



Consumer Sentiment Tracker: Reliability

Wave 3

March 2026

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 strategic communications and research company.

Executive Summary

Mobile reliability is fundamental to Australians

Consumers place a lot of importance on the reliability of their mobile service. When asked to rank their priorities, 26% of consumers rated it as their most important feature, second only to price (46%). Reliability featured more highly as a priority than coverage (14%) and speed (14%).

The essential nature of mobile phone services is reflected in high levels of reliance for access to emergency services, with 76% of people telling us that their mobile phone is the only way they have to contact Triple Zero.

The risk to the community from failures of mobile services is stark, with consumers reporting significant vulnerability. Almost a quarter (23%) of people told us that they, or someone in their household, have a medical condition that would place a life at risk if access to Triple Zero services via a mobile phone were lost.

But they are worried about having access when they need it

Consumer confidence in the Triple Zero service is low, with almost half of consumers concerned that their mobile call to Triple Zero could fail to connect during an emergency (47%).

This concern appears at least in part to be driven by experience, with 33% of consumers reporting having experienced at least one unplanned mobile outage in the past year. A further one in 10 (10%) consumers reported that they or a family member had not been able to contact Triple Zero from a mobile phone due to a mobile outage in the past 12 months.

Consumers want meaningful government action to address reliability

People want to see the government take a more active role in telecommunications regulation. Seventy-four percent (74%) of Australians want the government to play a stronger role in regulating telecommunications companies.

Three-quarters (76%) of consumers are supportive of the introduction of minimum reliability requirements for mobile phone networks to match requirements like those in the electricity and water sectors.

Consumers want minimum standards for mobile on a range of service areas, including: ability to call Triple Zero services (85% support), stable phone call connections (85% support), accurate and timely reporting of outages (82% support) and accuracy of coverage maps (82% support).

Crucially though, these service standards need to have teeth.

Consumers overwhelmingly told us that it is important to them that mobile phone providers abide by minimum standards, especially around the ability to call Triple Zero (86% rated it extremely important or very important).

If mobile phone providers fail to follow minimum standards, 74% of consumers support financial penalties.

“Keeping connected = keeping safe”

Mobile reliability is fundamental to Australians

ACCAN asked consumers:
What does having a reliable mobile phone network connection mean to you?
A sample of responses includes:

“This day and age require you to be constantly contactable for daycare, work etc. a reliable mobile connection would remove the anxiety of something happening and I couldn't be connected or contacted” - Participant

“It allows me to feel safe ” - Participant

“I need to be able be on call when my family need me” - Participant

*“Having a reliable connection means that I am able to message people in important situations at best, to access maps to find essential services.”
- Participant*

Q: What does having a reliable mobile phone network connection mean to you?
Base: All participants (n=1,014)

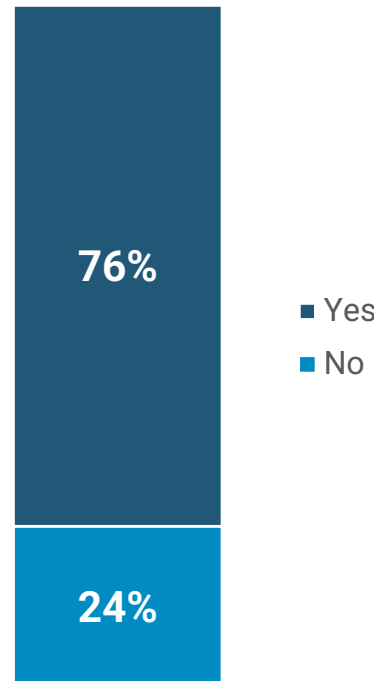
Mobile phones access is fundamental to accessing emergency services

Mobile phones have become essential to people's safety. Over three-quarters (76%) of people tell us that their mobile phone is the only way to contact Triple Zero.

This is particularly true for 18–34-year-olds (80%) and 35–54-year-olds (81%).

The majority (80%) of people who describe their financial circumstances as struggling a bit or in serious difficulty rely on their mobile phone to contact Triple Zero.

Mobile only access to Triple Zero



“Living in a rural area.....everything!! Travelling long distances you rely on excellent service if you have a breakdown etc.”

- Participant

“Very important, I live alone so I need to have the access in case of emergency. I have no landline too”

- Participant

Q: In your household, is a mobile phone the only way to contact Triple Zero (Police, fire brigade or ambulance)?
Base: All participants (n=1,014)

Access to Triple Zero is critical for vulnerable consumers



23%

of households reported having a medical condition that would place a life at risk if access to Triple Zero services via a mobile phone was lost.

“Very important as my daughter has asthma and I need to know I can call an ambulance asap”

- Participant

“Means safety and security for me ”

- Participant

“Being able to rely on both coverage and connection in case of emergency”

- Participant

Q: Do you, or someone in your household, have a medical condition that would place a life at risk if access to Triple Zero services via a mobile phone was lost?

Base: All participants (n=1,014)

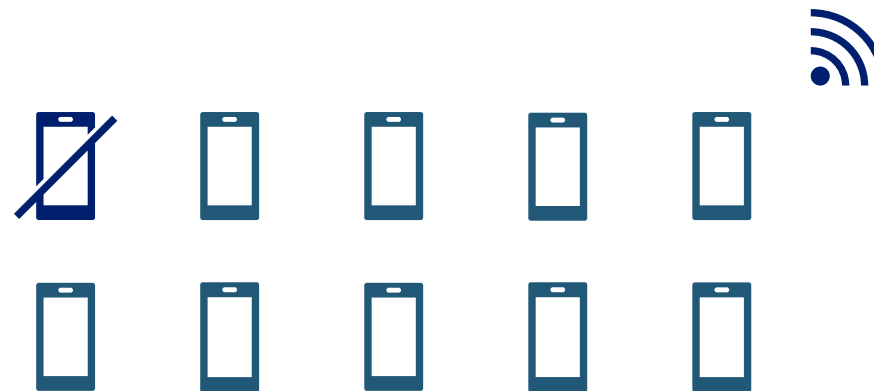
Consumers are reporting difficulties in accessing Triple Zero due to mobile network outages

Ten percent (10%) of people report that they, or a member of their family, were not able to contact Triple Zero from a mobile phone due to a mobile outage in the past 12 months.

It appears that younger people and culturally and linguistically diverse people were also more likely to report an issue.

Nineteen percent (19%) of 18–34-year-olds reported an issue with contacting Triple Zero from a mobile (n=292).

The number of reported difficulties was also higher (20%) for people who speak a language other than English at home (n=169).



One in ten

consumers report that they or a member of their family could not contact Triple Zero from a mobile phone due to a mobile outage in the past 12 months.

Q: In the past 12 months have you or a member of your family not been able to contact Triple Zero from a mobile phone due to a mobile outage?

Reports reflect consumers perceived experience in accessing Triple Zero. ACCAN notes that multiple factors may influence the ability of consumers to access Triple Zero services, but consumer perceptions of mobile outages may influence their behaviour when seeking to access emergency services.

Base: All participants (n=1,014)

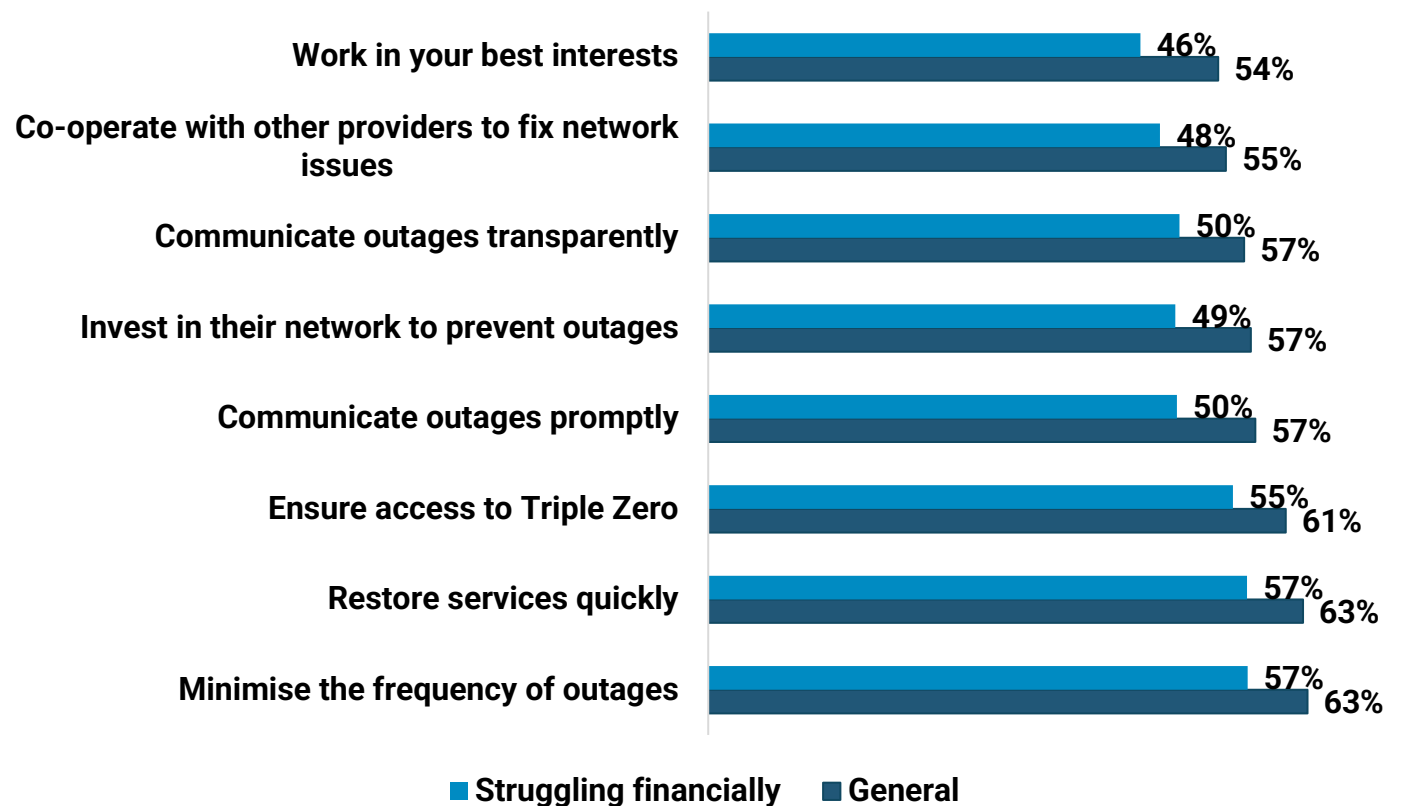
Many consumers do not trust their mobile network provider around reliability and there is a trust gap with those who are under financial pressure

Consumers had mixed views about the level of trust in their mobile phone provider. Consumers were least trusting around their mobile provider working in their best interest (54%) or co-operating with other providers to fix network issues (55%).

Of most concern, trust in access to Triple Zero only held at 61%, indicating that there is more to do to ensure consumer trust in emergency communications.

There was also a noticeable trust gap between those experiencing financial pressure and the average. Across every measure, participants under financial strain reported lower trust in their mobile network provider. As cost-of-living pressures continue, this trust gap could indicate material service differences for consumers.

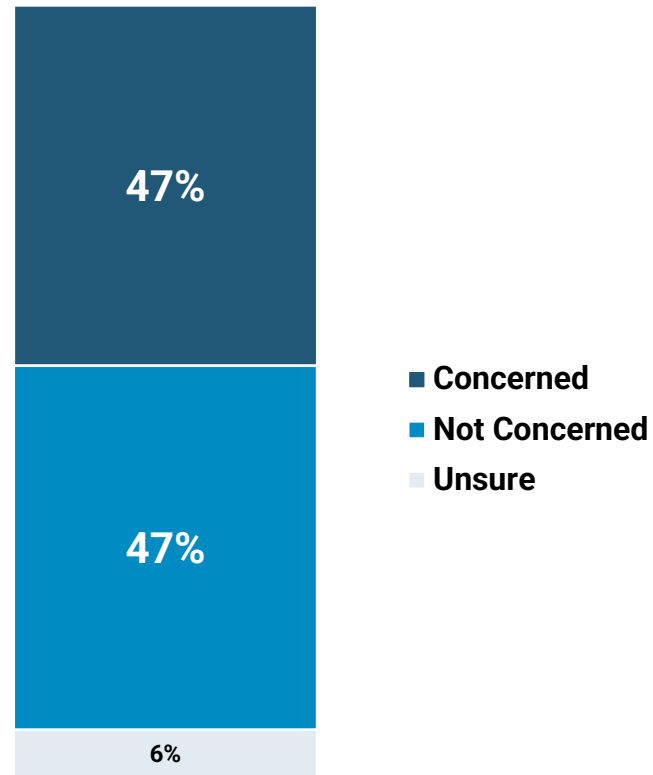
Trust in mobile network provider: **Total trust (4 and 5)**



Q: How much do you trust your mobile phone network provider to do each of the following? Five-point scale from 'trust completely' to 'Do not trust at all'.
 Base: All participants (n=1,014), 'Struggling a bit' and 'In serious difficulty' (n=457)

Almost half of consumers are concerned that their mobile call could fail to connect during an emergency

Concern for Triple Zero connection in an emergency



Q: How concerned are you that your mobile call to Triple Zero could fail to connect during an emergency?
Base: All participants (n=1,014)

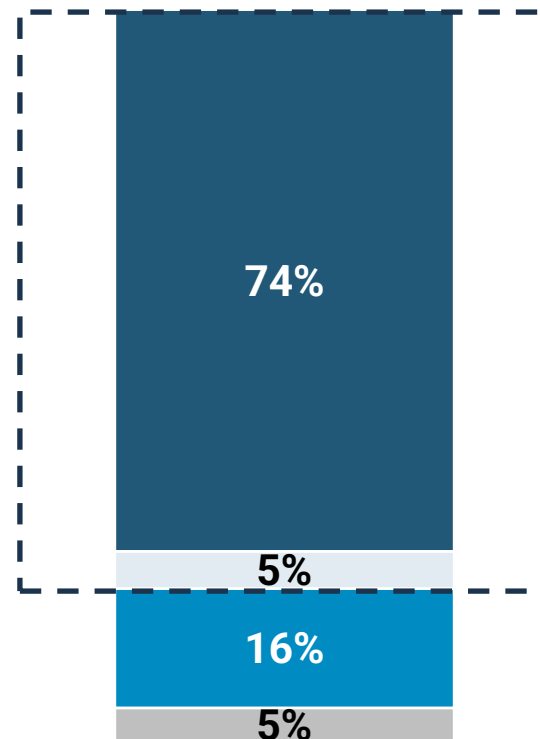
Consumers want meaningful
government action to address reliability

Consumers overwhelmingly support the government to play a stronger role in regulating telcos

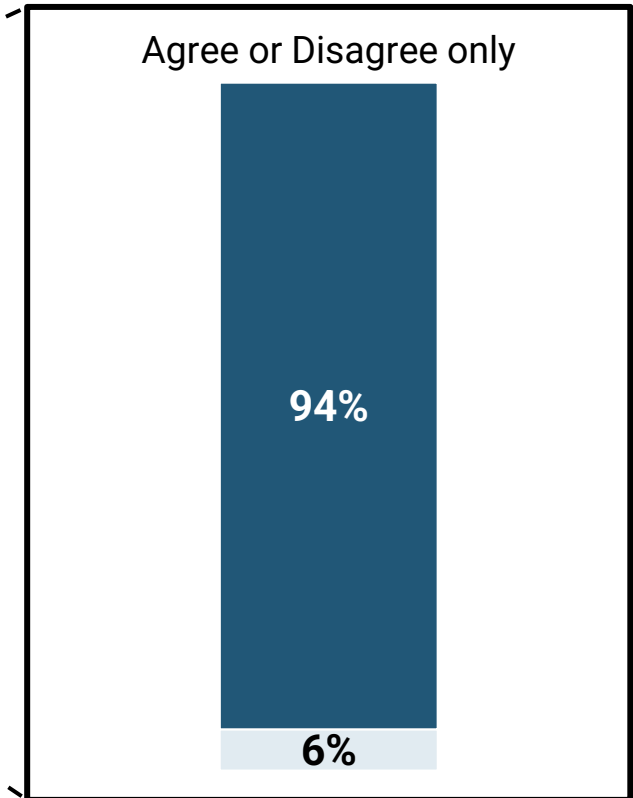
Around three-quarters of consumers want to see the government take a more active role in telecommunications regulation (74%).

When we filtered for responses with a firm view (excluding unsure and neither agree nor disagree), 94% of those with a firm view agreed that the government should play a stronger role in regulating telecommunications providers, and only 6% disagreed.

Stronger role for government in telecommunications regulation



Agree or Disagree only



■ Agree ■ Disagree ■ Unsure ■ Neither agree, nor disagree

Q: To what extent do you agree or disagree that the government should play a stronger role in regulating telecommunications companies?

Base: All participants (n=1,014), rebased modelling removing 'Neither agree nor disagree' and 'Unsure' (n=801).

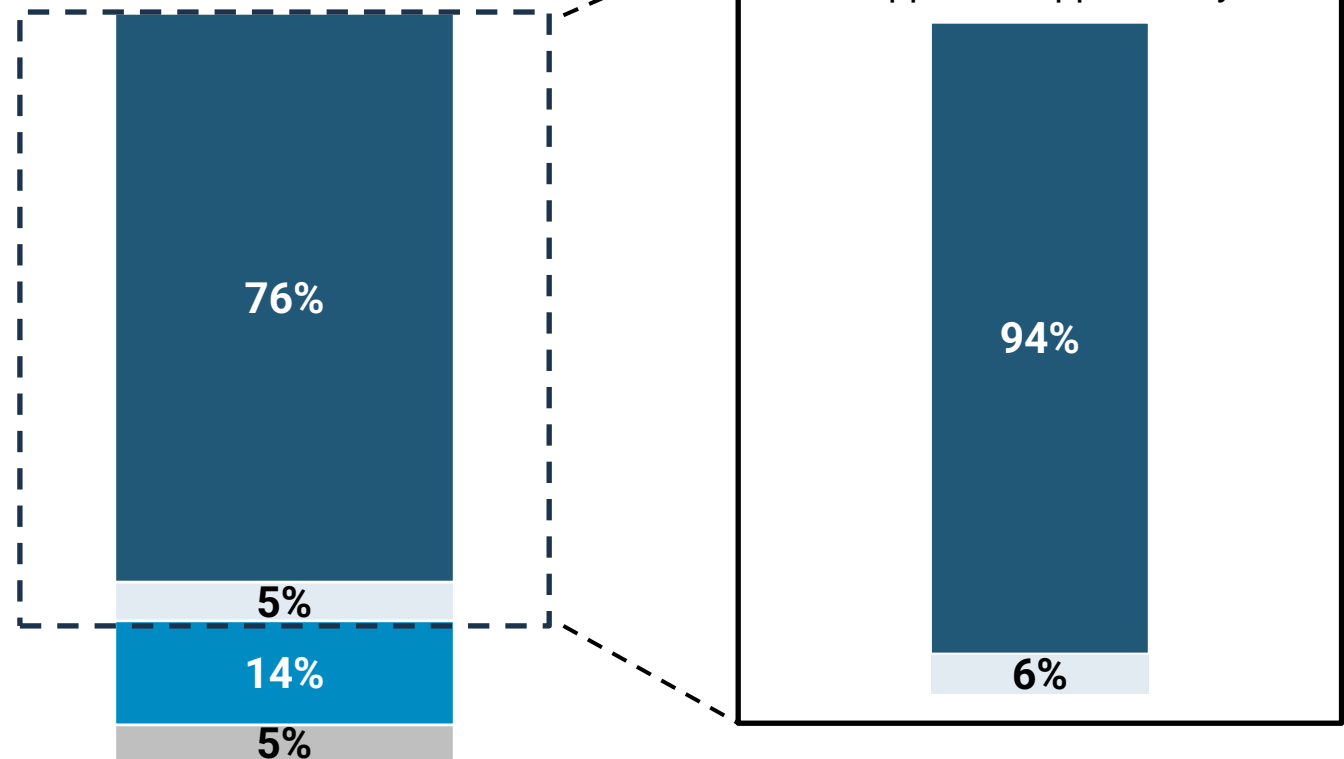
Results with <5% are not labelled on chart

Consumers strongly support the government introducing minimum service standards

More than three-quarters (76%) of consumers are supportive of the introduction of minimum reliability requirements for mobile phone networks to match requirements like those in the electricity and water sectors.

When we filtered for responses with a firm view (excluding unsure and neither support nor oppose), 94% of those with a firm view supported introducing minimum reliability requirements for mobile network providers and only 6% opposed.

Minimum reliability requirements for mobile phone network providers



■ Support ■ Oppose ■ Unsure ■ Neither support, nor oppose

Q: Do you support or oppose the introduction of minimum reliability requirements for mobile phone network providers like those in electricity and water?

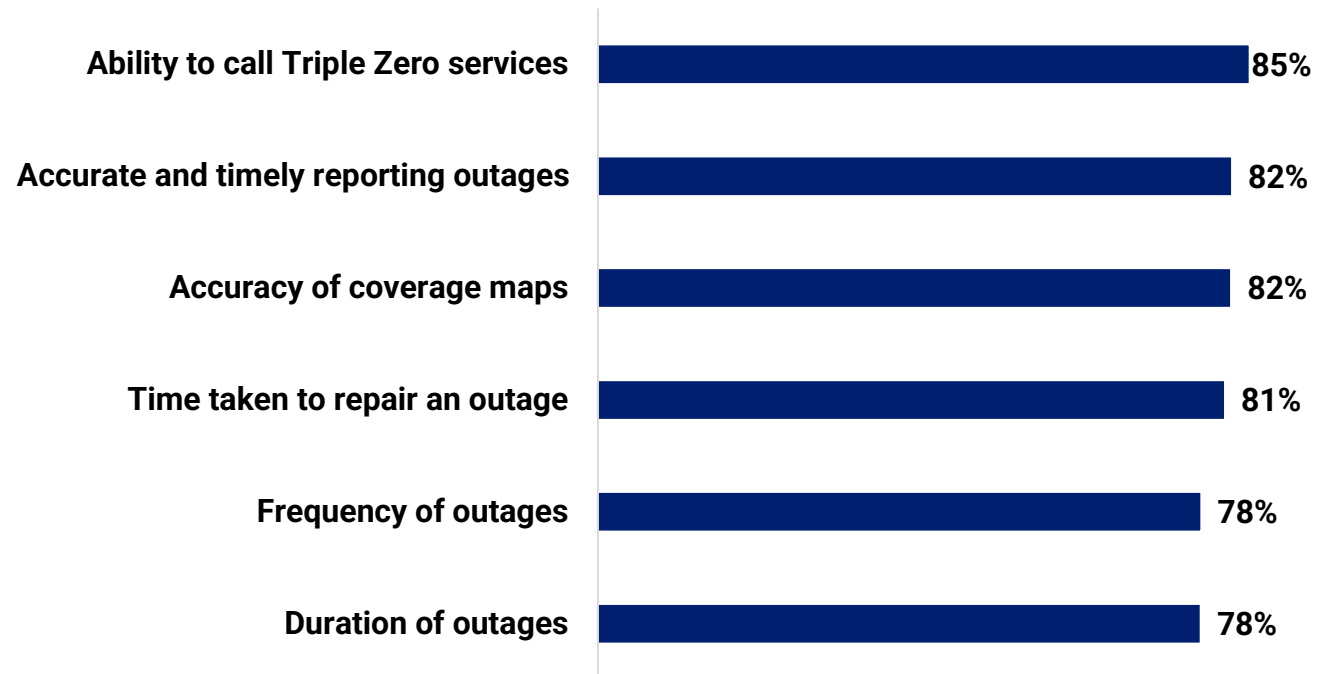
Base: All participants (n=1,014), rebased modelling removing 'Neither agree nor disagree' and 'Unsure' (n=826).

Results with <5% are not labelled on chart

Consumers support minimum mobile service standards, especially for Triple Zero

Consumers want minimum standards for mobile on a range of service areas. Priority service areas include: ability to call Triple Zero services (85%), accurate and timely reporting of outages (82%) and accuracy of coverage maps (82%).

Strength of support for minimum mobile service standards:
Strongly support and somewhat support

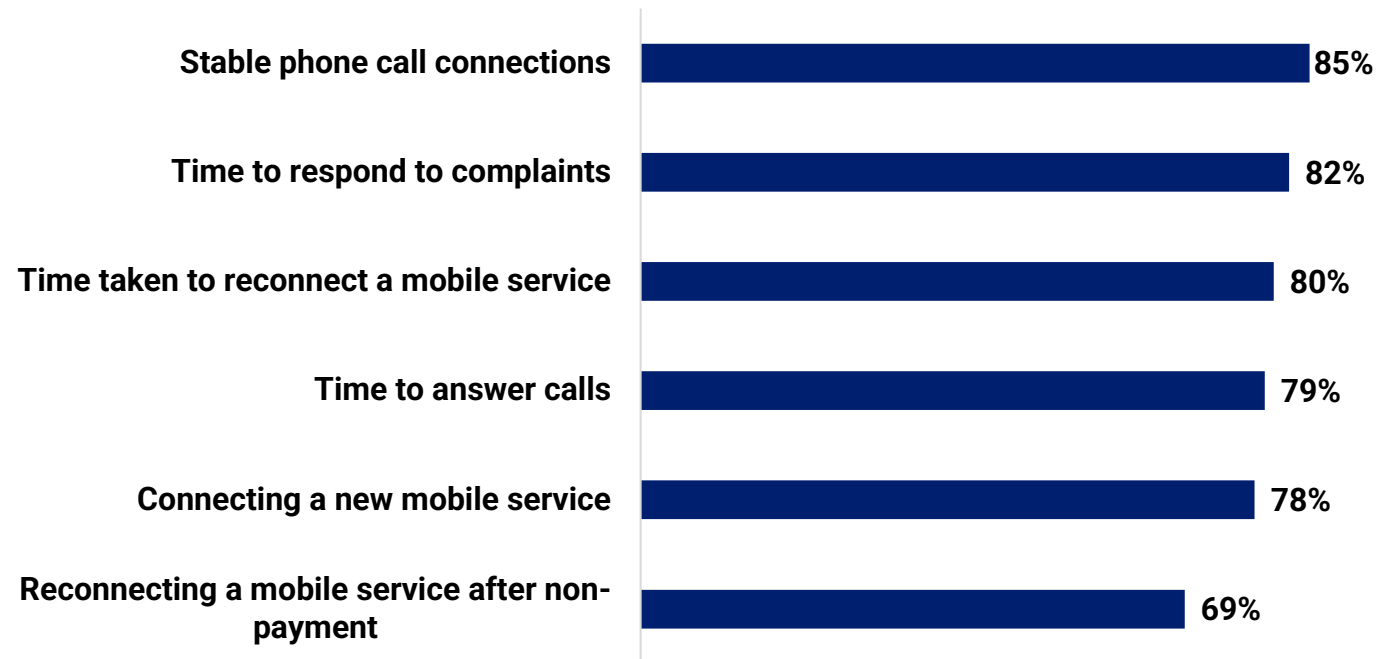


Q: How strongly do you support or oppose mobile phone network providers having to abide by rules around minimum standards in each of the following areas?
Base: All participants (n=1,014)

Consumers support mobile service standards to improve customer service

Consumers overwhelmingly told us that they support minimum standards for a range of service areas. The most important service standard for consumers was stable phone call connections (85%).

Strength of support for minimum mobile service standards:
Strongly support and somewhat support

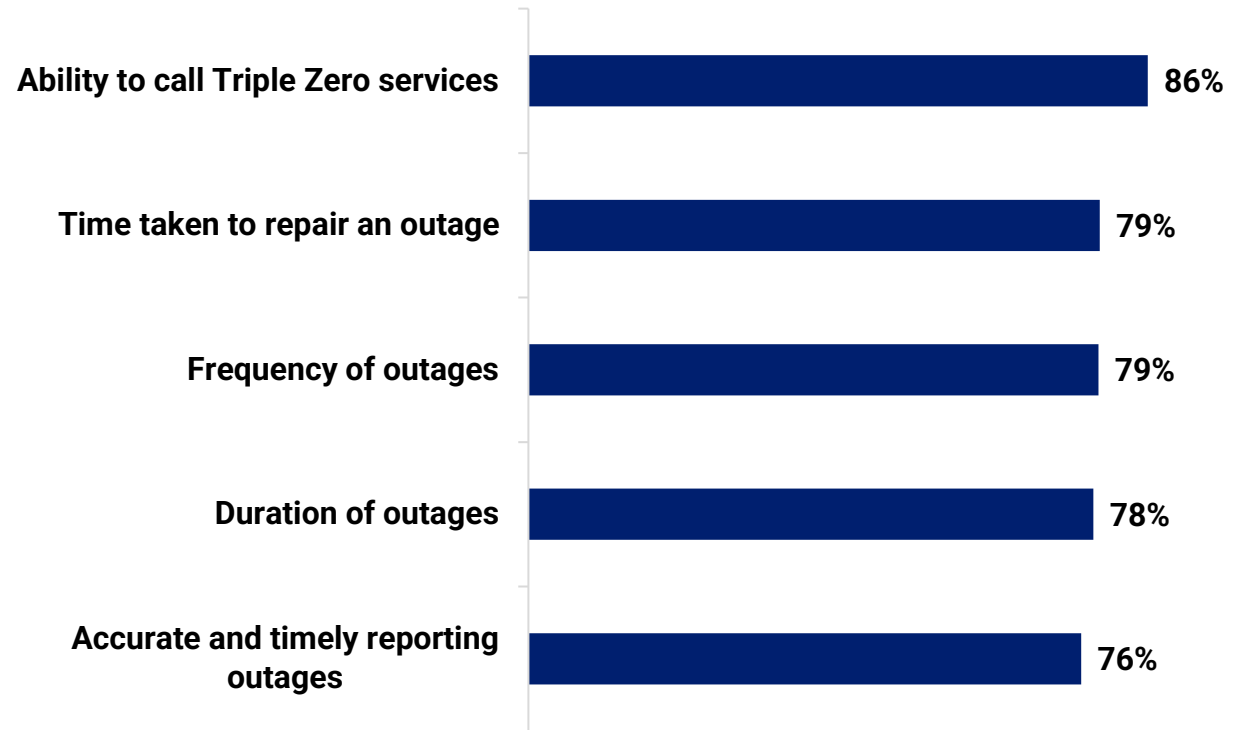


Q: How strongly do you support or oppose mobile phone network providers having to abide by rules around minimum standards in each of the following areas?
Base: All participants (n=1,014)

Consumers want telcos to follow minimum standards for reliability

It is important to consumers that mobile phone providers abide by minimum service standards around reliability, especially around the ability to call Triple Zero (86% rated extremely important or very important).

Importance that mobile providers abide by minimum standards:
Extremely important and Very important

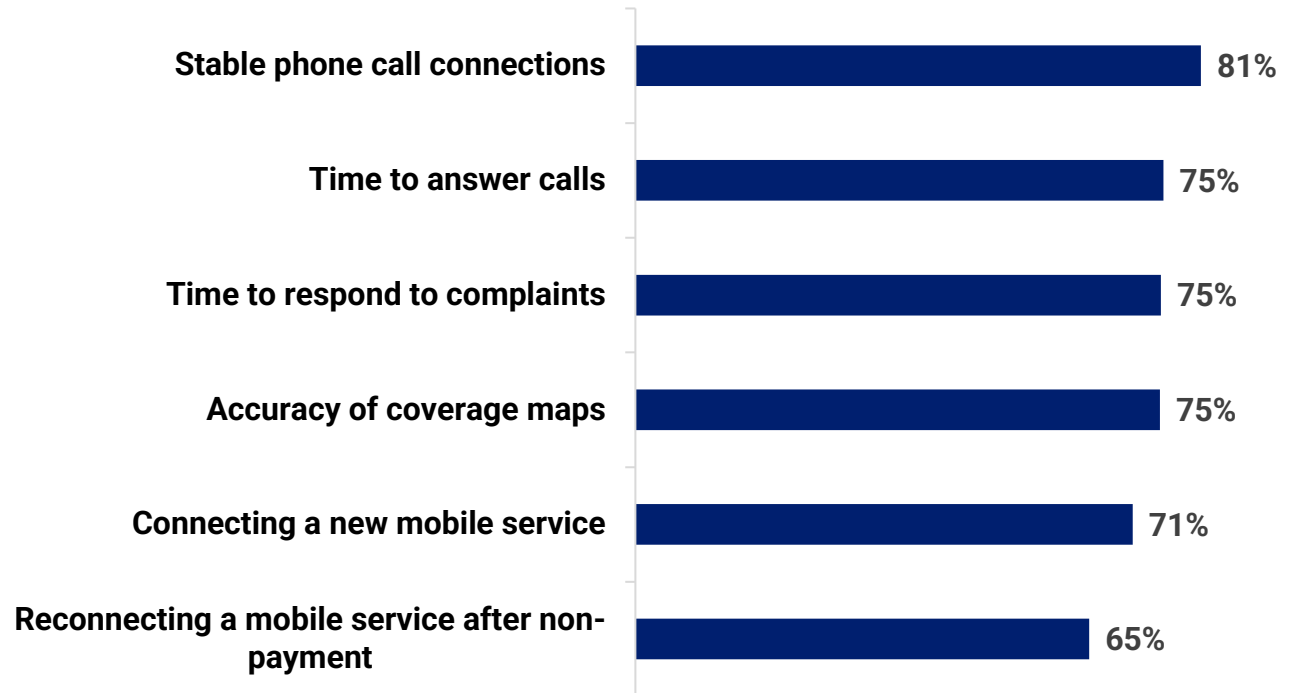


Q: How important to you is it, that mobile phone network providers abide by rules around minimum standards in each of the following areas?
Base: All participants (n=1,014)

Consumers want telcos to follow minimum standards for customer service

Consumers told us that it is important to them that mobile phone providers abide by minimum customer service standards. Consumers rated providing stable mobile phone call connections (81%) as a high priority.

Mobile providers abide by minimum standards:
Extremely and Very important

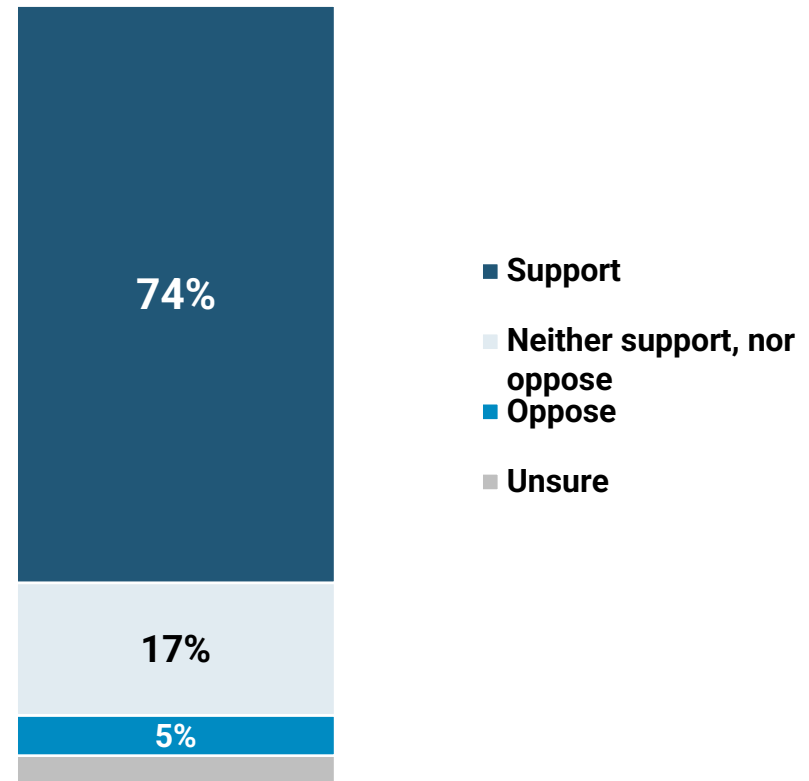


Q: How important to you is it, that mobile phone network providers abide by rules around minimum standards in each of the following areas?
Base: All participants (n=1,014)

Consumers support financial penalties for mobile phone networks that fail to deliver

If the government introduces minimum service standards, consumers want their mobile phone provider to follow the rules. Three quarters (74%) of consumers support financial penalties for mobile phone network companies who fail to meet minimum service standards.

Financial penalties for mobile phone network companies



Q: If reliability standards were to be introduced for mobile phone services, to what extent would you support or oppose financial penalties being handed out to mobile phone network companies who fail to meet service standards?

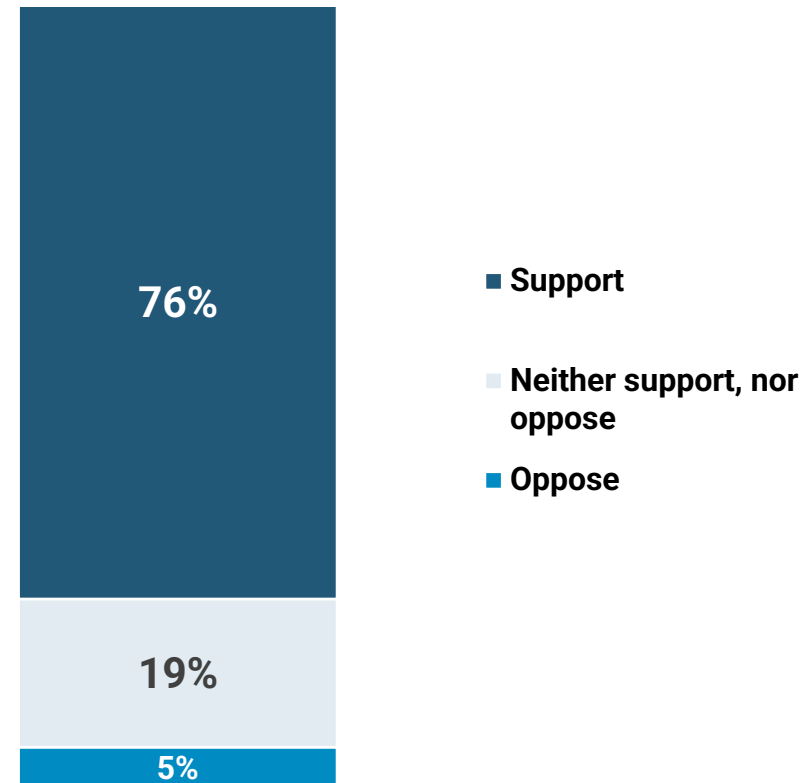
Base: All participants (n=1,014)

Results with <5% are not labelled on chart

Consumers support compensation for affected customers when things go wrong

If the government introduces minimum service standards, consumers want their mobile phone provider to provide compensation if the provider does not meet those standards. The majority of consumers support (76%) automatic compensation to customers if mobile phone network providers fail to meet minimum service standards.

Support for compensation to customers



Q: To what extent do you support or oppose automatic compensation to customers if mobile phone network providers fail to meet service standards?


Base: All participants (n=1,014)

Results with <5% are not labelled on chart

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:	<p>The target population was Australian residents aged 18+ who are customers for mobile and/or home internet services.</p> <p>Quotas were applied to be representative of the target population by gender, age and location.</p> <p>The following samples were achieved in each fieldwork period: March 2025 n=1,065; August 2025 n=1,000; February 2026 n=1,014.</p>
Fieldwork Dates:	<p>Wave 1: 4th March to 18th March 2025. Note that fieldwork was paused in Queensland between 7th March and 10th March to avoid the impact of Cyclone Alfred.</p> <p>Wave 2: 15th August to 29th August 2025.</p> <p>Wave 3: 13th February to 2nd March 2026.</p>
Weighting & margin of error:	<p>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.</p> <p>Wave 1: 98% weighting efficiency at a national level, giving an effective sample size of 1,041 and a maximal margin of error at the overall sample size of $\pm 3.0\%$ (95% confidence level).</p> <p>Wave 2: 96% weighting efficiency at a national level, giving an effective sample size of 965 and a maximal margin of error at the overall sample size of $\pm 3.2\%$ (95% confidence level).</p> <p>Wave 3: 98% weighting efficiency at a national level, giving an effective sample size of 994 and a maximal margin of error at the overall sample size of $\pm 3.1\%$ (95% confidence level).</p>
	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. The questionnaire weighting and data summaries were prepared by Essential Research, while analysis and reporting were conducted by ACCAN with consultation with Essential Research.

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

Demographic Tables

Gender	n=		
	March 2025	August 2025	February 2026
Male	525	495	500
Female	540	505	513
Other term	0	0	1

Age	n=		
	March 2025	August 2025	February 2026
18-24	104	102	110
25-34	180	175	182
35-44	187	177	175
45-54	173	151	160
55-64	160	150	149
65-74	144	128	127
75+	117	117	111

Consumer status*	n=		
	March 2025	August 2025	February 2026
Mobile internet consumer	767	696	717
Home internet consumer	940	865	869

* Participants can qualify as one, or both consumer groups

Location	n=		
	March 2025	August 2025	February 2026
New South Wales	336	323	320
Victoria	276	257	260
Queensland	215	204	199
South Australia	80	77	76
Western Australia	110	101	105
Tasmania	22	24	26
Australian Capital Territory	18	11	17
Northern Territory	8	3	11

Financial Circumstances	n=		
	March 2025	August 2025	February 2026
Comfortable I don't have to worry about paying bills, I have savings and enough to buy luxuries	179	144	145
Secure I'm able to pay bills and usually have money spare for savings or buying luxuries	408	420	412
Struggling a bit I have to watch the budget to make sure there's enough money for all the bills	395	370	379
In serious difficulty Being able to pay all the bills is a regular concern	83	66	78



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