

accan



Consumer Sentiment Tracker

Wave 1

July 2025

ACCAN Consumer Sentiment Tracker

From education and employment to health care, government services and social connection, internet access underpins full participation in modern life. Reliable and affordable connectivity is a necessity for many Australians and a non-discretionary item in household budgets.

As the voice of consumers of communications and digital services, ACCAN recognises the importance of grounding its advocacy work in robust, up-to-date evidence about how people are using digital communications services, what's working for them, and if they are being let down.

This research will identify how Australians engage with their mobile and home internet services, what drives satisfaction and dissatisfaction, and where gaps or barriers may exist in access, affordability, reliability, and digital inclusion.

The findings will be used to inform policy, regulation and industry practice - ensuring that consumer needs are at the centre of decisions about Australia's communications future.



ACCAN

ACCAN is the peak national consumer advocacy organisation for communications.

Essential Research

Essential Research is a progressive strategic communications and research company.

Executive Summary

Connectivity is a compulsory household expenditure for most Australian households and as such, price is a key barrier or enabler to access

Nearly nine in ten consumers say their home internet connection is vital and they require either constant or nearly constant access (89% of consumers), with mobile connectivity slightly less essential (76%).

78% of consumers agree that affordable, reliable mobile is an essential service, to which every Australian should have access.

Price is the most important factor to consumers when considering their mobile (47%) or home internet plans (41%). Price is particularly important to consumers facing financial insecurity.

Clearly, communications services are a 'must have' for Australian households and stakeholders need to work together to ensure that communications services are affordable for everyone.

Many consumers are satisfied with their communications services but there are areas for improvement around trust and complaints

Connectivity (home and mobile) value for money was consistent with other essential services (e.g. water, banking, etc.), but a significant minority (around 25%) rated the value from internet retailers as poor.

Only 18% of consumers have a high trust that telcos will work to keep costs low and only 19% have high trust that telcos will act in the best interests of consumers.

The trust scores may also reflect the poor numbers that only 66% of consumers who raised an issue with their provider had their complaint fully resolved, and only 39% were satisfied with the complaint resolution experience.

These figures show that telcos are doing a good job most of the time but they need to improve consumer outcomes when things go wrong. There is also more work to be done to drive trust in communications as a sector, particularly around keeping costs low and doing what's best for consumers.

Many consumers are not regularly checking to ensure they are receiving the best deal for mobile and home internet

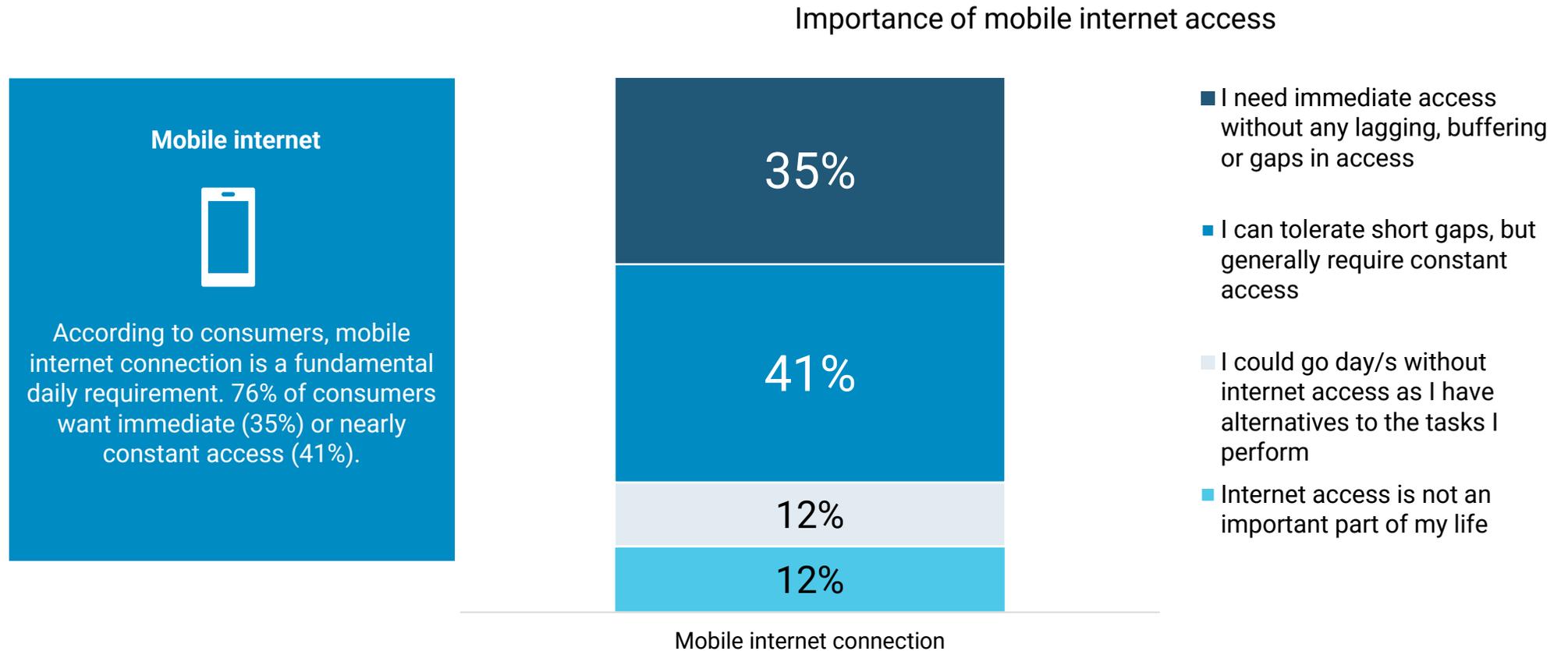
Only 27% of consumers are checking for a better mobile deal every year and only 10% changed their provider in the last year.

Home internet tells a similar story with 27% of consumers investigating switching in the last year and 13% of people having changed providers in the last 12 months.

Around half of consumers are taking longer than 2 years to investigate better mobile and home internet plans.

This data shows that stakeholders should investigate opportunities to give consumers independent, trusted information about the market and what plans are right for them.

More than two thirds of consumers say that mobile internet access is a crucial daily requirement



Q: How important is having internet access to your life? **On the go / In your home**

Base: All participants (n=1,065)

Results with <5% are not labelled on chart

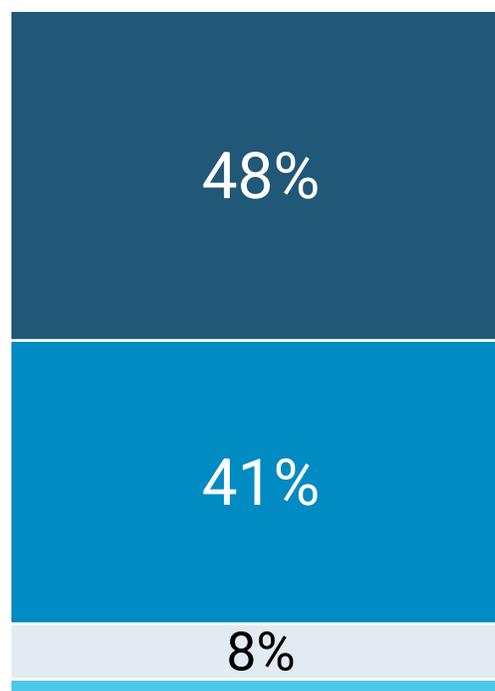
Home internet access is a crucial daily requirement for the vast majority of households

Importance of internet access at home

Home internet



Eighty nine percent of consumers consider their home internet connection a vital part of life and require constant access (48% require immediate access and 41% require constant access).



- I need immediate access without any lagging, buffering or gaps in access
- I can tolerate short gaps, but generally require constant access
- I could go day/s without internet access as I have alternatives to the tasks I perform
- Internet access is not an important part of my life

Home internet connection

Q: How important is having internet access to your life? **On the go / In your home**

Base: All participants (n=1,065)

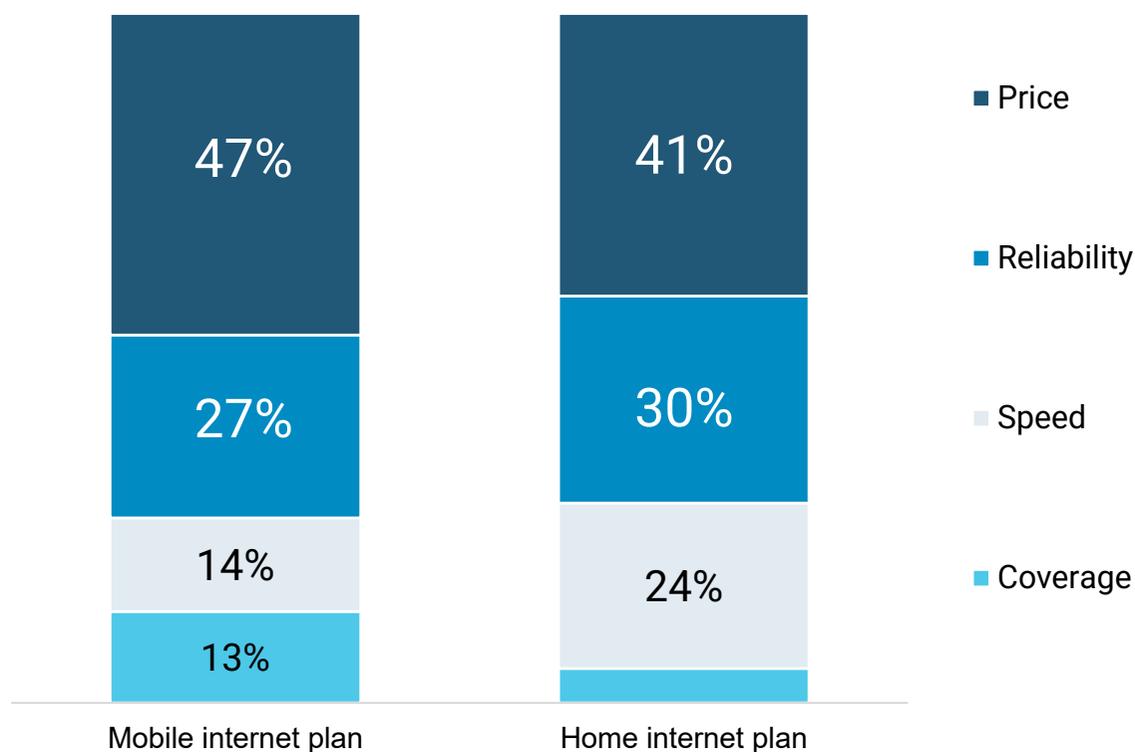
Results with <5% are not labelled on chart

Overall, price is the most important factor when finding a mobile or internet plan – this is particularly relevant for those feeling the greatest cost-of-living pressures

Ranked factors when choosing internet plan: **Most important**

Among all consumers, almost half (47%) rate price as the most important factor when considering their mobile plans.

For home internet, 41% of consumers consider price to be the most important factor for their home internet.



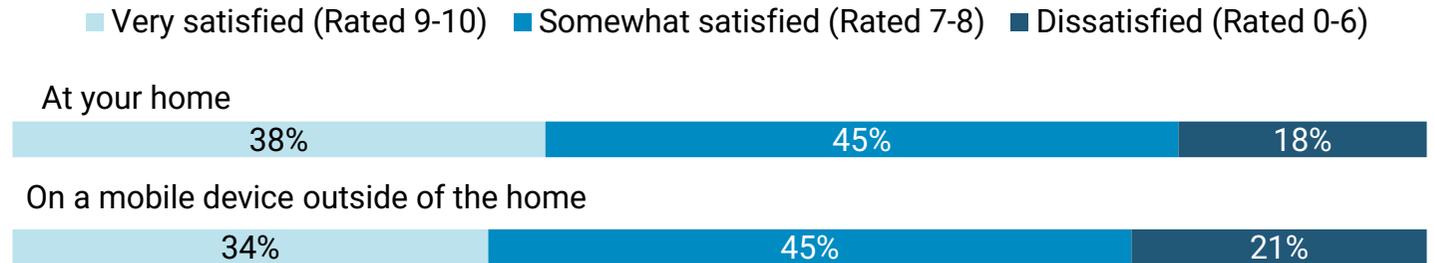
Q: Please rank the following factors in terms of importance when considering which mobile/internet plan is right for you. % **Most important**

Base: All participants (n=1,065)

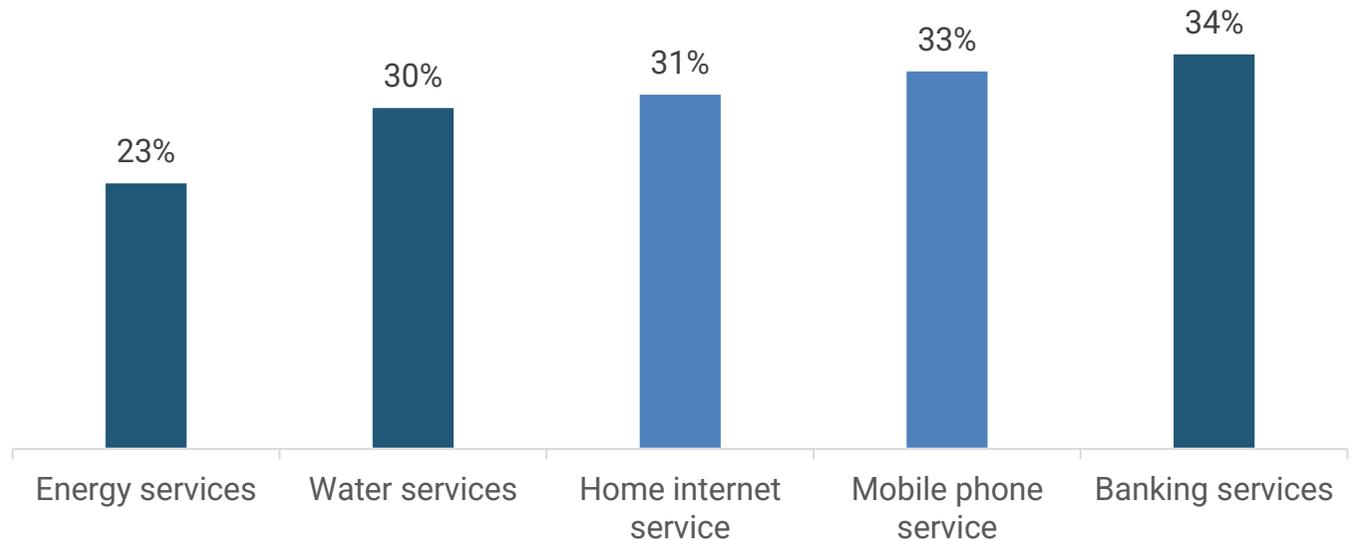
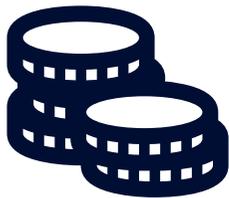
Results with <5% are not labelled on chart

Overall, consumers are mostly satisfied with their communications services and value for money of connectivity providers is comparable to other services with mobile rated slightly higher than home internet

Satisfaction with communications service over the past 6 months



Value for money over the past 6 months



Q: Overall, how satisfied are you with the service and delivery of your communications service over the past 6 months?

Q: How would you rate the overall value for money by your service provider in the following areas, in the past 6 months?

Base: All participants (min. n=767)

Results with <5% are not labelled on chart. Only showing results who rated value for money at 9 & 10.

Home and mobile internet providers are generally trusted to use up-to-date technology and provide protection and security, but less so keeping costs low

Trust with communications service over the past 6 months

■ High trust (Rated 9-10) ■ Moderate trust (Rated 7-8) ■ Low trust (Rated 0-6)

Use the best and most up to date technology



Keep my personal and financial information secure



Provide protection from viruses, scams and hackers when I'm online



Not to misuse my internet search history, appliance usage and information



Act in the best interests of customers



Make a recommendation of the best plan to suit my needs – not just the most expensive



Work to keep costs low



Categories with the highest trust scores are around security – 'Use the best and most up-to-date technology' (25% high trust and 45% moderate trust), 'Keep my personal and financial information secure' (25% high trust and 41% moderate trust) and 'Provide protection from viruses, scams and hackers' (24% high trust, 40% moderate trust).

Consumers are more doubtful about whether providers act in the customers' best interest, offer fair plan recommendations and manage costs effectively.

Q: To what extent do you trust your internet and/or mobile provider in the following areas?

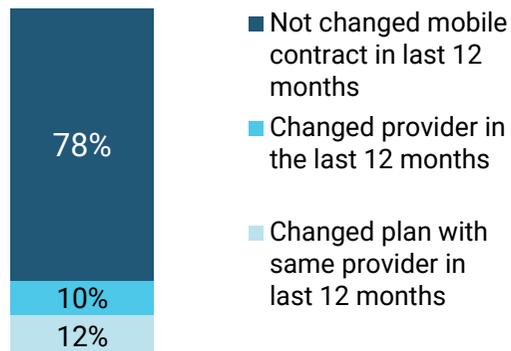
Base: All participants (n=1,065)

Many consumers are not regularly checking their plans and competition to ensure they are receiving the best service or offer

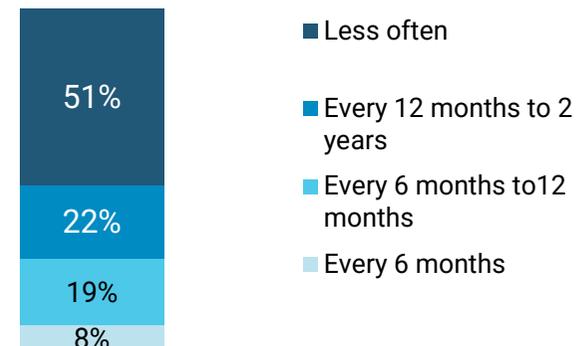
Mobile internet plan



Changed provider or plan



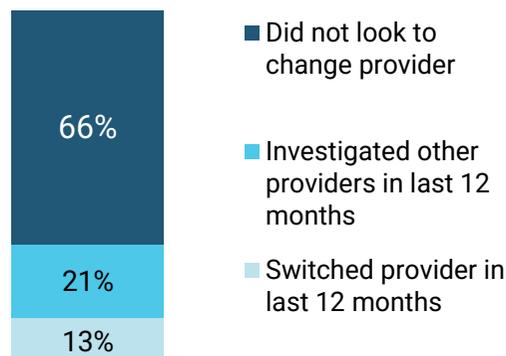
Frequency of investigating switching



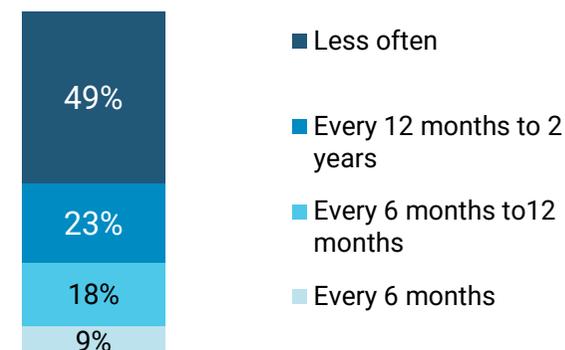
Home internet plan



Changed provider or plan



Frequency of investigating switching



Q: How long have you had your current mobile plan?
 Q: Have you changed your mobile plan provider in the last 12 months?
 Q: How frequently do you usually investigate changing your mobile plan for a better offer?
 Base: All mobile consumers (n=767)
 Results with <5% are not labelled on chart

Q: Have you changed your home internet provider in the last 12 months?
 Q: Have you investigated or compared other internet providers (without switching) in the last 12 months?
 Q: How frequently do you usually investigate changing your home internet for a better offer?
 Base: All home internet consumers (n=940)

Only 14% of mobile consumers had problems with their provider but most who raised the issue were unsatisfied



Q: In the last 12 months, have you had a problem or issue with your mobile provider?

Q: Did you raise this issue or problem as a complaint with your provider?

Q: Has the complaint been fully resolved?

Q: To what extent are you satisfied or dissatisfied with the experience of raising a complaint with your mobile provider?

Q: Did you escalate your complaint to the Telecommunications Industry Ombudsman (TIO)?

☆: All mobile consumers who experienced issue or complaint (n=106).

☎: All mobile consumers who raised the issue with provider (n=76)

Drivers of overall satisfaction: Home internet retailers

Introduction to Drivers Analysis

Relative Importance Analysis is a statistical technique used to determine the proportionate contribution of each independent variable (or driver) in explaining the variation in a dependent outcome (such as satisfaction). It goes beyond standard regression by breaking down the overall impact of predictors, even when they are correlated, to show how much each variable really matters in driving the outcome.

How It Works

Overall satisfaction was selected as the outcome variable, with individual satisfaction elements used as the driver variables. The model then estimates how much each driver contributes to explaining variance in the outcome.

Drivers at the top of the list are the most powerful levers for changing the outcome variable (overall satisfaction), those with medium to lower importance may still matter but are less critical for influencing the outcome.

Results

Consistent speeds are considered the most important driver for home internet satisfaction. Having access to billing, account and usage information follow as other primary drivers.

Drivers of home internet retailer satisfaction



Q: Overall, how satisfied are you with the service and delivery of your communications service over the past 6 months? **At your home**

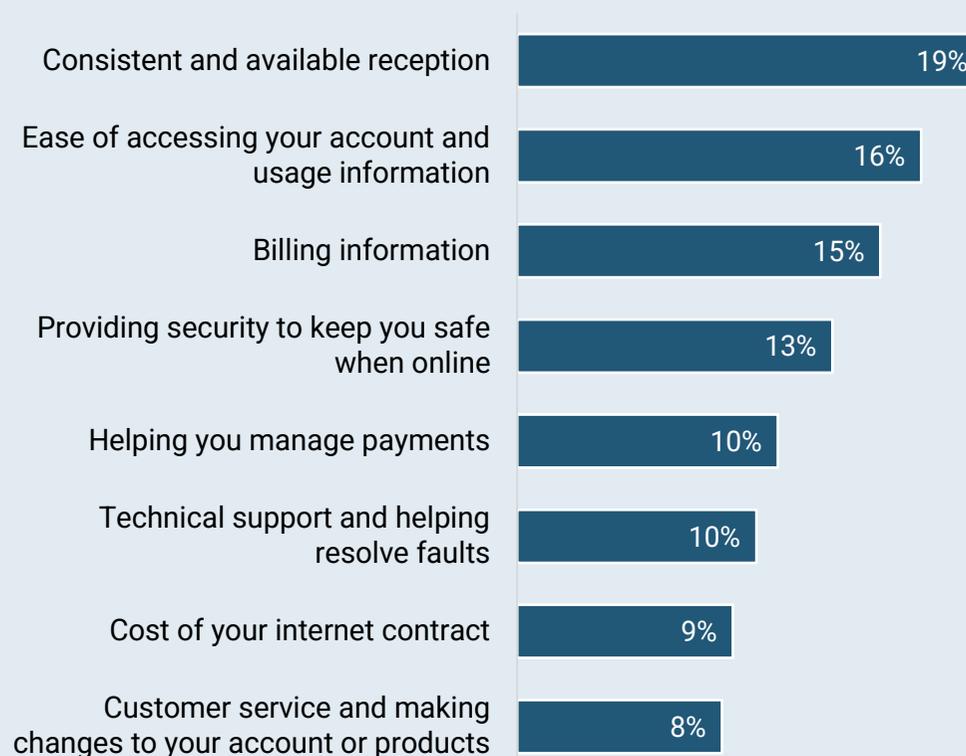
Q: How satisfied are you with the following aspects of your home internet retailer in the past 6 months?

Base: Home internet consumers excl. any incomplete/missing values (n=680)

R²=56%. Overall, the model explains 56% of the variation in the outcome variable

Consistent and available reception is the biggest driver of mobile retailer satisfaction

Drivers of mobile retailer satisfaction



Q: Overall, how satisfied are you with the service and delivery of your communications service over the past 6 months? **On a mobile device outside of the home**

Q: How satisfied are you with the following aspects of your mobile contract retailer in the past 6 months?

Base: Mobile consumers excl. any incomplete/missing values (n=570)

R²=51%. Overall, the model explains 51% of the variation in the outcome variable

Appendix - Methodology



Methodology

Approach:

Online survey: Participants were invited to participate and completed the survey online without an interviewer present and incentives were offered for participation. Participants were sourced via Dynata's online panel.

Sample:

The target population was Australian residents aged 18+ who are customers for mobile and/or home internet services.

Quotas were applied to be representative of the target population by gender, age and location.

The sample of n=1,065 participants was achieved.

Fieldwork Dates:

4th March to 18th March 2025

Fieldwork was paused in Queensland between 7th March and 10th March to avoid the impact of Cyclone Alfred.

Weighting & margin of error:

RIM weighting was applied to the data using information sourced from the Australian Bureau of Statistics (ABS). The factors used in the weighting were gender, age and location.

The weighting efficiency applied to the results at a national level is 98%, which gives an effective sample size of 1,041. The maximal margin of error at the overall sample size is $\pm 3.0\%$ (95% confidence level).



All Essential Research staff hold Research Society membership and are bound by professional codes of behaviour.

Methodology

The target population for the ACCAN Consumer Sentiment Tracker are home and mobile internet consumers aged over 18.

The survey is conducted online, with participants being invited to participate and complete the questions in their own time without an interviewer present. The survey generally takes around 15 minutes to complete.

Quotas were placed on the overall sample by gender, age and location.

Random Iterative Method (RIM) weighting was applied to the final data using information sourced from the Australian Bureau of Statistics (ABS). The final data is weighted based on ABS data by location, age and gender.

Results with a base size of less than n=100 are shown with a caution that results will have a high Margin of Error and therefore may be subject to high variability. Results with a base size of less than n=30 have not been shown.

The survey was programmed and hosted by Dynata, an international online sampling and data collection organisation. All other tasks were completed by Essential Research.

All Essential Research staff hold Research Society membership and are bound by professional codes of behaviour.

Demographic Tables

Gender	n=
Male	525
Female	540
Other term	0

Age	n=
18-24	104
25-34	180
35-44	187
45-54	173
55-64	160
65-74	144
75+	117

Consumer status*	n=
Mobile internet consumer	767
Home internet consumer	940

* Participants can qualify as one, or both consumer groups

Location	n=
New South Wales	336
Victoria	276
Queensland	215
South Australia	80
Western Australia	110
Tasmania	22
Australian Capital Territory	18
Northern Territory	8

Financial Circumstances	n=
Comfortable I don't have to worry about paying bills, I have savings and enough to buy luxuries	179
Secure I'm able to pay bills and usually have money spare for savings or buying luxuries	408
Struggling a bit I have to watch the budget to make sure there's enough money for all the bills	395
In serious difficulty Being able to pay all the bills is a regular concern	83



www.accan.org.au

info@accan.org.au

02 9288 4000

The operation of ACCAN is made possible by funding provided by the Commonwealth of Australia under section 593 of the Telecommunications Act 1997. This funding is recovered from charges on telecommunications carriers.