



Future of Australia's NBN Community Engagement Report

AUSTRALIAN COMMUNICATIONS CONSUMER ACTION NETWORK
2026

We pay our respects to the Traditional Custodians, Ancestors, and Elders past, present, and emerging. Our team is proud to live, learn and thrive in the place we now call Australia. We recognise that sovereignty was never ceded. Always was, Always Will Be Aboriginal Land. As embedded in our values, we are committed to building connected, healthy, and resilient communities and creating purposeful outcomes that reflect our deep appreciation for the peoples and cultures that make us who we are and shape where we are going - together as one.

**WE ACKNOWLEDGE THE
TRADITIONAL CUSTODIANS
OF THE LANDS ON WHICH
WE LIVE AND OPERATE.**

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EXECUTIVE SUMMARY

For the first time, NBN Co has developed a formal proposal to the Australian Competition and Consumer Commission (ACCC), outlining its proposed approach to pricing, service standards and other key aspects of how it manages the National Broadband Network (NBN) from July 2026 to June 2029.

The Australian Communications Consumer Action Network (ACCAN) consulted with consumers and stakeholders to ensure consumer voices informed NBN Co in the planning of future pricing and investment decisions. The feedback received through this process was incorporated into NBN Co's plan through ACCAN's formal submission to the Australian Competition and Consumer Commission (ACCC).

ENGAGEMENT OVERVIEW

ACCAN and CRED Consulting undertook a community engagement program with consumers, small businesses and stakeholders to inform ACCAN's submission to the ACCC on its consultation on NBN Co's Replacement Module Application (RMA).

The program aimed to gather feedback from consumers and stakeholders about NBN Co's proposed expenditure and work programs, to better understand their experiences with the NBN, their communications needs and how broadband internet can better support their communities.

Engagement was conducted from 13 August to 6 October 2025, reaching roughly 1,150 consumers and 27 stakeholder organisations through a range of in-person and online activities, including the following:



3

online focus groups across consumers from metropolitan, inner regional, and outer regional and remote consumers across Australia



A community pop-up event at the Bulli Village Markets to directly engage end-users



27

online and in-person meetings with stakeholders across Australia



A community broadband forum at Western Sydney University



3

site visits to underserved communities in Melbourne, regional NSW, and regional Tasmania



A national survey (the ACCAN Consumer Sentiment Tracker) reaching **1,000** consumers



An online survey targeted towards high-use consumers

ACCAN staff consulted widely to speak with stakeholders, small businesses and end-users in underserved regions. In the limited timeframe that the regulatory process allowed, ACCAN staff met stakeholders in Melbourne, Hobart and Canberra, conducted site visits to underserved regions in the Tasman Peninsula and Wamboin, NSW, and hosted an end-user pop-up stand in Wollongong.

ACCAN staff also undertook virtual consultations with representatives and community organisations from around the Northern Territory, Western Australia and Queensland, to ensure that engagement was representative of the breadth and diversity of Australia's population.

ACCAN expresses their sincere thanks and appreciation to all consumers and stakeholders who gave their time and expertise to support this project, and to CRED Consulting for putting this report together.

ACCAN also wishes to thank the Australian Government for the funding grant that has made this work possible.

KEY FINDINGS FROM THE ENGAGEMENT

Throughout the engagement program, ACCAN asked participants to consider the four dimensions of service as the most essential considerations for consumers:

- Network performance and reliability.
- Affordability.
- Internet speeds.
- Service standards.

Along these lines, participants reported the following key themes across the engagement:



Consumers highly valued more **reliable internet** and **strong network performance**.



Affordability was key for many consumers, particularly vulnerable cohorts.



Consumers wanted faster internet speeds, but **did not prioritise it** above other metrics.



Service requests timeframes were a significant concern in **regional, rural and remote areas**.

Reliability and affordability emerged as the two chief concerns, as consumers expressed the need for their broadband to work when they needed it and be priced at an affordable rate. Consumers did support faster internet speeds, but usually as a lower priority, whereas stricter service standards were often a high priority for consumers living in regional, rural and remote (RRR) areas.

Participants noted a number of issues with their experiences of broadband connectivity and the NBN more broadly:

- Some consumers indicated that they experience **reliability issues** and **disconnection**, impacting their daily activities and putting their **safety at risk**.
- Consumers reflected that poor access to the NBN forces them to rely on **less reliable and more expensive** forms of internet connectivity, such as mobile networks and fixed wireless.
- Broadband prices were a concern and many consumers indicated that they do not have the **time or knowledge** to shop around and access better plans.
- Accessing support and organising repairs can be challenging, particularly for consumers in **rural and remote areas**, leaving consumers without internet for long periods of time.
- Limited connectivity was impacting the **productivity and incomes of small businesses** by hindering their ability to **process payments** and access essential government services like the ATO.

KEY RECOMMENDATIONS FROM THE ENGAGEMENT

Participants expressed support for the following initiatives to improve outcomes for consumers:

-  NBN Co should **continue its fibre upgrade program** but investment in the network should not come at the expense of consumers who do not have the means to pay.
-  **Service request timeframes** should be significantly improved in regional, rural and remote areas.
-  NBN Co should **directly compensate consumers** for failures to meet service standards, with rebates going directly to consumers rather than retailers.
-  The Entry Level Offer should be subject to **retail price controls** to ensure it is affordable for vulnerable and low-income consumers who need it most.
-  The Entry Level Offer should be **upgraded to a faster speed and be reviewed frequently** to ensure it meets community expectations.
-  NBN Co's spending on marketing, communications and engagement should be redirected to **consumer education and outreach activities** to improve connectivity.



ACCAN staff visiting regional consumers on their property in the Tasman Peninsula

1.

INTRODUCTION

1.1 BACKGROUND

The Australian Communications Consumer Action Network (ACCAN) is Australia's peak communications consumer organisation. ACCAN is the peak national consumer organisation advocating for trusted, accessible, inclusive, affordable and available communications and digital services.

NBN Co is a government-owned utility company which provides wholesale broadband internet to homes and businesses across the country. As a monopoly provider with few competitors in the wholesale broadband market, NBN Co must follow strict rules overseeing how it can set prices, deliver services and plan expenditure.

Following the establishment of new regulations in 2023, NBN Co has developed a formal proposal to the ACCC called the Replacement Module Application (RMA). This document outlines NBN Co's proposed approach to pricing, service standards and other key aspects of its operations from July 2026 to June 2029. This requires NBN Co to consult with retail service providers, like Telstra and Optus, as well as with consumer advocacy groups like ACCAN, and incorporate their feedback into their RMA.

To support their submission to the ACCC's consultation, ACCAN has consulted with consumers and stakeholders to ensure that consumer voices are incorporated into NBN Co's decision-making process as it determines its expenditure and investment activities. The feedback received through this process will be incorporated into ACCAN's formal submission to the ACCC, and go on to influence the Replacement Module Determination that the regulator will make about NBN Co's proposal.

1.2 PURPOSE OF ENGAGEMENT

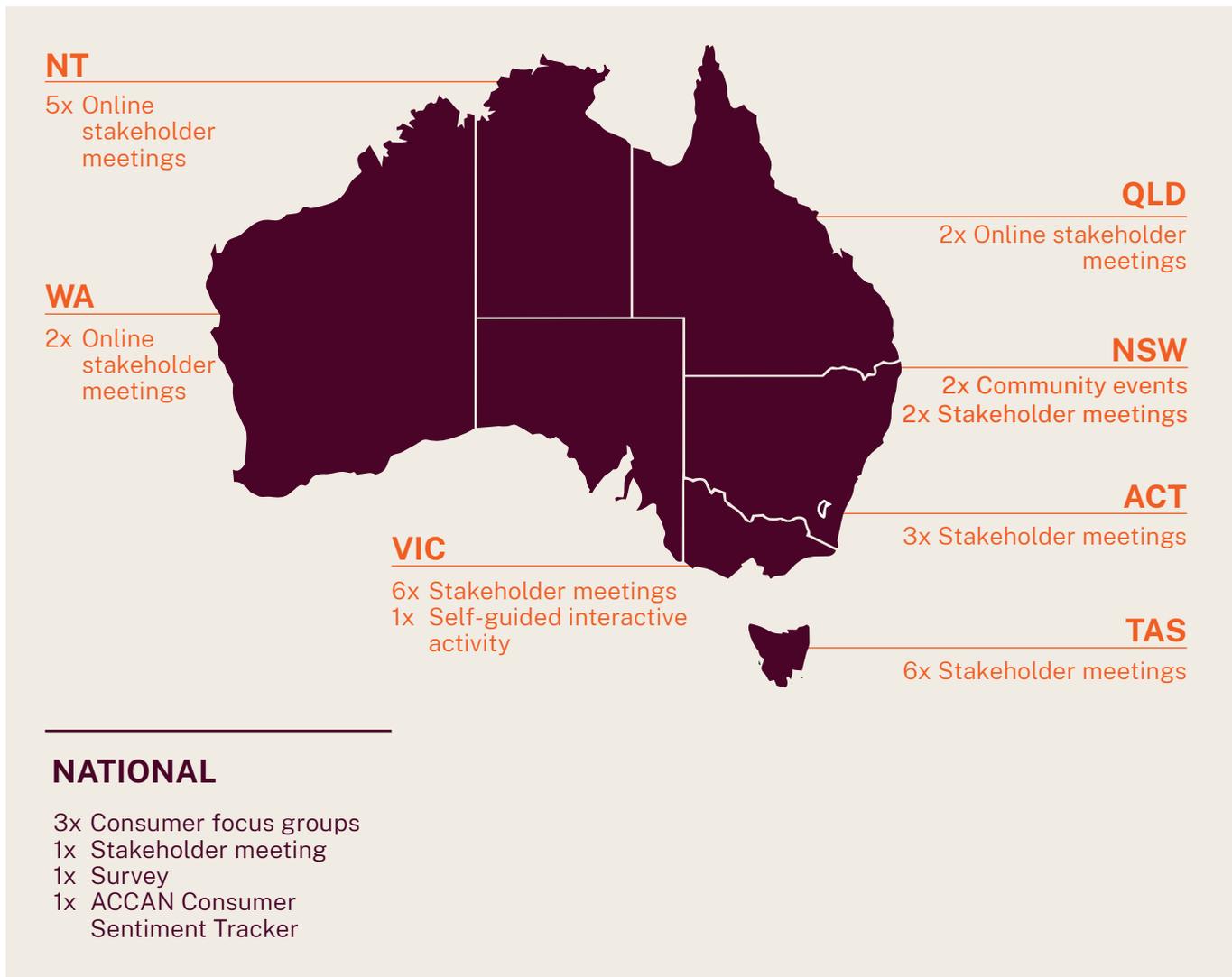
An engagement program was conducted to speak with consumers, small businesses and stakeholders to inform ACCAN's submission to the ACCC. The purpose of ACCAN's engagement was to:

- Ascertain consumer preferences with regard to the NBN and broadband internet more broadly.
- Assess consumer preferences against NBN Co's expenditure and activity proposals in the RMA.
- Determine what changes to the RMA would best reflect consumer interest and preferences.
- Ensure that consumer input informs the ACCC's decisions and NBN Co's expenditure.

1.3 ENGAGEMENT PROGRAM

The engagement program was conducted from 13 August to 6 October 2025. It was designed to reach a diverse cross-section of consumers, small businesses, peak bodies and other stakeholders through a range of channels. Figure 1 provides a summary of the program, with the full engagement program at Appendix 1.

Figure 1 - Engagement snapshot



1.4 ENGAGEMENT APPROACH

Methodology

ACCAN undertook a mixed-method approach to engagement by drawing on meetings with stakeholders, a nationally representative survey, online focus groups with consumers, self-guided interactive activities and an online survey targeted towards high-use consumers. Stakeholder meetings were conducted both in-person and online and included consumers, small businesses and relevant peak bodies. By employing this mixed-method approach, ACCAN sought to ascertain what issues and themes were most relevant to communities across Australia.

ACCAN Consumer Sentiment Tracker

The ACCAN Consumer Sentiment Tracker is a nationally representative survey conducted every six months through Essential Research. This survey, reaching a sample size of 1,000 in each wave, tracks consumer sentiment on a range of topics, including in this instance issues raised within NBN Co's RMA. Insights from this survey conducted in August 2025 have been included in this report to provide depth of analysis and substantiate feedback received through the targeted engagement.

Noting multiple waves asking the same questions may be referenced, there are instances in which the sample size referenced will reach 2,065.

Consumer focus groups

Three online focus groups were held online with consumers across Australia. Each focus group was targeted to either metropolitan, inner regional and outer regional and remote consumers respectively. A total of 33 participants attended the focus groups.

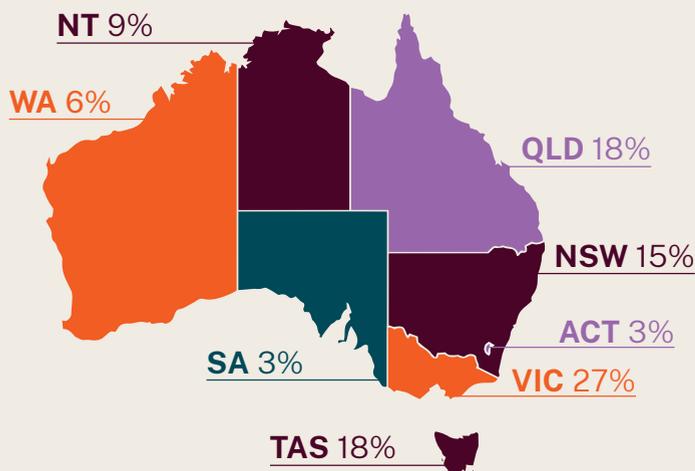
The purpose of the focus groups was to collect qualitative data on consumer views on NBN services (see Appendix 2 for the full list of focus group questions). The focus groups were designed to be a facilitated conversation, guided by a series of targeted questions on the following topics:

- Experience and satisfaction with NBN services.
- Consumer priorities.
- Service standards.
- Capital expenditure projects.

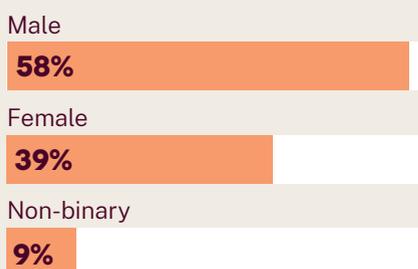
The focus group participants were recruited, with an aim to capture as demographically representative group of consumers as possible. Consumers were selected according to demographic factors, including location, age, gender, income, language spoken at home, ability and whether they identify as Aboriginal or Torres Strait Islander. NBN service type was also considered in the selection process, to ensure representation from consumers on fixed line, fixed wireless and satellites connections.

Figure 2 provides a demographic snapshot of the participants who attended the focus groups.

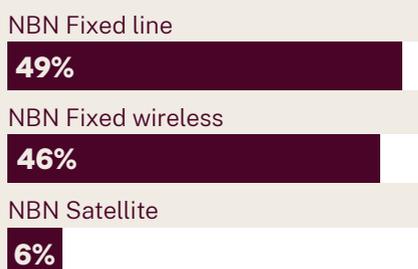
Figure 2 - Consumer focus group participant profile



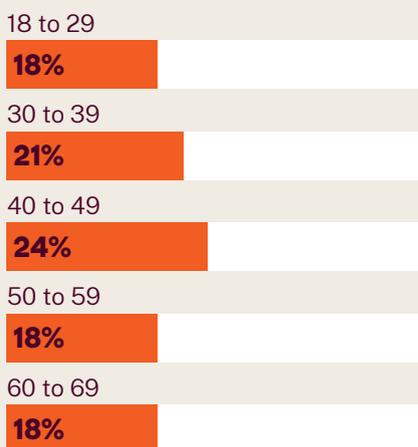
GENDER



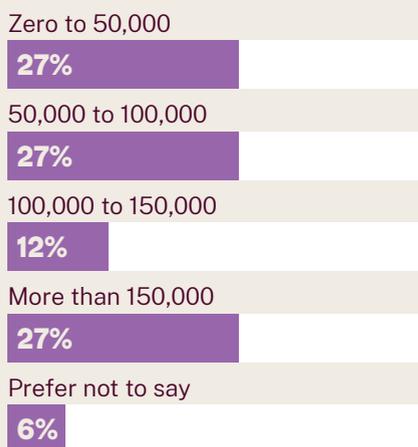
NBN SERVICE TYPE



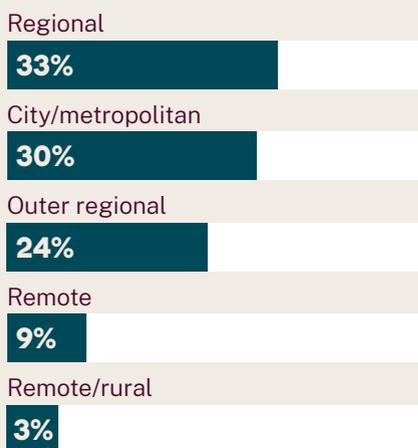
AGE



INCOME



GEOGRAPHICAL CLASSIFICATION



Community events

Two community consultation events were held during the engagement period, at Bulli Village Markets in Wollongong and Western Sydney University in Parramatta. The purpose of these community events was to gather feedback from consumers on their experience with the NBN, their priorities and their feedback on a range of capital expenditure projects.

The event at Bulli Village Market was designed to be a pop-up information and feedback stall where consumers could learn about the project, ask questions of the ACCAN project team and provide their feedback using interactive activity boards. The event at Western Sydney University was run in a workshop format to maximise opportunities for stakeholder feedback.

Stakeholder meetings

ACCAN conducted 27 meetings with key stakeholders across Australia regarding the NBN economic regulation project and ACCAN's role, educate stakeholders about how NBN Co's pricing and investment decisions affect consumers and gather feedback on the following topics:

- Internet speeds and service.
- The Entry Level Offer.
- Capital expenditure.
- Operating expenditure.
- Service standards.

Stakeholders represented a range of organisations and sectors, many of whom provided feedback on behalf of low-income or vulnerable cohorts.

Self-guided interactive activities

A self-guided interactive activity poster was placed at the Carlton Neighbourhood Learning Centre for approximately two weeks during the engagement period. The poster was designed to capture public feedback from students, staff and visitors around their priorities.

Online survey of high-use consumers

To supplement ACCAN's Consumer Sentiment Tracker, an online survey was conducted with consumers to explore their experience with the NBN, their priorities and their feedback on a range of initiatives and capital expenditure projects. The survey was open from 24 September to 6 October 2025 and a total of 93 responses were received. The online survey questions are provided at Appendix 3.

The online survey was designed to provide an additional channel through which high-use consumers could share their views. The survey was promoted through a range of channels, including emails with stakeholders, the online community broadband forum Whirlpool and the Reddit r/nbn subreddit.

Due to the topic and the recruitment channels, participants were primarily high use, high information consumers, who have significant numbers of devices in their home and use data frequently. Almost half of all survey participants (47%) indicated that they use more than 15 devices to access the internet at home, and half (52%) indicated that they are currently on a 100Mbps plan and above.



ACCAN staff on the road down to the Tasman Peninsula from Hobart

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SUMMARY OF KEY FINDINGS

2.1 KEY THEMES FROM CONSUMERS

Throughout the engagement program, ACCAN asked participants to consider the four dimensions of service as the most essential considerations for consumers:

- Network performance and reliability.
- Affordability.
- Internet speeds.
- Service standards.

Reliability and affordability emerged as the two top priority concerns, as consumers expressed the need for their broadband to work when they need it and be priced at an affordable rate. Consumers did support faster internet speeds, but usually as a lesser priority, whereas stricter service standards were often a high priority for consumers living in regional, rural and remote areas.



Consumers highly valued more reliable internet and strong network performance

A reliable home internet connection allows consumers to participate in a range of activities, including accessing government services, accessing health services, working or running a business from home and undertaking school or study from home. This is particularly important for cohorts including people with disability, who use the internet to assist them with daily tasks, and new residents from overseas, who use online translation tools and stay connected to friends and family.

Many consumers shared experiences of their internet dropping out, slow internet speed and unreliable connections. This impacts their ability to participate in daily activities, like joining online meetings, attending telehealth appointments and participating in online work or study.

Consumers in regional and remote areas indicated that they rely particularly heavily on the internet as an alternative to in-person options, however they were far more likely to experience an unreliable connection. Network unreliability is exacerbated during peak times (such as weekends, school holidays and tourist seasons) and during weather events and natural disasters. Not only does this create barriers to participating in daily activities, but consumers noted that it prevents them from receiving evacuation warnings, accessing emergency information and seeking help during an emergency.



Affordability was key for many consumers, particularly vulnerable cohorts

Affordability was listed as the single-highest concern in ACCAN's Consumer Sentiment Tracker and was frequently rated as a significant concern in ACCAN's engagement program. Participants frequently reported cost-of-living concerns, and noted that while reliable internet connectivity is essential, many consumers struggle to afford or retain an internet connection suitable to their needs.

As government services and many other aspects of day-to-day life shift online, there is an expectation that people have access to reliable internet, but affordability is often a key barrier, as internet connectivity often represents a significant percentage of household expenditure. This is particularly the case for more vulnerable cohorts like people from low-income households, people living with disability and First Nations people, who indicated that they are being left behind when it comes to internet connectivity.

This is further exacerbated as there are significant price discrepancies between different providers for the same product. Consumers also face regular price increases, with levels of service that do not reflect the premium pricing paid to some retailers. While there are often deals and cheaper options available that can help to reduce the price of NBN services, shopping around comes with a level of confusion and administrative burden for which many consumers do not have the time or knowledge to navigate.



Consumers wanted faster internet speeds

The desire for faster and more reliable internet connectivity emerged as a key theme across the board. With the growing digital transformation, fast and reliable internet connectivity is integral to the operations of many organisations and the day-to-day lives of Australians. Consumers indicated that upload speeds are becoming just as important as download speeds in allowing data to be uploaded, backed up and transferred efficiently.



Service requests timeframes were a significant concern in RRR areas

Accessing support and organising repairs can be a challenge. Consumers indicated that it is often a complex, lengthy process, leaving them confused about who to contact first and sometimes being passed around without resolution or experiencing no-shows with booked repair jobs. NBN infrastructure is often impacted by weather events, with storms and rain causing internet connectivity to drop out or resulting in damage to the network.



ACCAN Staff speaking with the Wamboin Communications Action Group in regional NSW

2.2 KEY RECOMMENDATIONS FROM CONSUMERS

Participants in the engagement program made a series of key recommendations to inform the RMA and NBN Co's future pricing and investment decisions. These recommendations address their priorities, concerns, and desired direction for the future of the NBN.

RECOMMENDATION 1

NBN Co should continue its fibre upgrade program, but investment in the network should not come at the expense of consumers who do not have the means to pay

Consumers were generally supportive of NBN Co's proposed capital expenditure projects, as important national infrastructure improvements. They wanted to see a focus on ensuring consumers in regional and remote areas have access to resilient internet infrastructure (through improving satellite infrastructure and protecting the network) so they are able to participate effectively in work, study and daily life online and can stay connected and safe during emergency events.

However, willingness to accept bill increases to accommodate capital expenditure projects was mixed among consumers. While some consumers may have the means to pay more, NBN services are already unaffordable for many, and increased prices disproportionately impact low-income households, affecting their ability to continue to access the internet.

Consumers considered investment in capital expenditure projects to be important, however they did not support this investment coming at the expense of those who are already struggling to afford the NBN. Consumers expressed that price increases driven by infrastructure investment should be equitably distributed, with higher cost plans having a higher contribution to cost recovery efforts.

RECOMMENDATION 2

Service request timeframes should be significantly improved in regional, rural and remote areas

Consumers wanted to see NBN Co improve timeframes for service requests for RRR consumers to be the same or as close as possible to metro timeframes. RRR consumers indicated that they rely on the internet more heavily as an alternative to in-person activities, and pay similar (if not higher) prices for their internet connection as those living in metropolitan areas. When the internet is not working, there are significant risks for these communities during emergency and health situations.

RECOMMENDATION 3

NBN Co should directly compensate consumers for failures to meet service standards, with rebates going directly to consumers rather than retailers

NBN Co is required to pay rebates when it fails to meet service standards, providing an incentive for better performance and compensation for consumers for poor service quality. However, in many cases, the compensation goes mostly to retailers, with only small amounts being passed through to consumers.

With the transition to a more digital world, poor internet connectivity means many consumers are unable to access online services, impacting their ability to participate in economic activity, run their business and exacerbating social isolation. Consumers and stakeholders wanted NBN Co to proactively provide compensation for failures to meet service standards, and expressed a desire for all or most of the compensation to go directly to consumers as opposed to retail service providers.

RECOMMENDATION 4

The Entry Level Offer should be subject to retail price controls to ensure it is affordable for vulnerable and low-income consumers who need it most

Stakeholders and consumers wanted retailers to be required to sell the Entry Level Offer to support consumer access to cost-effective services. However, the current lack of competition and regulation in entry level plans creates inequitable pricing, impacting low-income consumers who are forced to pay high prices for low speeds. Stakeholders and consumers wanted to see retail price caps implemented to reduce retail margins and ensure the price of the Entry Level Offer remains at an affordable level for people experiencing financial difficulty.

RECOMMENDATION 5

The Entry Level Offer should be upgraded to a faster speed and be reviewed frequently to ensure it meets community expectations

Stakeholders and consumers indicated that there is a need for faster and more reliable entry level plans to ensure infrastructure is futureproofed and consumers can access faster internet speeds. They expressed a desire for the Entry Level Offer to be reviewed frequently to ensure that the needs of people experiencing financial difficulty are met today and in the future.

RECOMMENDATION 6

NBN Co's spending on marketing, communications and engagement should be redirected to consumer education and outreach activities to improve connectivity

Stakeholders and consumers wanted marketing, communications and engagement expenditure to be focused on consumer education and information, including transparency around pricing, guidance on making the most out of an internet connection and notices about service disruptions. Brand awareness and advertising was seen as the least beneficial spend for consumers, with existing advertising often not meeting the diverse needs of consumers.



ACCAN staff with Tasman Council

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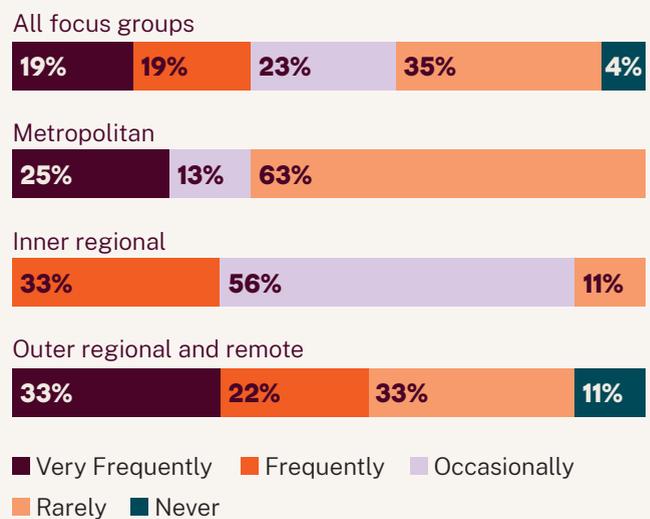
EXPERIENCE AND SATISFACTION WITH THE NBN

3.1 SOME CONSUMERS EXPERIENCE RELIABILITY ISSUES AND DISCONNECTION, IMPACTING THEIR DAILY ACTIVITIES AND PUTTING THEIR SAFETY AT RISK

Internet disconnection and reliability issues were relatively common for consumers in the focus groups, with several participants indicating that they experience disconnection or an unreliable internet service frequently or very frequently (more often for outer regional and remote consumers).

It was clear that consumers have different experiences with the NBN depending on where they live, with consumers in outer regional and remote areas far more likely to experience internet disconnection or unreliability. Figure 3 provides an overview of the average frequency of disconnection or unreliability across all focus groups, along with a comparison of each focus group to provide an indication of how experiences differed across metropolitan, inner regional, and outer regional and remote consumers.

Figure 3 - Frequency of internet disconnection or reliability issues (Source: CRED Consulting focus group data. Sample size: 33)



Many consumers shared experiences of their internet dropping out, slow internet speed (particularly during peak times or when streaming videos or meetings) and generally unreliable connections, which impacts their ability to attend important online meetings, telehealth appointments and participate in online study. Similar sentiments were corroborated by end-users throughout ACCAN's engagement.

Stakeholders spoke about the impact of poor internet connectivity on small businesses, preventing them from growing and functioning effectively. They shared experiences of not being able to use EFTPOS machines or essential government services like the ATO due to poor internet connectivity, and not being able to provide a reliable internet connection for their customers.

One stakeholder indicated that their local medical centre and nursing home run multiple services (such as Starlink and NBN through multiple separate retailers) in order to have a back-up option and ensure reliability. Internet disconnection can have significant impacts on the expenses of service providers and small businesses, as a result of the disruption to services and impact on revenue. However, paying for multiple services also has a significant impact on affordability for these businesses.

Consumers with fibre to the premises generally shared more positive experiences than those with other connection types, and several consumers indicated that since being upgraded to fibre to the premises, they have experienced substantial improvements in the speed and reliability of their connection. However, consumers and stakeholders who are not able to access fibre or other fixed-line connections report having no choice but to rely upon less reliable fixed wireless connections.

Focus group participants expressed concern about misleading advertising, where consumers are led to believe they will be getting a high-speed, high-quality service but end up with ongoing speed and reliability issues. It was felt that the NBN Co and retail service providers have promoted the products in a way that does not reflect their experiences as consumers. Participants also noted that download speeds are often promoted but not upload speeds, even though many households and businesses require strong upload speeds. This was echoed by stakeholders who wanted to see more promotion on other aspects of the NBN, beyond just download speeds.

SELECTED QUOTES FROM STAKEHOLDERS:

“Consistency is critical to be able to offer services which rely on internet, be that cloud storage and accessing documents or other basic business needs.”

“People in the industry will say everyone is surviving on 25Mbps, and that’s fine. People can’t innovate and improve their systems, particularly small businesses, because they can’t access higher speeds. 25Mbps doesn’t cut it.”

“Economic activity from tourism is being impeded by poor internet access.”

“We would like to see NBN Co report on more than download speeds. We know that there is high packet loss on those services.”

“I work from home a few days a week. The quality over the last few years or so have gone down – any time I have big meetings or watch videos for training the internet is a lot slower. I’ve had to rely on hotspotting, increase my data and not rely on the wifi so much.”

METROPOLITAN CONSUMER

“We’ve got fibre to the premises. Generally happy and it’s pretty standard for the download speed and upload speed. I wish it was faster but it’s satisfactory.”

INNER REGIONAL CONSUMER

“I had fibre to the node for a number of years and it was terrible and dropped out constantly. I recently got upgraded to fibre to the premises and it’s been fantastic. I get the odd drop out, but most of the time it’s great.”

OUTER REGIONAL/REMOTE CONSUMER

“The unreliability [can cause] a great deal of stress when online meetings or appointments are arranged. There is always anxiety around the internet not working and often I will organise going into town to ensure I have internet.”

OUTER REGIONAL/REMOTE CONSUMER

“Australia’s internet is rated well below internet services in a number of other countries, including some that you would expect that we would far exceed.”

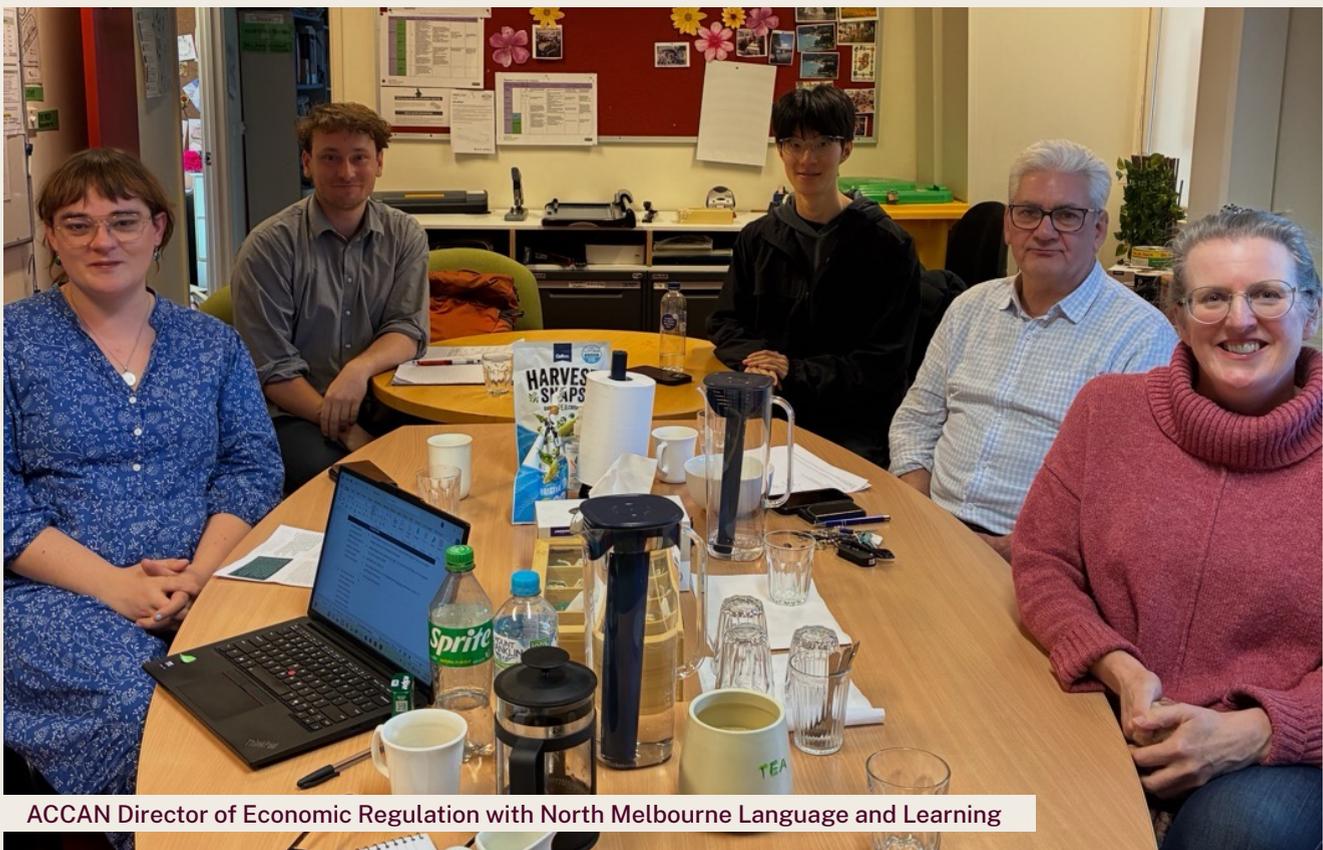
OUTER REGIONAL/REMOTE CONSUMER

“I’ve had to work from home on the weekends and the internet is pretty good quality – why is it during the working week that the internet is poor?”

METROPOLITAN CONSUMER

“No real issues with me. It very rarely drops out – once every six months maybe.”

METROPOLITAN CONSUMER



ACCAN Director of Economic Regulation with North Melbourne Language and Learning

3.2 POOR ACCESS TO THE NBN FORCES CONSUMERS TO RELY ON LESS RELIABLE AND MORE EXPENSIVE INTERNET CONNECTIONS, SUCH AS MOBILE AND WIRELESS

Consumers and stakeholders in outer regional and remote areas indicated that peak tourism seasons have significant impacts on the reliability of their NBN connection. A focus group participant in Port Arthur, Tasmania, noted that their internet connection becomes unusable when cruise ships are docking at the port. Participants also spoke about reliability issues on weekends and school holidays. Stakeholders echoed this, noting that high tourist rates regularly overload the network and there is a need for improvements in communications to facilitate continued economic development in regional and remote areas. They expressed concern about the privatisation of communications services.

Consumers in outer regional and remote areas indicated that when their internet connection goes down, they are unable to contact emergency services or family members, do online banking and manage everyday life. They expressed concern about the safety implications of being unable to access the internet during fire season or emergency events. Stakeholders echoed this and indicated that many areas are at risk of being completely disconnected during emergency events (leading many consumers to opt for Starlink, which is not preferred). They shared experiences of SES, fire and ambulance services not being able to dispatch staff to people in need, and a person who experienced a pacemaker malfunction due to poor internet connectivity. Stakeholders also noted that many disaster warnings are now online, making reliable internet connectivity more critical.

Many consumers spoke about needing to rely on other forms of internet to mitigate the unreliability of their NBN connection. This includes tethering wifi from a mobile phone (creating a 'hotspot') or purchasing Starlink, a high-speed but expensive (and not always reliable) satellite internet service.

"I had NBN, and it hardly worked where I am so I had to go to Starlink."

OUTER REGIONAL/REMOTE CONSUMER

"We're in Port Arthur. We get cruise ships every summer carrying 3000 passengers and 1500 crew members. [When the cruise ships come in] you don't bother to do anything because it overloads the entire network."

OUTER REGIONAL/REMOTE CONSUMER

"[The NBN] was just such poor quality that we didn't notice a difference when we started hotspotting – my husband is working from home on a mobile hotspot."

METROPOLITAN CONSUMER

SELECTED QUOTES FROM STAKEHOLDERS:

"Starlink is guaranteed to work – so people value it."

"Mobile and internet services have become virtually unreliable to the extent that people are resorting to ancient technology (radios)."

"Like most small business owners, I seem to set and forget and not shop around. I would rather spend my time otherwise. It's a debate as to whether the difference in price is worth the investment in time and stress."

"Small businesses are cash and time poor - they don't have time to search the market for the best deal."

3.3 COMPETITION IN THE RETAIL MARKET IS NOT DOING ENOUGH TO BRING DOWN PRICES OR MEET CONSUMER NEEDS

Consumers had mixed opinions on whether their NBN service is affordable. The majority of participants (53%) in ACCAN's Consumer Sentiment Tracker indicated that they have not upgraded to a higher speed broadband plan because they cannot afford it. While this is likely in part attributable to the margins of retail service providers, this reflects a concern from over half of respondents who report prices as a real limitation to their accessing faster internet speeds.

Some focus group participants felt comfortable with the price they were paying, while others raised concerns about plans being too expensive (particularly for single-person households and in comparison to other countries). Participants also spoke about significant price discrepancies between different providers for the same product, regular price increases and a level of service that does not necessarily reflect the premium pricing. Some participants indicated that in the past, they had cancelled their NBN service for a period of time in order to save money.

Stakeholders indicated that cost of housing is taking up the majority of the income of people experiencing financial hardship, meaning that budget for internet and other essentials is reduced. They noted that higher speed services, in particular, are financially out of reach for many consumers.

Focus group participants indicated that while there are often deals and cheaper options available that can help to reduce the price of an NBN service, most consumers do not have the time, energy or knowledge to shop around and change providers. This feedback was echoed in ACCAN's Consumer Sentiment Tracker, where 23% of participants stated that the reason they have not upgraded their plan was because of the confusion or administrative burden associated with weighing up the options and changing their plan.

Some participants were also concerned about

losing their long-term email address (originally created through their provider) if they changed providers, reducing their incentive to switch, even if it would save money. Rural consumers noted that there are far fewer providers in rural areas compared to metropolitan areas, reducing their ability to shop around and access competitively priced products.

There was a general sense that internet connectivity is a necessity, particularly given the transition of many government services to digital, and consumers do not have any choice but to pay for a home broadband connection even if it is expensive.

"I have previously stopped my NBN connection for a while to save money."

METROPOLITAN CONSUMER

"The increase in price is a lot considering you've got to have the internet to do anything now."

METROPOLITAN CONSUMER

"It's a bit of a price gouge, as a long-term client, to be increasing prices annually. You end up paying more and the service seems to be going the other way."

INNER REGIONAL CONSUMER

"Thinking about changing providers is scary and daunting. We're nervous that our email address will get lost if we move to a different provider."

INNER REGIONAL CONSUMER

"The amount of energy you need to invest to get a better plan is stressful. I don't have the confidence that anyone will be able to do a better job."

INNER REGIONAL CONSUMER

3.4 ACCESSING SUPPORT AND ORGANISING REPAIRS CAN BE CHALLENGING, LEAVING CONSUMERS WITHOUT INTERNET FOR LONG PERIODS OF TIME

Activating a connection

Focus group participants indicated that activating an NBN connection can be a complex, lengthy process. Participants shared stories of their property being missed by mistake when NBN boxes were initially being installed, difficulties in activating a connection for a new build property and slow timeframes for new connections, sometimes taking up to three weeks. One participant stated that they received one month's credit as compensation for the difficulties in activating their NBN connection.

Accessing support

Focus group participants expressed concern about long wait times to access support, confusion around who to contact if they have an issue and being 'given the run around' between NBN Co and the retailer. Participants noted how this delayed or even prevented resolution to service issues, or meant they were otherwise poorly updated on how their issue was being addressed. It was noted that accessing support is a time-consuming process that leaves consumers without internet for relatively long periods of time. Participants also spoke about needing to resort to threats of legal action or making a complaint through the Telecommunications Industry Ombudsman in order for issues to be addressed.

One participant in the outer regional and remote focus group stated that NBN Co visits their area with Service NSW every few months. While this is not advertised very well to residents, it is a helpful service where consumers can access information and support.

"I never know who to talk to, as it's not clear whether it's the retail provider or NBN Co who's responsible."

INNER REGIONAL CONSUMER

"Having to go through the provider rather than direct to NBN Co often means it takes a couple of days before the issue even gets raised and starts to be investigated."

OUTER REGIONAL/REMOTE CONSUMER

"If I need help, I need to wait 3-4 weeks before I receive a response and I often need to follow up. There's a lack of initiative and proactiveness on their part."

METROPOLITAN CONSUMER

"I had some strange issues with a recent attempt to go to a fixed wireless plan. It was delayed due to issues with the contractor, however I was charged for months for a product that I wasn't using."

INNER REGIONAL CONSUMER

"We've found it much easier joining a broadband company than leaving one, to the point where we've needed to threaten legal action."

OUTER REGIONAL/REMOTE CONSUMER

"We have fibre to the node. We had a cyclone and lost NBN service for 6 weeks. It was a daily fight to have it restored – I got palmed between Telstra and NBN Co and it was ultimately resolved through the Ombudsman."

INNER REGIONAL CONSUMER

Repairs

Focus group participants expressed concern about the resilience of NBN infrastructure, with the pits often filling with water or components breaking, causing consumers to be without internet for extended periods of time while the issue was resolved. Participants shared stories of booking in repairs and NBN Co technicians not showing up, which can be frustrating when they have been waiting at home.

Many focus group participants spoke about their internet connectivity issues being resolved when they replaced their modem. However, some participants expressed concern that significant e-waste is generated from modems being low quality and frequently needing to be replaced, and new modems being sent out when consumers change providers.

Weather impacts and power outages

Consumers in outer regional and remote areas indicated that the weather has significant impacts on their NBN connection, with storms and rain often causing the internet to drop out. This is often due to power outages or water in the pits, both of which can mean consumers lose access to the internet for extended periods of time.

“Water in the pit across the road interrupted service for days.”

OUTER REGIONAL/REMOTE CONSUMER

“There was an issue where there was a broken part in the pit. In a month we’ve had 6-8 days without internet, which has been incredibly frustrating as my husband and I work from home.”

OUTER REGIONAL/REMOTE CONSUMER

“On one occasion they didn’t show up because a technician was not available - even though they had assigned the date and time.”

OUTER REGIONAL/REMOTE CONSUMER

“Because we’re satellite, the storm will impact it. You know when it’s raining that you’re going to have issues – the weather is problematic.”

OUTER REGIONAL/REMOTE CONSUMER



ACCAN Director of Economic Regulation with local Taxi operator in the Tasman Peninsula

3.5 WHILE THE NBN AND INTERNET CONNECTIVITY WAS SEEN AS CRITICAL, CONSUMERS WANT TO SEE SIGNIFICANT IMPROVEMENTS FROM THEIR NBN SERVICE

While consumers value the role of NBN Co as the provider of an essential service, perceptions of how it operates in practice were often frustrated by limitations in service delivery. While the majority of stakeholders and consumers saw internet connectivity (and by association NBN Co) as critical to daily life, many frustrations were shared about the service provided. This was reflected in ACCAN’s Consumer Sentiment Tracker, where only 57% of participants indicated that they trust NBN Co to deliver the best service for money, as shown in Figure 4. However, 73% saw the NBN as a fundamental public utility and 70% stated that it should always be publicly owned.

Feedback from the engagement demonstrated strong social license for the NBN, and greater trust in NBN Co as an organisation, especially compared with retail service providers. However, there were also significant critiques throughout, with consumers and stakeholders not having their expectations met or not being able to access reliable services through the NBN.

Figure 4 - Participants’ perceptions of the NBN (Source: ACCAN Consumer Sentiment Tracker August 2025. Sample size: 1,000)



4.

CONSUMER PRIORITIES

Overall, consumers prioritised affordability and reliability as their key concerns. As shown in Figure 5, 41% of participants in ACCAN's Consumer Sentiment Tracker rated price as the most important factor when considering which internet plan is right for them, followed by 30% who rated a reliable, available service as their top priority.

Participants in the focus groups were asked to rank reliability, affordability, speed and service standards in order of importance. As shown in Figure 6, 58% of focus group participants ranked reliable internet connectivity as their highest priority, followed by 23% who ranked faster internet speeds and 15% who ranked affordability of services as their highest priority. Participants in inner regional, outer regional and remote areas were more likely than those in metropolitan areas to prioritise affordability.

Participants in the high-use online survey were also asked to rank reliability, affordability, speed and service standards in order of importance. They rated faster internet speeds (35%) and more reliable connectivity (34%) as their top priorities, followed by affordability (24%). This reflects the online survey participants being a higher use cohort compared with ACCAN's Consumer Sentiment Tracker, who were a more diverse mix of consumers.

Participants noted that priorities often fluctuate over time depending on needs. For example, while affordability and reliability were the highest priorities at the time of the

consultation, service standards or coverage may become more important to a consumer if they were experiencing an issue that needed to be resolved. However, it was clear that affordability and reliability are of critical importance across the board in providing equitable and functional access to internet.

Figure 5 - ACCAN Consumer Sentiment Tracker consumer priorities (Source: ACCAN Consumer Sentiment Tracker March and August 2025. Sample size: 2,065)

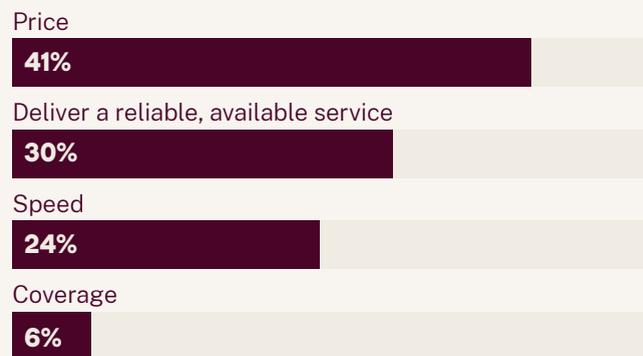
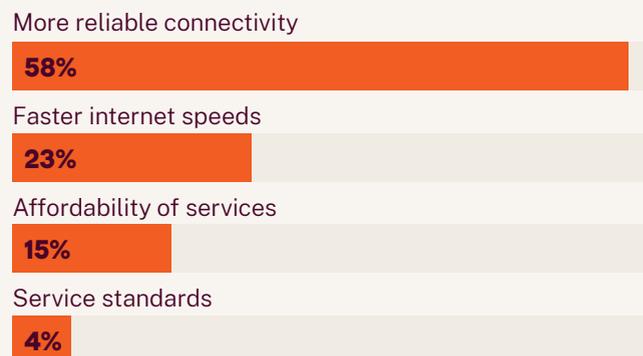


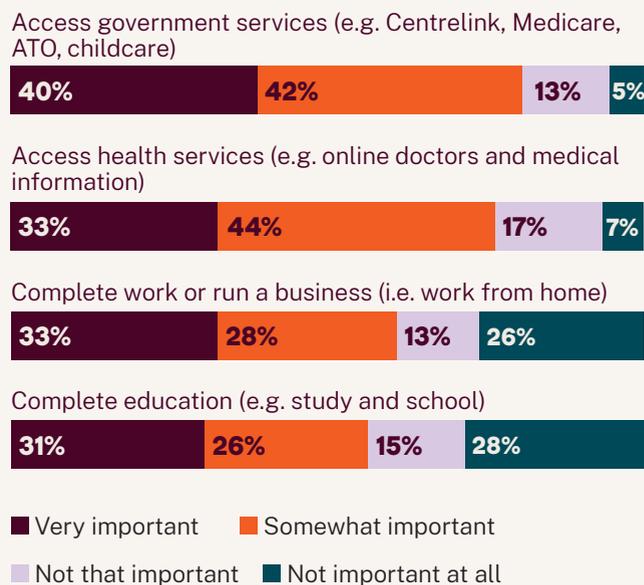
Figure 6 - Focus group consumer priorities (Source: CRED Consulting focus group data. Sample size: 33)



4.1 CONSUMERS VALUE RELIABLE INTERNET CONNECTIVITY FOR DAY-TO-DAY LIFE

95% of participants in ACCAN’s Consumer Sentiment Tracker rated network performance and reliability as being important to them. Participants indicated that a reliable home internet connection allows them to participate in a range of activities, including accessing government services, accessing health services, working or running a business from home and undertaking school or study from home. As shown in Figure 7, the majority of participants rated these activities as important, with the most critical being government services (82% rated as important) and health services (77% rated as important). Participants indicated that on average, they spend over 16 hours online per week, and they save over five hours per week by doing tasks online as opposed to in person.

Figure 7 - Importance of a reliable home internet connection (Source: ACCAN Consumer Sentiment Tracker August 2025. Sample size: 1,000)



ACCAN Director of Economic Regulation with The Brotherhood of St Laurence

87% of participants in ACCAN's Consumer Sentiment Tracker stated that they require constant internet access, with only 13% indicating that they could go more than a day without internet access.

Stakeholders indicated that reliability is a priority for their organisations and the consumers they represent. With the growing digital transformation (including more videoconferencing, online government services, online employment processes and remote studying/working), fast and reliable internet connectivity is integral to the operations of many organisations and the day-to-day lives of Australians.

Stakeholders generally indicated that extremely high speeds may not be a priority for all consumers, but there was a clear desire for a level of speed and reliability that makes the connection functional and allows people to do what they need to do online. It was noted that upload speeds are becoming just as important as download speeds in allowing data to be uploaded, backed up and transferred efficiently, particularly for those who work, run a business from home or study remotely.

There are certain cohorts of the community who rely more heavily on the internet in order to participate in daily life, and as a result need a reliable connection. Stakeholders indicated

“Without reliability, [speed, affordability and service standards] are irrelevant”

INNER REGIONAL CONSUMER

“I think it depends on your situation – I don't need to have higher service standards, except if [issues were] happening every week, that would increase in priority dramatically”

OUTER REGIONAL/REMOTE CONSUMER

“Service standards are only an issue when you need them.”

OUTER REGIONAL/REMOTE CONSUMER

that access to the internet is very important for newly arrived migrants and refugees, and they rely on it for a range of reasons, including Google Translate and staying connected with family and friends overseas.

Likewise, stakeholders indicated that many people with disability use the internet to assist them with their disability. For example, video interpretation tools (for people with vision impairments) and many medical devices require internet connectivity. It was noted that when other infrastructure (like transport) is inadequate or inaccessible, internet becomes increasingly important to daily work and life for all Australians, but especially for people with disability.

SELECTED QUOTES FROM STAKEHOLDERS:

“Internet is life-saving infrastructure and critical for the medical needs of people who live with a disability. For example, external monitoring of machines and medical activity is often internet dependent.”

“Blind people need bandwidth to enable video interpreting services.”

“The economic impact of reliability over speed cannot be underestimated.”

“Even primary school kids are expected to have internet to do homework online. Kids had to try 20-30 times to upload their completed assignments.”

“If a child does not have mobile service, they are entirely reliant on household internet for their education. Household internet is incredibly important for educational access and education.”



4.2 AFFORDABILITY WAS KEY FOR MANY, PARTICULARLY VULNERABLE CONSUMERS

Affordability emerged as another top priority for consumers. Stakeholders noted that with government services and many other aspects of day-to-day life shifting to digital, there is an expectation that people have access to reliable internet, but many consumers struggle to afford NBN services. This was identified as a challenge particularly for older people or people with disability, who may be on fixed incomes. Free public Wi-Fi is often relied upon as an alternative, but as a limited offering only accessible in public spaces, it does not offer the same speed, reliability or privacy as a home internet connection.

Stakeholders stated that affordability is a priority for First Nations communities, who are often left behind when it comes to internet connectivity. They indicated that NBN and Starlink services are unaffordable and people who are from a low socioeconomic background do not often check their plan to monitor prices.

An unfortunate consequence of the relative unaffordability of an NBN plan for these communities, as well as contracting terms that are not designed with community experience in mind, is that connectivity needs are being met by high-cost pre-paid mobile services, which further exacerbate affordability issues.

One participant at Carlton Neighbourhood Learning Centre noted that they do not have Wi-Fi at home because they cannot afford it. This was echoed by a focus group participant in a metropolitan area, who stated that they have previously disconnected their NBN service in order to save money. This participant indicated that the quality of their internet connectivity was so poor that they found their mobile hotspot to be a comparable experience.

Stakeholders saw value in NBN services being subsidised for those in need, just like water and electricity. They also spoke about how consumers often first look at the affordability of internet service plans, rather than reliability, which can be harder to understand due to digital literacy barriers.

SELECTED QUOTES FROM STAKEHOLDERS:

“Affordability will have the single biggest impact on First Nations peoples.”

“Most people in remote communities use the free community Wi-Fi, provided by NBN Co to 23 remote First Nations communities. About 10-20% of people would use their own paid household internet, and others rely on the free Wi-Fi.”

“For remote Indigenous communities, price is the largest issue. Where community Wi-Fi isn't there, pre-paid services are a nightmare in terms of affordability. Contract issue is a big problem in Indigenous communities and are driving people onto high-cost pre-paid services.”

“Price is the biggest factor. A lot of the families in the community centre are large families, who have use for better internet services.”

SELECTED QUOTES FROM STAKEHOLDERS:

“There is a shift towards online service delivery. There is an expectation that people have access to reliable internet. Public Wi-Fi is relied upon heavily.”

“Lots of people studying outside in the free Wi-Fi. Connection is old and they cannot afford another connection.”

“Lower health literacy rates are influenced by digital connectivity. Ability is also a piece, but we can't really work on the ability until we have the connectivity.”

4.3 CONSUMER PRIORITIES ARE DEPENDENT ON INDIVIDUAL CIRCUMSTANCES

As expected, consumer priorities were dependent on individual circumstances. Consumers who worked from home or were higher-use individuals were more likely to prioritise faster internet speeds, as demonstrated by 80% of online survey participants rating very fast internet speeds (500Mbps and above) as being important for them. Consumers on lower incomes or with

tighter budgets were more likely to prioritise affordability.

Some focus group participants who were more skilled with technology indicated that they felt comfortable investigating and resolving certain issues on their own and as a result, rated service standards as a lower priority.

Stakeholders indicated that people living in social housing, such as temporary accommodation and transitional housing situations, are sometimes unable to connect to the NBN or afford the cost.

“I ranked faster internet speed first because of the nature of the work I do from home – it requires a stronger and faster internet speed.”

METROPOLITAN CONSUMER

“With the cost-of-living crisis, every single bill in my life is significantly increasing. Affordability is a major priority.”

METROPOLITAN CONSUMER

“I don’t have the same budget concerns that many people do. For me, it’s about getting the best service – if something goes wrong, I don’t want to wait a week, two weeks or a month.”

METROPOLITAN CONSUMER

“As long as the modem is working, I don’t really need the service standards. I can self-service my own modem.”

METROPOLITAN CONSUMER

SELECTED QUOTES FROM STAKEHOLDERS:

“We found that some people had barriers to participating, as some people were unable to get NBN due to temporary accommodation or transitional housing situations. The NBN is ideal for broadband connection, however it’s not always the most appropriate depending on circumstances.”

“There is not a culture of signing up to a contract or having bill obligations. People [living in remote First Nations communities] don’t want to enter into contractual obligations, and it’s a barrier to internet uptake.”

“[Remote First Nations communities] are not homogenous. Consumers priorities will differ.”

4.4 CONSUMERS IN OUTER REGIONAL AND REMOTE AREAS RELY HEAVILY ON THE INTERNET TO ACCESS SERVICES AND STAY SAFE DURING EMERGENCIES

Geographical location was a clear driver of consumer priorities. Consumers living in outer regional and remote areas rely heavily on the internet as an alternative to in-person options. They indicated that unreliable or poor internet connectivity creates significant barriers to attending telehealth appointments, joining important meetings, making online payments, and participating in online study. Network unreliability is exacerbated during peak times (such as weekends and school holidays) and during weather events like storms, which is particularly the case for satellite users.

Outer regional and remote consumers shared many experiences of unreliability and inconsistency with their internet connection. One consumer in Queenstown, Tasmania, with a fibre to the node connection spoke about experiencing full days without internet connection and only being able to access the internet in certain parts of their home. They indicated that this is a common occurrence in their area, and makes seeking remote, disability-friendly employment significantly harder.

Outer regional and remote consumers and stakeholders spoke about the importance of having a reliable internet connection in order to stay safe during disasters and emergency events. Phones are often unreliable and consumers in these areas need appropriate internet connectivity at home so they can receive evacuation warnings, access emergency information, and seek help if needed. Some focus group participants

indicated that consumers in outer regional and remote areas are more dependent on the NBN for essential services and connectivity than consumers in other areas.

Stakeholders shared how remote First Nations communities have to use Wi-Fi dongles in order to access the internet. It was noted that some outer suburban areas in more regional areas such as Alice Springs may have no internet at all or prohibitively expensive internet, which poses an extreme safety risk to households in these areas.

SELECTED QUOTES FROM STAKEHOLDERS:

“We ended up providing mobile broadband dongles for a lot of recipients. Often, when trying to resolve an issue, consumers got passed between RSPs and NBN Co.”

“Volunteer brigade doesn’t have adequate communications. Even radios don’t work because of the terrain. It can make things difficult in an already difficult situation.”

“In terms of the more remote parts of Alice Springs, it’s a question of ‘do they have internet?’ for starters. A lot of places probably won’t.”

“Without connection, lifesaving emergency services are at risk of not being able to provide their services.”

“I have a chronic illness and telehealth appointments are impossible sometimes. On top of that, I’m trying to finish off a university degree and either things don’t load or there’s not enough internet.”

OUTER REGIONAL/REMOTE CONSUMER

“Our phone is really unreliable and you have to be at a certain spot in the driveway to get a mobile call, so the satellite was the only way we could get internet.”

OUTER REGIONAL/REMOTE CONSUMER

“In the summertime during fire seasons, it’s important we keep our internet connections. Our phones are unreliable and we need to know whether to evacuate or not and where the fires are.”

OUTER REGIONAL/REMOTE CONSUMER

“Longer outages can pose safety risks in severe weather events or emergencies.”

OUTER REGIONAL/REMOTE CONSUMER

“Given that all taxpayers are funding the NBN, it’s a reasonable expectation that there is equal opportunity for access.”

METROPOLITAN CONSUMER

4.5 REPAIRS, UPGRADES AND MAINTENANCE SHOULD BE EASY AND EFFICIENT

While service standards were rated lower in comparison to other consumer priorities, consumers consistently shared experiences of long waiting periods for repairs, dealing with poor or confusing communication from NBN Co and internet providers or being frustrated and inconvenienced by scheduling issues. There was a clear desire for improved service standards and efficient repairs, upgrades and scheduling.

This was echoed in ACCAN’s Consumer Sentiment Tracker, where 93% of participants rated time taken to repair faults as important, 85% rated time taken to upgrade a connection as important and 85% rated convenience of maintenance scheduling as important, as shown in Figure 8. Participants also expressed a desire for better communication from internet providers and ease of switching between providers, which reflects broader consumer feedback about the confusion, overwhelm and time required to research and change internet plans.

Figure 8 - Participants’ priorities (Source: ACCAN Consumer Sentiment Tracker August 2025. Sample size: 1,000)

Network performance and reliability (i.e. providing consistent speeds)



Time taken to repair faults



Communication from internet providers



Time taken to upgrade my connection



Convenience of maintenance scheduling (i.e. making an appointment)



Ease of switching between internet providers



Very important Somewhat important
Not that important Not important at all Unsure

4.6 ALL AUSTRALIANS SHOULD BE ABLE TO ACCESS A FAST, RELIABLE AND AFFORDABLE INTERNET CONNECTION

Consumers and stakeholders consistently spoke about internet connectivity being essential for people to participate in daily life, stay safe and connect to important services. 70% of participants in ACCAN’s Consumer Sentiment Tracker stated that their NBN connection is essential to their daily life.

They highlighted the importance of all consumers having access to a fast, reliable and affordable internet connection and the associated repairs and support needed to maintain it. Focus group participants felt strongly that all aspects of their internet service are important and consumers should not have to choose one element over another when they are paying for a service.

“I think they’re all equally important and all a priority to me. Why can’t we have all of it? Why do we have to pick one and sacrifice on the other three?”

INNER REGIONAL CONSUMER

“As a motivated consumer that would spend more money on a better connection, there’s a sense of extremes – there should be something in the middle that services my needs.”

INNER REGIONAL CONSUMER

4.7 CONSUMERS SHOULD BE EMPOWERED TO DETERMINE HOW THE NBN OPERATES

Consumers and stakeholders expressed a strong desire for consumers to be consulted on NBN services and operations. The majority of participants from ACCAN’s Consumer Sentiment Tracker highlighted the importance of consumers being able to have a say on affordable entry level internet plans and quality and reliability of NBN services, as shown in Figure 9. They also wanted to see consumers being empowered to have a say on how rural, regional and remote communities are connected to the internet and how NBN Co operates the network and plans its expenditure.

This was echoed by consumers at the Bulli Village Market event, where 100% of participants indicated that NBN Co should consult with consumers about ensuring all Australians have access to an affordable entry level internet plan, and 98% of participants indicated that it is important to consult with consumers on how Australia’s regional, rural and remote communities are connected to the internet, and the quality, reliability and maintenance of NBN services.

Figure 9 - Participants’ perceptions on consumers having a say on NBN services and operations (Source: ACCAN Consumer Sentiment Tracker August 2025. Sample size: 1,000)

Ensuring that all Australians are able to access an affordable entry-level internet plan



The quality, reliability and maintenance of NBN services (e.g. how soon NBN Co needs to fix a fault)



How Australia’s regional, rural and remote communities are connected to the internet, including satellite services



How NBN Co operates, invests its money and sets prices



Very important Somewhat important
Not that important Not important at all Unsure

5 .

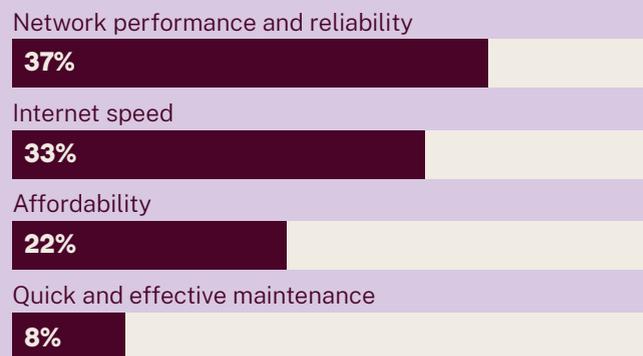
COMMUNITY EVENT - BULLI VILLAGE MARKETS

5.1 NETWORK PERFORMANCE AND RELIABILITY IS FRONT OF MIND FOR CONSUMERS

Participants at the Bulli Village Markets community consultation event were asked to indicate their top two priorities for their internet service. They identified network performance and reliability as their highest priority (37%), followed by internet speed (33%), as shown in Figure 10. Participants had varied experiences depending on their location, connection and personal needs. Some were satisfied with their service (generally those with fibre to the premises), while others spoke about having inconsistent speeds around their home and slow upload speeds.

Participants were concerned about NBN services being too expensive. It was noted that prices are going up but consumers' experience of the NBN has not improved, and one participant indicated that it takes a lot of time and effort to research and switch plans to save money. Another participant stated that they do not know who to contact when they experience issues with their internet service.

Figure 10 - What's most important to you when it comes to your internet service? (Source: CRED Consulting community event data. Sample size: 50)



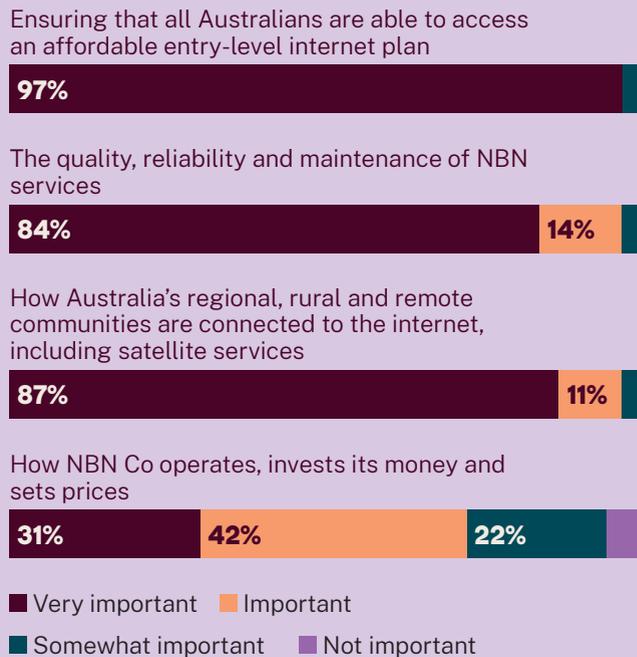
“Reliability and effective maintenance should be a given.”

5.2 CONSUMERS WANT TO BE CONSULTED BY NBN CO

Participants were supportive of consumers having a say in various aspects of NBN Co's operations and service delivery. As shown in Figure 11, 100% of participants indicated that NBN Co should consult with consumers about ensuring all Australians have access to an affordable entry-level internet plan (100% rated it as very or somewhat important). 98% of participants indicated that it is important to consult with consumers on how Australia's regional, rural and remote communities are connected to the internet, and the quality, reliability and maintenance of NBN services.

Participants spoke about network reliability and service maintenance needing to be standard with any internet connection. Internet reliability was also identified as highly important by those moving into the area. Some participants were comfortable not being consulted, as long as NBN Co delivers what it needs to and does right by consumers.

Figure 11 - How important is it that consumers have a say in each of the following? (Source: CRED Consulting community event data. Sample size: 50)



ACCAN staff at a pop-up stand at the Bulli Village Markets in Wollongong, NSW

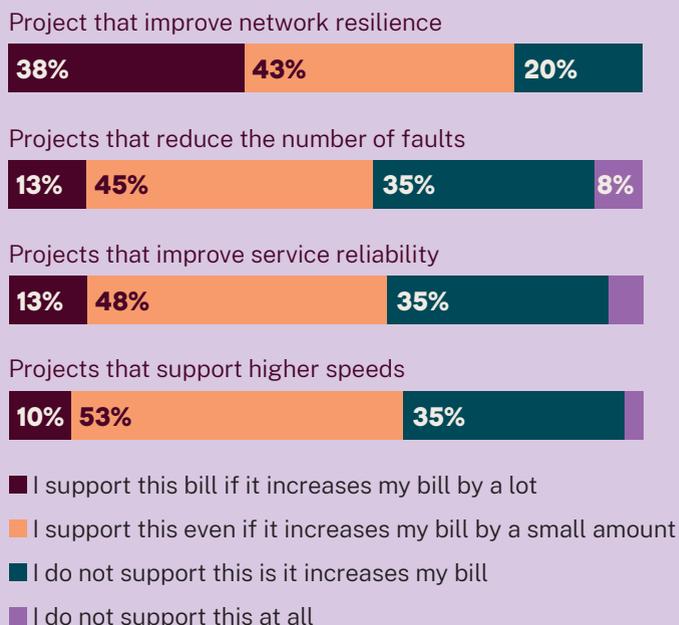
5.3 MANY CONSUMERS WILL ACCEPT PAYING MORE FOR NETWORK IMPROVEMENTS

Participants were strongly supportive of projects that improve network resilience. As shown in Figure 12, 81% of participants would be willing to accept an increase in their bill to accommodate this (38% were comfortable with a large increase and 43% with a small increase). Participants highlighted the need to improve network resilience so people can access the internet during times of natural disasters.

The other capital expenditure projects assessed had more mixed responses from participants. While level of support was still high (with more than half of participants happy to accept an increase in their bill to accommodate the projects), many participants indicated that they would not pay more.

Participants who were already satisfied with their internet service generally did not see any value in paying more to accommodate these projects (or these projects occurring at all). Some participants felt that the amount they currently pay for NBN services should cover the cost of these projects.

Figure 12 - Which projects would you support? (Source: CRED Consulting community event data. Sample size: 50)



“These things should already be covered by what I pay. They should be business as usual.”



ACCAN staff at a pop-up stand at the Bulli Village Markets in Wollongong, NSW

6 .

SERVICE STANDARDS

The vast majority of focus group consumers strongly agreed that NBN Co should directly compensate consumers for failures to meet service standards. A significant majority considered that NBN Co should improve timeframes for service requests in regional, rural and remote areas to be the same or as close as possible to metro timeframes, while a smaller majority supported the notion that NBN Co should prioritise connections and upgrades based on an area’s level of connectedness.

Figure 13 shows the overall level of agreement across all focus groups. Figure 14 shows a comparison of each focus group, to provide an indication of how average ratings (presented as a weighted average) differed across metropolitan, inner regional, and outer regional and remote consumers.

Figure 13 - Overall service standards agreement statements across all focus groups (Source: CRED Consulting focus group data. Sample size: 33)

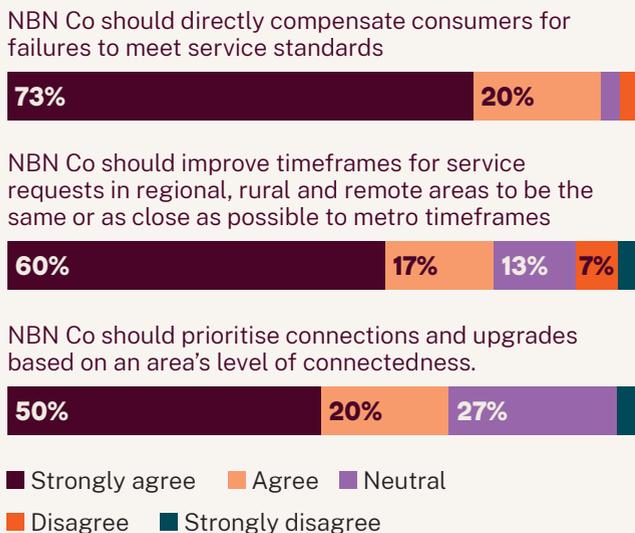
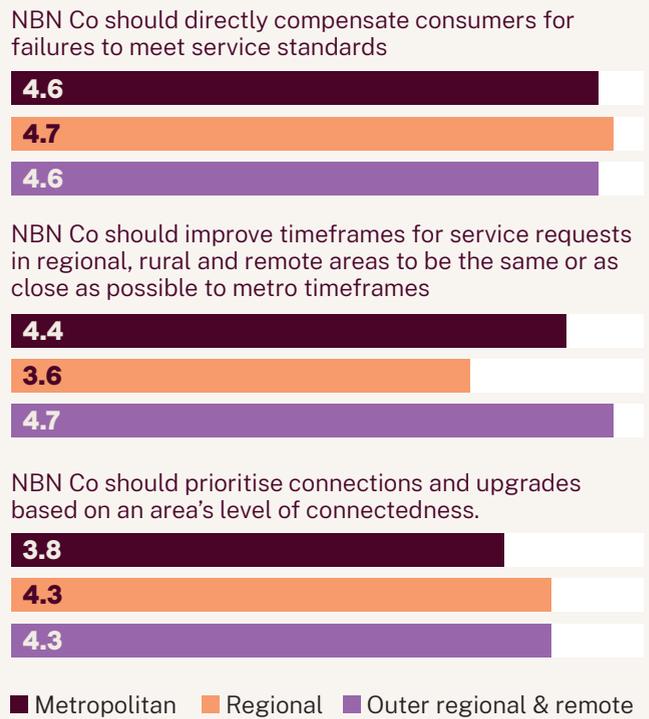


Figure 14 - Comparison of service standards agreement statements at each focus group (Source: CRED Consulting focus group data. Sample size: 33)



Online survey participants felt strongly that service standards should be regularly reviewed through public consultations to ensure that they reflect consumer needs and preferences. 50% expressed a desire for annual reviews and 40% proposed reviews every two-to-three years.

6.1 NBN CO SHOULD COMPENSATE CONSUMERS FOR SERVICE STANDARD FAILURES

As shown in Figure 15 on the previous page, metropolitan and inner regional consumers were most likely to agree that NBN Co should directly compensate consumers for failures to meet service standards. This was echoed in ACCAN's Consumer Sentiment Tracker, with 89% of participants indicating that NBN Co should be required to compensate consumers when they do not meet agreed service standards.

Consumers and stakeholders expressed strong support for NBN Co to provide compensation for failures to meet service standards. They shared experiences about needing to proactively seek compensation for a technical issue (rather than compensation being offered as required) or receiving compensation but without any resolution of the issue or assurance that it would not happen again. One stakeholder spoke about being refunded the cost of their plan (upon request), but not receiving any compensation payments for underperformance or inconvenience before the initial technical complaint was issued.

83% of ACCAN Consumer Sentiment Tracker participants indicated that when NBN Co is unable to meet agreed service standards, most if not all of the compensation should go directly to consumers as opposed to retail service providers, as shown in Figure 15.

Figure 15 - ACCAN Consumer Sentiment Tracker consumer priorities (Source: ACCAN Consumer Sentiment Tracker March and August 2025. Sample size: 2,065)



“They stated it would be three business days for help to arrive. We went to Telstra three months after this phone call and cancelled our plan, as a technician never came. They refunded us for three months, but there was no compensation for under-performance or inconvenience before the initial technical complaint was issued.”

STAKEHOLDER

6.2 TIMEFRAMES FOR SERVICE REQUESTS SHOULD BE IMPROVED IN RRR AREAS

77% of participants in the focus groups agreed that NBN Co should uplift timeframes for service requests for consumers in RRR areas to reach a similar level to metro timeframes. As expected, outer regional and remote consumers were most likely to agree with this statement.

The need to improve service standard timeframes for consumers in regional, rural and remote areas was supported by high-use online survey participants, 67% of whom supported faster or significantly faster timeframes to more closely match metropolitan consumers. 11% of those participants were willing to accept slower timeframes for metropolitan consumers as a result.

Stakeholders supported the need for faster repair timeframes for regional, rural and remote consumers. They indicated that with the transition to a more digital world, disrupted internet connectivity means people are unable to access online support services, exacerbating social isolation. Stakeholders noted that people receiving income support payments are cut off if they are unable to upload their income reports, which is challenging when they are experiencing issues with their internet connection, and some people forgo their Centrelink payments entirely because it is too hard to do online. Stakeholders also highlighted the risks to remote communities, such as farmers, who rely on the internet to access mental health support and telehealth services. Improving timeframes are also important for healthcare providers who often dial in specialists who are time sensitive.

Stakeholders stated that NBN Co needs to be more competitive in its service offerings and have faster repair times. They indicated that Starlink is preferred over NBN services in many cases for its higher service reliability.

Stakeholders also highlighted the utility of Starlink to be convenient for businesses and for farmers who are more willing to pay more for a reliable internet service.

As a workaround to the timeframes, stakeholders suggested training technicians in regional areas to ensure these communities are able to independently troubleshoot issues. They suggested having localised technicians for consumers using satellite technology to improve service delivery timeframes, and having parts located at centralised hubs for easy access.

SELECTED QUOTES FROM STAKEHOLDERS:

“When the internet goes down, individuals lose contact with all vital services. Complete social isolation.”

“A remote farmer in Tasmania, who may require mental health support, is relying upon telehealth appointments.”

“As we move towards telehealth options, the ability to have a safe and secure internet connection to enable video calls is critical.”

“It could be faster, however the longer timeframes do make sense. What could be a more feasible solution is training regional technicians in communities to ensure that communities can troubleshoot the issues themselves.”

Inner regional and outer regional and remote consumers expressed their dissatisfaction with NBN Co's service standards, particularly when technicians do not show up to scheduled appointments for service requests. Inner regional focus group participants spoke about experiencing severe weather conditions and facing time lags in having their internet restored. In one case, the Telecommunications Industry Ombudsman had to step in to resolve the issue, which led to further delays in restoring the consumer's internet connection.

SELECTED QUOTES FROM STAKEHOLDERS:

“NBN Co should be taking ownership as the national provider, by ensuring they are the only installer. There are many cases where NBN Co is not installing the infrastructure themselves.”

“No school for ten days is two weeks of learning. Even if someone was going to mail physical learning materials to you, it would still take too long.”

“It's the wrong way around. Regional, rural and remote should be prioritised.”

“Reliability is the primary concern. Farmers are willing to pay more if they know they can get more reliable services.”

“Digital health is also for providers. They want to be able to do telehealth and dial in a specialist at the same time. You can't have drop outs, as specialists have waiting times and making the most of the time they give you is important.”

The process of requesting repairs is also challenging when consumers do not know which organisation is responsible for issues, and are passed between their local council, NBN Co and the internet provider. For example, an outer regional focus group participant shared an experience of reporting an issue with their NBN connection through the SnapSendSolve app, which allows residents to report issues to their local council. Council directed them to their internet service provider, who then connected them to NBN Co, after which point they had been without internet for several days.

“They told me it was a four-hour timeslot on the Saturday morning and they didn't come.”

OUTER REGIONAL AND REMOTE CONSUMER

“The providers look at it first, and then you've lost two or three days before it's in the right hands.”

OUTER REGIONAL AND REMOTE CONSUMER

“When there was a failure with the NBN modem, to troubleshoot it took a lot of time because it had to go through multiple levels.”

METROPOLITAN CONSUMER

“We have fibre to the node and generally speaking it works quite well, however getting the service restored after weather issues [has been challenging].”

INNER REGIONAL CONSUMER

“It's curious that Starlink can provide me a better and cheaper service than the NBN.”

INNER REGIONAL CONSUMER

6.3 CONNECTIONS AND UPGRADES SHOULD BE PRIORITISED BASED ON AN AREA'S LEVEL OF CONNECTEDNESS

Access to essential online services emerged as an important driver for consumers prioritising connections and upgrades and improving timeframes for service requests in regional, rural and remote areas. Focus group participants spoke about how people living in RRR areas experience difficulties accessing essential services, such as education, telehealth and emergency services, due to their geographic location, which poses a risk for these communities.

Inner regional consumers expressed a desire to enjoy as similar a quality of service to metropolitan consumers as possible, as they rely on the internet more heavily and pay similar, or even more expensive, retail prices for their internet connection as those living in metropolitan areas. One focus group participant indicated that metropolitan consumers already have a standard living baseline that is not being experienced by those in RRR areas, so it is illogical to prioritise metropolitan areas.

“My kids need to be able to video call to ensure they can connect with other kids. They deserve to be able to see their classmates.”

STAKEHOLDER

“If you think about use of internet for medical appointments, this sort of thing is vital for people living in regional/rural areas.”

METROPOLITAN CONSUMER

“I feel like remote areas should have the same services as metropolitan areas. Sometimes it's harder for us, as we're relying a lot more on the internet due to our location.”

INNER REGIONAL CONSUMER

“People in metropolitan areas have so many more options – it's so much harder for rural people to access services. That's an enormous amount of time that we are expected to wait to be able to get that access restored, and those implications can be life-threatening.”

OUTER REGIONAL AND REMOTE CONSUMER

“I think they need to prioritise people in regional and rural areas – we have to wait four hours for them to come out, so they need to prioritise us too.”

INNER REGIONAL CONSUMER

“Prioritising more suburban areas doesn't benefit people because they've got a standard living baseline that isn't being experienced by everyone else.”

OUTER REGIONAL AND REMOTE CONSUMER



ACCAN staff visiting regional consumers on their property in the Tasman Peninsula

7.

THE ENTRY LEVEL OFFER

Stakeholders and consumers were in agreement that retailers should be required to sell the Entry Level Offer (ELO) to support consumer access to cost-effective services. Consumers and stakeholders raised several concerns with current pricing of the NBN and the ELO, and expressed a desire for more affordable, faster and more reliable plans.

Participants in ACCAN’s Consumer Sentiment Tracker expressed high levels of agreement that entry level plans should be more affordable, subject to retail price caps and reviewed frequently to ensure they are accessible and meeting the needs of the consumers who use them, as shown in Figure 16.

Figure 16 - Participants’ desired improvements to the Entry Level Offer (Source: ACCAN Consumer Sentiment Tracker August 2025. Sample size: 1,000)

Entry level plans should be subject to retail price caps to prevent retailers (e.g. Optus, Telstra, TPG etc.) from making excessive profits from these plans



The retail price for an entry level plan should be affordable for people experiencing financial difficulty, like those in social housing & single-parent households



Entry level plans should be reviewed frequently, to ensure that the needs of people experiencing financial difficulty are met today and in the future



The entry level plan should be significantly cheaper than the next cheapest plan



■ Strongly agree ■ Agree ■ Neutral
■ Disagree ■ Strongly disagree

7.1 THERE IS A LACK OF COMPETITION AND REGULATION, RESULTING IN HIGH PRICES

Stakeholders noted that there is a lack of competition among retailers, meaning they can set higher prices to generate more profit. This creates inequitable pricing, impacting low-income consumers who are forced to pay high prices for low speeds. These high prices have flow-on impacts on wellbeing and quality of life for vulnerable cohorts. For example, stakeholders indicated that some people with disability will prioritise their internet connectivity over essential needs, such as food.

Stakeholders indicated that the lack of regulation plays a key part in retailers’ high profit margins.

Stakeholders suggested that a cap should be imposed to ensure that internet services are affordable for consumers. This could be similar to the profit margin regulations in place for energy providers in Tasmania, which results in more affordable energy plans for consumers. Stakeholders expressed support for a concessional broadband plan to ensure affordability of internet services.

SELECTED QUOTES FROM STAKEHOLDERS:

“Not having internet is an impediment to people’s education and ability to participate in society.”

“I’d be in favour of anything that brought the price of lower tier plans down – somebody with a disability shouldn’t be forced to pay. People with disabilities will prioritise their online connections, and miss out on other essentials such as food.”

“There is no default market offer like there is with electricity.”

“Freedom to charge whatever, for a plan that is targeting people on low incomes, is way too expensive. We would want to see some form of a price setting mechanism.”

“Why is this done differently for the NBN? Why is it not treated like every other essential service?”

“Retail margins are three times what they are in the energy sector.”

“Aurora, who used to be the monopoly energy retailer in Tasmania, was regulated and the regulators determined the standard offered retail prices to ensure it was fair, equitable and appropriate for an essential service.”

7.2 THE ENTRY LEVEL OFFER SHOULD BE FASTER AND REVIEWED REGULARLY

The majority of participants in ACCAN’s Consumer Sentiment Tracker (80%) agreed that entry level plans should be reviewed frequently, to ensure that the needs of people experiencing financial difficulty are met today and in the future. Only 2% of participants opposed regular reviews of the ELO. This was echoed consistently by stakeholders.

Stakeholders and high-use online survey respondents wanted the ELO to be set at a higher speed tier than the 25/5 service, to ensure infrastructure is futureproofed and consumers can access faster internet speeds. Only 5% of online survey participants felt that the existing 25/5Mbps plan is suitable, with all other participants supporting higher speeds. 50% saw value in the download and upload speeds being raised to 100/20Mbps or higher, with 63% seeing value in annual reviews to regularly review the speed the ELO is set at moving forward.

Stakeholders indicated that the ELO should be reviewed before the next regulatory cycle, based on the accelerating innovation of technology and the risk of increasing social inequality. They noted a contradiction between raising the speeds of 100+Mbps tiers through the Accelerate Great program, and retaining the ELO at a mere 25Mbps for the foreseeable future.

“If internet speed differences aren’t addressed, then over three years that’s going to increase divides in education and health outcomes between those who can afford fast internet and those who cannot.”

STAKEHOLDER

7.3 THE ENTRY LEVEL OFFER SHOULD BE MORE AFFORDABLE

Stakeholders and consumers indicated that the price for the ELO should be lower to support affordability of internet services and ensure fair and equitable pricing for consumers. They spoke about the retail margin resulting in unreasonably high pricing of low-speed tier plans, impacting the ability for consumers to afford internet services. Stakeholders expressed support for retail price caps to manage prices for the ELO, or for the Australian Government to offer subsidies to assist low-income households

80% of participants in ACCAN's Consumer Sentiment Tracker supported entry level plans being subject to retail price caps to prevent retailers from making excessive profits and 80% wanted the retail price for an entry level plan to be affordable for people experiencing financial difficulty, such as those in social housing and single-parent households. A very small proportion of participants opposed these initiatives (4% and 3%, respectively).

High-use online survey respondents echoed this, with 88% indicating that the retail price for an entry level plan should be affordable for people experiencing financial difficulty, and 78% expressing a desire for retail price caps to be imposed to ensure the service is affordable.

SELECTED QUOTES FROM STAKEHOLDERS:

“If we are saying that everybody should have access to a reliable and decent speed internet connection, then the ELO is probably not priced well. Many low-income households rely on mobile hotspots because they cannot afford household internet.”

“From a consumer point of view, why has there been no push to create a standing offer for a basic NBN service that insulates people from excessive margins from retailers?”

“Low speed tier plans are more expensive than they should be. Pricing is insane.”

“Personally, I would love to see it subsidised entirely for people that can't afford it.”



ACCAN Director of Economic Regulation with the Carlton Neighbourhood Learning Centre

8 ■

CAPITAL EXPENDITURE

8.1 CONSUMERS AND STAKEHOLDERS WERE GENERALLY SUPPORTIVE OF NBN CO'S PROPOSED CAPITAL EXPENDITURE PROJECTS

Consumers in the focus groups generally expressed support for all of the proposed capital expenditure projects, as important national infrastructure improvements. The projects that were most supported overall were around protecting the network against cyber-attacks and natural disasters (93% support) and improving service standards (90% support). There were some differences across cohorts, with consumers in outer regional and remote areas prioritising satellite infrastructure.

Consumers expressed a strong desire for more competitive and reliable options for satellite technology, noting that existing NBN satellite internet connections often experience high latency and alternatives like Starlink are more expensive.

Figure 17 shows the level of support across all focus groups. Figure 18 over the page shows a comparison of each focus group, to provide an indication of how the level of support differed across metropolitan, inner regional, and outer regional and remote consumers. The priority scores were developed based on the ratings made by consumers in the focus groups, with higher scores indicating a higher average rating.

Figure 17 - Overall consumer support for capital expenditure projects across all focus groups (Source: CRED Consulting focus group data. Sample size: 33)

A project to upgrade and deliver new satellite infrastructure for people in RRR areas



A project to protect the network against cyber attacks and natural disasters and help maintain internet connectivity through these events



A project to improve service standards, including repairs, network performance, connection processes and connection times



A project to help reduce emissions and help make physical infrastructure (like fibre cables) more resilient to weather events



A fibre upgrade project, aimed at improving the reliability and speed of internet services



■ Strongly supportive ■ Supportive ■ Neutral
■ Not very supportive ■ Not at all supportive

Consumers and stakeholders highlighted the need to ensure consumers in rural, remote or disaster-prone areas have access to resilient internet infrastructure so they can stay connected and safe during emergency events and power outages. Ensuring consumers in RRR areas are connected was seen as a priority given the growing digital transformation and the need to be able to participate effectively in work, study, and daily life online.

Access to the internet was seen as underpinning the success of the National Foundational Skills Strategy, with special regard for productivity, employment and addressing social inequality, particularly for regional, rural and remote locations. One stakeholder further noted that NBN Co should also prioritise communities in black-spot areas, such as in the Hawkesbury, Blue Mountains, and Wollondilly.

SELECTED QUOTES FROM STAKEHOLDERS:

“Household internet is incredibly important for education, particularly in rural, regional and remote areas with the increasing digitisation of homework and school resources.”

“The cost of Starlink is probably prohibitive for a lot of people.”

“It would be good to see black spot communities prioritised or to see an equitable approach to investments.”

Figure 18 - Comparison of consumer support for capital expenditure projects at each focus group (Source: CRED Consulting focus group data. Sample size: 33)

A fibre upgrade project, aimed at improving the reliability and speed of internet services



A project to help reduce emissions and help make physical infrastructure (like fibre cables) more resilience to weather events



A project to improve services standards, including repairs, network performance, connection processes and connection times



A project to protect the network against cyber attacks and natural disasters and help maintain internet connectivity through events



A project to upgrade and deliver new satellite infrastructure for people in regional, rural and remote areas



■ Metropolitan ■ Regional ■ Outer regional & remote

“I think we need to work on the service to connect and stay connected in all parts of Australia, no matter where you live.”

INNER REGIONAL CONSUMER

“Cybersecurity is foundational. Resilience against natural disasters enables the continuity. It doesn’t matter if the private sector spends a high amount of money for these projects, as long as it leads to more equity, stronger internet infrastructure, and long-term resilience for all people.”

METROPOLITAN CONSUMER

“I’m sick of paying so much, but I’d like them to focus more on cyber security and other future-proofing projects – they have the responsibility to invest in this infrastructure.”

INNER REGIONAL CONSUMER

“One of my thoughts was around making the NBN more resilient to weather events – do you pay now or do you pay when it causes damage? That’s why I’d be happy to fund that.”

METROPOLITAN CONSUMER

“It’s about equity of access and everyone having the same baseline. So much of our lives are dependent on digital identity, online banking etc, which you can only do with an internet connection.”

OUTER REGIONAL/REMOTE CONSUMER



ACCAN Director of Economic Regulation with the Wamboin Communications Action Group

8.2 HOWEVER, WILLINGNESS TO ACCEPT BILL INCREASES WAS MIXED

Support for the proposed projects dropped significantly when the trade-off of higher bills was raised. Only 17% of focus group participants indicated that they would still be supportive if investment in these projects led to higher bills, as shown in Figure 19. Consumers in metropolitan areas were more likely than those in other areas to remain supportive, regardless of bill increases.

Figure 19 - Focus group participants' willingness to accept higher bills (Source: CRED Consulting focus group data. Sample size: 33)

Would still be supportive, even if investment in these projects led to higher bills

17%

Would not be supportive if investment in these projects led to higher bills

34%

Unsure about level of support

48%

Willingness to accept bill increases was higher among higher-use cohorts, such as the online survey participants. 73% of online survey participants indicated that they were willing to accept an increase to their bill, and 19% of those participants were comfortable accepting a significant increase. Most participants at the Bulli Village Markets community event were also willing to accept an increase in their bill to accommodate the proposed projects. Improving network resilience was seen as a high priority, with 81% of participants willing to accept an increase in their bill to accommodate projects of this type.

Consumers were conscious of the already high costs for internet services, with 53% of participants in ACCAN's Consumer Sentiment Tracker indicating that affordability was one of the main reasons they were unable to upgrade to a higher speed broadband plan.

Stakeholders expressed the view that Australia is already falling behind the rest of the world when it comes to internet, so there is a critical need to invest in infrastructure improvements to promote uptake and productivity. As the NBN is a national service, it was felt that the government should provide the investment or that NBN Co should continue to invest in infrastructure improvements.

Stakeholders expressed concern about the impact the proposed capital expenditure projects could have on consumer bills. Stakeholders noted that increased prices disproportionately impact low-income households and families experiencing poverty, affecting their ability to continue to access the internet. There was a desire for NBN Co to offer concessional rates for internet and distribute price increases equitably (for example by higher cost plans having a higher contribution to cost recovery efforts). One stakeholder expressed that farmers want to see their internet improved if their bill goes up substantially.

SELECTED QUOTES FROM STAKEHOLDERS:

“Any increase in price, when you are on a fixed income and on the poverty line, makes a massive difference.”

“Electricity in Melbourne is offered at a concessional rate but the service isn't at a lower quality. It's disappointing that for internet, the compromise is between price and quality.”

“There is a tension between NBN Co needing to be a profitable business and the need to address social inequalities and barriers to participation of those on low incomes. The NBN should be part of the entitlement of those on pensions, benefits and low incomes.”

8.3 NBN CO SHOULD WRITE OFF THE REPLACEMENT OF FTTN CONNECTIONS

NBN Co invested heavily in copper infrastructure required for fibre to the node connections, which are now being fully replaced by fibre to the premises services just a decade later. Stakeholders and online survey participants were asked if NBN Co should be required to write off this asset to prevent consumer prices from rising to pay for this replacement.

ACCAN's engagement indicated that consumers expressed a considerable degree of frustration that significant investment had been made into FTTN assets which would need to be replaced so soon and did not consider that NBN Co should be earning revenue based on these assets. However, consumers and stakeholders expressed differing views about how these assets should best be replaced from a financial and accounting perspective.

The majority of online survey participants (72%) indicated that NBN Co should be required to write off these assets, so they do not factor into their pricing decisions. One stakeholder expressed concern that NBN Co could recover the cost of investments in copper assets that should not have occurred in the first place, alongside the cost of fibre investments.

Others were more circumspect. One stakeholder was concerned that writing down profits will increase the risk of privatising the NBN, and noted that with technology investment becoming more obsolete and upgrades becoming more frequent, it is risky to not allow technology companies to cost-recover from legacy technology. Another indicated that assets degrade and if this is seen as a sunk cost by the Commonwealth, this should be NBN Co's problem.

8.4 IMPROVEMENTS TO SATELLITE INFRASTRUCTURE AND PROTECTION AGAINST CYBER ATTACKS AND NATURAL DISASTERS WAS A PRIORITY

Understanding the possibility of bill increases, focus group participants were asked to rank which projects they would prioritise for investment. Figure 20 shows the average ranking of projects across all focus groups. Figure 21 shows a comparison of each focus group, to provide an indication of how rankings differed across areas. The higher scores indicate a higher average ranking.

The overall top priority projects were to upgrade and deliver new satellite infrastructure for people in regional, rural and remote areas, and a project to protect the network against cyber attacks and natural disasters and help maintain internet connectivity through these events.

As expected, priority projects differed among different cohorts. Outer regional and remote consumers prioritised satellite improvements and inner regional consumers prioritised fibre upgrades to improve reliability and speed.

Figure 20 - Average capital expenditure project rankings across all focus groups (Source: CRED Consulting focus group data. Sample size: 33)

A project to upgrade and deliver new satellite infrastructure for people in regional, rural and remote areas

3.4

A project to protect the network against cyber attacks and natural disasters and help maintain internet connectivity through these events

3.4

A fibre upgrade project, aimed at improving the reliability and speed of internet services

3.2

A project to improve service standards, including repairs, network performance, connection processes and connection times

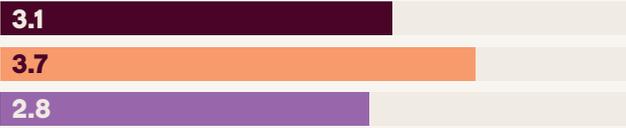
2.8

A project to help reduce emissions and help make physical infrastructure (like fibre cables) more resilient to weather events

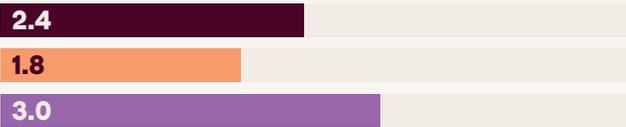
2.4

Figure 21 - Comparison of project rankings at each focus group (Source: CRED Consulting focus group data. Sample size: 33)

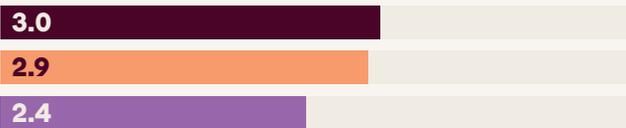
A fibre upgrade project, aimed at improving the reliability and speed of internet services



A project to help reduce emissions and help make physical infrastructure more resilient to weather events



A project to improve service standards



A project to protect the network against cyber attacks and natural disasters and help maintain internet connectivity throughout



A project to upgrade and deliver new satellite infrastructure for people in RRR areas



■ Metropolitan ■ Regional ■ Outer regional & remote

8.5 INVESTMENT IN SOME CAPITAL EXPENDITURE PROJECTS SHOULD BE DEFERRED

Stakeholders were asked if they would support deferring investment until the next regulatory cycle (FY30-FY32) if the borrowing costs outweigh the benefits.

With regard to the HFC network, stakeholders were supportive of deferring investment, with a desire for the focus to be on replacing or repairing the most urgent infrastructure issues, rather than achieving the best technological outcomes. Stakeholders highlighted the need to consider efficiency and how investment can best support more of the community.

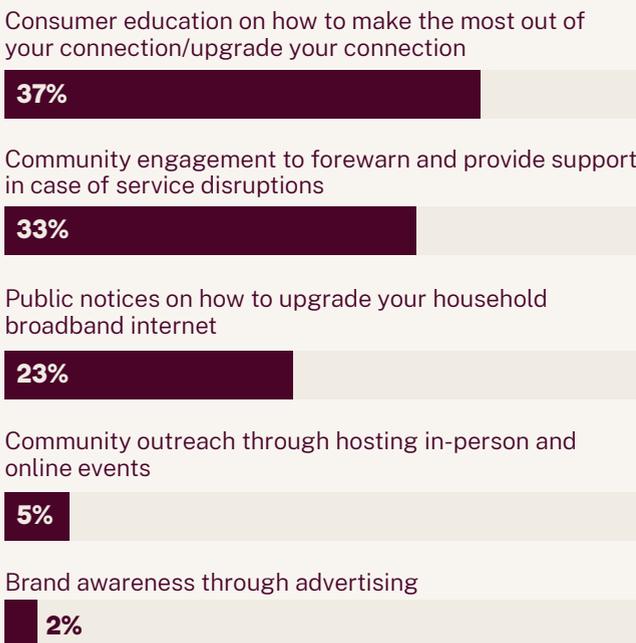
9.

OPERATING EXPENDITURE

9.1 CONSUMERS DID NOT SUPPORT NBN CO'S BRAND AWARENESS MARKETING

Consumers were generally unsupportive of NBN Co spending their marketing, communications and engagement budget on brand awareness through advertising. Only 2% of high-use online survey participants rated this as their highest priority, as shown in Figure 22.

Figure 22 - Participants' marketing, communications and engagement priorities (Source: High-use consumers online survey. Sample size: 82)



Stakeholders indicated that the current marketing approach does not benefit consumers. The existing advertisements (such as advertising at the cricket) were seen as not inclusive or representative of the community and not adding any value.

SELECTED QUOTES FROM STAKEHOLDERS:

“I can’t see a justification for advertising the NBN. It’s kind of like advertising roads. You may advertise a new highway/improvement to roads. But advertising that the road exists is pointless.”

“Nobody understands this NBN stuff. Marketing is not helping to educate.”

“Does it make sense for a monopoly infrastructure company to be do marketing? If it’s creating awareness [of the product], then yes.”

“The cricket advertisement means nothing.”

9.2 CONSUMERS WANTED MORE OUTREACH FROM NBN CO COMMUNICATIONS

Stakeholders and consumers indicated that NBN Co's marketing activities and operating expenditure should be focused on educating and informing consumers about how internet services help them. As shown in Figure 22 on the previous page, 37% of high-use online survey participants rated consumer education on how to make the most out of a connection or upgrade a connection as their top priority, followed by community engagement to forewarn and provide support in case of service disruptions (33%).

Stakeholders and consumers wanted to see transparency around pricing to ensure consumers are well-informed about pricing plan options when they go to retailers. Stakeholders also expressed a desire for community engagement on digital literacy, to upskill consumers (including those in remote communities) and educate them on scams, and disability awareness and connectivity information, to help equip people with disability living in RRR communities with the confidence to use computers.

Some stakeholders shared positive experiences with NBN Co's active engagement in particular communities around Australia. They shared how NBN Co positively engages with First Nations communities and provides funding for NBN Co staff to physically be present in remote areas. Staff also spoke about NBN Co hosting connectivity and digital literacy workshops for businesses and community members and supporting the sharing of localised information about programs, in order to help overcome digital literacy barriers. This highlights how NBN Co can educate and advocate for Australian communities to inform infrastructure development. Stakeholders want to see NBN Co investing more money in delivering these community programs.

However, some stakeholders held contrasting views, expressing that NBN Co has done limited engagement in regional or remote areas, particularly in the Northern Territory. Generally, stakeholders spoke about the need for NBN Co to improve its engagement and communication efforts to increase awareness and trust within communities.

SELECTED QUOTES FROM STAKEHOLDERS:

“NBN Co has had a positive impact and has conducted themselves with cultural sensitivity and communicated in an appropriate manner.”

“You wouldn't want the retailer to educate, because they are selling something. NBN Co can be an advocate for communities, to inform strategic direction of infrastructure development.”

“[NBN Co has] got much more of a community focus [in our region]. This is a great use of money, and we would welcome more money to be spent on this.”

“More grassroots engagement would be beneficial... there are so many people out there who wouldn't have a clue what the NBN is, let alone what they are trying to do and upgrade.”

“People don't know who NBN Co are, and this feeds into the trust issues within cultural and First Nations communities.”

9.3 STAKEHOLDERS SUPPORTED LEOSAT TECHNOLOGY BUT WANT TO SEE MORE COMPETITION

Stakeholders were generally supportive of NBN Co's investment into LEOSat technology, with some stakeholders seeing a future NBN-delivered Amazon LEO service as the preferable option over Starlink. Consumers and stakeholders welcomed an increase in wholesale competition in the LEOSat market. Stakeholders stated that they would like to see competitive plans and competition from providers, including pre-paid options and concessions. They did however flag reliability concerns for LEOSat services during wet weather conditions as an ongoing concern.

"If we didn't have friends who could set up our Starlink, and we had to pay commercially, we wouldn't have been able to afford it."

STAKEHOLDER

9.4 STAKEHOLDERS WANTED TO BE CONSULTED ON PRICING AND SERVICE OFFERINGS

Stakeholders indicated that they would like to be consulted on price, and want to ensure that there is a competitive retail market so prices and plan offers are suitable for consumer needs.

Stakeholders emphasised the importance of considering the needs of regional areas, including consultation in areas where inadequate infrastructure has been built. They suggested that users of alternative services such as Starlink, for example, could be asked if they would return to using a domestic internet service provider. Some stakeholders indicated that they would return to the NBN because of the access to physical support, which is not provided with Starlink.

"Consultation should be done where infrastructure has been attempted, but is not good enough, as they are the ones who will be willing to jump into something new."

STAKEHOLDER



ACCAN staff at a Community Broadband Forum at Western Sydney University

10 ■

CONCLUSION

Broadband internet is an essential service for Australian consumers and small business. Access to reliable and affordable household internet services allows end-users to access the necessities of life, including government and health services, education, employment and running a small business. It is therefore necessary to ensure that regulatory decisions concerning the NBN are made in the long-term interest of end-users.

Within a limited timeframe, ACCAN was able to reach a diverse cross-section of consumers, small businesses, peak bodies and other stakeholders. This engagement has provided new and necessary insight into what end-users are seeking from the publicly owned NBN.

Through multiple methods of engagement, including a nationally representative survey, in-person end-user engagement, and online focus groups targeted by regionality, ACCAN sought to ascertain the priorities of consumers and small businesses for the future of their NBN:

- Consumers demand **reliable internet** that delivers **strong network performance**.
- Consumers were especially sensitive to prices and prioritised **affordable services**.
- Faster internet speeds were valued, but **not prioritised** above reliability and affordability.
- Service standards were important for affected consumers, **especially in RRR areas**.

These priorities were a reflection of the experiences of consumers and small businesses, including **continued issues with reliability and disconnection**; poor connectivity forcing end-users to **supplement their service** with mobile and wireless internet; being exposed to **high prices** by some telcos; finding **long wait times** for service repairs in RRR areas; and **impacts on productivity and small business turnover** due to poor and limited connectivity affecting ability to process payments.

They also carried clear policy prescriptions to address the issues that end-users face, including the **continued investment** in the fibre upgrade program; the **significant improvement** of service standards for RRR consumers and **direct compensation** for consumers; **improving the speed** and **imposing retail price controls** for the Entry Level Offer; and **significantly redirecting** NBN Co's public communications towards community outreach and education.

More broadly, ACCAN staff observed that while consumers and small businesses greatly valued their NBN service, continued engagement with consumers and small businesses is necessary to ensure investment in the network delivers value-for-money outcomes. In particular, many vulnerable consumers reported being poorly served by the network and were often unable to sustain permanent broadband connections, using mobile and wireless internet as a substitute to shore up this gap in connectivity.

The NBN is an essential service for consumers across the country. It has a widespread remit as Australia's default national broadband infrastructure provider to deliver fast, effective, reliable and affordable services across the country, and it is in the long-term interest of consumers and small businesses to ensure that its expenditure and work plans are developed with end-users in mind.

ACCAN and CRED Consulting anticipate that the evidence in this report will provide a useful guide for NBN Co, the ACCC and the Australian Government for the upcoming regulatory cycle and beyond.

APPENDIX 1: ENGAGEMENT PROGRAM

Consumer focus groups	Metropolitan consumers	13 August 2025	Online (NAT)
	Outer regional and remote consumers	14 August 2025	Online (NAT)
	Inner regional consumers	19 August 2025	Online (NAT)
Community events	Consumers at Bulli Village Market	14 September 2025	NSW
	Community Broadband Forum at Western Sydney University	29 September 2025	NSW
Stakeholder meetings	Financial Counselling Victoria	18 August 2025	Victoria
	Carlton Neighbourhood Learning Centre	19 August 2025	Victoria
	The Brotherhood of St Laurence	19 August 2025	Victoria
	North Melbourne Language and Learning	19 August 2025	Victoria
	Adult Learning Australia	20 August 2025	Victoria
	First Nations Digital Inclusion Advisory Group	20 August 2025	Victoria
	Academics from University of Tasmania and Monash University	21 August 2025	Tasmania
	Tasmanian Council of Social Service	21 August 2025	Tasmania
	Disability Voices Tasmania	21 August 2025	Tasmania
	Tasmanian Small Business Council	21 August 2025	Tasmania
	Tasman Council	22 August 2025	Tasmania
	Small Business Owners from Tasman Peninsula	22 August 2025	Tasmania
	National Farmers Federation	26 August 2025	ACT
	Wamboin Community Action Group	26 August 2025	NSW
	Australian Small Business and Family Enterprise Ombudsman	27 August 2025	ACT
	National Rural Health Alliance	27 August 2025	ACT
	Financial Counselling Australia	29 August 2025	Online (NAT)
	First Nations Media Australia	3 September 2025	Online (NT)

Stakeholder meetings	Linkwest	3 September 2025	Online (WA)
	WA Digital Inclusion Project	3 September 2025	Online (WA)
	Better Internet for Regional Rural and Remote Australia	9 September 2025	Online (QLD)
	Isolated Children's Parents' Association QLD	9 September 2025	Online (QLD)
	Centre for Appropriate Technology Limited	11 September 2025	Online (NT)
	Central Land Council	11 September 2025	Online (NT)
	Simbani Research	15 September 2025	Online (NT)
	Regional Development Australia Northern Territory	16 September 2025	Online (NT)
	Pastoralists' Association of West Darling	18 September 2025	Online (NSW)
Self-guided interactive activities	Community members at Carlton Neighbourhood Learning Centre	19 August – 2 September 2025	Victoria
Online survey	High-use consumers from Reddit and Whirlpool	24 September - 6 October 2025	Online (NAT)
ACCAN Consumer Sentiment Tracker	Australian residents	August 2025	Online (NAT)

APPENDIX 2: CONSUMER FOCUS GROUP QUESTIONS

Experience and satisfaction with NBN services

- What NBN service do you currently have?
- Is your broadband service affordable for your household?
- Are you happy with your internet service?
- What issues do you and members of your community face with your internet?
- Do you face difficulties with accessing support when you need to activate, move or repair a connection?
- Do you regularly experience internet disconnection or an unreliable internet service? [very frequently, frequently, occasionally, rarely, never]
 - What are some of the risks that this poses for you and your community?
 - Do you feel that this is something understood by NBN? Why or why not?

Consumer priorities

- Which of the following is most important to you when it comes to internet service? Please rank from one to four.
 - Service standards (i.e. rectifications to faults, speed performance, network availability/performance and time taken for activating/modifying connections)
 - Faster internet speed
 - More reliable connectivity
 - Affordability of services
- Why have you ranked them this way?

Service standards

- What is your level of agreement with the following statements:
 - NBN should prioritise connections and upgrades based on an area's level of connectedness. For example, prioritising the least connected areas over the most connected areas.

- NBN should improve their timeframes for service requests (such as repairs, new connections etc) in regional, rural and remote areas to be the same or as close as possible to the timeframes in metropolitan areas.
- NBN should directly compensate consumers for failures to meet service standards.

Capital expenditure

- The NBN has identified a range of potential projects that they could deliver:
 - A fibre upgrade project, aimed at improving the reliability and speed of internet services
 - A project to help reduce emissions and help make physical infrastructure (like fibre cables) more resilient to weather events (like floods, storms and fires)
 - A project to protect the network against cyber attacks and natural disasters and help maintain internet connectivity through these events
 - A project to upgrade and deliver new satellite infrastructure for people in regional, rural and remote areas
 - A project to improve service standards, including improving repair success rates, clearer network performance standards, standardised connections processes and faster connection times for fibre connections.
- Please rate to what extent you support investment in each of these projects [strongly supportive, supportive, neutral, not very supportive, not at all supportive]
- What if investment in these projects led to a higher bills in the long term? increase in your bills? Would you still be supportive? Are there some projects you would support over others?
- Which of the projects would you prioritise for investment? Please rank them from one to five.

APPENDIX 3: ONLINE SURVEY QUESTIONS

- Are you filling this out on behalf of:
 - Yourself/your household
 - Your organisation
 - Your community.
- Please rank the following in terms of importance when it comes to your internet service. Please rank from 1 (most important) to 4 (least important).
 - Service standards
 - Faster internet speeds
 - More reliable connectivity
 - Affordability of service.
- Please rate the importance of very fast internet speeds (500Mbps and above) for you, your organisation, or the community you represent:
 - Very important
 - Important
 - Somewhat important
 - Not important.
- Typically, how many devices access the internet at any one time in your household? Please think about all devices that have internet access, including phones and tablets, laptops and computers, TVs, home management devices (e.g. Alexa).
 - One
 - Two
 - Three
 - Four
 - 5 to 7
 - 8 to 10
 - 11 to 15
 - More than fifteen.
- On 14 September 2025, NBN will introduce a program called Accelerate Great, which will automatically upgrade households on 100+Mbps broadband plans (on FTTP and HFC connections) to 500+Mbps plans, without additional cost. Knowing this, would you be more likely to upgrade your household plan to an 100+Mbps service?
 - Yes, even if it costs more
 - Yes, but only if it costs a little more
 - No, I don't want to spend more money
 - No, I am not on FTTP/HFC connections
 - I am already on a 100+Mbps plan.
- The Accelerate Great program will automatically upgrading households on 100+Mbps broadband plans (on FTTP and HFC connections) to 500Mbps. However it will not increase speeds for consumers on 25Mbps or 50Mbps plans, or those who are not on FTTP or HFC connections. Do you think this could expand digital inequality in Australia?
 - Yes, significantly
 - Yes, somewhat
 - No effect.
- The NBN sells a low-cost, entry level internet plan (25/5Mbps) at a wholesale price of about \$35. However, the average retail price across Telstra, Optus and TPG for this entry-level plan is \$83 per month. Do you consider that the retail price for an entry-level plan should be affordable for people experiencing financial difficulty, such as those in social housing and single-parent households?
 - Yes
 - No
 - Unsure.
- Noting the role of retail margins in the prices faced by households using the Entry Level Offer, should a retail price cap be imposed to ensure the service is affordable for households?
 - Yes
 - No
 - Unsure.
- NBN predicts that just under half of households connected to the NBN will have 500+Mbps services by 2029. Knowing this, do you support NBN's proposal to retain the Entry Level Offer at the 25/5Mbps tier until a further review in mid-2029? What speed tier do you think works best for the Entry

Level Offer for the years 2026–2029?

- I think 25/5Mbps is suitable.
- The upload speed of the ELO should be raised to 25/10Mbps.
- Both download and upload speeds should be raised to 50/20Mbps.
- Both download and upload speeds should be raised to 100/20Mbps or higher.
- Household need for faster internet speeds is expected to rapidly grow. Do you think that the Entry Level Offer should be regularly reviewed to ensure it remains up to date with household needs?
 - Yes, every 1-2 years
 - Yes, every three years
 - Yes, every five years
 - Not necessary.

- The proposed investments in fibre will prove NBN Co’s fibre footprint across Australia, offering households faster internet speeds and more reliable connectivity by replacing FTTN technology with FTTP connections. Would you be supportive of NBN Co’s proposed expenditure items on expanding the fibre network (Programs 1 and 2) if they led to an increase to your household bill? If so, to what extent?
 - I support this even if it increases my bill by a lot
 - I support this even if it increases my bill by a small amount
 - I do not support this if it increases my bill
 - I do not support this at all.
- Once the FTTN assets have been replaced and decommissioned, should NBN be required to write off these assets, so they do not factor into NBN’s pricing decisions? This may put downward pressure on prices, but will reduce the revenue that NBN Co is able to recoup.
 - Yes
 - No
 - Unsure.
- NBN has a budget for marketing, communications and engagement. Which of the following options would you recommend NBN prioritise? Please rank them from 1 (most important) to 4 (least important).
 - Consumer education on how to make the most out of your connection/upgrade your connection
 - Community engagement to warn and support service disruptions
 - Public notices on how to upgrade your household broadband internet
 - Community outreach through hosting in-person and online events
 - Brand awareness through advertising.

PROGRAM	SUMMARY	PROPOSED EXPENDITURE
Network build	<ul style="list-style-type: none"> • Includes fibre upgrade program for 622 000 premises 	\$3.5 billion (41%)
Connect maintain and assure	<ul style="list-style-type: none"> • Connecting new homes • Upgrading household connections 	\$3.1 billion (37%)
Network capacity and performance	<ul style="list-style-type: none"> • Investments in the speed and performance of HFC, fixed wireless and Satellite 	\$1.4 billion (16%)
Technology AI and automation	<ul style="list-style-type: none"> • Network security and resilience, IT systems 	\$344.5 million (4%)
Other	<ul style="list-style-type: none"> • Buildings, warehouses, corporate programs 	\$130.7 million (2%)

PROGRAM	End User Fault rectification Service Level by NBN Network	
	Fibre Network, FTTB Network, FTTN Network, FTTC Network, HFC Network and Wireless Network	Satellite Network
Urban Area and other locations where End User Fault does not require external or internal plant work or NBN attendance at Premises	5:00pm next Business Day	5:00pm next Business Day 5:00pm third Business Day
Major Rural Area or Minor Rural Area where End User Fault requires external or internal plant work or NBN attendance at Premises	5:00pm second Business Day	5:00pm third Business Day
Remote Area where End User Fault requires external or internal plant work or NBN attendance at Premises	5:00pm third Business Day	5:00pm fourth Business Day
Isolated Area where End User Fault requires external or internal plant work or NBN attendance at Premises	5:00pm tenth Business Day	5:00pm tenth Business Day
Limited Access Area where End User Fault requires external or internal plant work or NBN attendance at Premises	N/A	N/A

- Do you support stricter service standard timeframes for fault rectifications for consumers living in regional, rural and remote (RRR) areas, noting these consumers face longer service timeframes? Please select the statement most aligned to your judgement.
 - The current timeframes are appropriate
 - I support stricter (faster) timeframes for RRR consumers to more closely match metro consumers
 - I support significantly stricter (faster) timeframes for RRR consumers, even if it may require more relaxed (slower) timeframes for metro consumers.

- When NBN is unable to meet agreed service standards (i.e. it does not repair a fault within the required timeframe), how much of the compensation should go directly to consumers, and how much to retail service providers? (i.e. Telstra, Optus)
 - All of the compensation should go directly to consumers
 - Most of the compensation should go directly to consumers
 - The compensation should be split evenly between consumers and retail service providers
 - Most of the compensation should go to retail service providers
 - All of the compensation should go to retail service providers.

- Do you think service standards should be regularly reviewed through public consultations to ensure that they reflect consumer needs and preferences?
 - Yes, annually
 - Yes, every 2-3 years
 - Yes, every five years
 - Not necessary.

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