



1 NBN Australian Consumer Behavioural Survey - 2020

The purpose of this survey is to understand the change in consumers broadband usage behaviour due to COVID-19 for a range of new reasons including work from home, video conferencing with friends and family, school learning, adult learning and entertainment. Specifically, this survey will focus on:

- How consumers have changed their broadband usage
- What new services are they now aware of and which ones have they actually used, e.g. school classrooms, video conferencing, remote medical checks, global news etc.
- The rate of usage prior to COVID 19, during the lockdown and expected post lockdown
- Their views on the importance of broadband (prior to COVID 19 and now)
- What issues have they faced ranging from connectivity, home setup, online knowledge etc.

Survey is to national across Australia – requires a representative survey sample across available geographic regions. 1,200 completes as per survey gating question

2 Survey Gating Question

1. Do you have a broadband internet connection at your home?

- Yes
- No [END Survey]

General demographics

2. What is the postcode where you live?

[Enter postcode]

(Note: postcode analysis will be used to ensure a Nationally represented spread of responses in terms of state and metro/non-metro)

3. Are you...?

- Male
- Female
- Non-binary / X / Other

4. Which age band are you in?

- 18 – 24
- 25 – 34
- 35 – 44



- 45 – 54
- 55 – 64
- 65+

5. Please enter the number of people in your household (including yourself) within the following age bands:

- 0 – 11 years [enter number of people]
- 12 – 17 years [enter number of people]
- 18 – 24 years [enter number of people]
- 25 – 34 years [enter number of people]
- 35 – 44 years [enter number of people]
- 45 – 54 years [enter number of people]
- 55 – 64 years [enter number of people]
- 65+ years [enter number of people]

NOTE: Can we make sure one number must be non-zero and can we also allow blank fields (rather than having to put zero in unused fields)?

6. What is your total annual household income?

- Less than \$25,000
- \$25,000 - \$49,999
- \$50,000 - \$74,999
- \$75,000 - \$99,999
- \$100,000 - \$124,999
- \$125,000 - \$149,999
- Greater than \$150,000
- Prefer not to say

7. What type of household or dwelling do you currently live in?

- House
- Apartment
- Other (please specify)

8. Do you live in an owner occupied or rented household?

- Owner occupier
- Rented

9. How would you best describe the living arrangement in your home?



- I live with my family
- I live with my partner
- I live in a shared house
- I live alone
- Other (please specify)

3 Broadband and internet usage

In this section we want to understand your knowledge of broadband in the home

10. Is your household currently connected to the NBN?

- Yes
- No
- Unsure/Don't know

11. Who is your broadband provider?

- Telstra
- Optus
- TPG
- Vodafone
- iiNet
- Aussie Broadband
- Belong
- Southern Phone
- Dodo
- Do not know
- Other (please specify)

12. Do you understand what the difference is between your home broadband speed and bandwidth/capacity? (select only one)

- Yes [skip next question]
- No [go to next question]
- Unsure [go to next question]

13. Would you like to better understand the difference between your broadband speed and bandwidth/capacity? (select only one)

- Yes
- No

14. Do you know how to set up your **in-home** internet to get the fastest speed? (select only one)



- Yes
- No

15. Since the COVID-19 crisis (after 1 March) have you increased your understanding as to how to get better internet speed at home? (select only one)

- Yes
- No

16. Would you like more information on how to get fast internet speed in your home? (select only one)

- Yes
- No

In this section we want to understand how your household broadband usage behaviour has started to change due to the coronavirus crisis and staying at home.

Working from home

17. Prior to COVID-19 (before 1 March) were you in full time or part time employment?

- No [go to Question 21]
- Yes [go to next question]

18. Prior to COVID-19 (before 1 March) did you work from home?

- No, I did not work from home
- Yes, I worked from home sometimes
- Yes, I only worked from home

19. After the COVID-19 crisis started (from 1 March), did you start working from home and/or increase your number of days working from home? (select one)

- No – I am not in a position to work from home [skip next question]
- Yes – I started to work from home [go to next question]
- Yes – I increased the number of days I work from home [go to next question]

20. Do you agree or disagree with the following statements?

- Access to fast broadband has made me feel more secure about my job? (Agree / Disagree)
- I could not complete my job without access to fast broadband? (Agree / Disagree)
- The experience of working from home has positively changed the way I think about managing work/life flexibility? (Agree / Disagree)
- I expect to work more from home after the COVID-19 crisis and lockdown period has ended (Agree / Disagree)

Telehealth



21. Prior to COVID-19 (before 1 March) did you or your household members access online telehealth services (eg: online GP consultation or online prescriptions) from home? (select one)
- No
 - Yes, once or twice
 - Yes, regularly
22. After the COVID-19 crisis started (after 1 March) did you or your household members access online telehealth services (eg: online GP consultation or online prescriptions) from home? (select one)
- No
 - Yes, once or twice
 - Yes, regularly
23. After the COVID-19 crisis and lockdown period has ended do you anticipate using more online telehealth services in the future? (select one)
- Yes
 - No
 - Unsure

[if Q20 or Q21 = No]

24. What were your reasons for not accessing telehealth services? (select all that apply)
- I don't know what telehealth services are
 - I know what telehealth services are but don't know how to access telehealth services
 - I'm concerned about privacy
 - I only want a human to human medical consult
 - My local GP/medical professionals do not offer telehealth services
 - I have not needed a health consult

Online Education

25. Prior to COVID-19 (before 1 March), please indicate how often you or other household members used the following online education services?

	Did not use	Once or twice per month	Regularly
Secondary or primary school online classrooms in place of attending school classes during the day			
Secondary or primary school homework/learning after			



school hours			
Online computer skills training			
Online work skills training			
Online tertiary education			

26. Since the COVID-19 crisis started (after 1 March), please indicate how often you or other household members use the following online education services?

	Did not use	Once or twice per month	Regularly
Secondary or primary school online classrooms			
Secondary or primary school homework/learning			
Online computer skills training			
Online work skills training			
Online tertiary education			

27. Do you agree or disagree with the following statement; “supporting my child’s education (or my own education) would not be possible with access to fast broadband”? (select only one)

- Agree
- Disagree
- Not applicable

Social Activities

28. Prior to COVID-19 (before 1 March), please indicate how often you or other household members used the following online social activities to connect with people, (eg: using apps such as Zoom, Skype, FaceTime, Whatsapp, House Party etc.)?

	Did not use	Once or twice per month	Regularly
Social video calls with work colleagues			
Social video calls with family			



Social video calls with friends			
Online exercise class			
Live streamed a concert			
Online party applications			

29. Since the COVID-19 crisis started (after 1 March), please indicate how often you or other household members used the following online social activities to connect with people?

	Did not use	Once or twice per month	Regularly
Social video calls with work colleagues			
Social video calls with family			
Social video calls with friends			
Online exercise class			
Live streamed a concert			
Online party applications			

Online Shopping and Local Businesses

30. Since the COVID-19 crisis, has your household increased its online shopping activities?

- Yes
- No

31. Do you agree or disagree with the following statements?

- I consciously make a decision to support local businesses online (eg purchasing vouchers / takeaway deliveries) (Agree / Disagree)
- I would like to support more of my local businesses, but they only have a limited online presence (Agree / Disagree)

32. What do you think are the top things local small business can do to make it easier for people to support them? (tick all that apply)

- Develop a stronger online presence
- Communicate more regularly online with their local community



- Be more innovative in their offering
- Alter their operating hours
- Offer home delivery

Home Internet Setup

33. Since COVID-19 (from 1 March), tick all of the areas where you or your household members have improved the home internet setup (tick all that apply)
- Created a new/dedicated home office space
 - Purchased or upgraded computer(s)
 - Purchased new computer peripherals such as webcams, keyboards, monitors
 - Purchased new devices such as Tablets
 - Purchased new smart devices such as home security, smart lighting
 - Purchased new entertainment devices such as smart TVs, media devices or smart speakers
 - Improved home wi-fi setup and/or purchased new routers or wi-fi extenders
 - Improved home cyber security such as wi-fi and computer passwords
34. How many new devices (laptops, ipads, webcams, Wi-Fi extenders etc) has your household **purchased** during the COVID-19 crisis (from 1 March) to support your online activities such as education and working from home etc.? (select one)
- 1
 - 2
 - 3
 - 4
 - 5+
35. How much money do you estimate you have spent on your home internet setup and devices to support your household online activities since the COVID-19 crisis started (from 1 March)? (select one)
- Less than \$250
 - \$250 - \$499
 - \$500 - \$999
 - \$1,000 - \$2,000
 - More than \$2,000
36. On a scale of 1 (not important) – 5 (very important), how important did you believe broadband access and internet services were before the COVID-19 crisis (before 1 March)?
37. On a scale of 1 (not important) – 5 (very important), how important do you now believe internet access and services are for you and your family?

[END SURVEY]