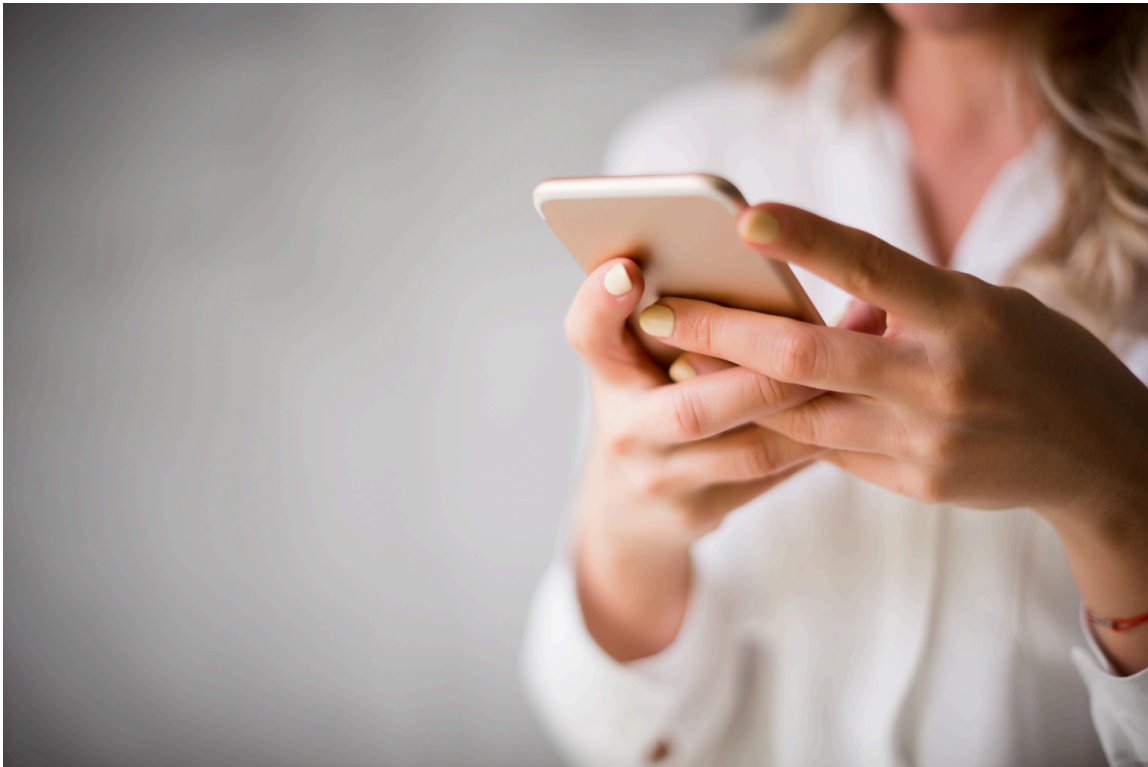


5G and Consumer Adoption.

The Quiet Revolution.



**JAMES MEESE
ROWAN WILKEN
CATHERINE MIDDLETON**

EXECUTIVE SUMMARY

This representative national survey of Australians reveals that consumers are experiencing 5G as a gradual transition rather than a revolution.

The main reason people have 5G is because they upgraded their phone. Non-users are not interested in signing up to 5G mobile in the short-term. Instead, the majority expect to roll over when their plans expire. Despite early promises of a 5G revolution, the technology is being adopted through routine plan upgrades rather than marketing-driven adoption.

Higher incomes and postgraduate education are associated with 5G use but the differences are small. Users and non-users share a broadly similar demographic profile. Once Australians do switch to 5G, satisfaction is high. The report also reveals popular consumer use cases for 5G home internet and 5G mobile.

We also discuss the fixed-line market where we see early signs that 5G Home Internet is becoming a viable alternative to the NBN. Dissatisfied NBN consumers and younger users are significantly more likely to consider switching. However, consumer intentions suggest that a significant switchover from fixed-line internet to wireless is unlikely in the near term.

62

% of 5G home internet users previously on NBN

33

% of people without 5G home internet haven't heard of it.

37

% of 5G mobile users got 5G because they upgraded when their plan changed.

METHOD

Online Research Unit was commissioned to provide a nationally representative sample of n=2,112 participants, sourced through an online panel. The target population was 18+ people living in Australia. Quotas were applied to be representative of the target population by age, gender and location. Fieldwork occurred from July 16 to August 8 2025. Weighting was applied to Sep 2024 ABS population data. RIM weighting was applied with an efficiency of 97%. The effective sample size is 2,042. The overall margin of error is $\pm 2.2\%$ (95% confidence).

ACKNOWLEDGEMENTS

We thank Jessica Kahn for her assistance with data analysis. This research was funded by the Australian Research Council (DP2010100386) Image is Canva Stock.

5G Mobile Adoption and Use

These key findings were borne out in our sample of 5G mobile users. The most popular reason for upgrading was 'No reason, I just upgraded when my plan changed' (37%), with the second being 'Faster speeds' (36%). All other reasons were under 10%.

These two reasons were associated in slightly different demographic profiles. With a mean age of 43, those upgrading for faster speeds centered around early middle age, were more likely to be male and based in a metro area. Those who just waited for the upgrade, skewed older with a mean age of 52 and were more likely to be female.

Our 5G mobile users revealed a gradually increasing adoption rate (see graph), with the highest rate of adoption within the last year. Our data also showed that income and education were the strongest predictors of 5G mobile adoption. Those living in households earning between \$80 - 150k or \$150k+ as well as those with postgraduate education were 40% more likely to be 5G users than other Australians.

Popular use cases were social media (57%), voice phone calls (53%), streaming video (39%) and video calls (34%). Satisfaction was high with responses for voice call quality, coverage, data speed and video calls above 85%.

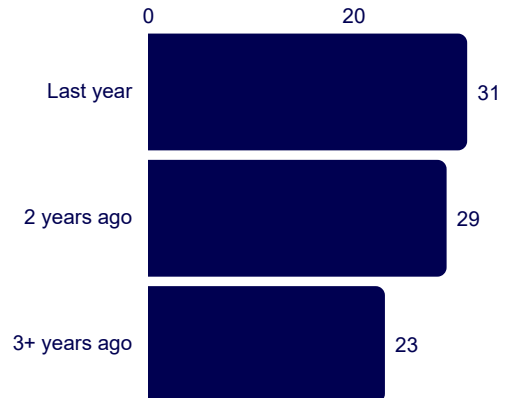
However, cost pressures were noticeable. While 54% of 5G mobile users reported costs to be about the same as their earlier service, 25% stated it was more expensive. Only 75% of respondents were satisfied with cost, a contrast to other questions about satisfaction.

Given the increased speed and capability of 5G connections, we also asked about hotspotting. That is, using your mobile phone for a WiFi connection.

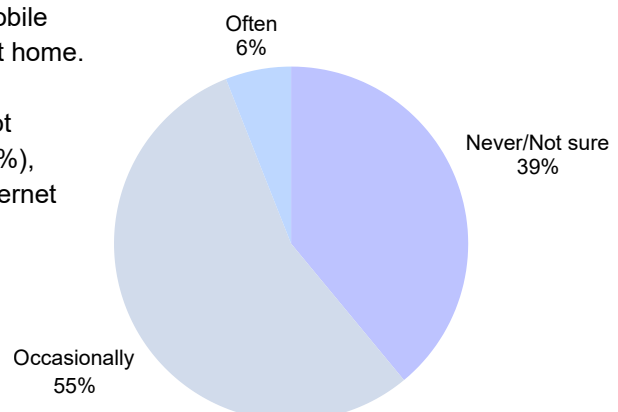
We wanted to see whether people used their 5G mobile connection instead of their NBN connection when at home.

Only 6% of respondents used their mobile to hotspot regularly. Most people only used it occasionally (55%), largely to do with home internet failures (e.g. the internet was down or too slow).

When did 5G mobile users adopt?



Are 5G users hotspotting?



5G Home Internet Adoption and Use

5G home internet is a wireless service that uses 5G networks to provide internet access to a home, instead of relying on a fixed-line NBN connection.

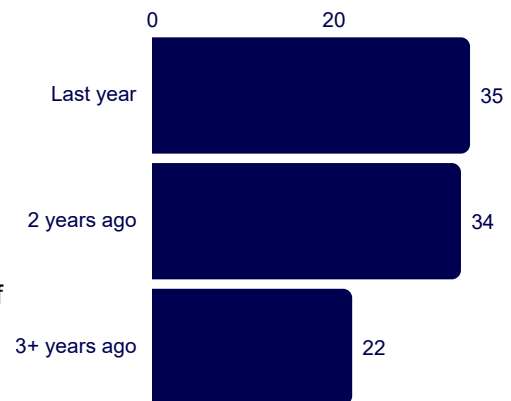
There have been concerns that 5G home internet could threaten the foundational presence that the National Broadband Network has in the Australian market.

Our findings show there is a small amount of market substitution with 62% of 5G home internet users previously using NBN. However, 5G home internet users only make up 14% of the sample, compared with 55% who have adopted 5G mobile. That being said, the pace of adoption is similar, with most users switching in the past two years.

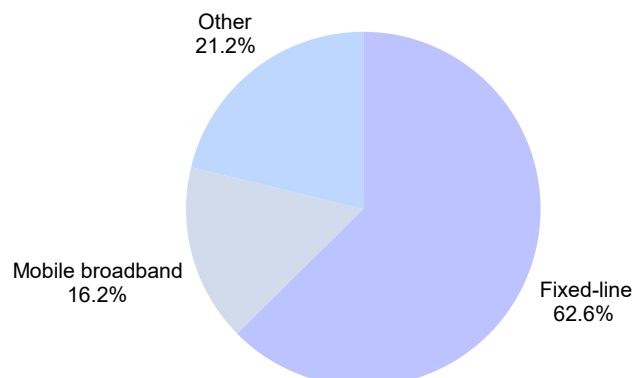
Popular use cases for 5G home internet were streaming video (71%), social media (67%), video calls (45%) and gaming (47%). There were also similar satisfaction ratings to 5G mobile albeit with more respondents happier with the cost of 5G home internet. Satisfaction with reliability, speed, cost and coverage was above 83% on all measures.

The majority of users did not perceive much difference between 5G home internet and their previous service (54%), although a small percentage of respondents believed it was either more expensive (20%) or cheaper (14%). That being said, a majority believed that the service provided by 5G home internet was better than before (60%). 64% of former NBN users thought their internet service was 'better than before'.

When did 5G mobile internet users adopt?



Where do 5G internet users come from?



Drivers and Barriers: 5G Home Internet Adoption

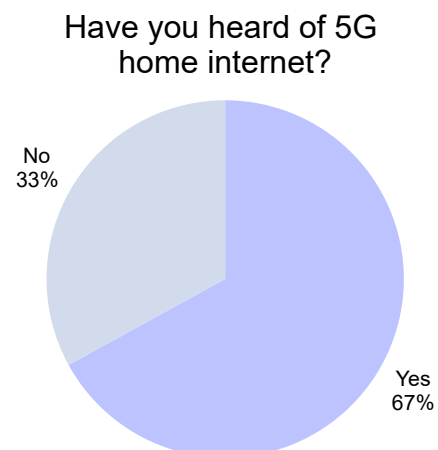
We asked everyone without 5G home internet whether they would adopt it, regardless of if they had a 5G mobile or not. There was a significant awareness issue in our sample, with a significant minority (33%) not even knowing that 5G home internet was an option.

There was limited difference in terms of propensity to change regardless of whether or not people had 5G mobile. 45% of users who had heard of 5G mobile internet said they were likely to switch within 2 years, and 41% had no desire to change at all. However, 47% of those who were dissatisfied with their NBN service said they were likely to switch to 5G mobile internet within the year and this went up to 59% within the first 2 years.

In terms of anticipating future internet demand, 33% of 5G mobile users expected to use the internet more in the future, whereas only 24% of those using earlier standards (4G) anticipated increased data use. Most people expected their internet use to stay about the same.

Most of our sample were broadly satisfied with their internet connections with reliability (85%) and speed (83%) all scoring above 80%. However, 35% of respondents were not satisfied with the cost of internet access. Mobile broadband customers were the most dissatisfied with 12% not satisfied with reliability or speed.

These findings suggest that market awareness is a key barrier to further take up of 5G home internet, with demand largely coming from early adopters and dissatisfied consumers, who are most likely to consider switching from mobile broadband or NBN.



Drivers and Barriers: 5G Mobile Adoption

There were similar challenges in terms of market awareness of 5G mobile, with 28% of people using earlier standards not familiar with the term. Respondents also had limited knowledge of whether 5G was even available in their current location. Half the sample (51%) wasn't sure if it was available or not. There was also little appetite to upgrade with only 32% actively considering upgrading.

There was also broad satisfaction with their current services with respondents happy with voice call reliability (92%), data speed (88%) and phone coverage (84%). As with internet services, less people were satisfied with the monthly cost of their mobile phone (78%) but that may reflect broader cost of living pressures across the sample.

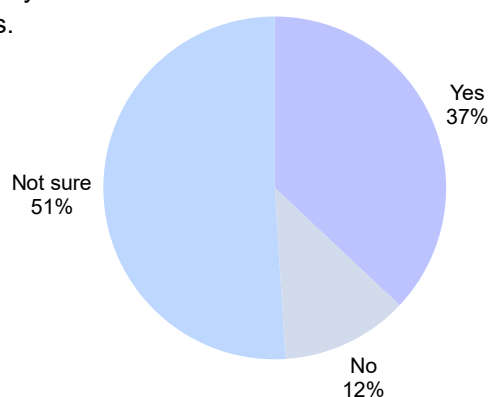
When asked about the likelihood of upgrading in the future, our respondents anticipated a gradual device upgrade pathway. Only 28% expected to upgrade in the next year, 45% in the next two years and 64% in the next 5 years. In many ways, these expectations matched those of the respondents who already had 5G mobiles. Rather than seek out the new technology, a number of respondents had also waited for their plan to be upgraded.

That being said, people on 4G might be missing out on improvements in connectivity. Our data showed that 5G users reported better connectivity than 4G users, even when accounting for demographics like age, location and income.

Those who were unhappy with their current service were more likely to anticipate upgrading. More people who were dissatisfied with their current phone coverage (36%) and data speed (37%) said it was likely they would move to 5G in the next year, a +8-9% increase when compared with the wider sample.

Much like 5G home internet, there is limited market awareness. However, demand is much more passive here, largely driven by device upgrades and a small group of dissatisfied consumers.

Is 5G available in your area?



CONCLUSION

Our survey reveals the following key takeaways:

There is **a lack of awareness of 5G mobile and 5G home internet amongst non-users.**

People see benefits from the technology from faster speeds to better coverage. **5G users are more likely to report having good or excellent coverage.** However, adoption is slow, **occurring when people upgrade their plans.**

There is a **group of early adopters** who are interested in faster speeds or new technology. These consumers are more likely to be middle-aged males living in capital cities.

A small portion of **customers dissatisfied with coverage or speed, are more likely to consider 5G mobile or 5G home internet** than the general population.

4 out of 5 people are satisfied with their mobile and internet service regardless of the service. The main area of dissatisfaction is cost. We did not ask questions about customer service.

Churn from NBN to 5G home internet is contained. Only 14% of our sample were using 5G for their main household connection.

People also only occasionally use 5G mobile to hotspot in place of an NBN connection. This suggests that **the NBN will remain a resilient technology nationally.**

There were hopes that 5G would spark a major consumer revolution, like 3G and 4G, which introduced video calling and on-the-move streaming respectively. Instead, **a process of gradual adoption is occurring.** If it's a revolution at all, it's a very quiet one.

**Low
Awareness**

**Passive
Adoption**

**NBN not
threatened**

