

Consumer Sentiment Tracker:

Expectations for mobile network delivery

Wave 3

April 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

Connectivity is increasingly essential for consumers, and most tend to have a positive experience

Ninety-one percent (91%) of consumers now require immediate or constant home internet access, up +6 percentage points since August 2025. Connectivity is particularly essential for those under 55 and in paid employment, for whom reliable connectivity is a non-discretionary need.

Most consumers haven't had an issue with their mobile provider, but there are still 14% of people who have experienced a problem in the last 12 months. Among those who have experienced an issue, reception or coverage was the most common cause by a significant margin, cited by 56%, which was well ahead of financial or billing issues (33%), Contract details (22%), and handset faults (21%).

While experiences tend to be positive for the majority, trust in mobile providers across key measures remains muted

Fewer than 2 in 3 consumers trust their mobile network provider across a range of key reliability measures. Trust peaks at 63% for minimising the frequency of outages and restoring services quickly, and falls to 54% for working in consumers' best interests. The gap is most pronounced among vulnerable groups, with just 46% of those struggling financially trusting their provider to work in their best interests, while regional and rural consumers are significantly less likely to trust their provider to minimise the frequency of outages (57%).

Consumers support the government imposing license conditions to use the publicly owned spectrum

Support for enforceable licence conditions is strong across all five conditions tested, with at least 81% of consumers strongly or somewhat supportive of each. Meeting minimum reliability requirements attracted the strongest support (52% strongly support), followed by disaster resilience investment (49% strongly support), expanding regional and rural coverage (48%), reducing outage frequency and duration (47%), and providing an affordable entry-level mobile service (47%).

Knowledge of the potential discount for telcos slightly shifts support

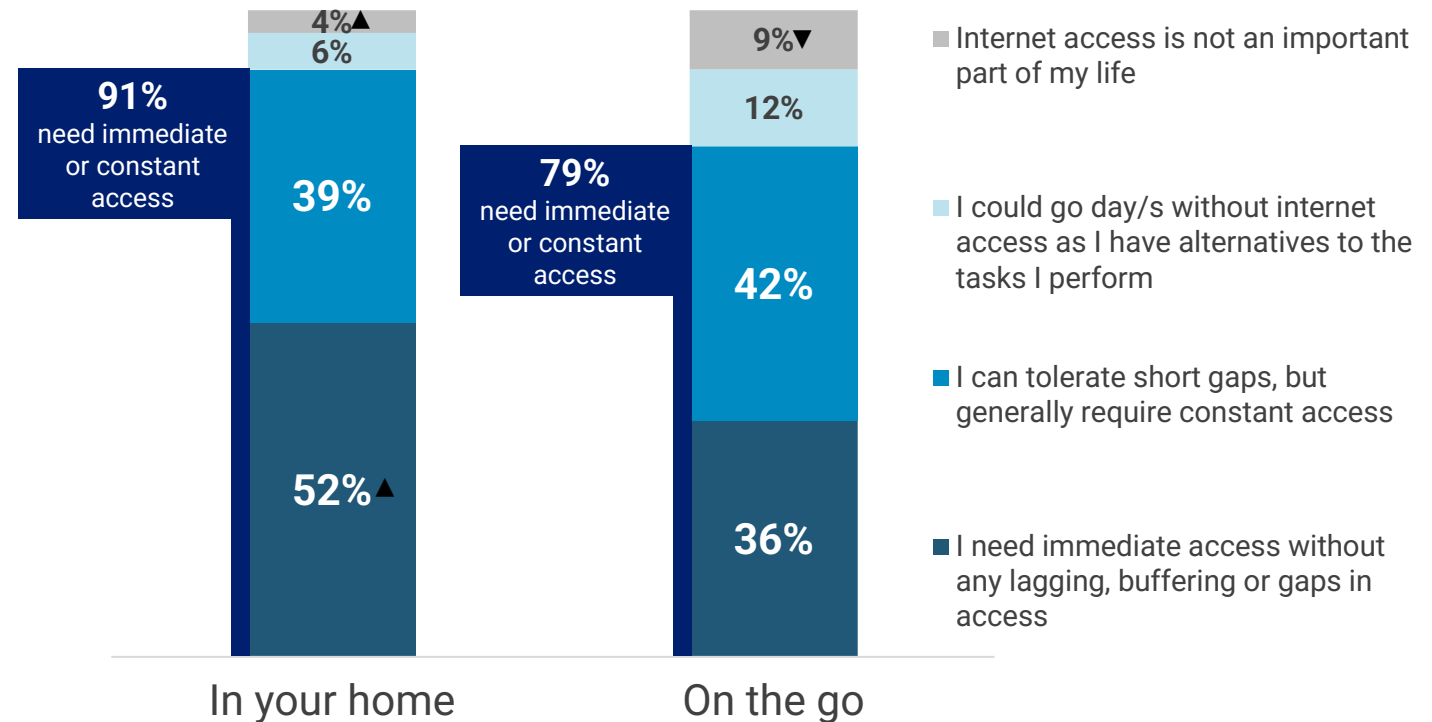
When informed of the government's potential licence discount for telcos, overall support strengthens only slightly (up to 3pts across each condition). Support was already strong before the discount context was introduced, indicating that consumers believe telcos should have obligations attached to spectrum use as a matter of principle, not just because of a financial benefit they stand to receive.

Internet connectivity is crucial to the lives of most consumers

Importance of internet access – Feb '26

The proportion of consumers who need immediate access without any lagging, buffering or gaps in the home has increased, up +6pts from Aug '25, while the proportion who claim internet is not an important part of their life has declined -5pts from Aug '25.

The need for immediate access is driven by consumers under 55 and those in paid employment, demonstrating affordable connectivity is a necessity for many Australians and a non-discretionary item in household budgets.



Q: How important is having internet access to your life?
Base: Feb'26 n=1014

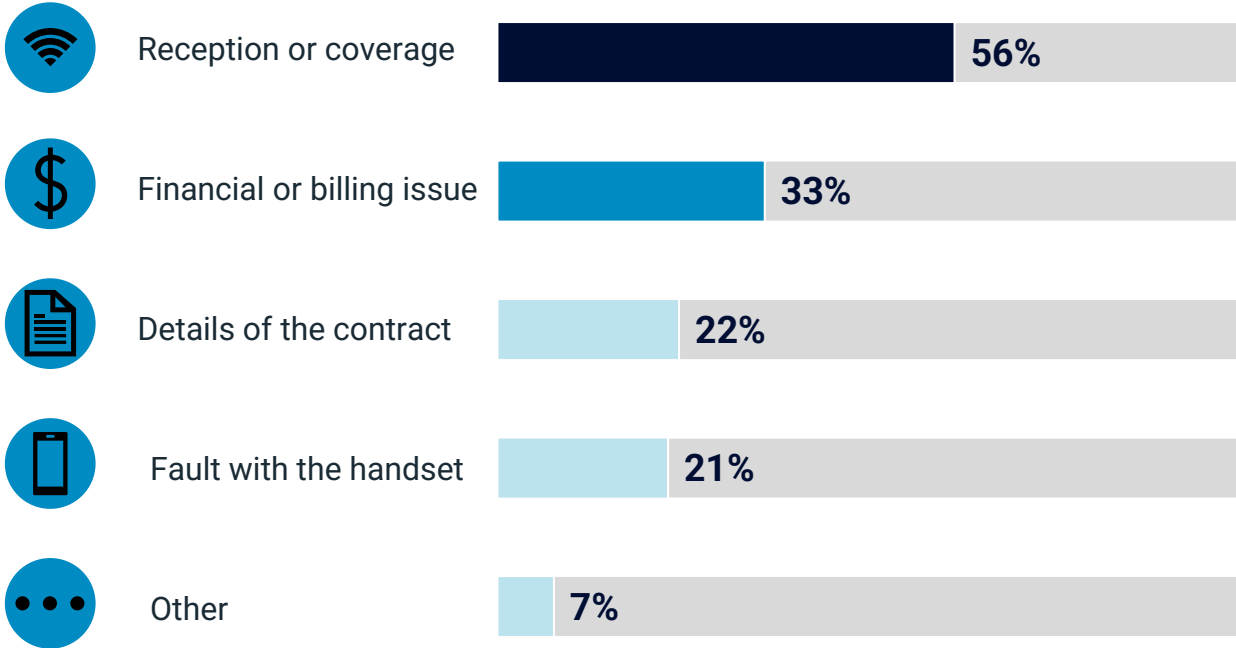
For consumers who have experienced a problem with their mobile provider, network reliability is most often the cause

Consumer Experience – Mar '25-Feb '26

Of those who experiences a problem or issue (14%), the nature of the issue was....



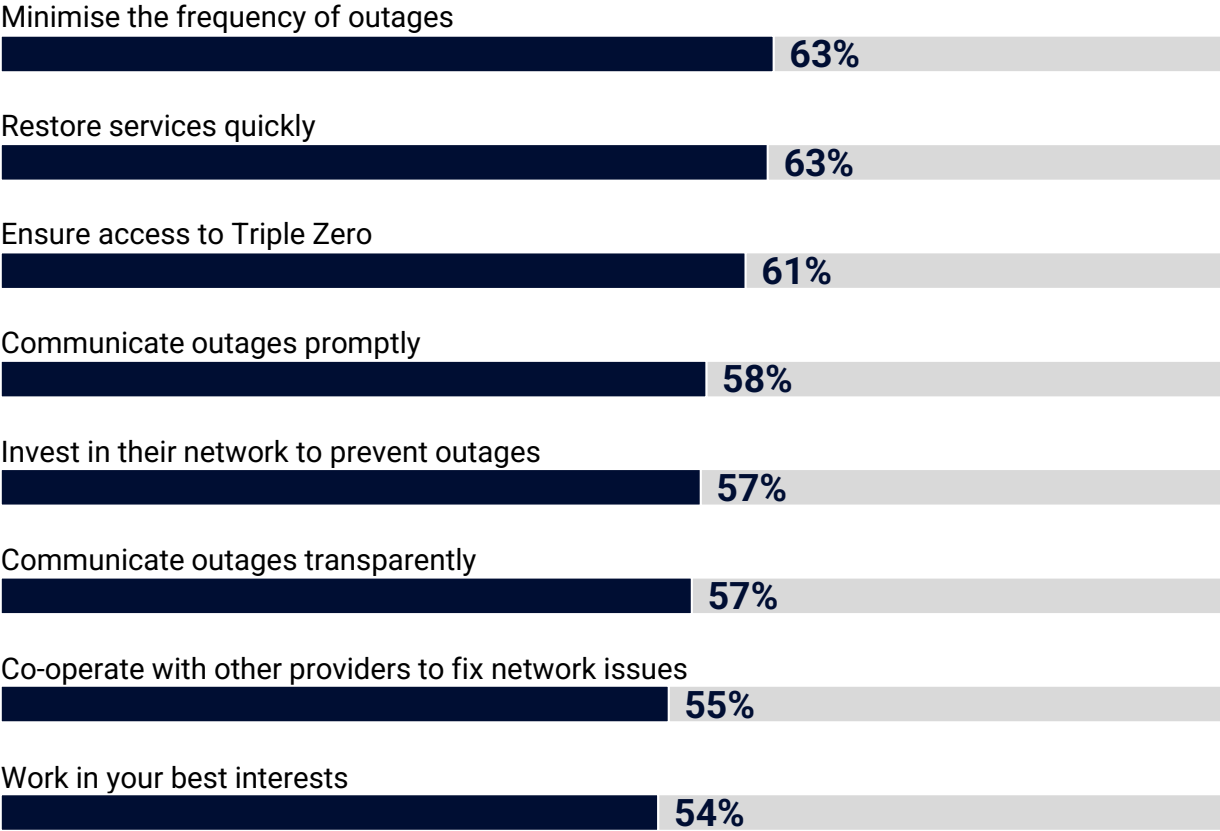
*Note Feb '26 (13%), Aug '25 (16%), Mar '25 (14%) combined



Q: In the last 12 months, have you had a problem or issue with your mobile provider? / Q: What was the nature of this issue or problem?
Base: Feb'26, Aug '25, Mar '25 combined n=2,180 / Those who experienced an issue (Feb'26, Mar'25, Aug '25 combined) n=307

Fewer than 2 in 3 consumers trust their mobile network provider across a range of key reliability measures

Consumer trust in mobile phone network provider – Feb '26 % rating trust 4+5 out of 5



Consumers living in regional and rural areas are significantly less likely to trust their mobile phone network provider to minimize the frequency of outages (57% trust)

Those struggling are significantly less likely to trust their mobile network provider across all of these aspects, with just 46% trusting their provider to work in their best interests.

Q: How much do you trust your mobile phone network provider to do each of the following?
Base: Feb'26 n=1014

A majority of consumers agree the government should play a stronger role in regulating mobile providers, such as imposing minimum reliability requirements

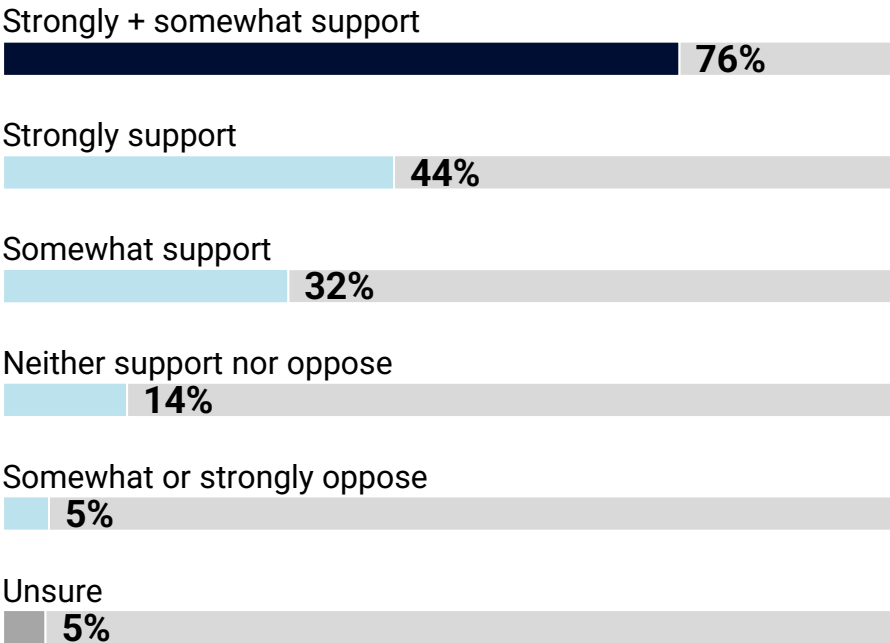
Government regulation

74%

somewhat or strongly agree

that the government should play a stronger role in regulating telecommunications companies

Support for introduction of minimum reliability requirements for mobile phone network providers like electricity and water:



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

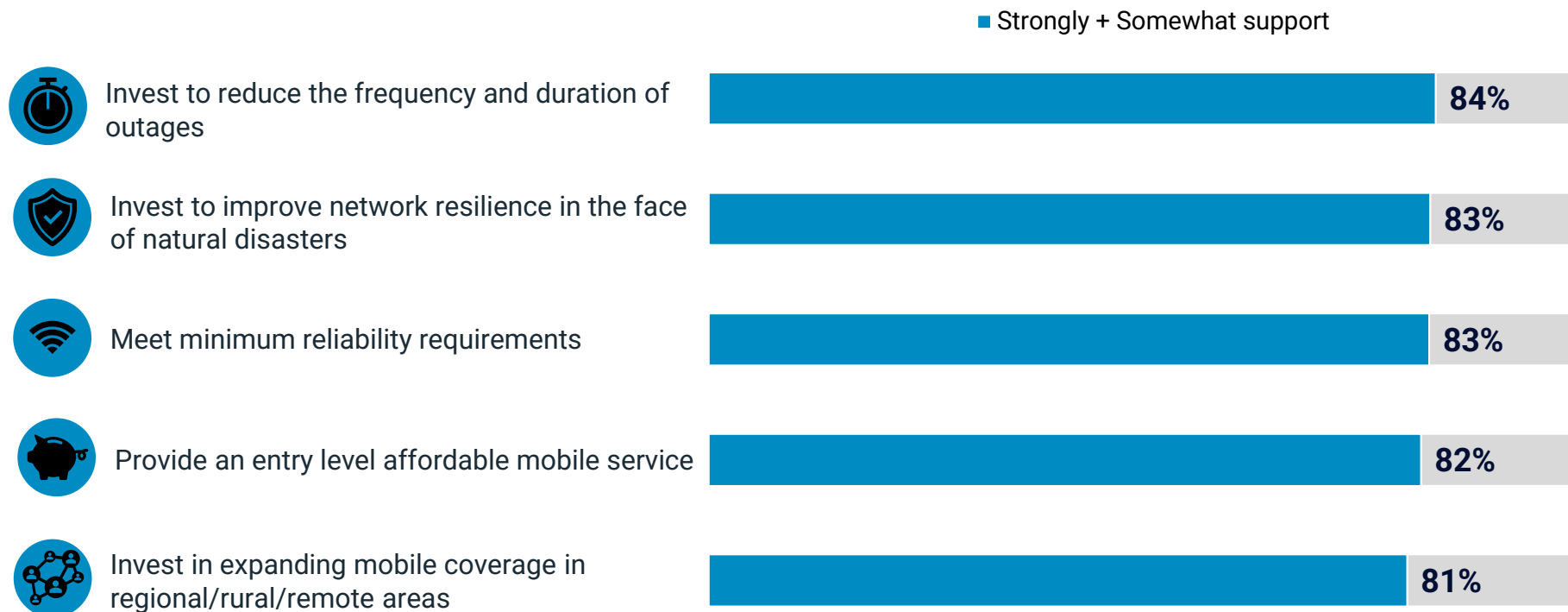
Base: All participants: Feb'26 n=1,014

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

Base: All participants: Feb'26 n=1,014

A strong majority of consumers support a range of enforceable licence obligations for mobile providers

Telecommunications companies pay for licences to use the airwaves (or spectrum) owned by the public.
To what extent do you support or oppose the government enforcing licence conditions which require mobile networks to do the following....



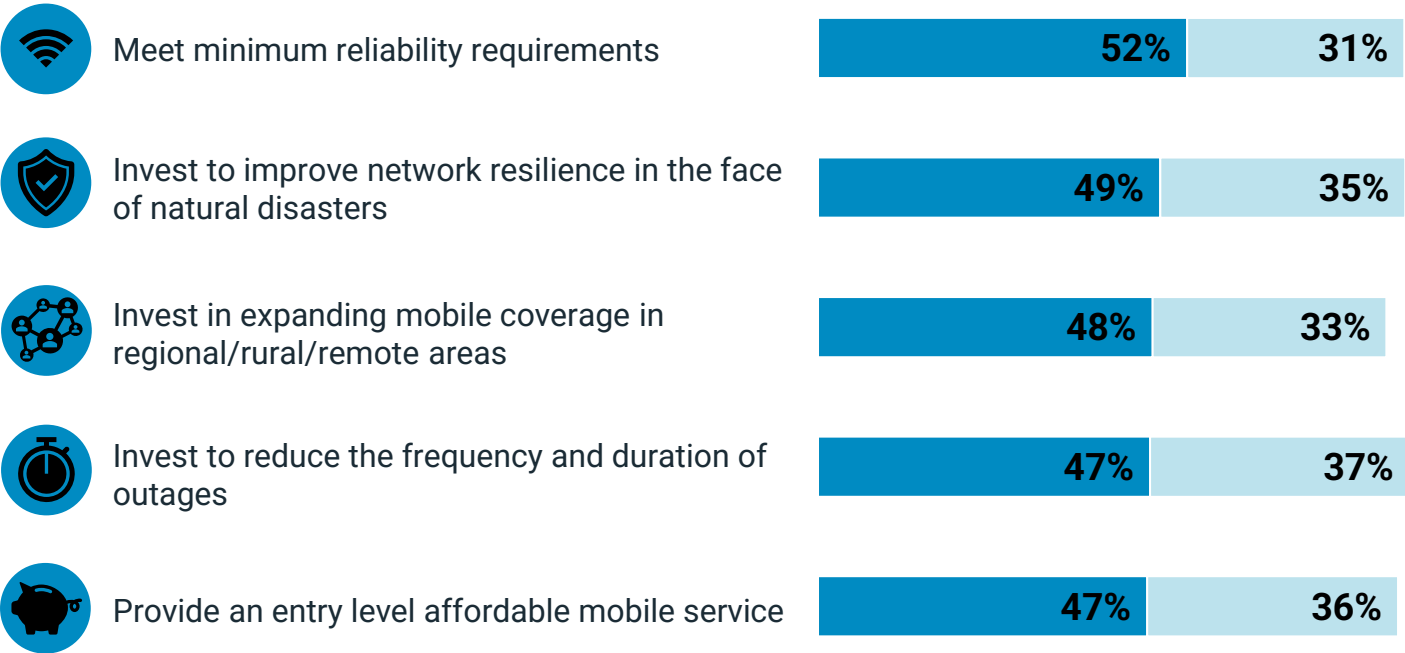
Q: Telecommunications companies pay for licenses to use the airwaves (or spectrum) owned by the public. To what extent do you support or oppose...

Base: All participants: Feb'26 n=1,014

Support for conditions is consistently strong, most notably for meeting minimum reliability requirements

Telecommunications companies pay for licences to use the airwaves (or spectrum) owned by the public.
To what extent do you support or oppose the government enforcing licence conditions which require mobile networks to do the following....

■ Strongly support ■ Somewhat support



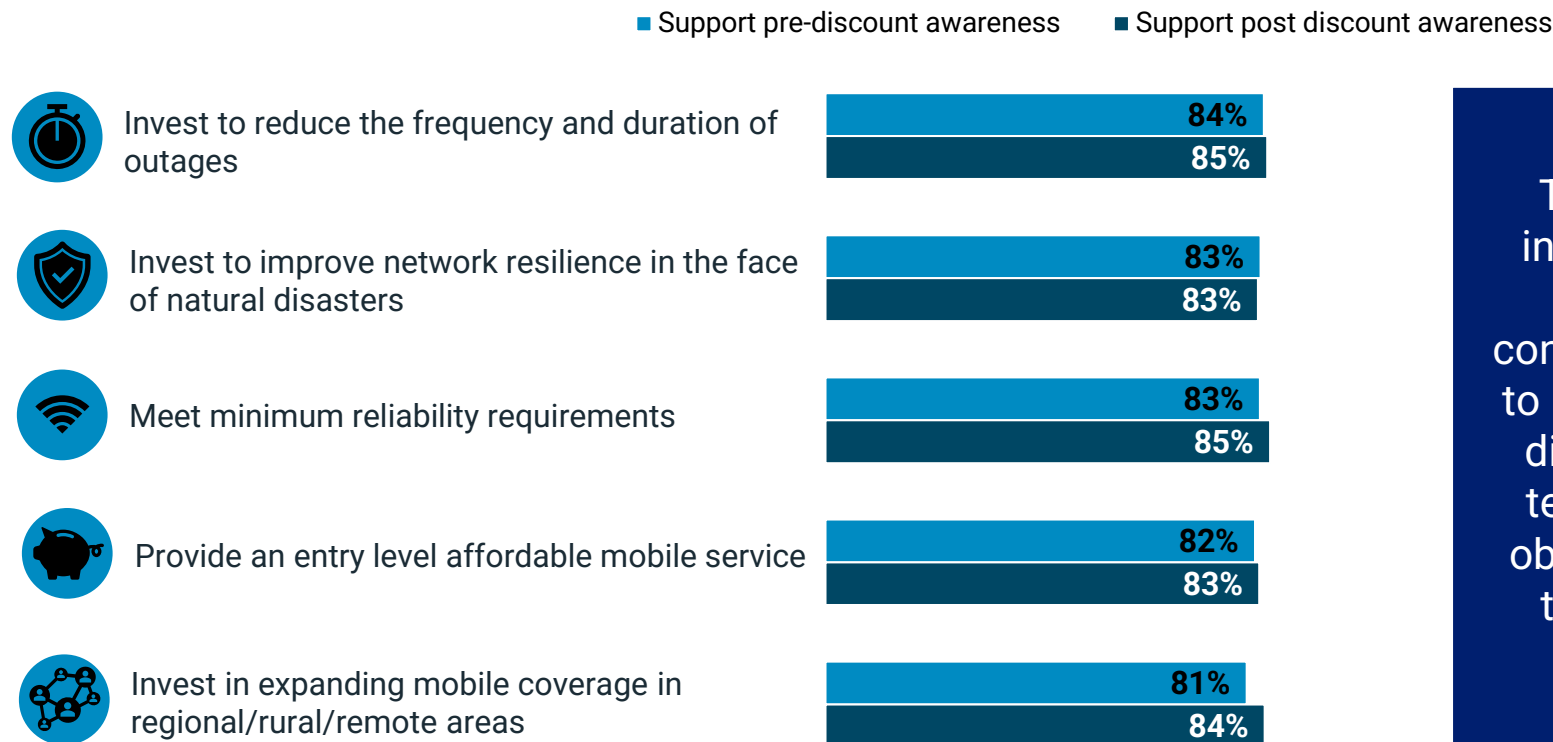
Strong support for meeting minimum reliability requirements and improving network resilience is driven by older consumers (55+), with 63% strongly supporting these conditions.

Younger consumers (18-34) are less likely to feel strongly about enforceable licence conditions.

Q: Telecommunications companies pay for licenses to use the airwaves (or spectrum) owned by the public. To what extent do you support or oppose...
Base: All participants: Feb'26 n=1,014

When prompted about a potential discount on licences, support for enforceable licence conditions strengthens very slightly

Context given to respondents: The Government is planning to give telcos discounts on their licences worth hundreds of millions of dollars. With this in mind, do you support or oppose the Government imposing licence conditions to require telecommunication companies to:



The relatively low increase in support suggests many consumers don't need to learn about a large discount to believe telcos should have obligations attached to their spectrum licences.

Q: The Government is planning to give telcos discounts on their licences worth hundreds of millions of dollars. With this in mind, do you support or oppose the Government imposing licence conditions to require telecommunication companies to... - % Strongly + somewhat support
Base: n=1014

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.
	The target population was Australian residents aged 18+ who are customers for mobile and/or home internet services.
Sample:	Quotas were applied to be representative of the target population by gender, age and location. The following samples were achieved in each fieldwork period: March 2025 n=1,065; August 2025 n=1,000; February 2026 n=1,014.
Fieldwork Dates:	Wave 1: 4 th March to 18 th March 2025. Note that fieldwork was paused in Queensland between 7 th March and 10 th March to avoid the impact of Cyclone Alfred. Wave 2: 15 th August to 29 th August 2025. Wave 3: 13 th February to 2 nd March 2026.
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. 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). 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). 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).
	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. This report has been prepared by Essential Research in consultation with ACCAN.

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Demographic Tables

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

	n=		
Age	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

	n=		
Consumer status*	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

	n=		
Location	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

	n=		
Financial Circumstances	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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