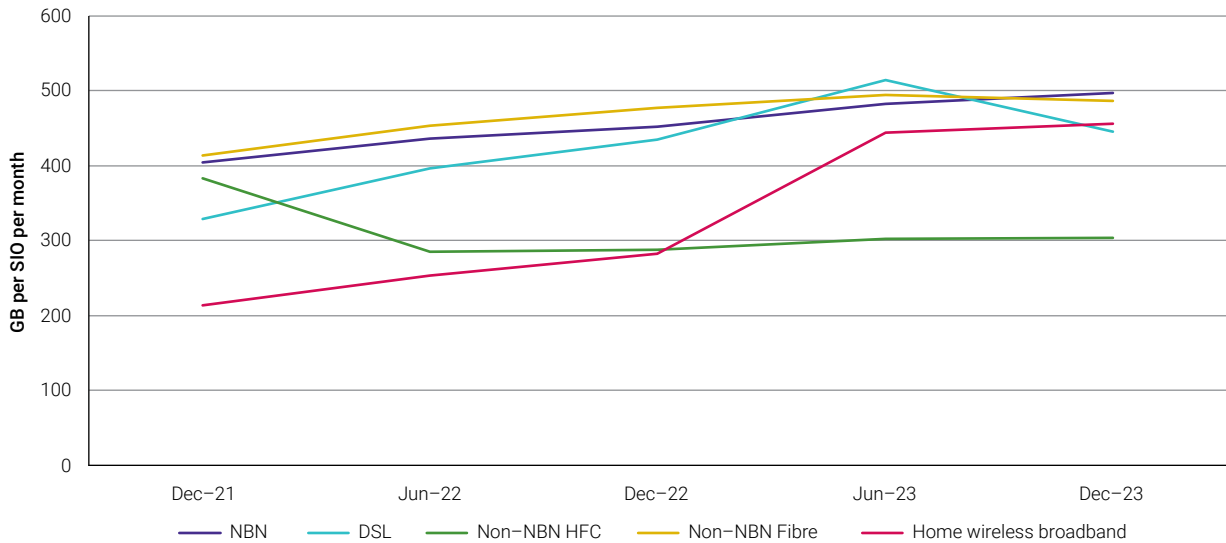
### Average monthly downloads continue to increase across most technology types except DSL

The amount of data download per service in operation differs by the type of network and technology type. Figure 2 shows the average monthly download volume per service across the preceding 3-month period for selected technology types. Home wireless broadband data was collected for the first time in the December 2021 period and the average download per home wireless broadband

<sup>2</sup> Figure 1 in this report includes the total Home wireless broadband category in non-NBN fixed services even though it uses mobile network infrastructure. This Internet Activity record keeping rule began collecting information on Home wireless broadband in the December 2021 period. Mobile services include both retail and wholesale services.

service has recently become similar to the average for NBN and non-NBN fibre services.<sup>3</sup> The lowest average monthly downloads were reported for the non-NBN HFC (Hybrid Fibre Coaxial) technology.

**Figure 2: NBN, Non-NBN and Home wireless broadband – Average monthly downloads per SIO per period by technology type**

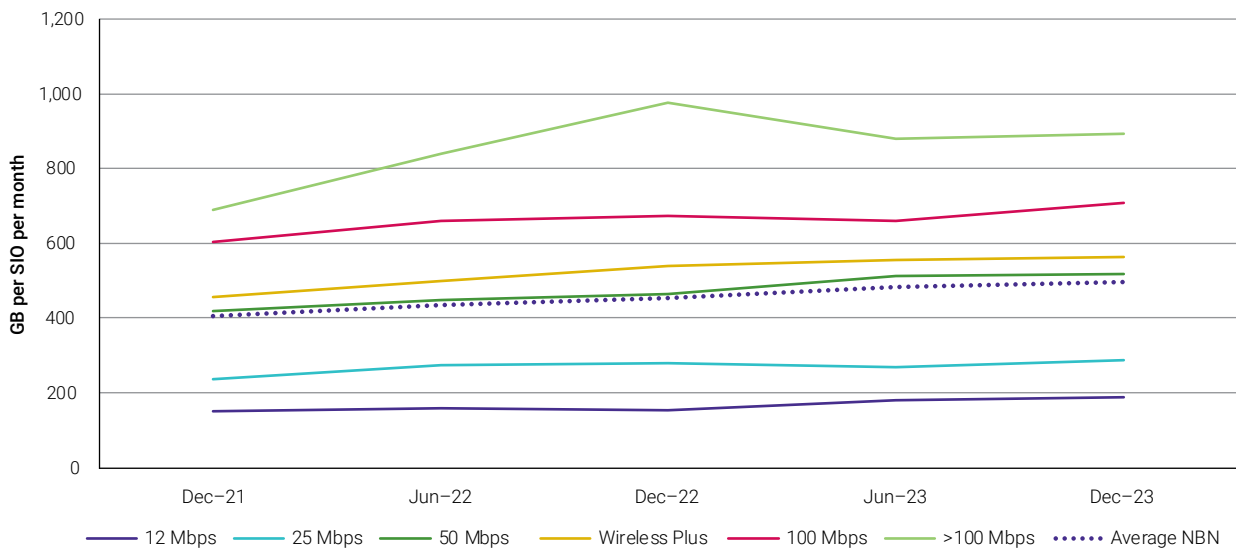


## NBN downloads are increasing the most in higher speed tiers

Figure 3 shows the average monthly download per service for NBN speed tiers across the preceding 3-monthly data collection period.<sup>4</sup> On average, each NBN service downloaded 497 GB per month, up from 482 GB per month in the June 2023 period.

The largest increases were in the NBN 100 Mbps (megabits per second) and 1000 Mbps speed tiers, with the average downloads per service per month increasing by 7% and 12% respectively.

**Figure 3: NBN retail broadband internet – Average monthly downloads per SIO per period by speed tier**



<sup>3</sup> Home wireless broadband provides internet over a 4G or 5G network connection to a fixed modem and access points connected to a mobile network.

<sup>4</sup> The 50 Mbps speed tier includes some Wireless Plus services that have download speeds up to 75 Mbps up until December 2021.



# Broadband services in operation

## The number of retail broadband internet services increased

There was an increase in the total number of NBN, non-NBN and home wireless broadband internet services reported in the December 2023 period. However, part of this increase was due to the addition of two new record keepers, Superloop and Uniti Internet.

At 31 December 2023, there were almost 8.5 million retail broadband internet services reported under this record keeping rule. Of these, almost 7.6 million (around 90% of the total) were NBN services followed by around 510,000 home wireless broadband services and nearly 405,000 non-NBN fixed services.

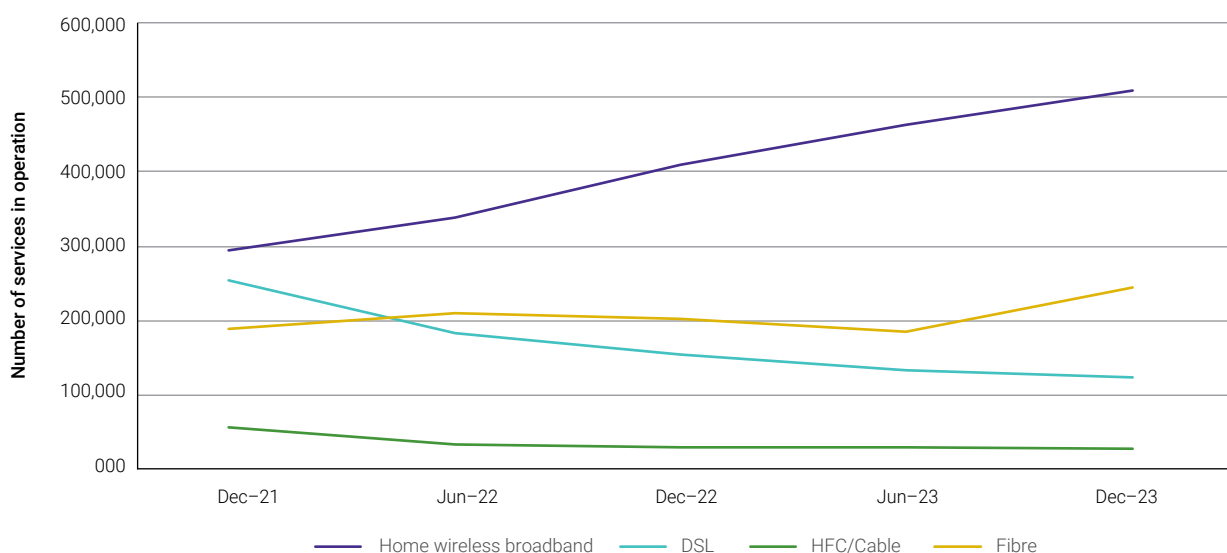
## The mix of retail broadband internet services continues to evolve

Figure 4 shows that the number of home wireless broadband services reported by mobile network operators has grown significantly from 294,000 in December 2021, reaching a series peak of 510,000 in December 2023. This represents an increase of 73% since the ACCC began collecting this information in December 2021.<sup>5</sup>

Non-NBN retailers reported that DSL<sup>6</sup> and HFC services declined again, by 7% each since June 2023, although the rate of decrease has slowed compared to previous periods.

In contrast, there were increases in the number of non-NBN fibre and fixed wireless services reported, partially attributable to the introduction of new record keepers for this period.

**Figure 4:** Retail broadband internet – non-NBN services by technology



<sup>5</sup> Figure 4 refers to Home wireless broadband retail services in operation only. It does not include the wholesale services reported under this category in the Internet Activity record keeping rule.

<sup>6</sup> Digital Subscriber Line.

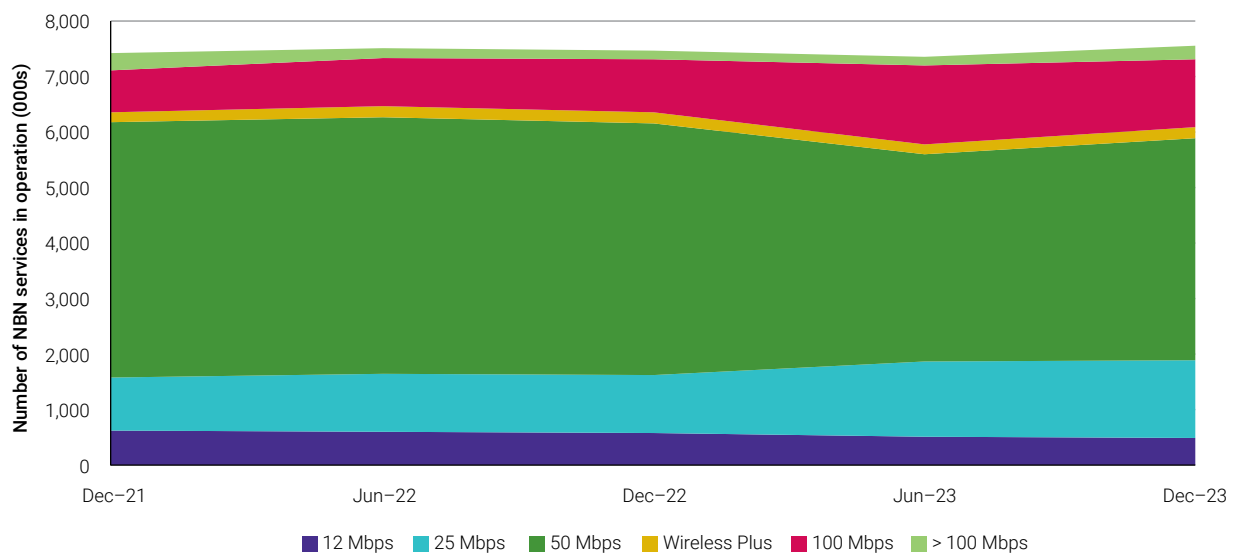
While there are fewer number of non-NBN services reported since the ACCC began collecting information, the proportion of those services with no data limit plans has continued to increase as newer technologies are capable of high data speeds and volumes. The reported number of non-NBN services with no data limit plans increased to 89% in December 2023 compared to 70% in June 2019. This is consistent with NBN services, with 93% of reported services with no data limit plans compared to 72% in June 2019.

## The 50 Mbps speed tier accounts for over half of all NBN services

Figure 5 shows that NBN services in the 50 Mbps speed tier make up just over half of all NBN services reported under the Internet Activity record keeping rule, accounting for around 53% of total NBN services reported in the December 2023 reporting period. This was followed by the 25 Mbps speed tier (around 18% of reported services) and 100 Mbps speed tier (just over 16%).

During the reporting period, the ACCC released its final decision to accept NBN Co’s proposed variation to its Special Access Undertaking.<sup>7</sup> The Special Access Undertaking included changes to wholesale product and pricing elements which may have resulted in some of the NBN speed tier movements in this period and may have an impact in future reporting periods.

**Figure 5: NBN retail broadband internet by speed tier – market share**



<sup>7</sup> ACCC, [NBN Co SAU Variation \(August 2023\)](#), accessed 12 July 2024.

# Mobile services

## Data downloaded over mobile services

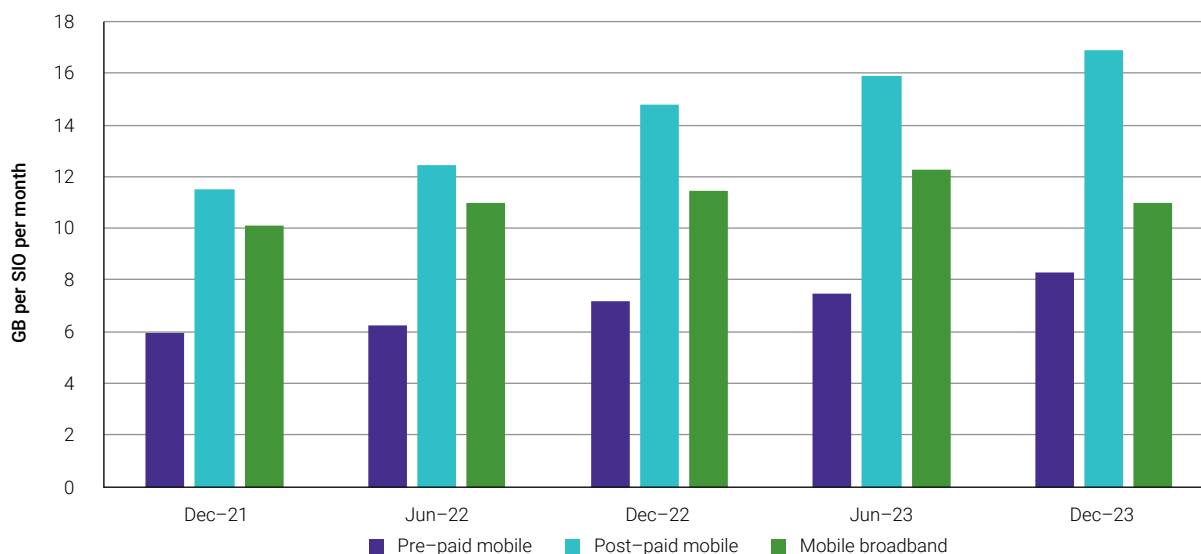
### Volume of data downloaded over mobile phone services also increased

Consistent with the trends seen for retail broadband internet services, mobile network operators reported an increase in total volume of data downloaded over their mobile networks in December 2023.

Figure 6 below shows that the average monthly volume of data downloaded per mobile service is greatest for customers on post-paid services, followed by mobile broadband services and lowest for pre-paid phone services.

While the average monthly volumes per service increased for both pre-paid and post-paid mobile services there was an off trend decrease in data downloads per service for mobile broadband services.

**Figure 6:** Mobile services – average data volume downloaded per month by service type



# Number of mobile services

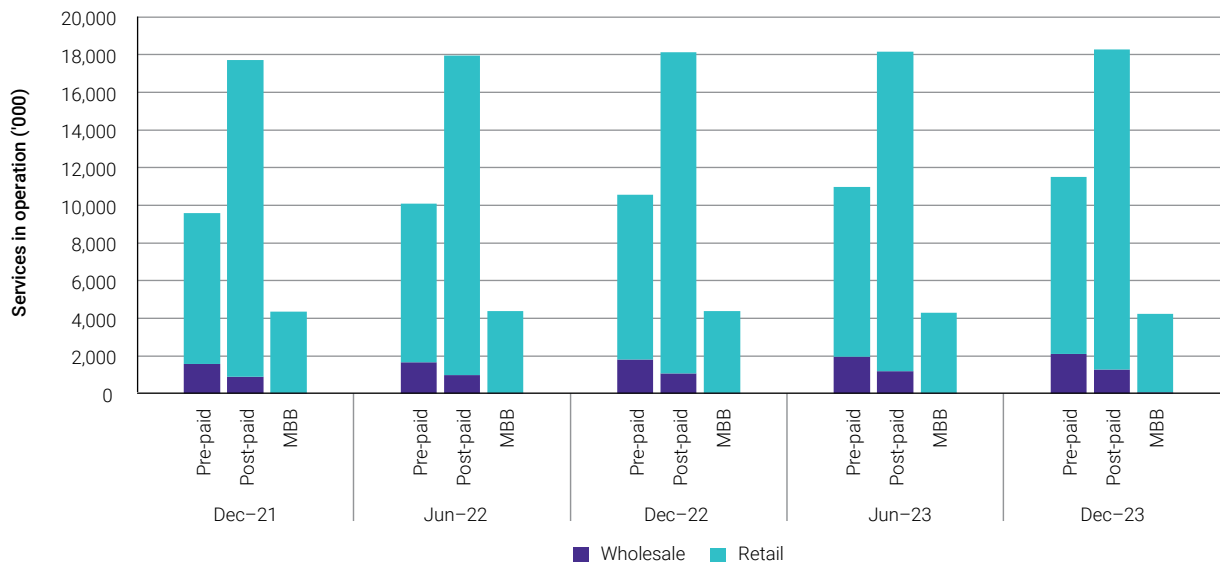
## Continued growth in the number of mobile phone services

Mobile network operators reported that the total number of mobile services increased in the December 2023 period. Figure 7 below shows an increase in the reported number of pre-paid and post-paid mobile services, and a slight decrease in the number of mobile broadband services.

The rate of increase was greatest for pre-paid services, which accounted for almost 40% of all pre-paid and post-paid mobile phone services in December 2023 (up from around 35% in December 2021).

In the December 2023 period the number of reported mobile virtual network operator services increased by 7%.<sup>8</sup> This increase was higher than the retail increases reported by the mobile network operators<sup>9</sup> (3% for TPG, 2% for Telstra and 0.4% for Optus).

**Figure 7: Mobile total services in operation by type and wholesale/retail splits**



<sup>8</sup> Wholesale pre-paid and post-paid services reported by the mobile network operators.

<sup>9</sup> Including their respective sub-brands.

