

Towards a super connected Australia

Gen**NBN**: understanding Australia's most connected generation



Foreword

Bernard Salt,
KPMG partner and social researcher

There is one feature that has galvanised Australians across every generation since WWII and possibly longer and that is the irrepressible pursuit of lifestyle.

To most Australians the idea of lifestyle involves having the personal and economic freedom to live comfortably and to pursue interests, family/relationships and work. In the post-war era the Australian lifestyle was embodied in the suburban home and the traditional nuclear family; today the idea of lifestyle is more sophisticated, more international perhaps, but at its core it still involves having personal and economic freedoms.

From the time of the three-bedroom brick veneer and the barbeque area of the 1950s

If my central proposition is correct, Australians are now, and in the past have been, fixated with lifestyle then this trend will continue to be at the core of our values. New technologies in communication, new housing styles, new forms of transportation, the arrival of new cultural influences, even changes to the way we work, have all been leveraged in one way or another by the Australian people to enhance their quality of life and their lifestyle.

This report looks at the themes and the technologies that have been central to the making of the modern Australia lifestyle,

“...when you look at the way we Aussies live, the reason for our lifestyle fixation is really quite simple.”

and the 1960s through to the sea-change shift of the late 1990s, and into the new century with the rise of the inner-city hipster, it's always been about and probably always will be about, lifestyle. That's what Australia is famous for and when you look at the way we Aussies live, the reason for our lifestyle fixation is really quite simple. Australia is a resource rich continent that naturally affords its inhabitants a good quality of life and a high standard of living.

from the time of Federation right through to today and beyond. It also investigates how the introduction of fast broadband could be the catalyst for a new generation, Australia's most connected generation, 'GenNBN'.



KPMG Partner
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Australia's
broadband
network

The making of modern Australia

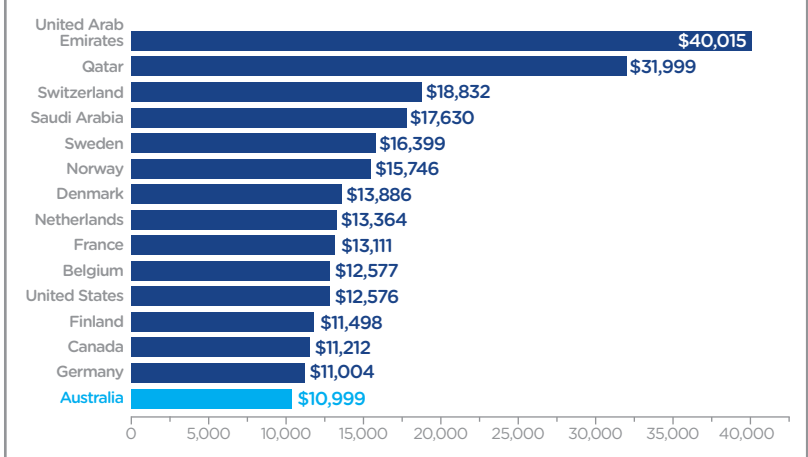


For more than a century Australia has ranked among the richest nations on earth and even more so since the global financial crisis. Favourable terms of trade, an abundance of resources and bountiful reserves of energy delivered prosperity to this nation at a time when others struggled.

But there is more to the story of Australia than dumb luck and/or good management. We are an adaptable people who have welcomed new cultures, new ideas and new technologies to extend and to evolve the Australian way of life. Our outdoorsy lifestyle fits comfortably with the Mediterranean preference for alfresco dining. Our fast take-up of pay TV, of mobile phones and deep engagement with the internet is evidence of an intrinsic desire for better connectivity and for more fluidity in all aspects of Australian life.

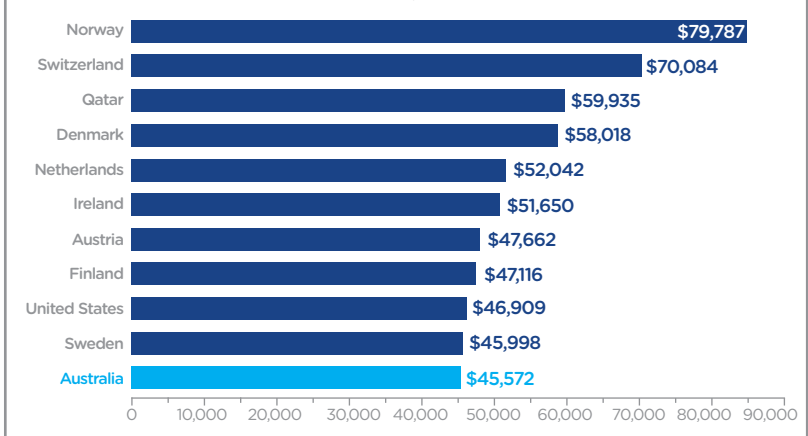
“We (Australians) are an adaptable people who have welcomed new cultures, new ideas and new technologies to extend and to evolve the Australian way of life.”

Top 15 GDP Per Capita - 1980



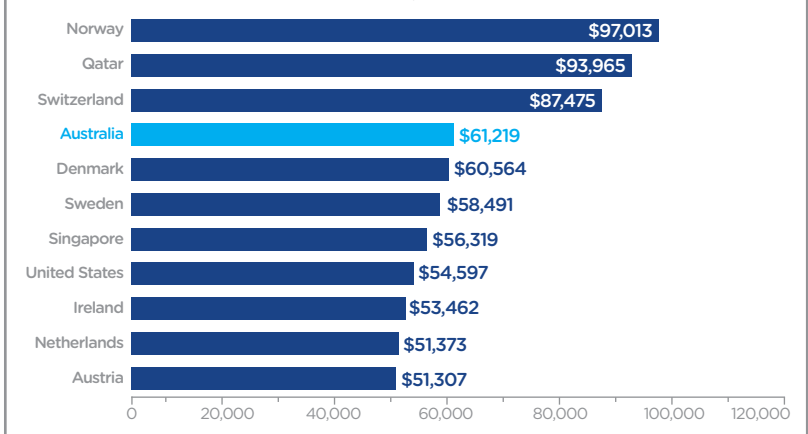
Top 11 GDP \$US Per Capita - 2009

Countries over US\$200 Billion GDP



Top 11 GDP \$US Per Capita - 2014

Countries over US\$200 Billion GDP



Source: IMF World Economic Outlook Dataset April 2015

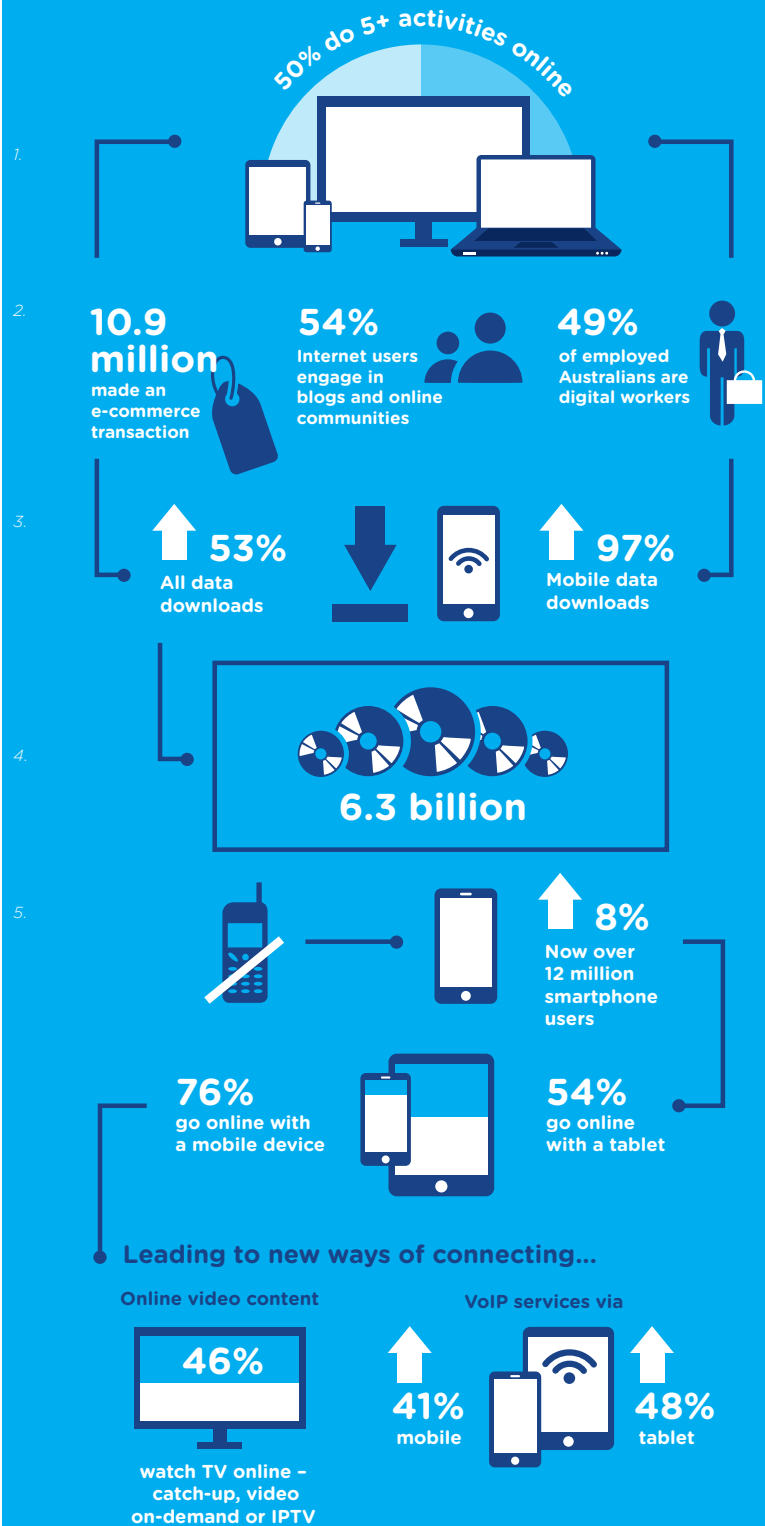
Technology Usage

Growth on previous year in Australia

The question this cultural history prompts is this: how might the Australian way of life change once ubiquitous high-speed broadband is rolled out by the end of this decade? Will we use the new technology to pursue sea-change or perhaps desert-change lifestyle options? Will we redefine how, when and where we work? Will the nature of work itself change? Will the process of how we connect with family and friends be vastly different in 2030 because of the universality of the internet?

I suspect that the adage “give an Australian half a chance and they will take the lifestyle option every time” will come to the fore with widespread access to a universal and fast broadband network. I suspect that Australians will adopt a highly connected-lifestyle in much the same way that they adopted technologies and then sought out various applications for more than a century. I suspect that high-speed broadband will deliver yet another way in which the Australian people might pursue and shape for themselves an even better lifestyle and an even better quality of life.

Aussie appetite for fast broadband continues to grow



1. Source: ACMA website citing ACMA Communications report 2013-14 tabled in parliament December 2014. Base: People aged 18 and over.

2. Source: ACMA Communications report 2013-14 series : Report 1 Australian's digital lives March 2015. Base: People aged 18 and over.

3. Source: ACMA website citing ACMA Communications report 2013-14 tabled in parliament December 2014. Base: People aged 18 and over. Growth is on previous year.

4. Source: Sony Storage Support website.

5. Source: ACMA website citing ACMA Communications report 2013-14 tabled in parliament December 2014. Base: People aged 18 and over. Growth figures are on previous year.

Four Australian lifestyle themes



Australia's
broadband
network

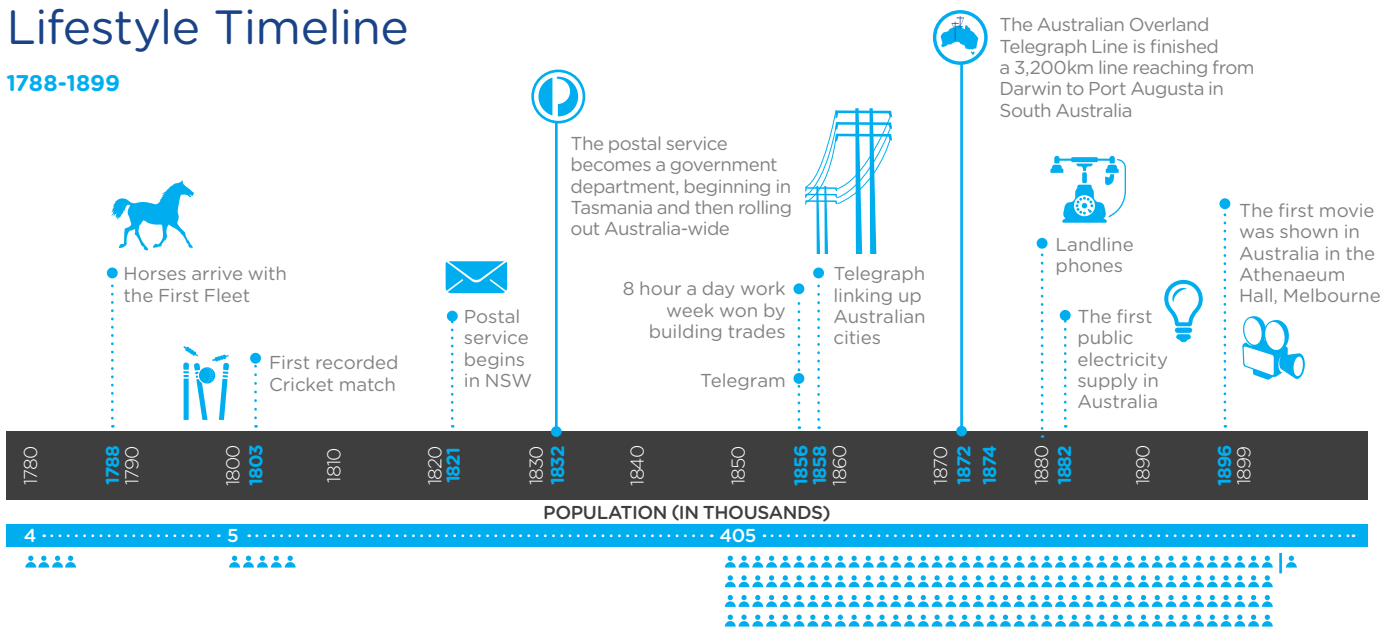
I think there are four themes that have largely shaped the Australian lifestyle probably since Federation but most certainly from WWII.

As a nation and as a people we have sought out—even yearned for—a global connectivity; we have changed the way we work; have changed the way we organise our homes and our households; and we have evolved and changed our leisure pursuits. In some respects everything has changed about the Australian nation in the last 70 years but in another respect nothing has changed.

We are still prosperous and egalitarian; we are still open, outdoorsy and self-confident; we still need to work and we still want to form relationships. Overall, we are still obsessed with lifestyle. And that is why I think we can be sure that the Australian people will use our new broadband network in the 2020s and beyond to enhance prosperity, to deliver an even better quality of life, and to build upon the unique and envied great Australian lifestyle.

Lifestyle Timeline

1788-1899



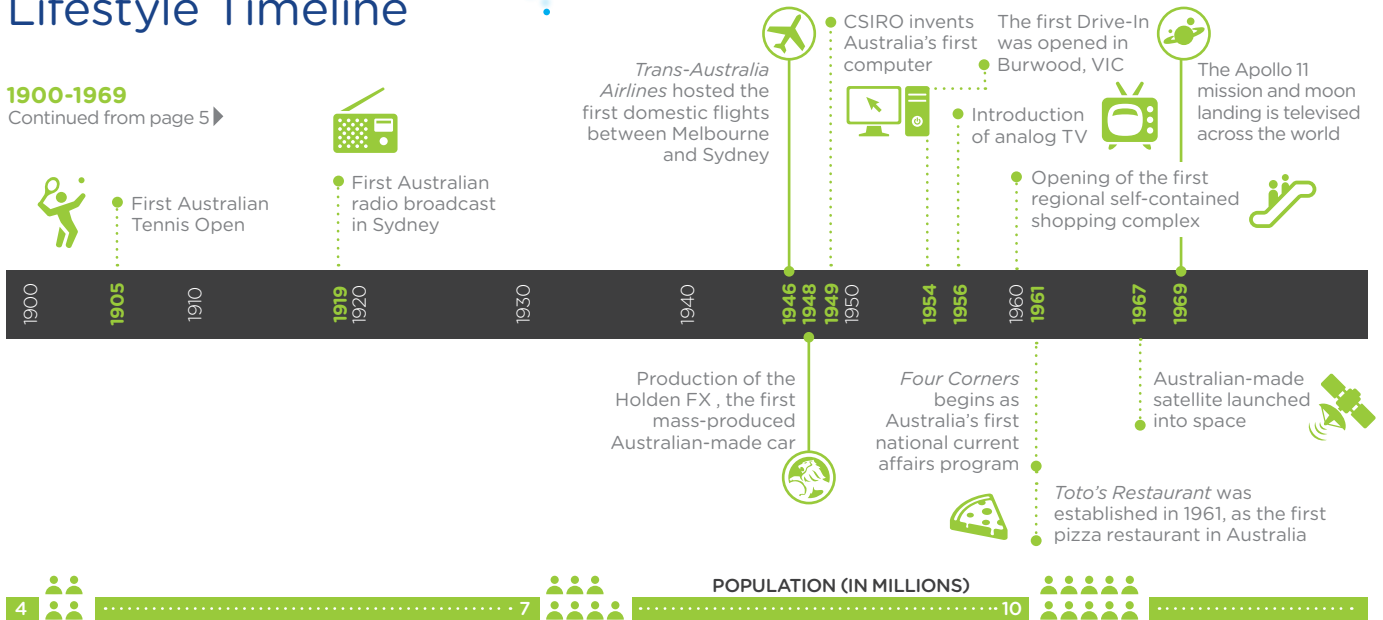
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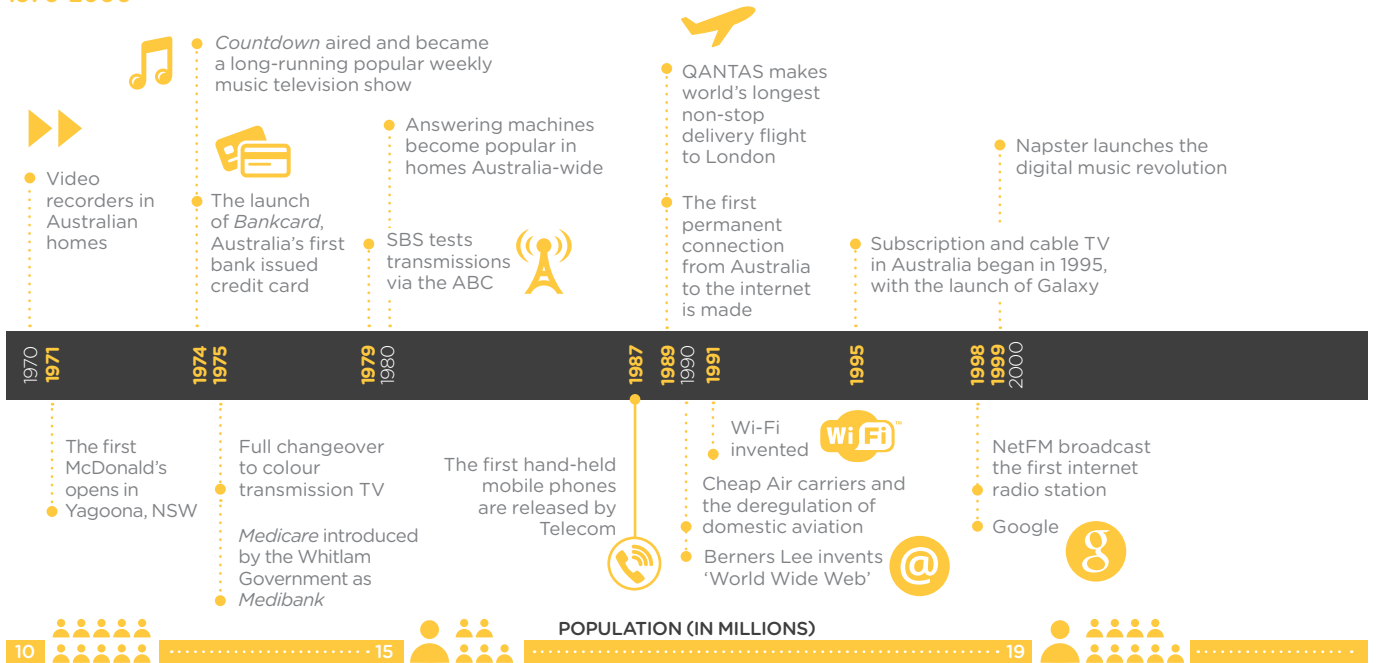
Lifestyle Timeline

1900-1969

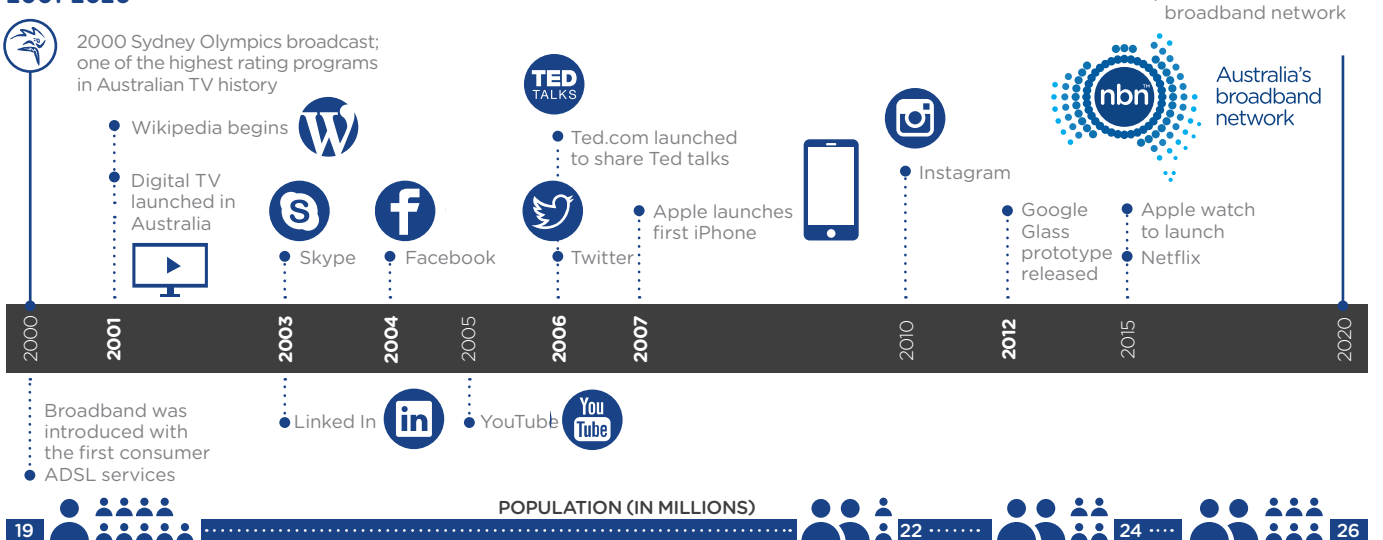
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1970-2000



2001-2020



So what are these four themes that have shaped the making of the modern Australian lifestyle?

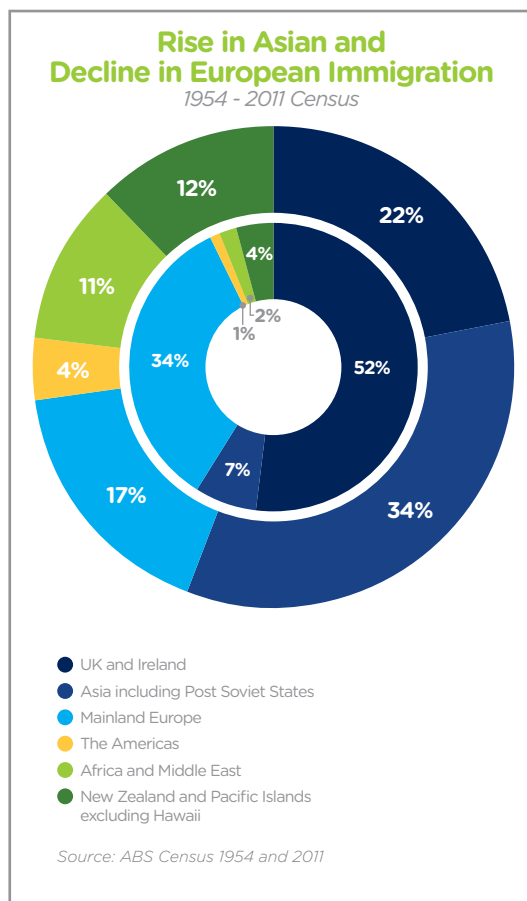
01. Global connectivity

Perhaps the defining characteristic of the Australian people and continent is that they are well removed from the traditional centres of economic power in the northern hemisphere. This has created a sense of disconnection that we have sought to overcome through various means of re-connection.

Initially it was through the concept of the cultural cringe: the notion that 'over there' was somehow better than 'back here'. In the early years of television presenters on the ABC mimicked the language and the accent of presenters on the BBC. By the 1960s there was an exodus of Australian talent with the likes of Germaine Greer, Barry Humphries and Clive James moving to London.

Then there was the Grand Tour of Europe which was a rite of passage for backpacking baby-boomers in the 1970s and 1980s. While we no longer talk of a cultural cringe both Generation X and Generation Y still see cachet in working overseas in their 20s before returning to Australia to settle down into family life.

“...Australia today is more accurately described as a fusion culture with cosmopolitan influences...”



Birthplace	2014	% Total Population	% Top 10 Overseas Born
Australian Born	16,890,250	72	
England	1,009,090	4	28
New Zealand	616,960	3	17
China	447,370	2	12
India	397,180	2	11
Philippines	225,110	1	6
Vietnam	223,180	1	6
Italy	201,830	1	6
South Africa	176,340	1	5
Malaysia	153,870	1	4
Germany	129,040	1	4

Source: ABS Catalogue 3412 Migration, Australia, 2013-14

Birthplace	1911	% Total Population	% Top 10 Overseas Born
Australian Born	3,667,670	82	
England	346,030	8	50
Ireland	139,434	3	20
Scotland	93,083	2	13
Germany	32,990	1	5
New Zealand	31,868	1	5
China	20,775	0	3
Wales	12,175	0	2
Italy	6,719	0	1
British India	6,644	0	1
USA	6,642	0	1

Source: ABS Census 1911

01. Global connectivity

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But it's not just through backpacking-exchanges that we have pursued global connectivity. In the post-war era Australia embarked upon an immigration program to build-up the population and to deliver prosperity through major infrastructure projects like the Snowy Mountains Scheme.

Immigrant workers were imported from war-torn Europe from the Baltic States, Italy, Greece and especially the UK. The abiding issue for Australians at this time was disconnection from Europe; the post-war response was in fact to bring Europe to Australia. By the time of the 1954 census barely 12 per cent of the Australia population was born overseas; today that proportion is closer to 28 per cent.

The nationalities that make up our overseas-born population today are vastly different to those from the immediate post-war era. Anglo influences have been broadened with new migrants now coming from places like China, India, the Philippines and a range of Arabic-speaking nations. Australia today is more accurately described as a fusion culture with cosmopolitan influences and especially in the largest cities.

An Australian sense of disconnection and isolation led to a broadening of our military alliances. We no longer felt safe under British protection after WWII; we sought out an ANZUS alliance with the US. This alliance ultimately brought Australia closer to Japan and trade linkages that have since widened into a far deeper connection with other parts of Asia.



Diversity of Australian cities and suburbs

Area	Overseas Born	Population	% Overseas Born
Greater Sydney	1,759,129	4,391,674	40
Cabramatta	6,106	20,779	71
Greater Melbourne	1,469,207	3,999,982	37
Dandenong	7,586	24,919	70
Greater Brisbane	613,101	2,065,996	30
Sunnybank	3,569	8,091	56
Greater Adelaide	364,953	1,225,235	30
Ferryden Park	2,020	4,099	51
Greater Perth	698,373	1,728,867	40
Bentley	3,169	9,303	66

Source: ABS Census 2011, Country of Birth and Population Estimates

Australians once lamented our disconnection from the UK and Europe; today we see advantage in closer engagement with Asia. Our most important modern-day trade exchanges with China, for example, have made an extraordinary contribution to the Australian way of life and quality of life. We are richer for the relationship and we have better access to affordable consumer goods.

Trading Partners from the first national census to now

Rank	1911 Export (£ Millions)		1988 Export (\$ Millions)		2014 Export (\$ Millions)	
1	United Kingdom	35	Japan	11,488	China	90,189
2	France	8	USA	4,445	Japan	47,819
3	Germany	7	Hong Kong	2,202	Korea, Republic	19,864
4	Belgium	6	New Zealand	2,138	USA	11,251
5	Ceylon	5	Korea, Republic	2,021	India	8,853
6	India	3	United Kingdom	1,485	Singapore	8,445
7	New Zealand	3	Taiwan	1,468	New Zealand	7,968
8	South Africa	2	Singapore	1,330	Taiwan	6,905
9	USA	1	Italy	1,137	Malaysia	6,024
10	Straits Settlements	1	Germany	1,105	Thailand	5,142

Source: ABS Catalogue 5368.0 International Trade in Goods and Services, Australia & ABS Catalogue 1301.0 Year Book 1913.

01. Global connectivity

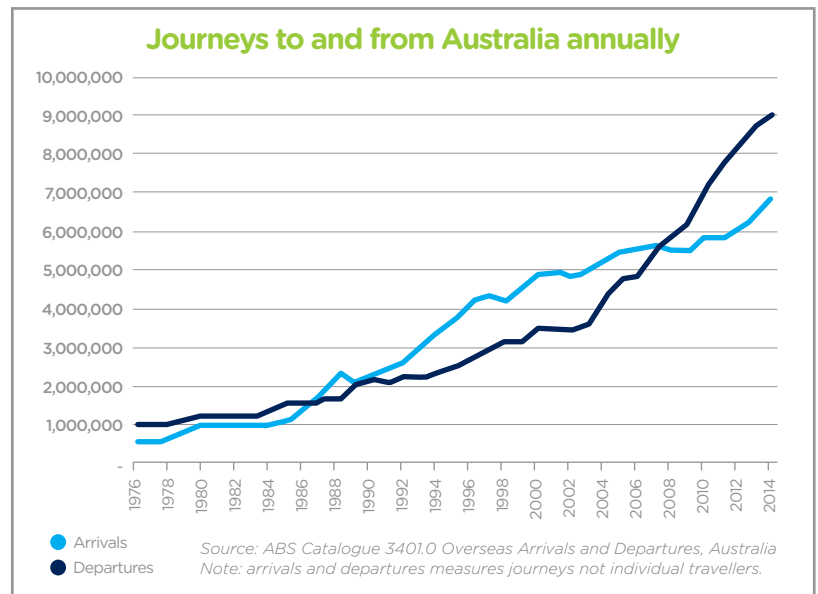
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But the Australian predilection for global connectivity goes beyond migrant influences, military alliances and trade; it extends to tourism both to and from the Australian continent. About eight million Australian visits are made overseas every year today; a generation ago this number was barely two million. Australians today have had more exposure to other cultures than previous generations either through travel or through contact with migrants. Our response is to adopt aspects of other cultures that suit our lifestyle aspirations and especially in food (eg pasta), design (European minimalism) and living styles (eg alfresco dining).

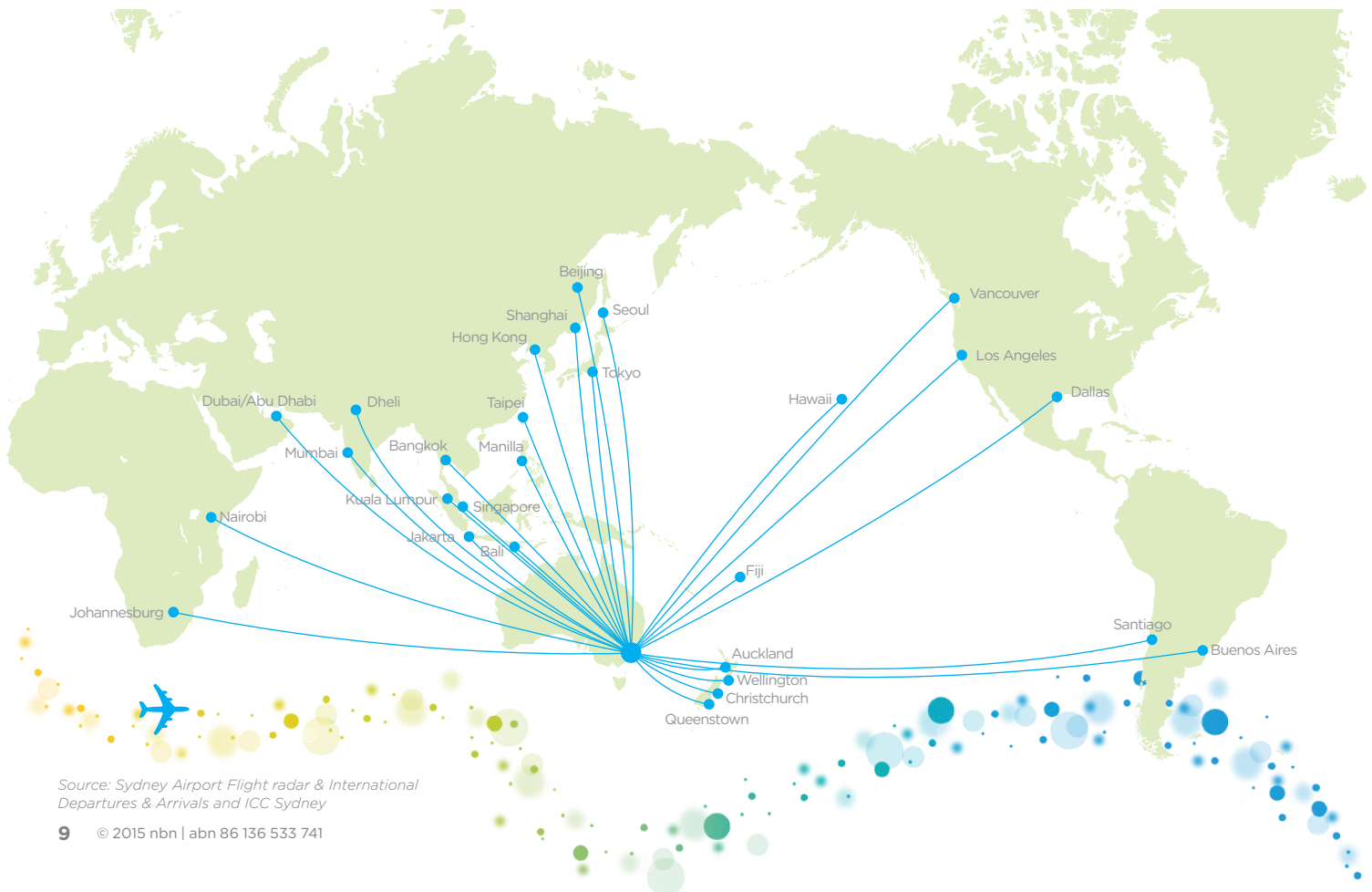
For more than a generation whenever Australian travellers have returned home their immediate advice to friends and family is that we live in the best country on earth. We prize our lifestyle; we see value in global connectivity; and we use whatever means we have at our disposal to build global connectivity.

The development of Australia's new broadband network may lead to new businesses being formed that connect globally-sourced products with local markets.

“...About eight million Australian visits are made overseas every year today.”



Direct non stop flight connections from Sydney to the world.



01. Global connectivity

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Or indeed it may lead to the development of micro-businesses marketing local products to global markets. The Australian penchant for global connectedness combined with improved connectivity via high-speed broadband is sure to somehow deliver to the Australian people improved prosperity and enhanced lifestyle. Perhaps such businesses will evolve not in traditional business locations but in suburbia or in lifestyle retreats. The Australian people will find a way to connect technology with global connectivity with lifestyle.



“The Australian people will find a way to connect technology with global connectivity with lifestyle.”







Number of journeys taken overseas and number of permanent arrivals by Country

Top 5 Countries Visited 1991		Top 5 Countries Visited Year to Sep 2014	
New Zealand	322,700	New Zealand	1,190,700
USA	309,700	Indonesia	1,053,400
Indonesia	173,300	USA	929,500
Hong Kong	130,100	Thailand	590,300
Singapore	100,300	China	399,100

Top 5 Tourist Countries 1991		Top 5 Tourist Countries Year to Sep 2014	
Japan	532,200	New Zealand	1,230,500
New Zealand	476,100	China	809,400
USA	278,000	USA	536,800
Singapore	86,400	Singapore	371,800
Germany	76,500	Japan	328,100

Source: ABS Catalogue 3401.0 Overseas Arrivals and Departures, Australia

Cost of Flights in Real Terms now

1947			2014		
					
Flight cost Equivalent of \$	Average weekly income Equivalent of \$	No. of weeks pay	Discount flight cost	Average weekly income	No. of weeks pay
\$1,170	\$14	85	\$1,300	\$1,130	1.2

Source: ABS Catalogue 6302.0 Average Weekly Earnings, Australia Nov 2014, QANTAS and FlightCentre websites

02. The world of work

The world of work has changed profoundly and consistently over the decades following WWII and perhaps even more so over recent years.

Globalisation brought multinational and industrial companies to Australia in the 1950s and 1960s from the US, from the UK and from Japan. This was all part of our pursuit of better global connectivity but it also had direct implications for work and for prosperity. Jobs in industry delivered overtime, security and a suburban lifestyle that could not be matched in war-torn Britain and Europe. Whole suburbs blossomed around car manufacturing plants in Melbourne's Broadmeadows, in Sydney's Pagewood, in Adelaide's Elizabeth. To the Australian people of the post-war era this was a dream lifestyle that delivered a job and a home.

The women's movement had its genesis in the US and in the UK in the 1960s and which sought to redefine the traditional role of women in society. By the 1970s and most certainly by the 1980s Australian women were making their mark through greater workforce participation. Plus the nature of work was changing. Better access to tertiary education and the rise of the services industries changed how we earned an income. Muscle jobs in manufacturing and agriculture receded; 'mind' jobs in finance, health and education expanded. The dollar was floated. More jobs were being created in offices than in factories and more and more women were taking up these so-called 'office jobs'.

"...by the 1980s Australian women were making their mark through greater workforce participation."



02. The world of work

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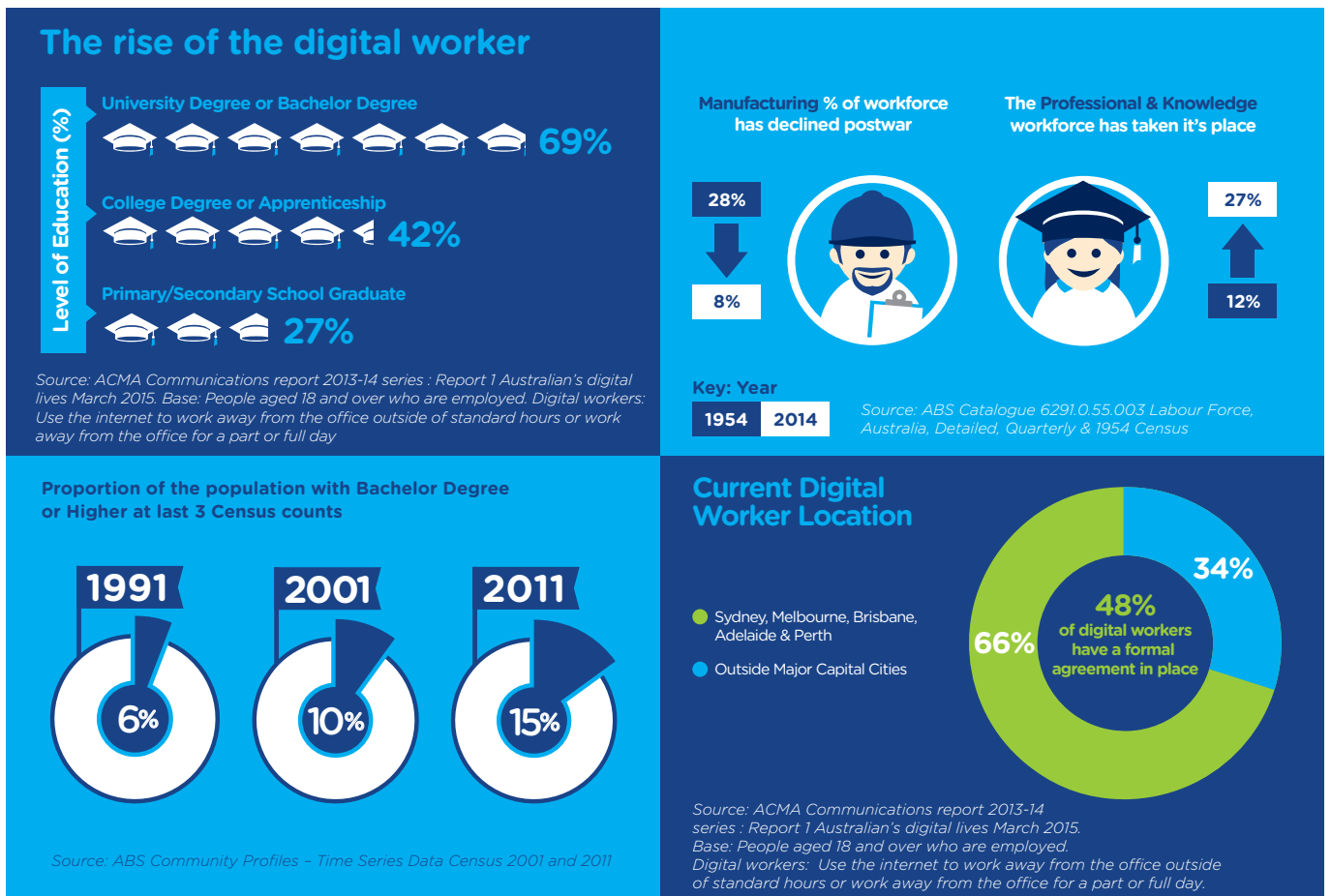
The office itself started to change. New workplaces emerged in the suburbs in places like Parramatta and Chatswood in Sydney and Box Hill in Melbourne. The advent of new office technology delivered better productivity and connectivity into the workplace. Fax machines, photocopiers, answering machines all accompanied new kinds of work that demanded new kinds of skills. The skills that mattered in this brave new world of work involved selling and managing and accounting, not drilling and refining and fabricating.

The transition of the way in which Australians earned an income from the farm to the factory to the office opened up new opportunities for prosperity and for lifestyle. At the time of Federation the Australian 'dream lifestyle' was the life of a bushman as encapsulated by Banjo Patterson in Clancy of the Overflow. This was a city clerk's lament about the lifestyle he wanted: "And I somehow rather fancy that I'd like to change with Clancy, Like to take a turn at droving where the seasons come and go."

“ The lifestyle opportunity that may be delivered by Australia’s new broadband network is the ability to time shift...”

With factory work in cities it was a suburban villa that Australians aspired to. Today with CBD-focused knowledge work the dream lifestyle might comprise an apartment with city views and access to the city's hippest restaurants and cafes.

Whereas in the 20th century Australian workers organised their suburban lives around workplaces, in the 21st Century and especially after 2020 and roll out of Australia's new broadband network it may be possible for workers to organise their work around their lives and their lifestyles. In some respects this is the Australian dream. While everyone will still have to work in the future, the workers of the future will have greater control over how and when they work.



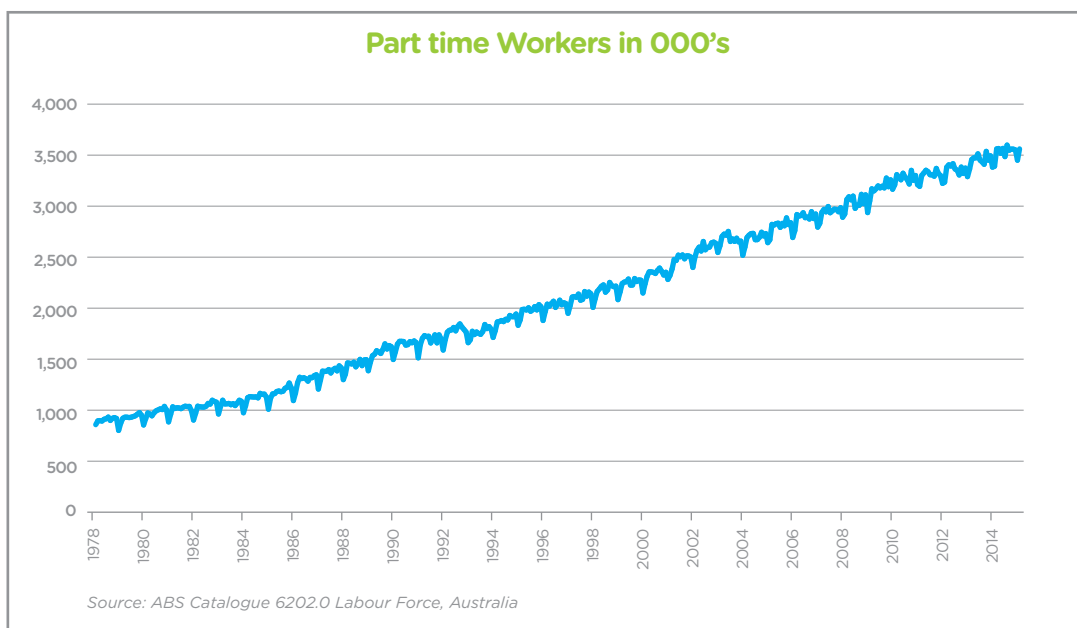
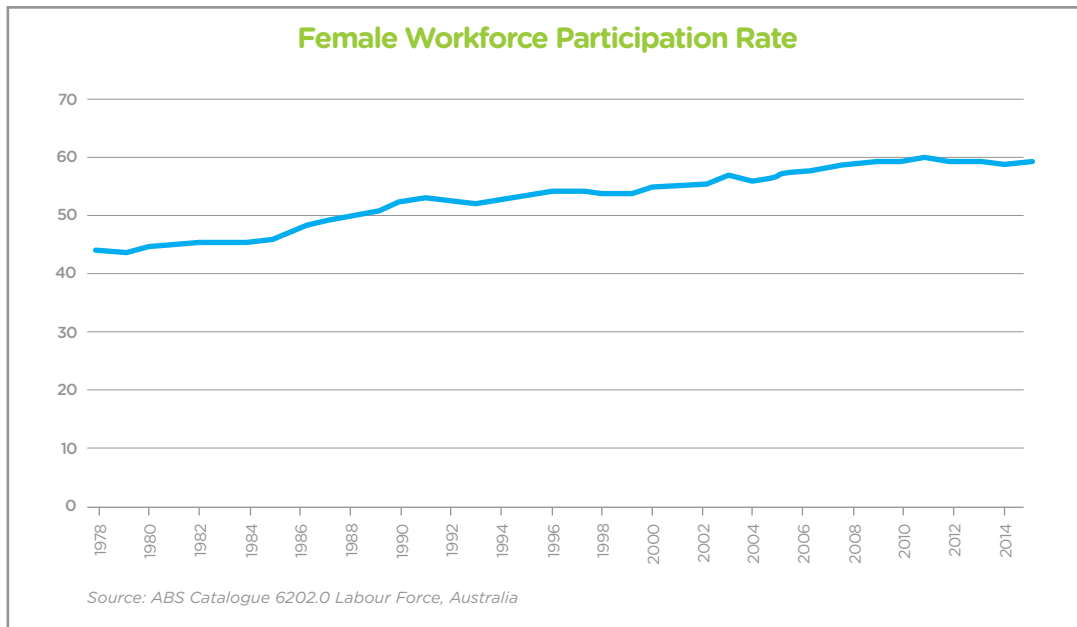
02. The world of work

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Work will be fitted into times and locations that suit the individual rather than lifestyle being fitted into and around commitments to work. That is the promise of high-speed broadband and this is an aspiration that fits comfortably with the Australian penchant for lifestyle.

It may be that by 2030 for example large Australian cities are configured differently in terms of work. The CBD is still important but why commute to a CBD workplace? Why not telecommute? Why commute for a meeting when you could use high-definition and multi-line video conferencing?

Why not combine telecommuting with occasional face-to-face collaboration in touch-down offices? Why not work from home or from the beach house or from a café wherever possible? If work is increasingly measured by deliverables then what does it matter if that deliverable is delivered over three bursts of work completed over 24 hours? The lifestyle opportunity that may be delivered by Australia's new broadband network is the ability to time shift; to work when and where we want to work. The challenge of this lifestyle might be to contain work. If work can be shuffled then for some personalities there are no boundaries to work. A challenge of this highly connected 'always-on' world may be defining boundaries and setting clear timeframes on when is 'work time' and when is 'non-work time'.



03. Home and household

If ever there was an aspect of the great Australian lifestyle that has evolved most over recent years it is the household.

This has shifted from the traditional nuclear family—mum, dad and the kids—to a wide array of new household options and living arrangements. The new Australian households include multi generational households that are mostly favoured by Mediterranean and some Indian cultures, double-income households with no children, single-person households comprising people in their 20s as well as singles over 60, same sex couple households, as well as blended-family households. It is also fair to say that one of the fastest growing household types in Australia today is the one-parent household and especially since the introduction of the Family Law Act of 1976.

The physical structure of the house has also changed from the three-bedroom brick-veneer on a separate suburban plot to high-rise apartments, to town-houses with gardens, to flats and villa units, to outer-suburban McMansions. Perhaps in response to the cost of housing or indeed to an emulation of how others live overseas, Australians are increasingly choosing to live in apartments. They are also increasingly choosing to live in a household without children either as double-income no kids (or DINKs) or in an extended state of singledom prior to having kids.

The great household shift of the last three decades has centred on the retreat of kids from the suburban home as the average family size shrinks, and on the fact that households are richer than ever before. The injection of more spending power into the average household is not just because the type of work we do is better remunerated it is because the average household has two incomes instead of one. These shifts have profoundly changed the way Australians live: we are richer than ever before; we have fewer kids per family than previous generations; and perhaps as a consequence of these two factors we are more self-indulgent. We can afford to pursue the better things in life from food and fashion to home furnishings and holidays. We want it all.



Residents by household type	1996	2011	2026 (projected)
Couple families with Children	55%	50%	47%
Couple families without Children	19%	21%	23%
One Parent families	11%	12%	13%
Other families	1%	1%	1%
Group households	4%	4%	4%
Lone Person households	9%	9%	10%
Non-Private dwellings	2%	2%	2%

Source: ABS Catalogue 3236.0 Household and Family Projections, Australia, 2011 to 2036

03. Home and household

Continued from page 14 ▶

The arrival of our new broadband network will enable Australians to re-imagine how their households and their homes might be used, where they might be located and how they might be configured in the future.

For example, the idea of neighbourhood might recede as Australians connect with like-minded tribes online. On the positive side this tribal connectedness creates new and vibrant communities.

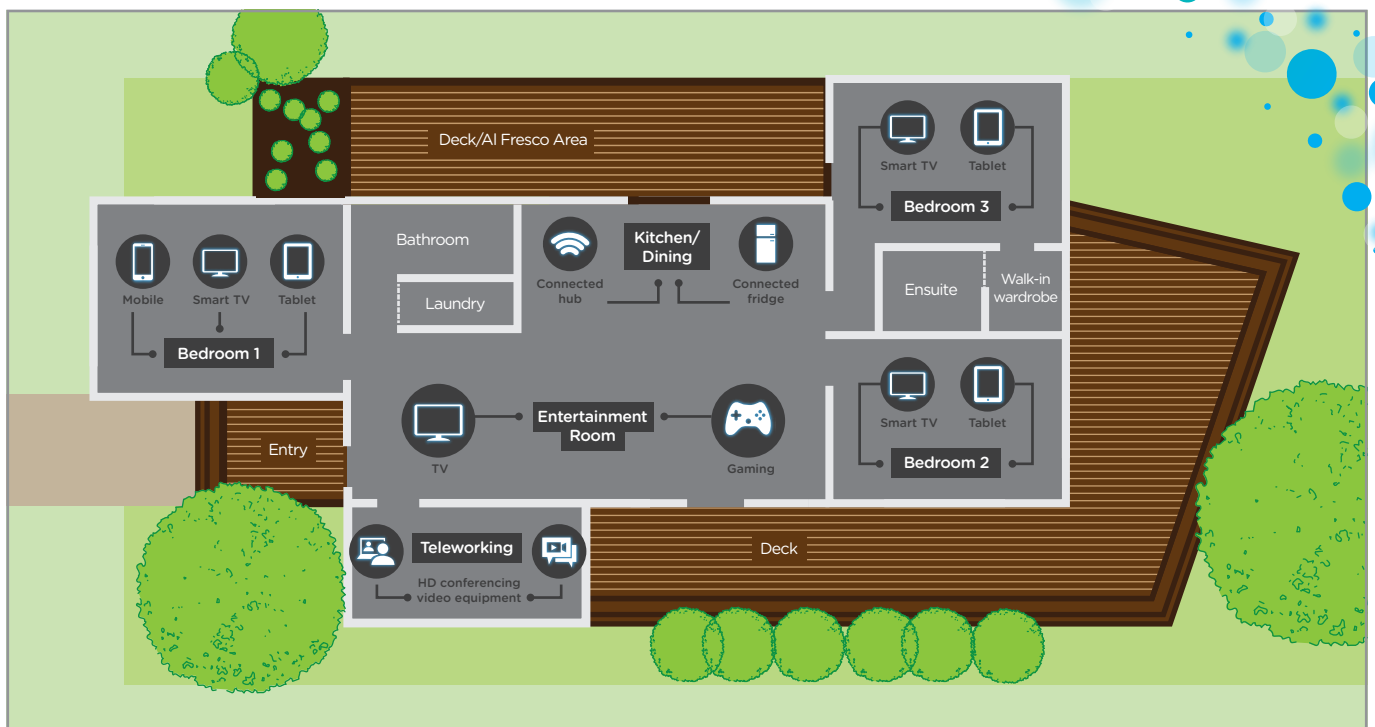
But this might also lead to a compartmentalisation where people only mix with like-minded people. At least with a neighbourhood residents are forced to mix with whoever lives in their local area.

The Australian home of the future might have a communications hub, a study or more likely a series of workspaces where mum, dad and the kids might connect into work, into school or into social networks. The family room might evolve as a command centre linked to the kitchen to the television and to lounging space. The Australian penchant for lifestyle locations such as seachange and tree change might be enhanced as more and more people set up businesses or deliver work via the internet from wherever they choose to live. The home might evolve into a resort or perhaps a new kind of hotel where members come and go and interact in much the same way office workers of the future might come and go and collaborate as required or as inclined.

1950s house floor plan



GenNBN home floor plan



04. Interests and leisure

The idea of leisure has been enshrined in the Australian way of life since the advent of the 19th century worker's movement that delivered the ideal of eight hours work, eight hours rest and eight hours play.

It is hardly surprising that this concept which elevates leisure to equal status with work should come out of Australia and soon after the gold rush. All that prosperity was soon converted into lifestyle. To the Australian mind, what is the point of wealth if it doesn't deliver a better quality of life? Leisure in the immediate post-war era revolved around sport: football, cricket and horse-racing. Workers worked five days plus Saturday morning; they 'knocked off' at midday and they made a beeline to the football for a 2 pm kick-off.

How do Aussies compare in sport?

ICC Cricket World Cup

Year	Host Nation	Winner	Runner-Up
1975	England	West Indies	Australia
1979	England	West Indies	England
1983	England	India	West Indies
1987	India & Pakistan	Australia	England
1992	Australia & New Zealand	Pakistan	England
1996	India, Pakistan & Sri Lanka	Sri Lanka	Australia
1999	England	Australia	Pakistan
2003	South Africa, Kenya & Zimbabwe	Australia	India
2007	West Indies	Australia	Sri Lanka
2011	Bangladesh, India & Sri Lanka	India	Sri Lanka
2015	Australia & New Zealand	Australia	New Zealand

Source: ICC Cricket World Cup History

As the Australian nation absorbed new cultural influences after the war the nature of our leisure pursuits shifted. We are still interested in sport but we are also interested in what might be termed lifestyle pursuits. Cafes, bars and restaurants litter our cities and towns; alfresco dining in the Greek or Italian style line the most fashionable capital-city streets as well as some parts of regional and coastal cities. We have embraced European lifestyle pursuits and an interest in food, wine, cooking and even home design. The idea of indoor-outdoor living was brought to Australia by Mediterranean migrants not by English settlers.

Attendance at Melbourne Cricket Ground

Attendance	Soccer Match	Year
104700	Olympic Games Final USSR v Yugoslavia	1956
95446	Friendly - Melbourne Victory v Liverpool FC	2013
95103	Friendly - Australia v Greece	2006
93225	Olympic Games - Australia v Italy	2000
85513	World Cup Qualifier - Australia v Uruguay	1997
93013	World Cup Final - Australia v New Zealand	2015

Source: MCG Attendance

The Australian penchant for sport and leisure is partly due to the fact that we have always paid ourselves well. That investment in productivity yielded free time during daylight hours to follow sport and leisure. Plus, we have always been a young nation; youth and vitality combined with a benign climate and an outdoorsy lifestyle delivered an interest in—some say obsession with—sport. Indeed as a nation we Australians are far more likely to measure our success in a global setting by sporting prowess than by economic activity.

“Australia have missed only 4 ICC men's finals in the last 40 years.”

Australian houses now pivot around the kitchen and a deck which we call not the barbeque area but the alfresco dining area or, more simply, 'alfresco'. Australians have embraced what the Italians describe as la dolce vita or the good life. The arrival of Mediterranean migrants from the 1950s onwards and their absorption into Australian society was always going to be a match made in heaven. Their European sophistication combined with our climate and prosperity was always going to re-forge the great Australian lifestyle.

04. Interests and leisure

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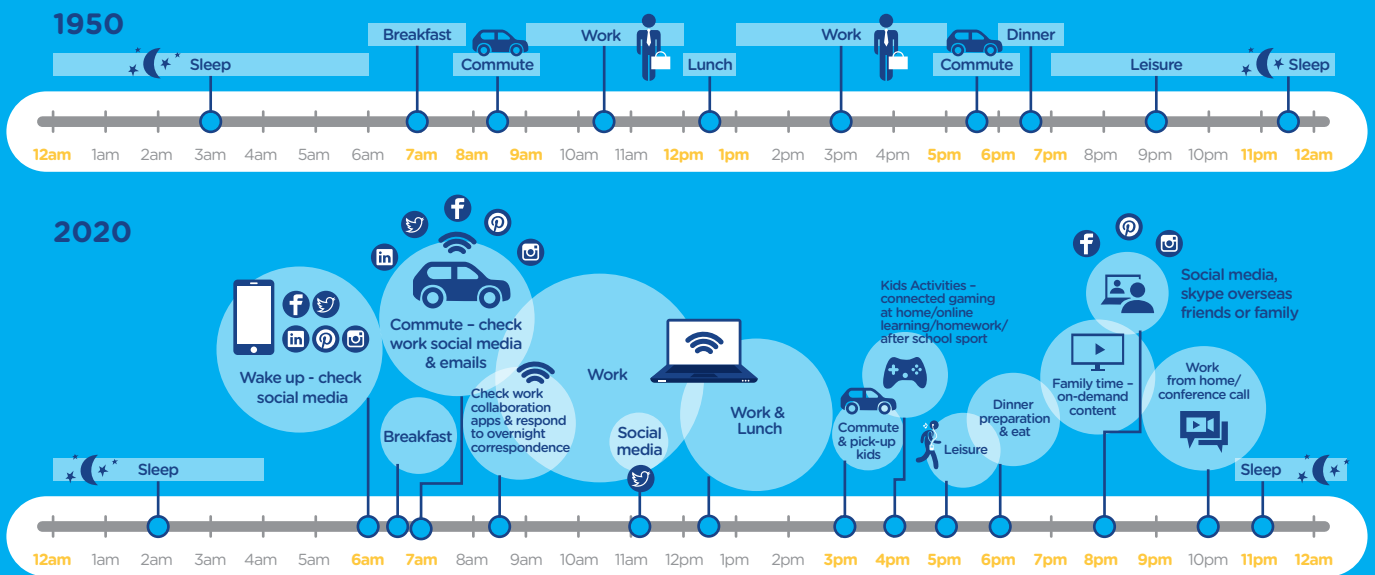
Australia is still a young country and will remain so for decades to come relative to other developed nations. Our birth rate has increased over recent years and we continue to attract young migrants. We will remain a sporty nation. We will most likely continue to pay ourselves well; we will have ample daylight leisure time; we will evolve and enhance an Australian version of the la dolce vita although in the future it may have a distinctively Asian-Indian-Arabic hue.

In the world of leisure Australia's new broadband network will most likely fulfil the role of enabler. It will support the communications necessary to retain and enhance linkages to family and friends.

It will enable Australians to research, share and engage with their hobbies, interests and passions. It will seamlessly connect Australians to their idea of how best to use their leisure time. Our penchant for sport for example might find an Australian market for watching American football or the English Premier League or the Indian Cricket League. Micro and niche sports might find in Australia an audience for curling or sumo wrestling. Our penchant for food and wine might see us exploring Scandinavian cooking shows or researching the wines of the Napa Valley. These options exist today but with the universality of fast broadband our access to such services and content will be limited only by our interest.



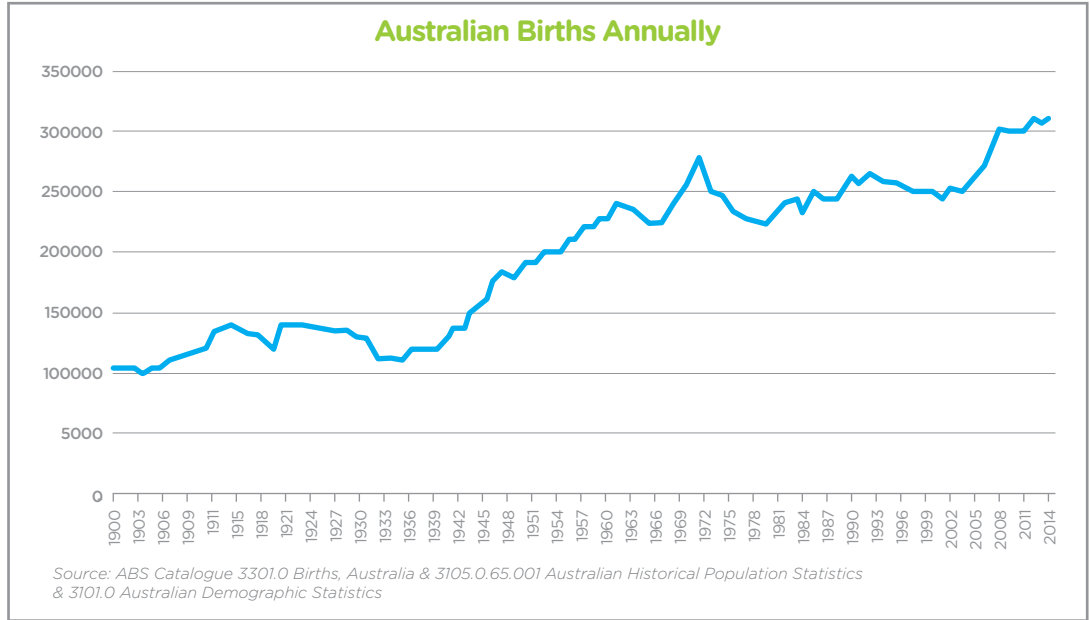
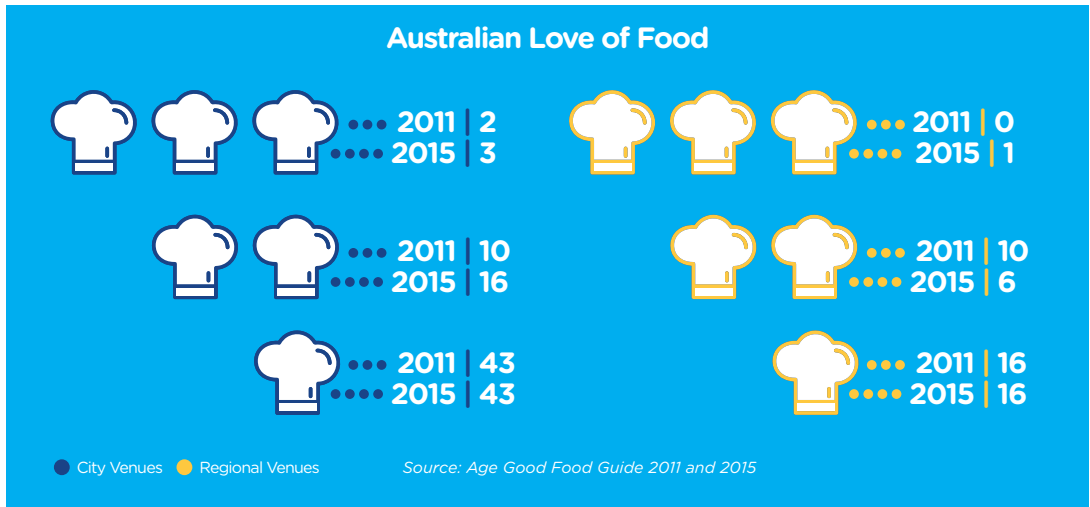
The new 'work, rest, play' in the Australian daily time budget



Source: KPMG Demographics

04. Interests and leisure

Continued from page 17 ▶



Australia's
broadband
network



The future of the Australian lifestyle and GenNBN



Australia's
broadband
network

Australian society has changed dramatically since WWII as indeed has the community in most developed nations.

But what is unique about Australian society over the last 70 years is the arrival of migrants in big numbers and our cultural shift from colonial outpost to global community engaged with its region. These factors plus changes to the way we work, the way we live and the way we organise ourselves into households has very much shaped the making of the modern Australian lifestyle.

The driver of this change has been new cultural influences, new thinking and new technologies. But even with this change the essence of the Australian people remains the same: we are still a young, prosperous, outdoorsy people intent on delivering and living a great quality of life. Our lifestyle today is different to the lifestyle we lived in previous eras but it is still uniquely Australian. It's as if the Australian people take each new development or each new technology and poke and prod and test until they find an application that delivers prosperity and/or that makes their lifestyle just that little bit better.

The arrival and roll out of Australia's new broadband network will be no different. Initial wariness will give way to curiosity

“...we are... a young, prosperous, outdoorsy people intent on delivering and living a great quality of life.”

and to the trialling of new work and business ideas, to new work arrangements, to new ways of forming relationships. There have been transformative developments in the making of the modern Australian lifestyle. WWII and post war immigration was one; the women's movement was another; the roll out of high-speed internet access promises to be another.

Perhaps in due course we know whatever generation that lies beyond Generation Y and Generation Z as Australia's most connected generation or perhaps 'GenNBN'. Here is the first generation of Australians maturing to adulthood in a connected and digitised world where curiosity is both piqued and sated. Here is a society where super connectivity is the foundation of all that is necessary for 21st Century Australians to pursue their interpretation of the great Australian lifestyle.

Methodology

nbn™ engaged KPMG Australia Partner **Bernard Salt** and his team to develop an assessment of how Australians have accommodated new technology into their lives over time. The objective being to lay the foundation for an interpretation of how universal access to fast broadband might change Australian society from 2020 onwards.

The approach adopted has been to assemble data points over a 100-year timeline. These datasets are mostly sourced from Australian Bureau of Statistics as well as other credible government or research-house organisations. Data sources are cited against each dataset.

By examining the metrics of Australian life over time it has been possible to discern the constant and recurring theme of lifestyle. This in turn leads to the conclusion that Australians are likely to use the high-speed broadband network to enhance their connectivity, their productivity, the way they live and the interests and leisure pursuits that interest them.