



Internet activity report

For the period ending 30 June 2024

December 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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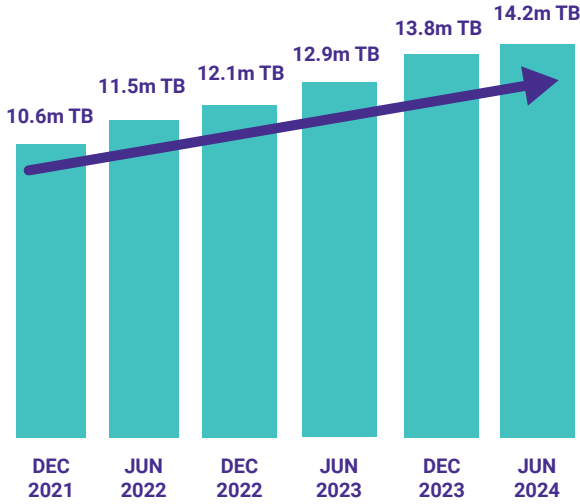
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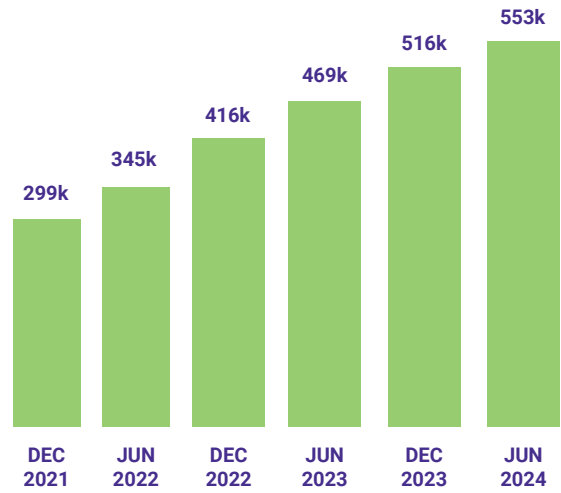
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Data snapshot

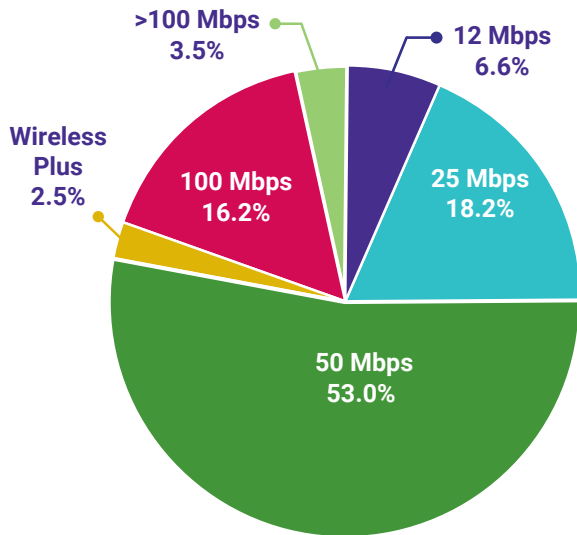
The volume of data downloaded has increased by 23% in the last 2 years



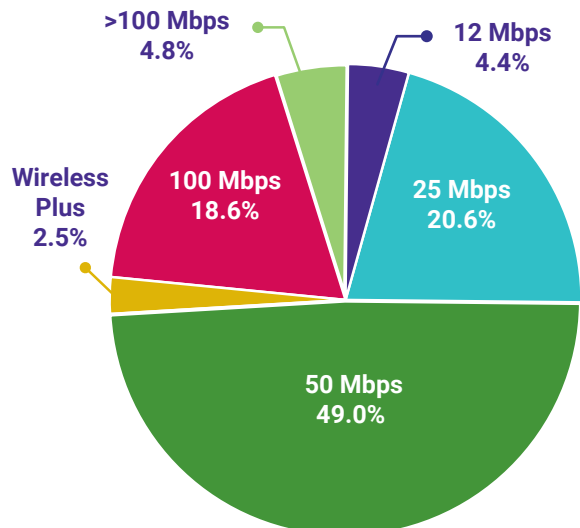
Home wireless broadband services continue to increase



NBN speed tier breakdown



December 2023



June 2024

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.

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

	Jun-23	Jun-24	% annual change
BROADBAND			
NBN	482	514	▲7%
DSL	514	452	▼12%
Non-NBN HFC/Cable	299	336	▲13%
Non-NBN Fibre	495	512	▲3%
Home wireless broadband	444	452	▲2%
MOBILE			
Pre-paid mobile	7.5	9.3	▲23%
Post-paid mobile	15.9	17.4	▲9%
Mobile broadband	12.3	11.7	▼5%

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.¹ 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.
- 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.
- 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. 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

Volume of data downloaded

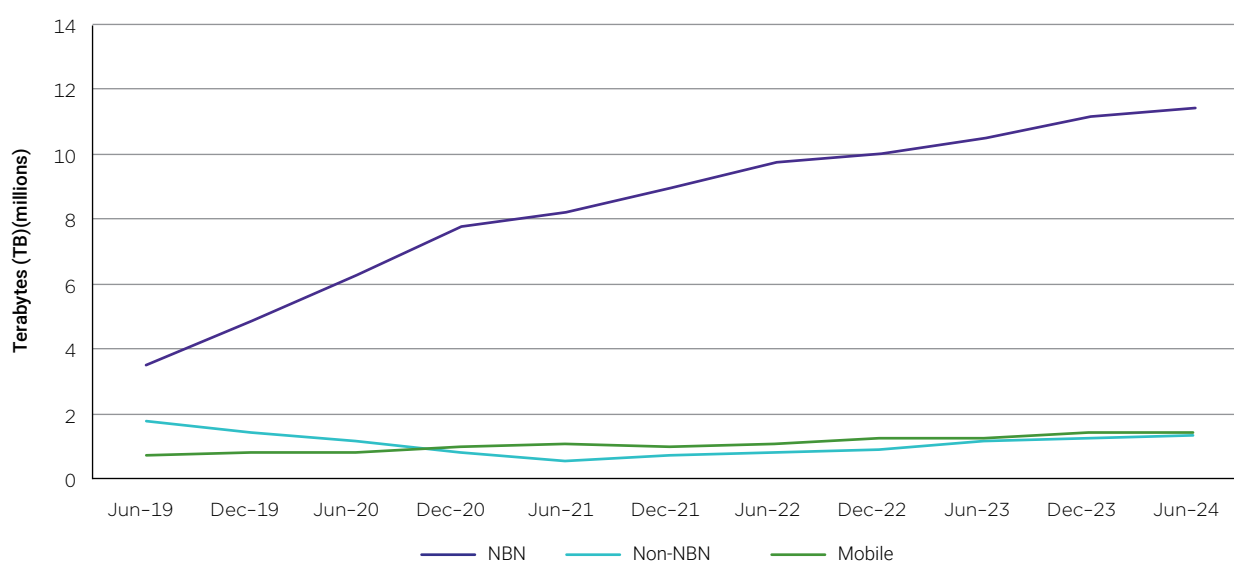
Total download volumes continue to increase across all network types

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 14.2 million Terabytes (TB) of data downloaded across retail broadband internet and mobile services in the 3 months from 1 April to 30 June 2024. This is an increase of 10% from the 12.9 million TB reported in the corresponding period in the June 2023 report.

Figure 1 shows that in June 2024, 81% of these downloads were attributed to NBN services, 10% to mobile services and 9% to non-NBN fixed services.²

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



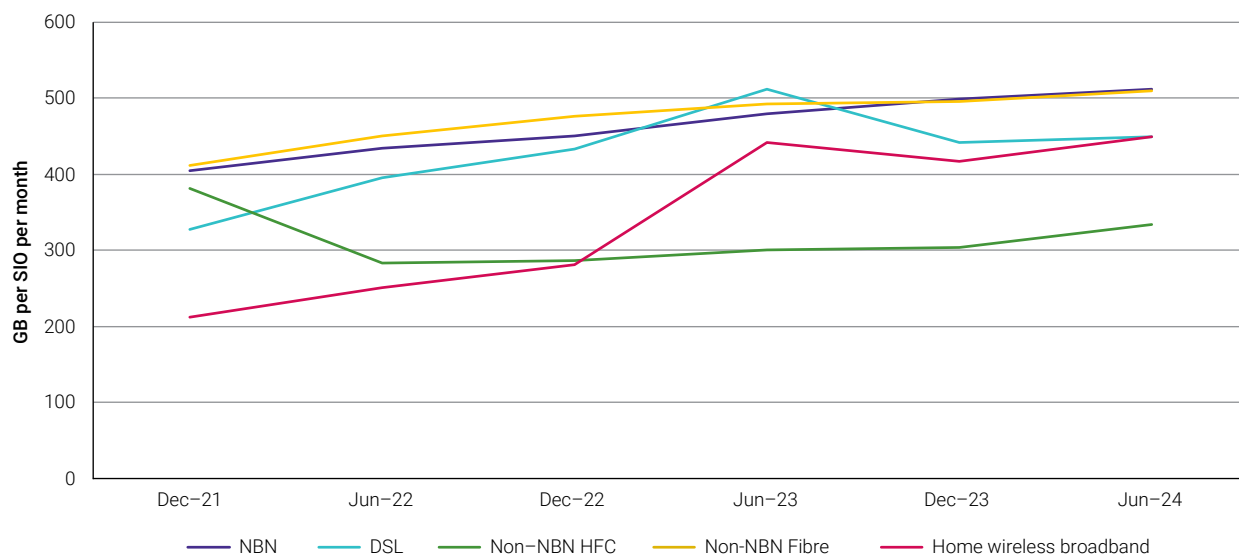
Average monthly downloads increased across all technology types

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. NBN and non-NBN fibre services continue to record the highest average monthly downloads. However, the average download per home wireless broadband service also continues to rise and is equivalent to the average download over digital sub

² 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.

scriber line (DSL) services.³ The lowest average monthly downloads continue to be reported for the non-NBN hybrid fibre coaxial (HFC) technology.

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



NBN downloads decreased in the 12 Mbps and 100 Mbps speed tiers

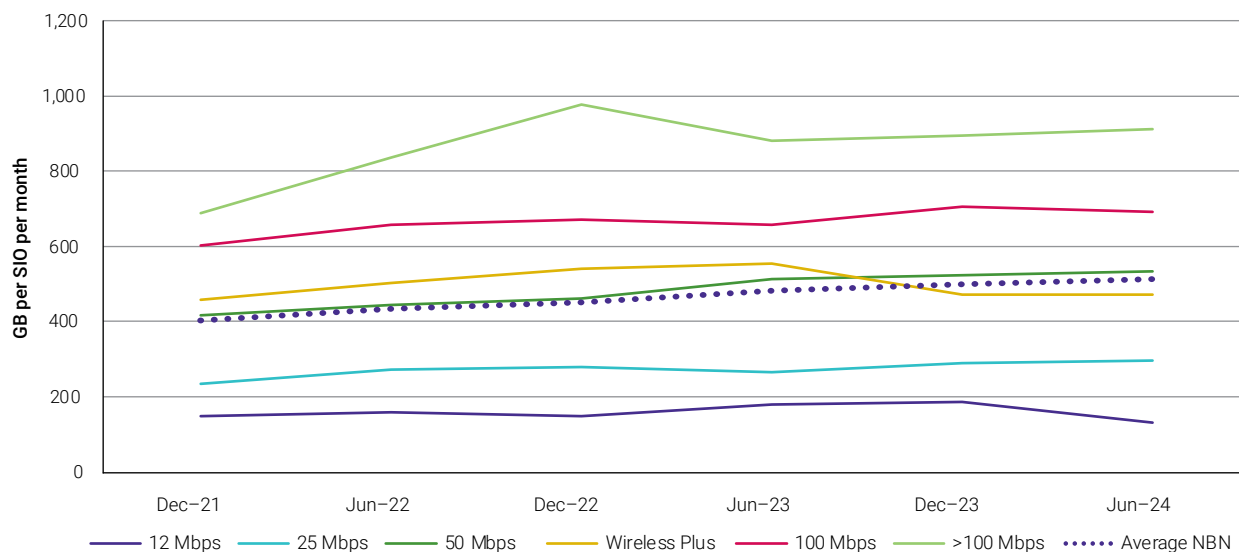
Figure 3 shows the average monthly download per service for NBN speed tiers across the preceding 3-monthly data collection period.⁴ On average, each NBN service downloaded 514 GB per month, up from 501 GB per month in the December 2023 period.

Despite the overall increase in monthly NBN downloads, there were decreases reported in the 12 Mbps and 100 Mbps speed tiers. The largest decrease reported between December 2023 and June 2024 was in the 12 Mbps speed tier, with the average downloads per service per month decreasing by 29% to 132 GB, while the 100 Mbps speed tier decreased by 2% to 694 GB per month.

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

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

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



Broadband services in operation

The number of retail broadband internet services remained steady

At 30 June 2024, there were almost 8.4 million retail broadband internet services reported under this record keeping rule, unchanged from December 2023. Of these, 7.4 million (89% of the total) were NBN services followed by around 549,000 retail home wireless broadband services and 392,000 non-NBN fixed services.

The number of home wireless broadband services continues to increase

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

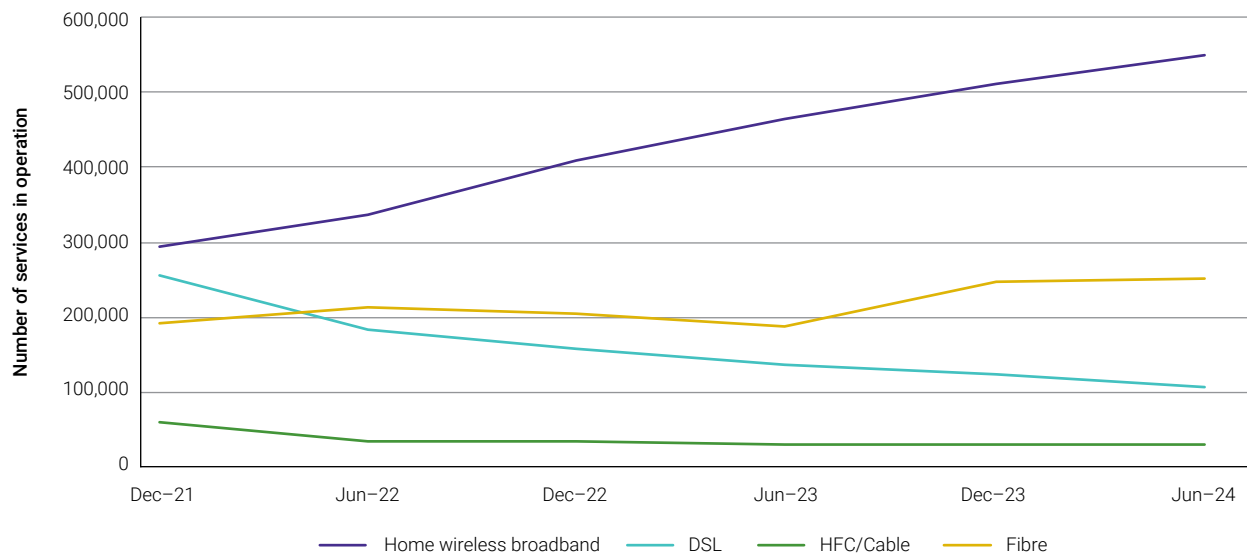
The number of retail home wireless broadband services increased by 8% in the 6 months to 30 June 2024, with approximately 549,000 services reported at 30 June 2024. Figure 4 shows that the number of home wireless broadband services, reported by mobile network operators, has increased significantly from the 294,000 services reported when the ACCC began collecting this information in December 2021.⁵

Unlike the growth observed in the home wireless broadband services reported, there were decreases in the number of NBN and non-NBN fixed lines. The number of NBN services decreased by around 27,000 services in the six months to 30 June 2024.

Non-NBN retailers reported that digital subscriber line services declined again, with a 14% decrease since December 2023. There was a small increase of 2% in the number of non-NBN fibre services reported, with just over 250,000 services reported in the June 2024 period.

⁵ 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.

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



The reported number of NBN and non-NBN services with no data limit plans remained steady, with 93% of services with no data limit plans compared to 90% of non-NBN services with no data limit plans.

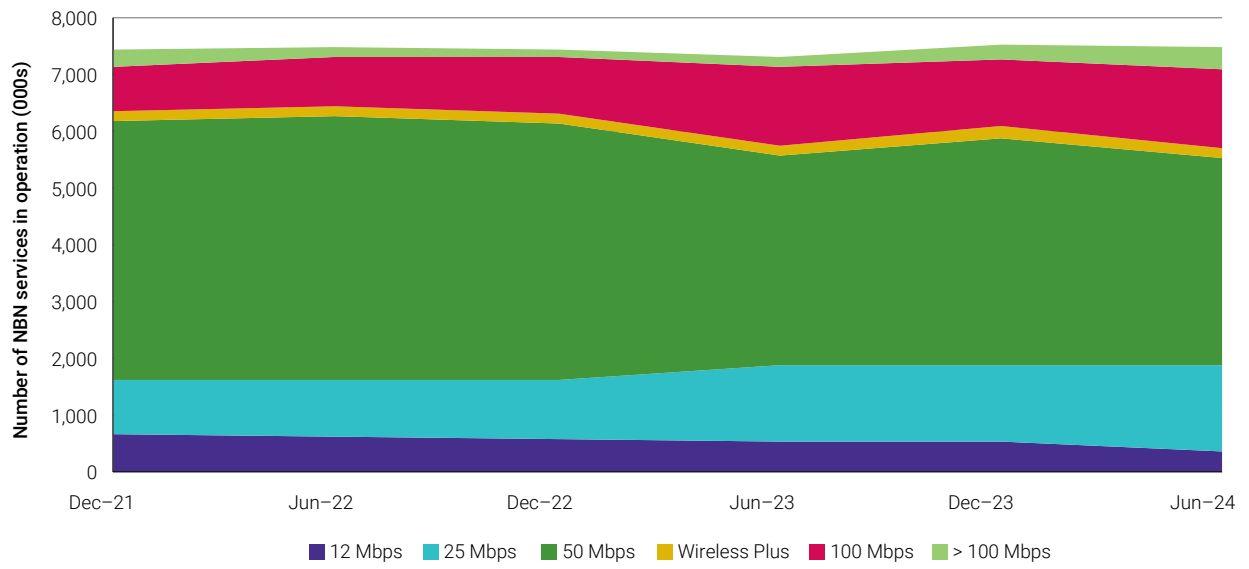
The distribution of NBN speed tiers is evolving

Figure 5 shows that almost half (49%) of NBN services reported in the Internet Activity record keeping rule are at the 50 Mbps speed tier, although this is a decrease from the 53% reported at 31 December 2023. This was followed by the 25 Mbps speed tier (which increased to around 21% of services) and the 100 Mbps speed tier (just under 19% of services). These 3 speed tiers make up almost 90% of all NBN services reported.

Services on NBN speed tiers above 100 Mbps increased by almost 90% since June 2022, increasing from 187,000 services to 352,000 in June 2024. Services above 100Mbps account for almost 5% of total NBN services.

There was a large decrease in the number of NBN services at the 12 Mbps speed tier, with only 328,000 services reported in June 2024, down from 492,000 services in December 2023. Services at the 12 Mbps speed tier now account for 4% of NBN services compared to 7% of all services in December 2023.

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



Mobile services

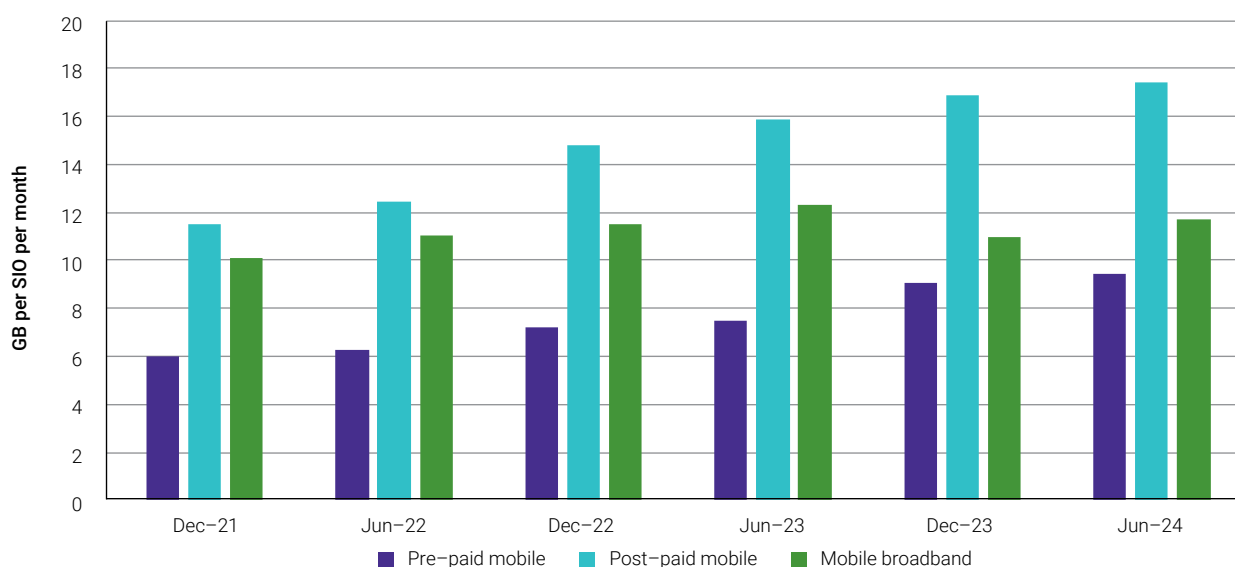
Data downloaded over mobile services

Volume of data downloaded over all mobile services increased

Consistent with the trend seen for retail broadband internet services, mobile network operators reported an increase in total volume of data downloaded over their networks between December 2023 and June 2024.

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

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



Number of mobile services

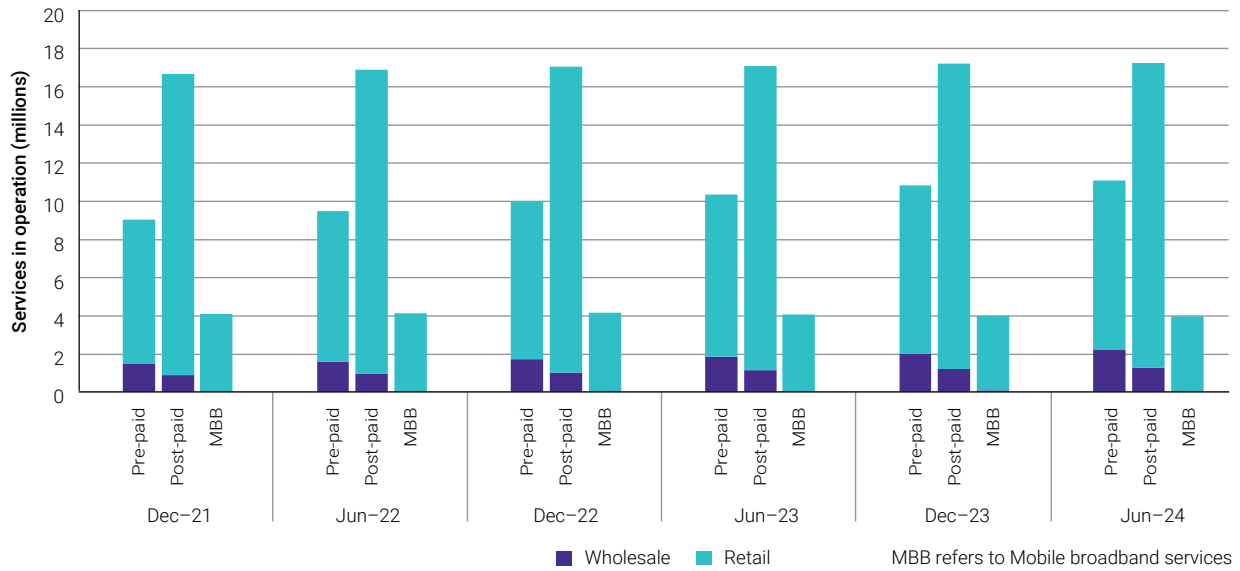
The number of mobile phone services increased, but the rate of growth is decreasing

Mobile network operators reported that the total number of mobile services increased between December 2023 and June 2024. Figure 7 below shows increases of 2.3% and 0.3% in the reported number of pre-paid and post-paid mobile services respectively and a 1.2% decrease in the number of mobile broadband services reported.

The number of pre-paid and post-paid services reported under the Internet Activity record keeping rules was just over 30 million services for the first time in June 2024. Pre-paid services continued to account for 39% of all reported pre-paid and post-paid mobile phone services in June 2024.

The number of pre-paid and post-paid services offered by mobile virtual network operators increased by 8% in the six months to 30 June 2024.⁶ This increase was higher than the increases reported for the mobile network operator's own retail brands however the overall market share remained steady.⁷

Figure 7: Total mobile services in operation by type and wholesale/retail splits



⁶ These are the wholesale pre-paid and post-paid services reported by the mobile network operators.

⁷ Including their respective sub-brands.

