

Thursday, 27 April 2017

Battlers and retirees are more likely to have NBN than well-off homes and inner city Metrotechs

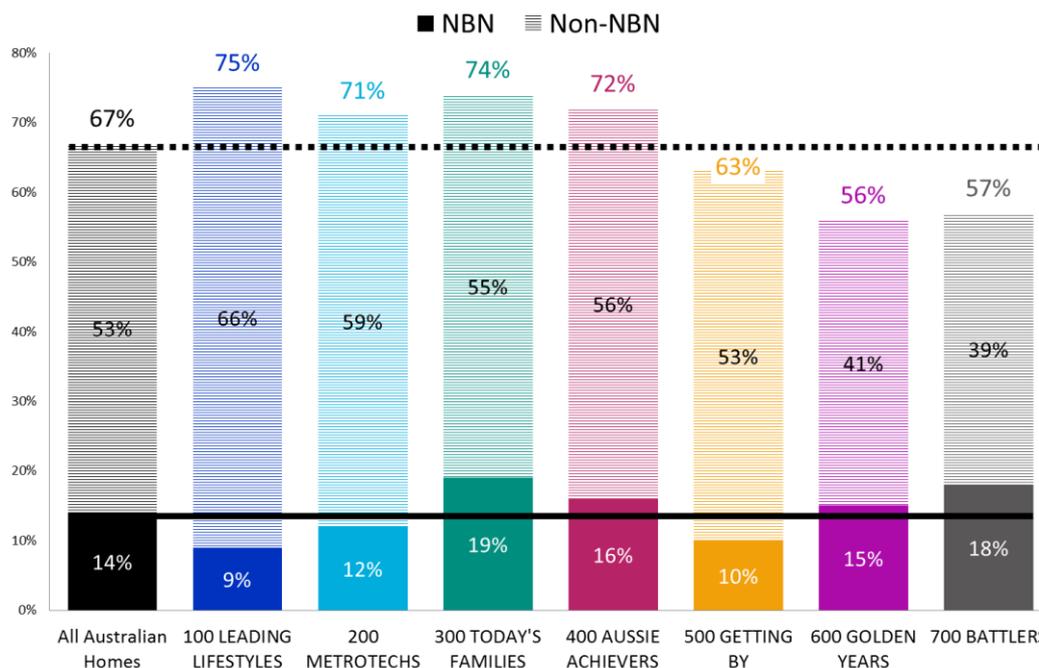
Battlers are twice as likely as affluent urban families to have the NBN, traditional Australian-born families are more likely than those in multicultural areas, and more people in their Golden Years have it than younger internet-loving Metrotechs, Roy Morgan Research shows.

Around one in seven Australian homes (14 percent) were connected to the NBN in the latest research to February 2017. Another 53 percent have a non-NBN fixed home broadband connection, for a total 67 percent of homes with fixed internet.

Roy Morgan's [Helix Personas](#) segments and maps Australians into 56 Personas across seven Communities. Prosperous homes in the 'Leading Lifestyles' Community are the *most* likely to have a fixed internet connection, but the *least* likely to be on the NBN: 75 percent have fixed broadband overall, including nine percent with NBN—so far. With their higher incomes, numerous devices, and heavier internet usage, it's not as though these households don't *want* to upgrade to faster internet; however the NBN hasn't yet arrived in many of their established inner metropolitan suburbs.

It's a similar situation for younger 'Metrotechs' living mostly in gentrified inner city hotspots. Although often ahead-of-the-curve when it comes to technology adoption and usage, only 12 percent are on the NBN. Another 59 percent have regular fixed broadband—and are perhaps counting down the days until the NBN arrives.

Proportion of Helix Communities with Fixed Broadband including NBN



Source: Roy Morgan Single Source (Australia), September 2016 to February 2017, sample n = 23,885 Australians aged 14+

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Multicultural 'Getting By' homes across outer suburbs are also below the norm for NBN, with just 10 percent connected. However they are also less likely than other homes to have fixed broadband connected at all (63 percent).

'Today's Families' homes are almost as likely to have a fixed internet connection as 'Leading Lifestyles' (74 percent). However, thanks to NBN Co's decisions about where and when to roll out the network, far more of these households have the NBN (19 percent)—equal to just over a quarter of all fixed broadband homes in these areas.

The next most-likely homes to have the NBN are 'Battlers' (18 percent), followed by 'Aussie Achievers' (16 percent) and 'Golden Years' (15 percent).

With only 57 percent of Battlers connected to fixed home internet overall, the 18 percent with NBN represent nearly a *third* of all Battler homes with fixed internet. Similarly, Golden Years are the least likely homes to have any fixed broadband (56 percent)—so the NBN accounts for 27 percent of Golden Years' fixed internet connections.

As Roy Morgan recently showed, [the NBN is a catalyst for many fixed internet customers to switch provider](#), and spurs others to get fixed internet for the first time. During this period of flux, internet service providers need to take every opportunity to claim NBN customers now—by pinpointing market advantages down to the suburb and street alongside the NBN's roll-out plan.

Michele Levine, CEO – Roy Morgan Research, says:

"The NBN isn't rolling out evenly across regional areas, towns, suburbs and inner cities. Looking only at today's market share tells only part of the story.

"Each service provider has strengths and weaknesses in different markets: providers that are favoured in areas where the NBN has already rolled out could expect to have an early market share advantage; others will catch up once the NBN becomes available to their target customers.

"With its psychographic mapping capabilities, Helix Personas is ideally suited to the task of measuring the NBN market during the roll-out. It can help predict how quickly new NBN roll-out areas will take up the connection, identify how providers are currently performing relative to expectations, and what sort of boost (or challenges) they can expect in 2017 and beyond.

"The NBN market is already far more competitive than fixed ADSL and cable. Smaller providers, as well as new entrants like MyRepublic and soon Vodafone are gaining share. Between them, the top five internet provider brands hold 81 percent of the residential NBN market, compared with 85 percent of all fixed broadband connections."

To learn more about Roy Morgan's telecommunications research and Helix Personas, call (+61) (3) 9224 5309 or email askroymorgan@roymorgan.com

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About Roy Morgan Research

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Roy Morgan Research is the largest independent Australian research company, with offices throughout Australia, as well as in Indonesia, the United States and the United Kingdom. A full service research organisation specialising in omnibus and syndicated data, Roy Morgan Research has over 70 years' experience in collecting objective, independent information on consumers.

Margin of Error

The margin of error to be allowed for in any estimate depends mainly on the number of interviews on which it is based. Margin of error gives indications of the likely range within which estimates would be 95% likely to fall, expressed as the number of percentage points above or below the actual estimate. Allowance for design effects (such as stratification and weighting) should be made as appropriate.

Sample Size	Percentage Estimate			
	40%-60%	25% or 75%	10% or 90%	5% or 95%
5,000	±1.4	±1.2	±0.8	±0.6
7,500	±1.1	±1.0	±0.7	±0.5
10,000	±1.0	±0.9	±0.6	±0.4
20,000	±0.7	±0.6	±0.4	±0.3
50,000	±0.4	±0.4	±0.3	±0.2

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