AUSTRALIAN COMPETITION & CONSUMER COMMISSION

Internet activity report

For the period ending 31 December 2024

October 2025

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
23 Marcus Clarke Street, Canberra, Australian Capital Territory, 2601

ACCC 10/25_25–48

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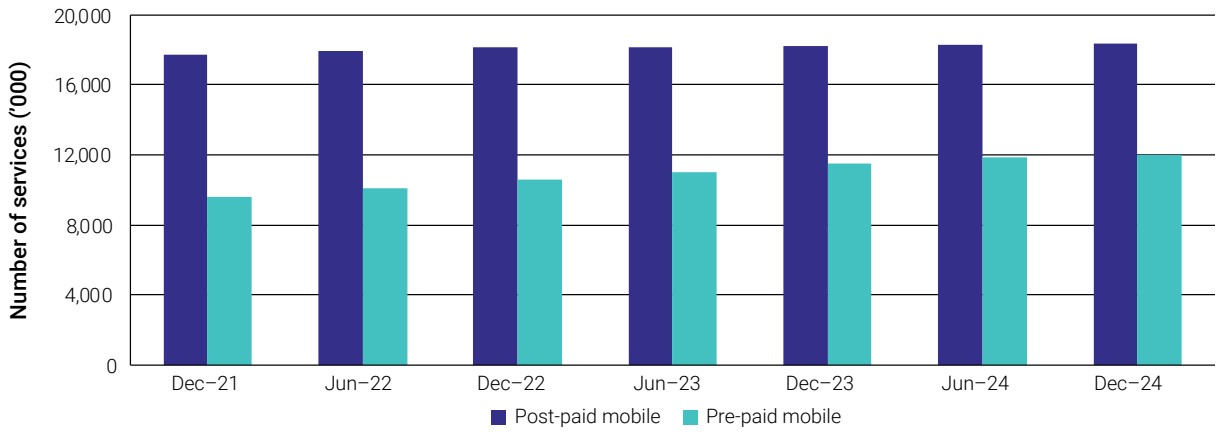
Contents

Data snapshot



Average data usage: Gigabytes (GB) per service per month

	Jun–24	Dec–24	% change
BROADBAND			
NBN	509	518	▲2%
DSL	452	432	▼4%
Non-NBN HFC/Cable	336	322	▼4%
Non-NBN Fibre	518	551	▲6%
Home wireless broadband	452	462	▲2%
MOBILE			
Pre-paid mobile	9.2	9.7	▲6%
Post-paid mobile	17.4	18.0	▲3%
Mobile broadband	11.8	12.0	▲2%

Notes: The Internet Activity Record Keeping Rule collects information on retail broadband and mobile services. The figures above include wholesale services for home wireless broadband and other mobile services. Home wireless broadband is a type of fixed wireless service, delivered over existing mobile networks. Some figures have changed from previous reports. This is due to changes in reporting methodology or record keepers providing amended returns.

About this report

The ACCC's bi-annual Internet Activity Report includes information on the number of services in operation and the volume of data downloaded across NBN, non-NBN fixed broadband and mobile services.[1] It also reports various metrics on some 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 rule are Aussie Broadband, Australian Private Networks, Dodo, iiNet, IP Star Australia, Primus, Singtel Optus, SkyMesh, Starlink, Superloop, Telstra, TPG Telecom 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 only contains retail information collected from the group of retailers set out above.
- In contrast, the ACCC's NBN Wholesale Market Indicators Report only contains information on wholesale services directly acquired from NBN Co.
- Therefore, NBN Co's report includes information on entities not reporting under the Internet Activity record keeping rule and services that an entity may on sell to other retailers.
- Given the above, there will be a divergence between the number of wholesale services reported in the NBN Wholesale Market Indicators Report and the number of retail services reported in the Internet Activity Report.
- 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.
- Record keepers report information for both the current and previous reporting periods. Therefore, 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.

1 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

Retail broadband services in operation

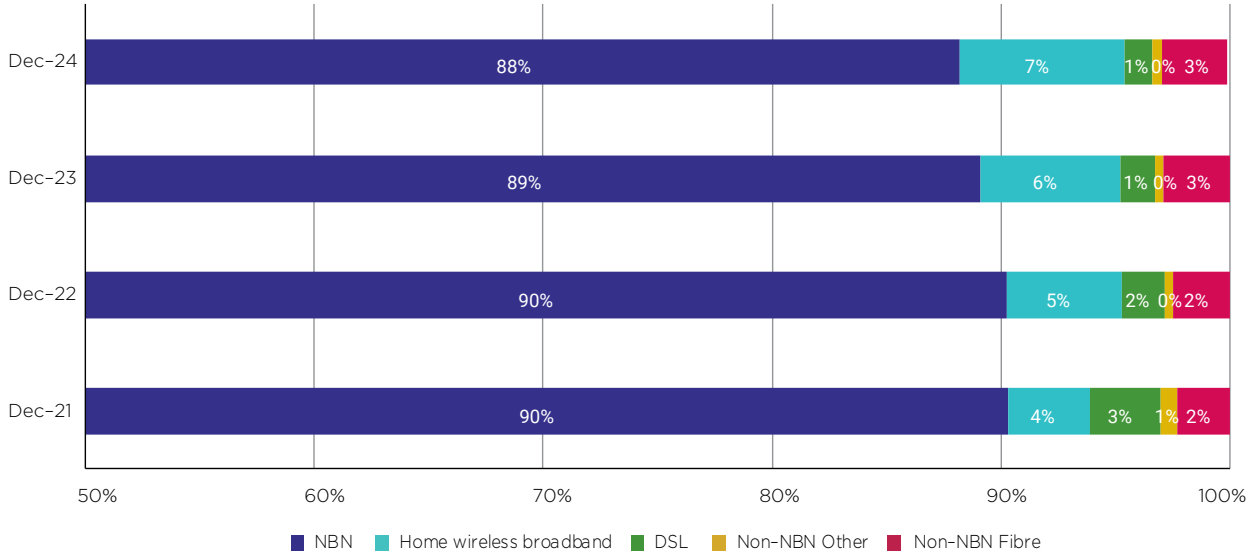
The total number of reported broadband services decreased slightly

There were almost 8.4 million retail broadband services reported under the Internet Activity record keeping rule for the December 2024 period, a slight decrease of 0.2% on the number of services reported in June 2024.[2]

Figure 1 shows the proportion of broadband services by technology type. The largest proportion of services (88%) continued to be those provided over the NBN with the number of services captured remaining steady at around 7.4 million services.

The proportion of home wireless broadband services increased to 7%, up from 4% in December 2021. Conversely, the number of DSL services dipped below 100,000 for the first time since the ACCC began collecting this information.

Figure 1: Proportion of broadband services by technology type



Note: Non-NBN Other includes HFC and non-NBN Fibre. This report excludes non-NBN satellite.

2 This report excludes non-NBN satellite services in operation. Note that not all broadband service providers are captured in the Internet Activity record keeping rule, so the actual number of retail broadband services is higher than 8.4 million.

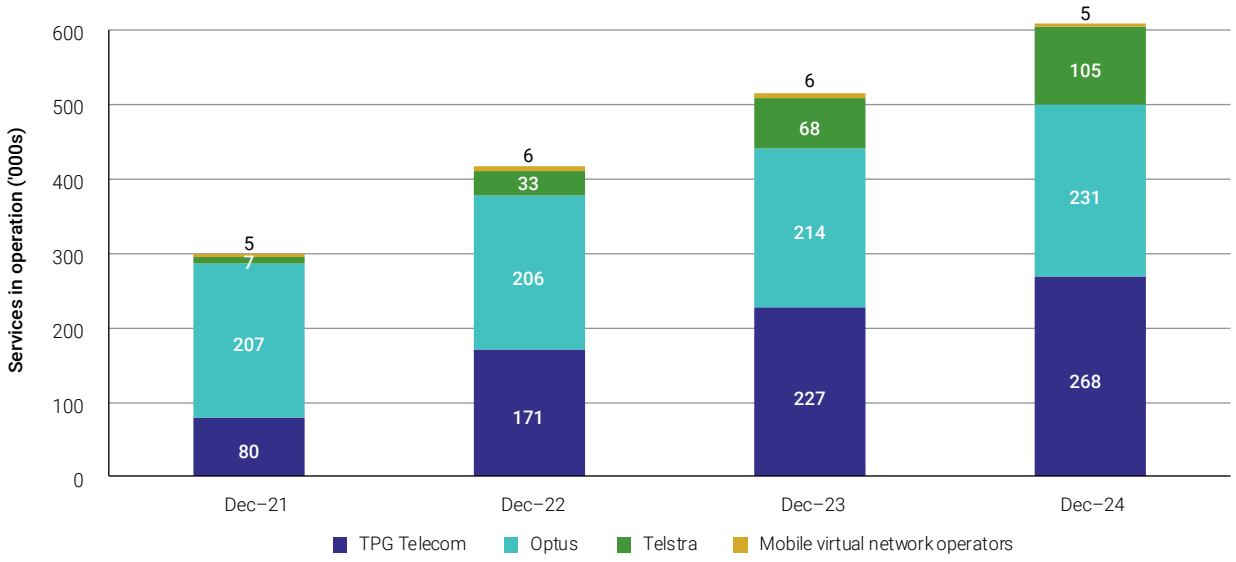
The number of home wireless broadband services continues to increase

Home wireless broadband is a type of fixed wireless service delivered over existing mobile networks.

The number of home wireless broadband services increased by 9.9% in the 6 months to 31 December 2024, with around 608,000 services reported. This is an annual increase of 17.8%.

Figure 2 shows the dominance of the mobile network operators' own brands. TPG Telecom reported the largest market share with around 268,000 services (44%), followed by Optus (231,000 services or 38% market share) and Telstra (105,000 services or 17% market share). The mobile virtual network operators held less than 1% market share (5,000 services).

Figure 2: Number of home wireless broadband services by provider



The total number of reported NBN retail services decreased slightly but the number of services on higher speed tiers is increasing

The total number of NBN retail services reported decreased slightly by 0.8% (57,000 services) over the 6 months to December 2024, with just under 7.4 million services.

For context, there were approximately 8.8 million wholesale services reported by NBN Co in the December 2024 ACCC Wholesale Market Indicators Report.[3] This leaves a difference of approximately 1.4 million services between reports. There are 2 reasons for this. Firstly, not all NBN retail suppliers are required to report under the Internet Activity record keeping rule to minimise regulatory burden on smaller retailers. Secondly, some of the wholesale services reported by NBN Co in the Wholesale Market Indicators Report are resold to downstream wholesale markets and therefore out of scope of this report.

Almost 21% of NBN retail services reported to the ACCC in December 2024 were at the 100 Mbps speed tier, compared to only 8% at June 2019. The proportion of 50 Mbps NBN services decreased slightly to 46% in December 2024 but remains the most prevalent speed tier with around 3.4 million services reported.

3 ACCC, Wholesale Market Indicators Report, December 2024, accessed 2 May 2025.

Figure 3 shows changes in the composition of retail NBN services reported by speed tier since December 2021. There has been a sharp decline in the number of 12 Mbps services over the past year. There were around 321,000 services reported in December 2024 which now represents only 4% of the total services reported. This is almost half the number of services at this tier in December 2021 (628,000).

Figure 3: NBN broadband by speed tier

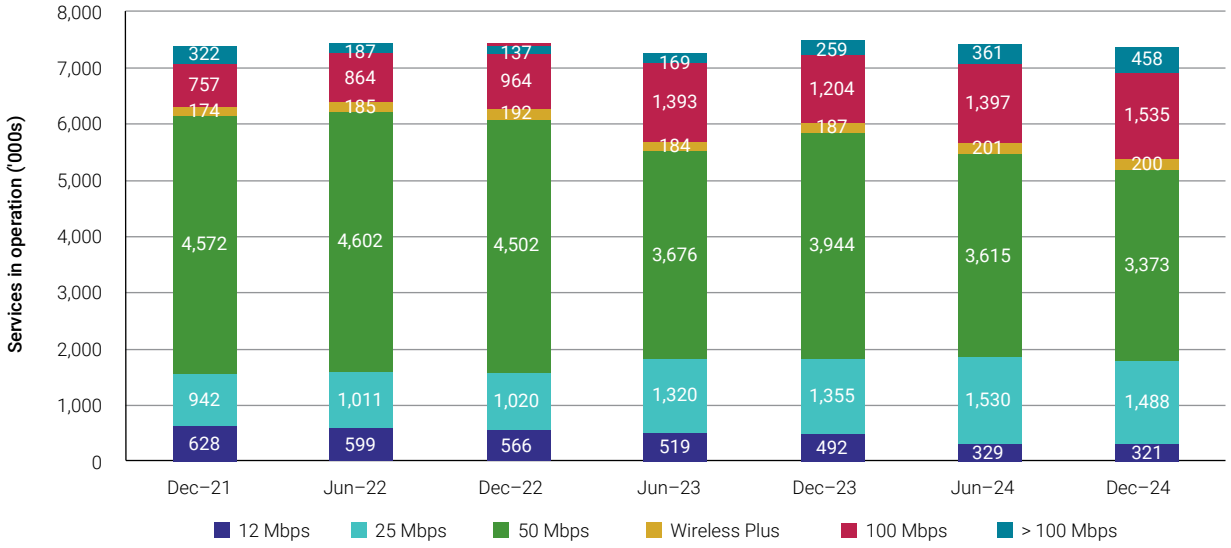
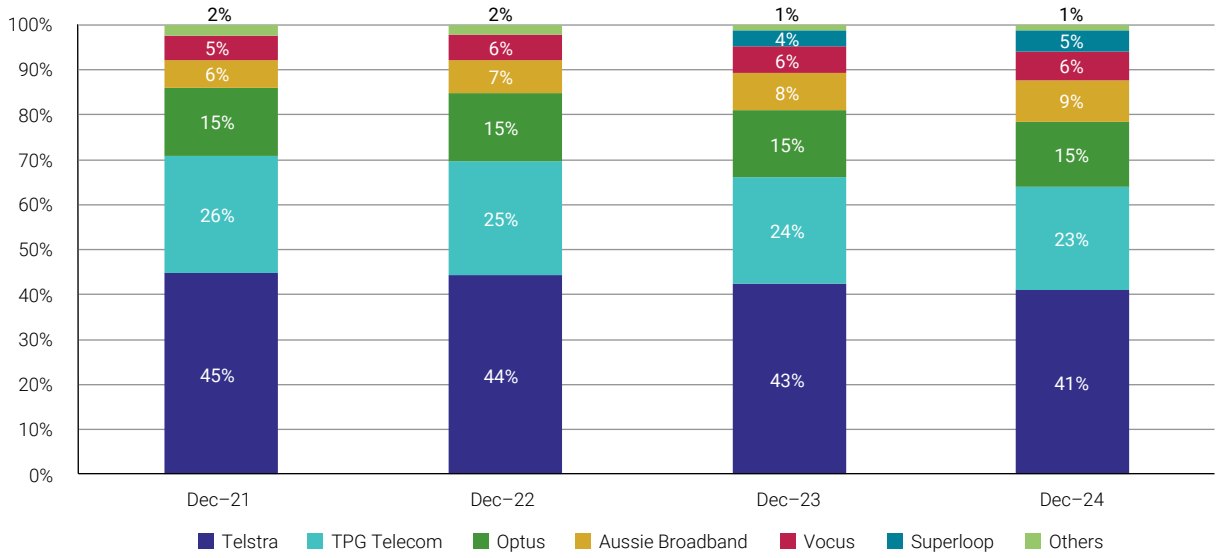


Figure 4 shows that Telstra, TPG Telecom and Optus remain the largest retailers of NBN services of those that report under the record keeping rule, however other reporting entities such as Aussie Broadband, Superloop and Vocus are continuing to capture market share from the larger retailers and through customer acquisitions.

Figure 4: NBN broadband retailer market share[4]



4 Superloop was added to the record keeping rule in December 2023.

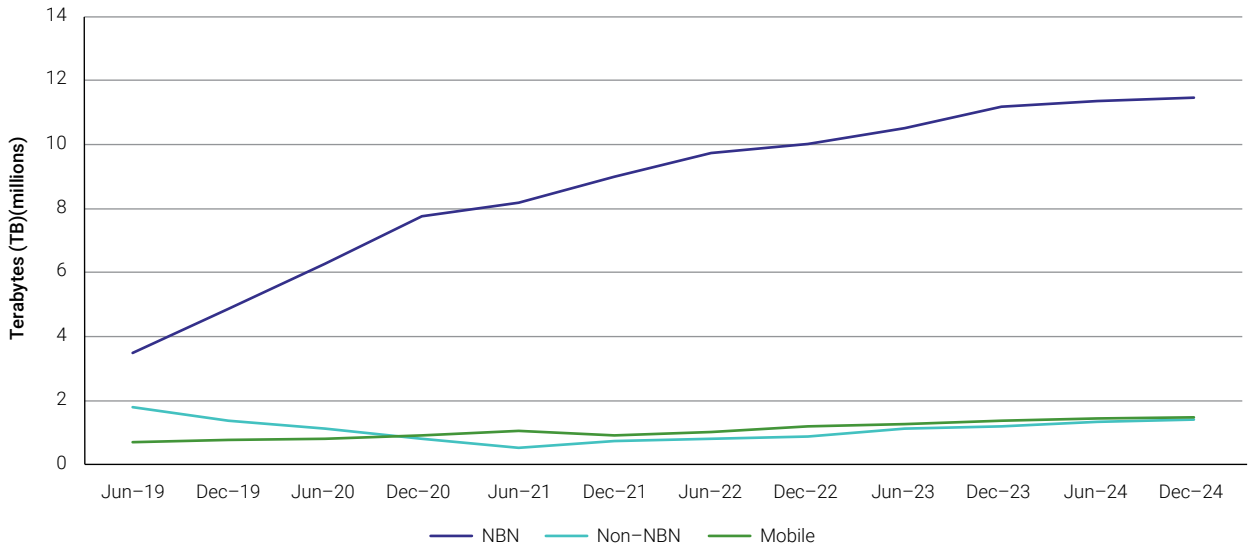
Volume of data downloaded

Total reported data usage continues to increase across most network technologies

A total of 14.4 million Terabytes (TB) of downloads were reported in the 3 months from 1 October 2024 to 31 December 2024.[5] This is an increase of 1.8% from the 14.1 million TB reported in June 2024.

Figure 5 shows the total volume of data downloaded for NBN, non-NBN and mobile services by reporting entities.[6] In December 2024, 80% of these downloads were attributed to NBN services and 10% each to non-NBN fixed (including home wireless broadband) and mobile services.

Figure 5: Total volume of data downloaded during 3-month reporting period



Note: This report excludes non-NBN satellite and retail M2M. Non-NBN includes home wireless broadband.

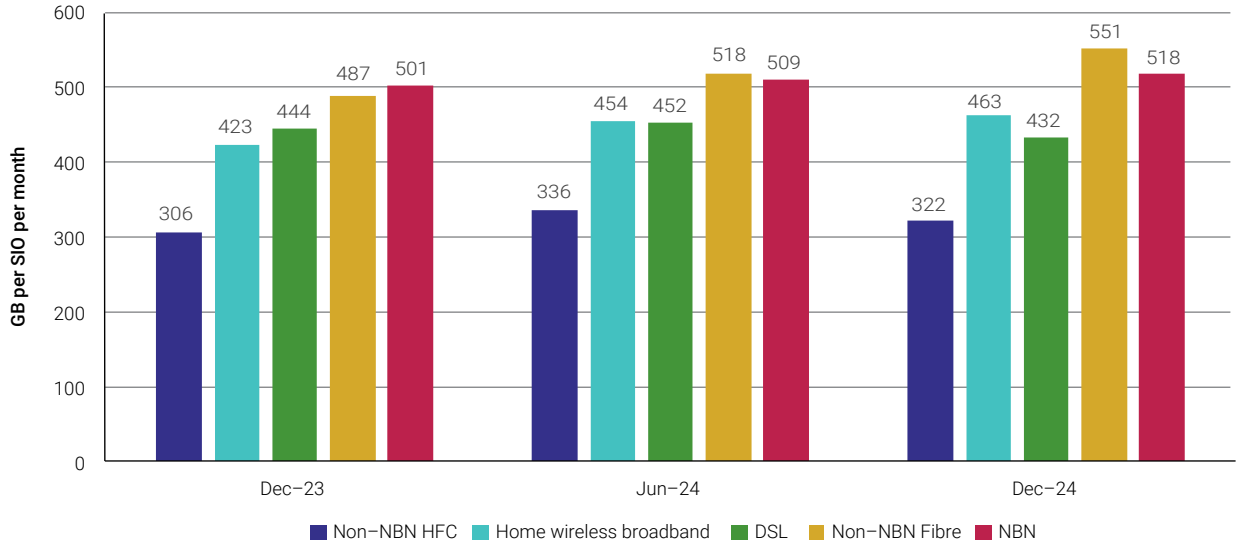
Average monthly downloads also increased across most technology types

Figure 6 shows the average monthly download volume reported per retail service across the preceding 3-month period for selected technologies. Almost all categories recorded average downloads greater than 400 GB, except for non-NBN HFC at 322 GB per month.

5 This report excludes non-NBN satellite and M2M retail services in operation.

6 Figure 5 includes home wireless broadband services in the non-NBN category, 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. Excludes non-NBN satellite and M2M services. Data is collected for a 3-month period. For June periods, this is 1 April – 30 June, for December periods it is 1 October – 31 December.

Figure 6: Retail broadband services – monthly downloads per service



NBN downloads were steady

Figure 7 below shows the average monthly download volume per service for the various NBN speed tiers for captured reporters across the preceding 3-month period.[7] On average, NBN services downloaded 518 GB per month in the December 2024 period, an increase of 1.7% from the 509 GB reported in June 2024.

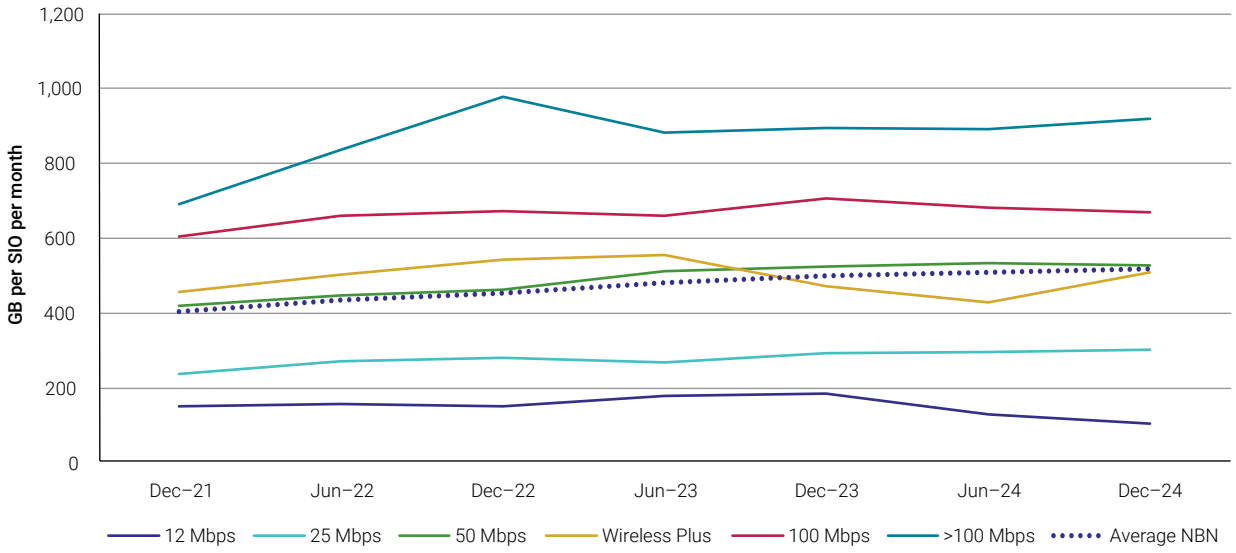
Average downloads for services in the greater than 100 Mbps and Wireless Plus speed tiers recorded the largest increases. The sharp increase in Wireless Plus downloads is partly due to a change in reporting methodology by record keepers which impacted June 2024 as well as changes to NBN's network to boost speeds for Fixed Wireless Plus customers.[8]

Reported downloads for the 12 Mbps tier decreased for the second consecutive period as consumers shift to higher speed tiers.

7 The 50 Mbps speed tier includes some Wireless Plus services that have download speeds up to 75 Mbps up until December 2021. Unweighted averages.

8 NBN Co, '*Boosting speeds for fixed wireless customers*', 26 March 2024, accessed 17 September 2025.

Figure 7: NBN broadband – average monthly downloads per SIO per period by speed tier



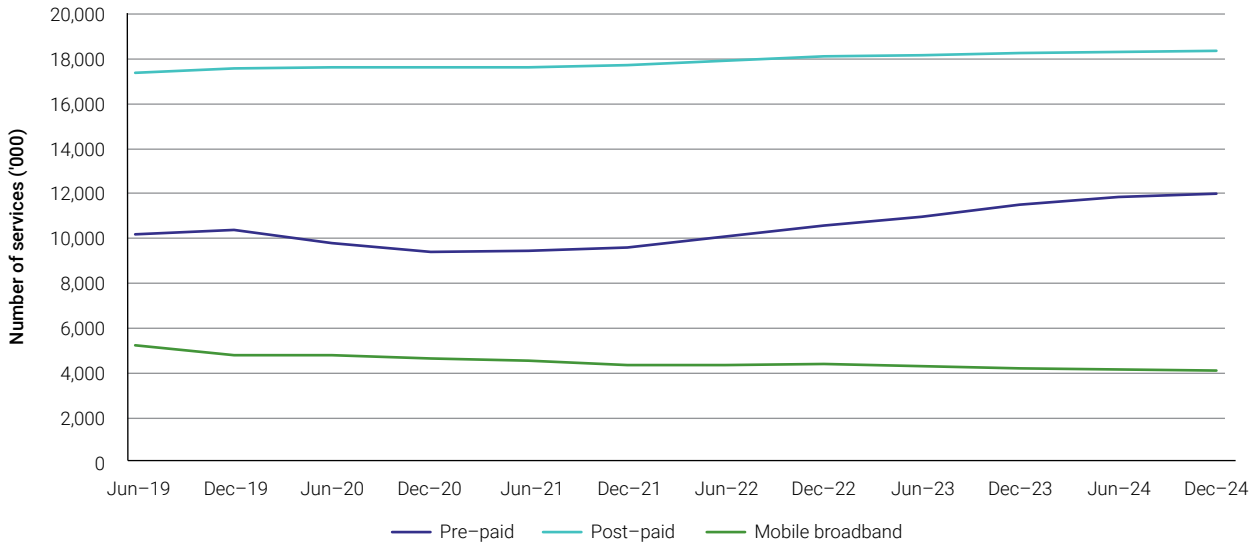
Mobile services

Number of mobile services

Mobile network operators reported small increases in the total number of mobile services, with pre-paid and post-paid mobile services increasing by 0.8% in total over the 6 months to 31 December 2024.

Figure 8 below illustrates the number of mobile services by type and shows the number of post-paid and pre-paid services at 18.4m and 12.0m respectively. Mobile broadband services (which include devices such as dongles and data-only SIM cards for use in laptops and tablets) continued to decrease, falling to a series low of just over 4 million services in December 2024. This may be due to consumers using their phones for data-based services instead of purchasing a mobile broadband service.

Figure 8: Number of mobile services by type



The number of pre-paid mobile services is growing at a faster rate than post-paid

The total number of pre-paid services reported reached 12 million for the first time, an increase of 1.4% from June 2024. Figure 9 below shows that the proportion of mobile services that are pre-paid has steadily increased to 40% of total services in December 2024.

Figure 9: Proportion of pre-paid and post-paid mobile services

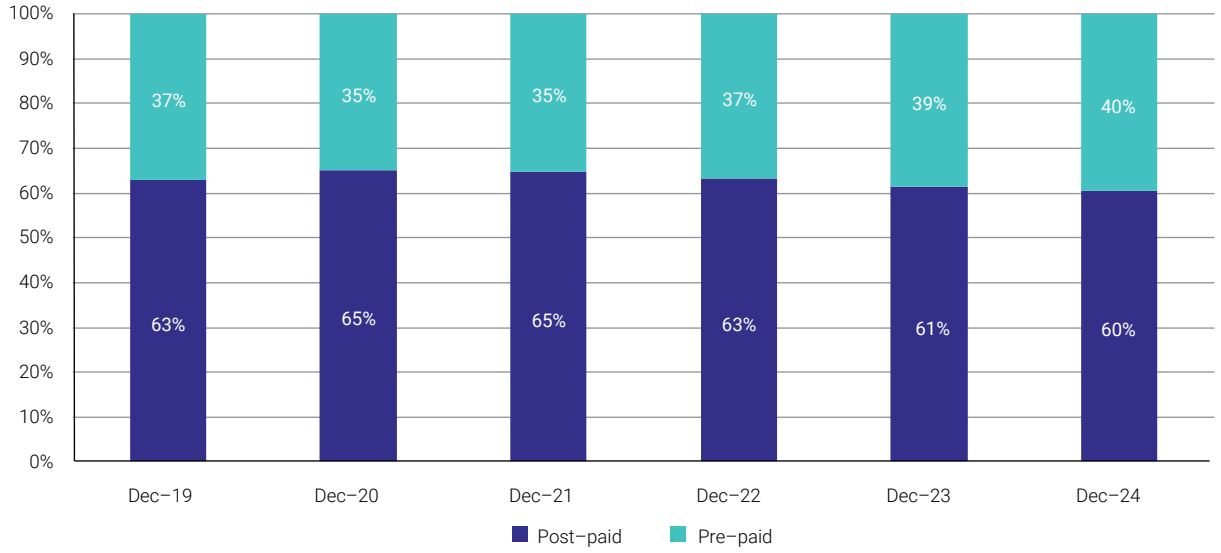
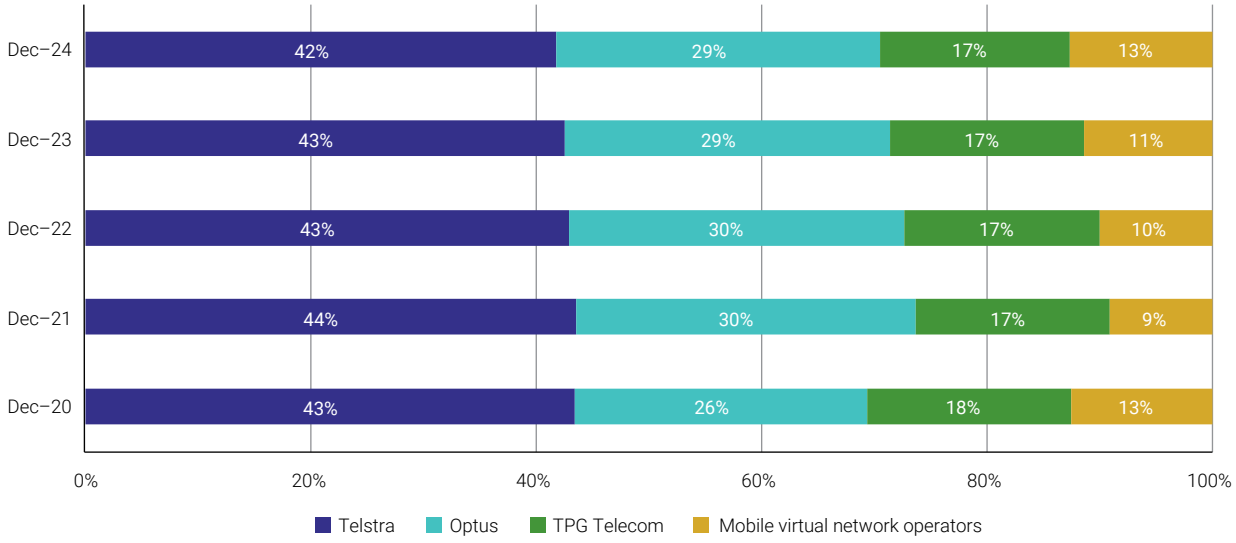


Figure 10 below shows the market share of pre-paid and post-paid mobile phone services by provider. Mobile network operators (including their sub-brands) continue to dominate the market although there has been an increase in the share of services sold by mobile virtual network operators (MVNOs). MVNO market share is now 13%, back to similar levels reported in December 2020.

Figure 10: Pre-paid and post-paid market share



The growth in the proportion of pre-paid services and the rise of MVNO (wholesale) market share suggests that consumers may be seeking out lower cost alternatives.[9] While the flexibility of pre-paid plans can suit temporary users such as travellers, we have previously been informed that pre-paid plans are considered more affordable in the short-term if a consumer has a low or unreliable

9 The ACCC's Communications market report 2023–24 (see section 3.4.3 on page 36) found that the median advertised prices for the mobile network operators' flagship brands have been significantly higher than the median advertised prices of their sub-brands and MVNOs plans for at least the last 4 years.

income.[10] A consumer survey published by the Australian Communications and Media Authority (ACMA)[11] reported:

- younger Australians in the 18–24 age group were nearly twice as likely (41%) to have a pre-paid service compared with those aged 35 and older (25%)
- Australians living in households with an annual household income under $60,000 were more likely (34%) to have a pre-paid service compared with those living in higher income households (21%).

The Bureau of Communications, Arts and Regional Research (BCARR) report[12] on its findings from the Longitudinal Study of Australian Children noted:

- pre-paid plans are more common among children and 'among groups identified in previous studies to be less digitally connected'
- children in regional areas had higher rates of pre-paid plans (75%) than children in major cities (61%)
- pre-paid plans are more common for First Nations peoples.

Data downloaded over mobile services

Volume of data downloaded over mobile services increased

Mobile network operators (including sub-brands) reported an increase in downloads between June 2024 and December 2024. Figure 11 below shows the average monthly data usage for mobile phone and mobile broadband services. Data usage for post-paid mobile phone plans continue to increase, reaching another series peak of 18.0 GB per month. This is a 56% increase from the 11.5 GB reported in December 2021.

Average data usage for pre-paid mobile phone services reached a series peak of 9.7 GB in December 2024. While there has been a 62% increase in data usage for pre-paid mobile services since December 2021, it continues to be much lower than post-paid services as most pre-paid options have lower data rates.

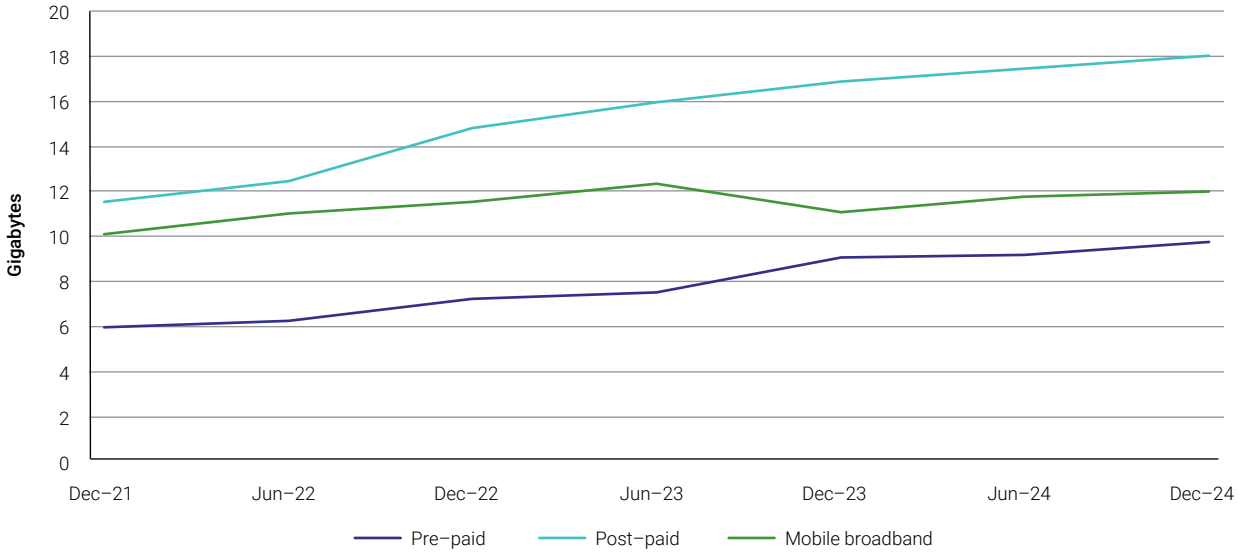
The average data usage for mobile broadband services increased 2.0% to 12.0 GB in December 2024 although the gap to pre-paid services continues to narrow.

10 For example, see: ACCC, *Regional Mobile Infrastructure Inquiry final report*, 23 October 2023, p 15, accessed 17 September 2025.

11 Australian Communications and Media Authority (ACMA), *Telco consumer experience – Australian adults and households*, October 2020, p 16, accessed 17 September 2025.

12 Bureau of Communications, Arts and Regional Research (BCARR), *Australian youth online – Findings from the Longitudinal Study of Australian Children*, August 2025, p 4, accessed 17 September 2025.

Figure 11: Mobile phone and broadband services – average monthly download volumes per service

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