

The Role of the NBN in creating sustainable economic growth in regional Australia.

October 2011

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Agenda

- Who are we?
- What do we do?
- What are we going to present?

Roy Morgan Research

- **Who are we?**
 - Roy Morgan Research is Australia's best known and longest established market research and public opinion survey company.
 - Founded in Melbourne by Roy Morgan 70 years ago.
- **What we do?**
 - Roy Morgan Research is the provider of the world's most extensive and only true single source survey.
 - Today annual turnover is more than \$50 million, with offices in four mainland Australian States, Auckland, London, New York, Princeton and Indonesia.

The 8 NBN 'Digital Economy Goals'

1. Online participation by Australian households
2. Online engagement by Australian businesses and not-for-profit organisations
3. Smart management of our environment and infrastructure
4. Improved health and aged care
5. Expanded online education
6. Increased teleworking
7. Improved online government service delivery and engagement
8. Greater digital engagement in regional Australia.

Our Consumer Surveys

- The Roy Morgan Single Source Survey has 50,000 respondents every 12 months
- Methodical screening and cleansing of data

Internet c

13. Do you have an Internet connection at home?
Yes (Continue) No (Skip to Q34)

PLEASE ANSWER THE FOLLOWING QUESTIONS FOR YOUR MAIN HOME INTERNET CONNECTION ONLY

14. Which Internet service provider (ISP) do you use for your main connection at home?

3 <input type="checkbox"/>	OPTUSnet <input type="checkbox"/>
AAPT <input type="checkbox"/>	Primus-AOL <input type="checkbox"/>
Adam <input type="checkbox"/>	TADAust Connect <input type="checkbox"/>
Chariot <input type="checkbox"/>	Telstra BigPond <input type="checkbox"/>
Dodo <input type="checkbox"/>	TPG Internet <input type="checkbox"/>
Exetel <input type="checkbox"/>	Unwired <input type="checkbox"/>
iiNet <input type="checkbox"/>	Virgin <input type="checkbox"/>
Internode <input type="checkbox"/>	vividwireless <input type="checkbox"/>
iPrimus <input type="checkbox"/>	Vodafone <input type="checkbox"/>
Netspace <input type="checkbox"/>	WestNet <input type="checkbox"/>

Other (write in):

Don't know

Internet c

25. What kind of Internet connection do you have at home ?

Dial up modem (Skip to Q36)
ISDN
Broadband/High speed (Continue)

26. What type of Broadband connection do you have at home?

ADSL/DSL
Cable (Continue)
Satellite
Wireless (Skip to Q28)

27. Do you also access that connection wirelessly around your home?
Yes (Skip to Q30)
No

28. Which of the following devices do you use for your Wireless Broadband?

Mobile Phones continued

53. IMPORTANT INSTRUCTIONS:
If you own or use a mobile phone → Continue
If you intend to buy a mobile phone → Continue
If you don't own or use AND don't intend to buy one → Skip to Page 63

Please complete the table below.
(Mark only one brand in each column)

	53a. Current brand own/use	53b. Previous brand of mobile phone	53c. Brand you intend to buy
Apple iPhone	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BlackBerry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dell	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Garmin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HTC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Huawei	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

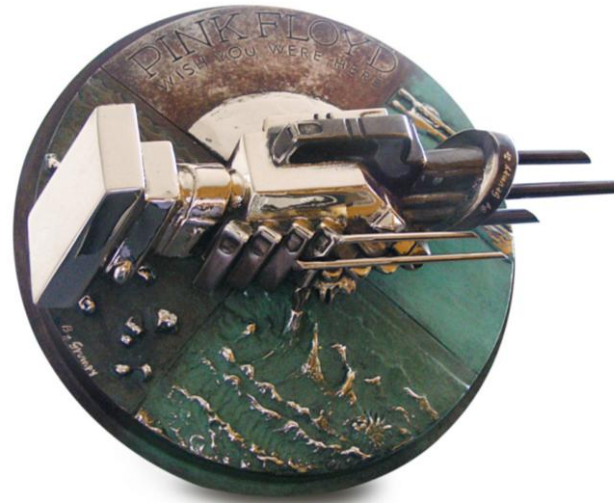
Phones

19. What have you used your main mobile phone for in the last 4 weeks?

Made calls to mobiles	<input type="checkbox"/>
Made interstate calls	<input type="checkbox"/>
Made overseas calls	<input type="checkbox"/>
Received voicemail	<input type="checkbox"/>
Received SMS	<input type="checkbox"/>
Sent SMS	<input type="checkbox"/>
Taking photos	<input type="checkbox"/>
Video messaging	<input type="checkbox"/>
Made video calls	<input type="checkbox"/>
Taking videos	<input type="checkbox"/>
Playing music/MP3s	<input type="checkbox"/>
Listening to the radio	<input type="checkbox"/>
Playing games	<input type="checkbox"/>
Accessed my mobile phone portal (eg. Optus Zoe Planet 3, BigPond Mobile, Vodafone Live!)	<input type="checkbox"/>
Accessed the Internet by typing in a website address (eg. www.google.com)	<input type="checkbox"/>
Downloaded an application (from an app store)	<input checked="" type="checkbox"/>

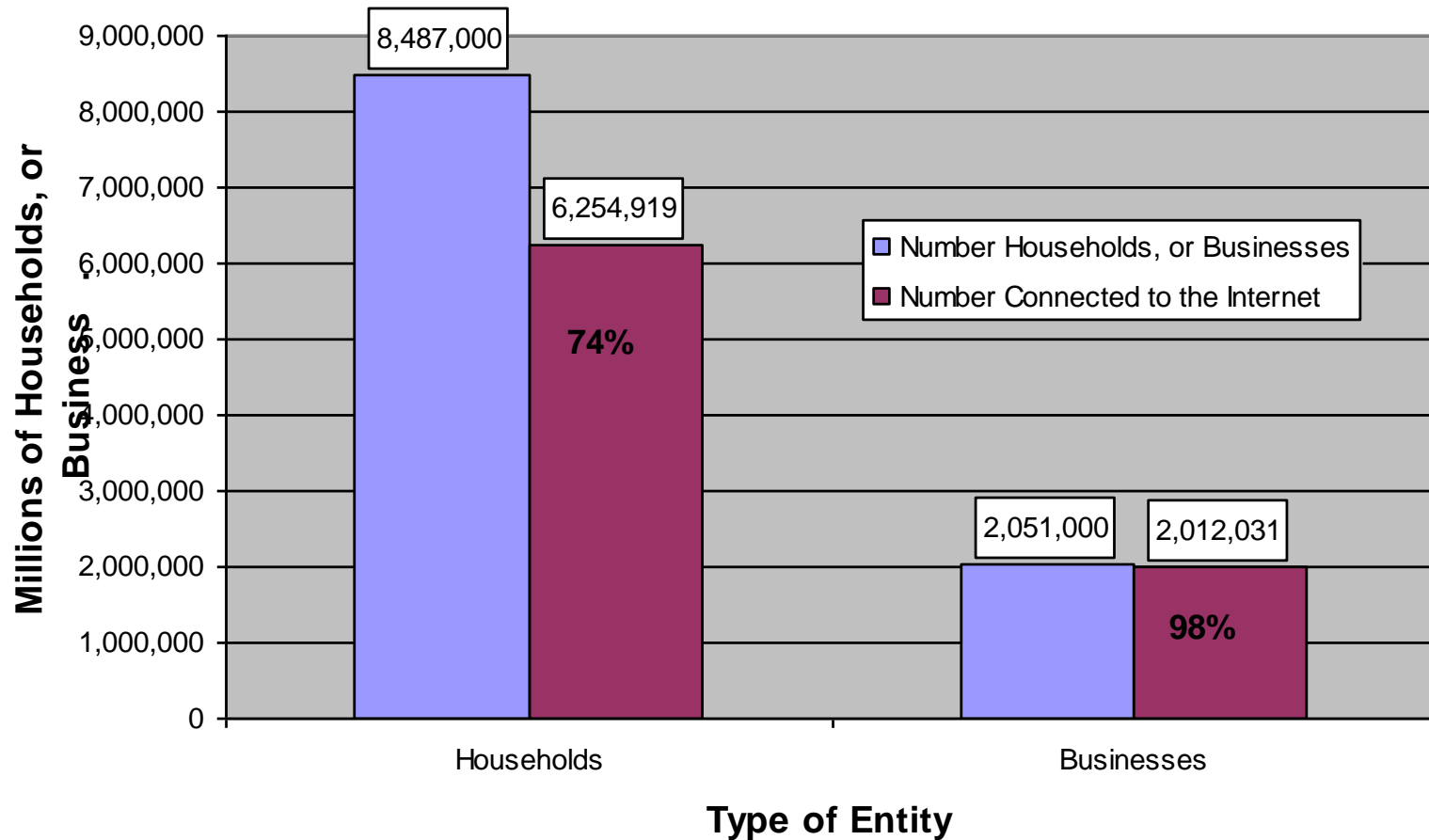
Our Business Survey

- The Roy Morgan Business to Business Survey is the first in a series of a regular study of 12,000 businesses every 12 months
- First results from 449 businesses



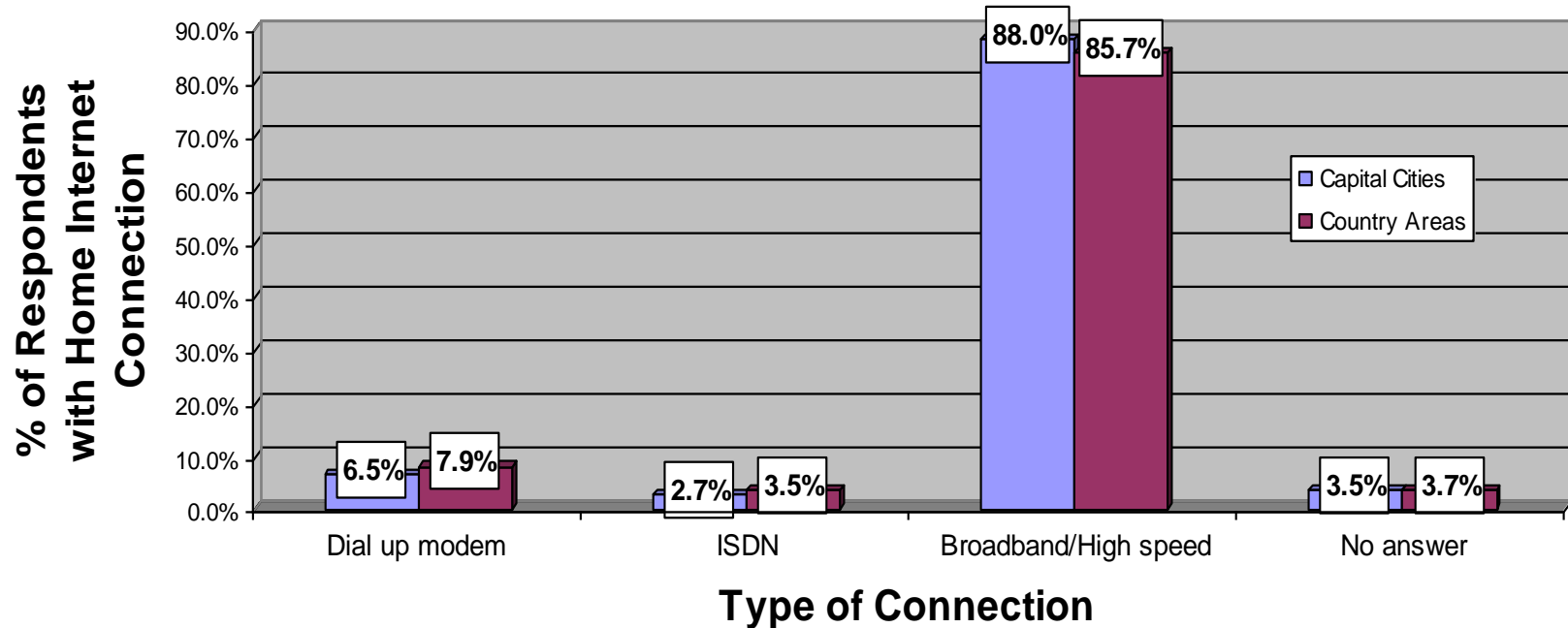
Basic statistics

Number of Households and Businesses in Australia and the % with Internet Connection



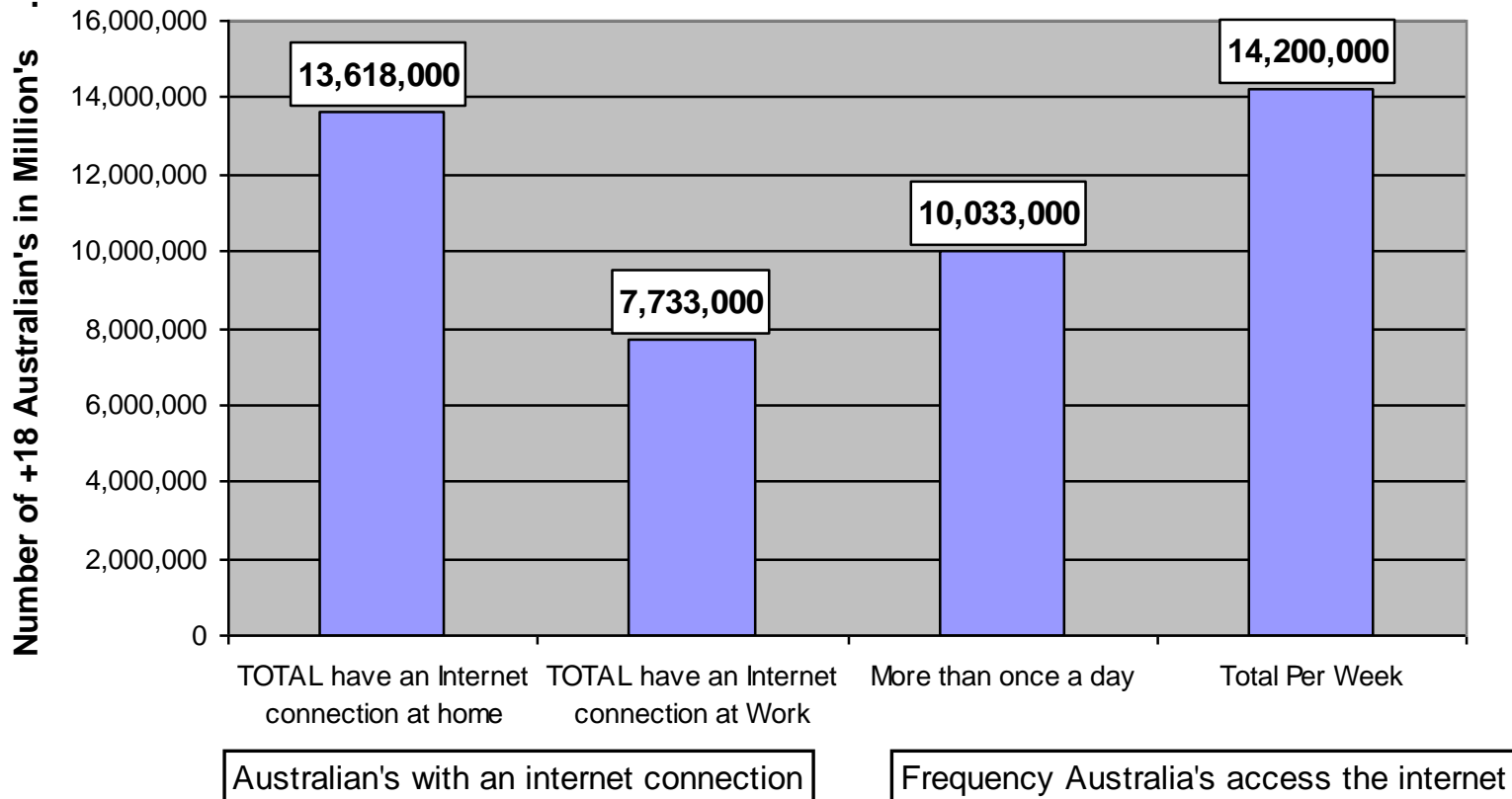
Type of Internet Connection - City vs. Country

Type of Connection for Households with Home Internet - July 2010 to June 2011



Connection and Frequency of Internet Usage

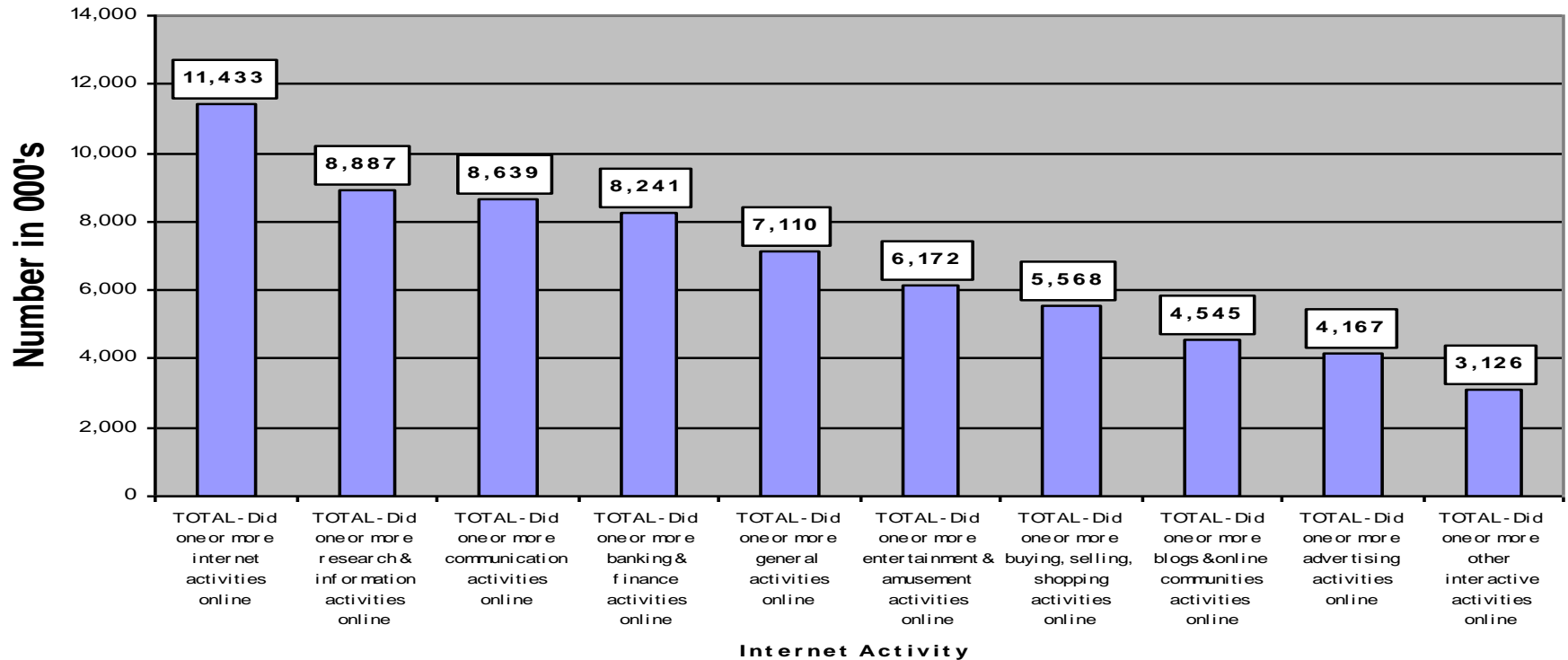
Internet Connections and Frequency of Usage of +18 Australian's



Base Aust Population aged 14+; Source: Roy Morgan Research n = 18135 (Jul11-Jun11)

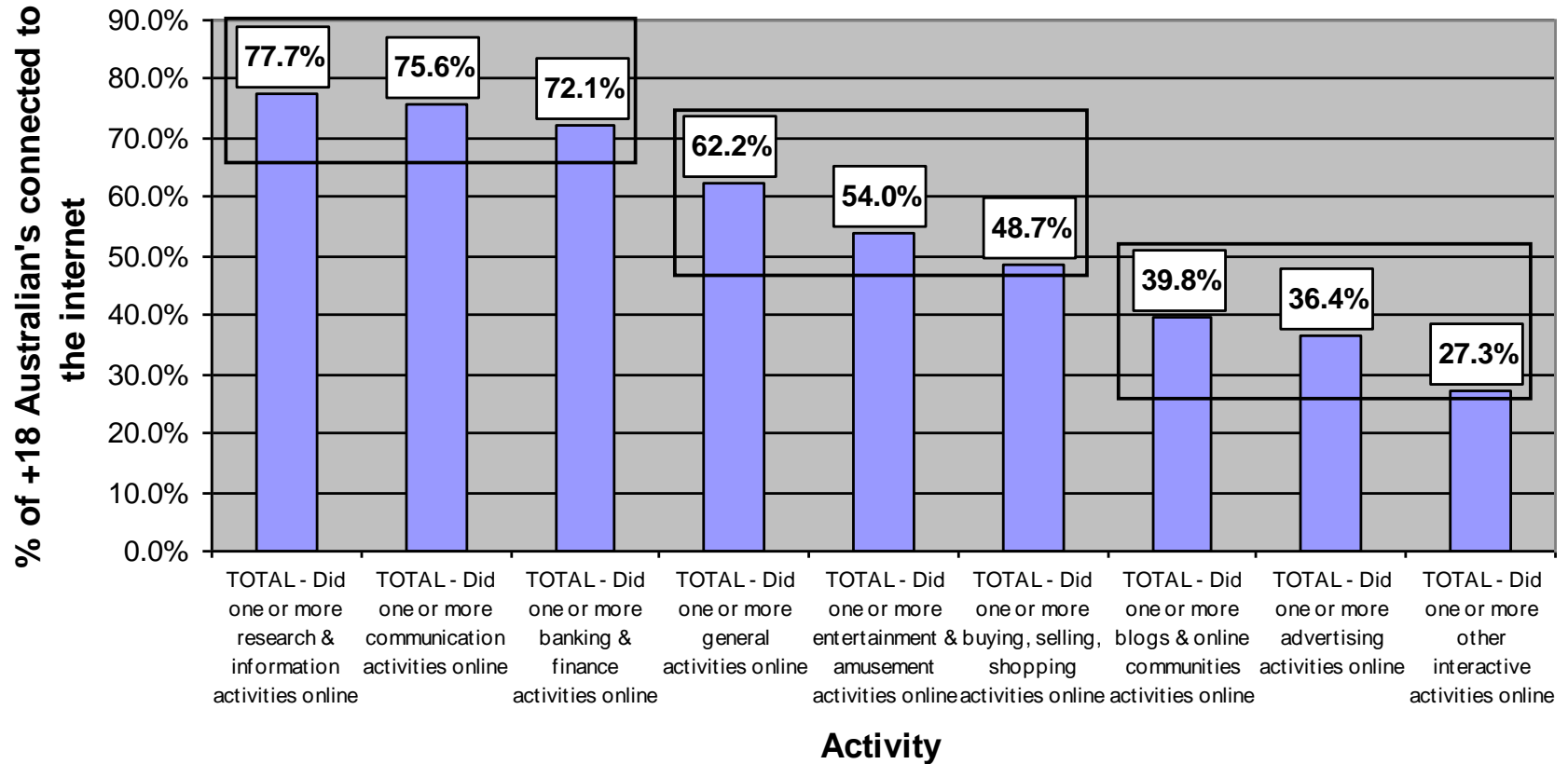
Internet Habits

Internet Habits of +18 Australian's over the last 4 weeks who are Connected to Internet - July 2010 to June 2011



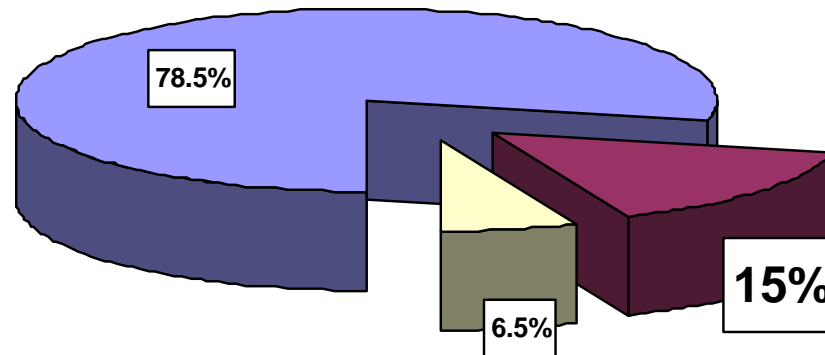
Internet Habits

Internet Activities of +18 Australian's with Internet Connection and who Accessed the Internet in the Last 4 Weeks - July 2010 to June 2011



Australian's with Home Internet Connection

- TOTAL have an Internet connection at home
- TOTAL do not have an Internet connection at home
- Can't say



Issues we share

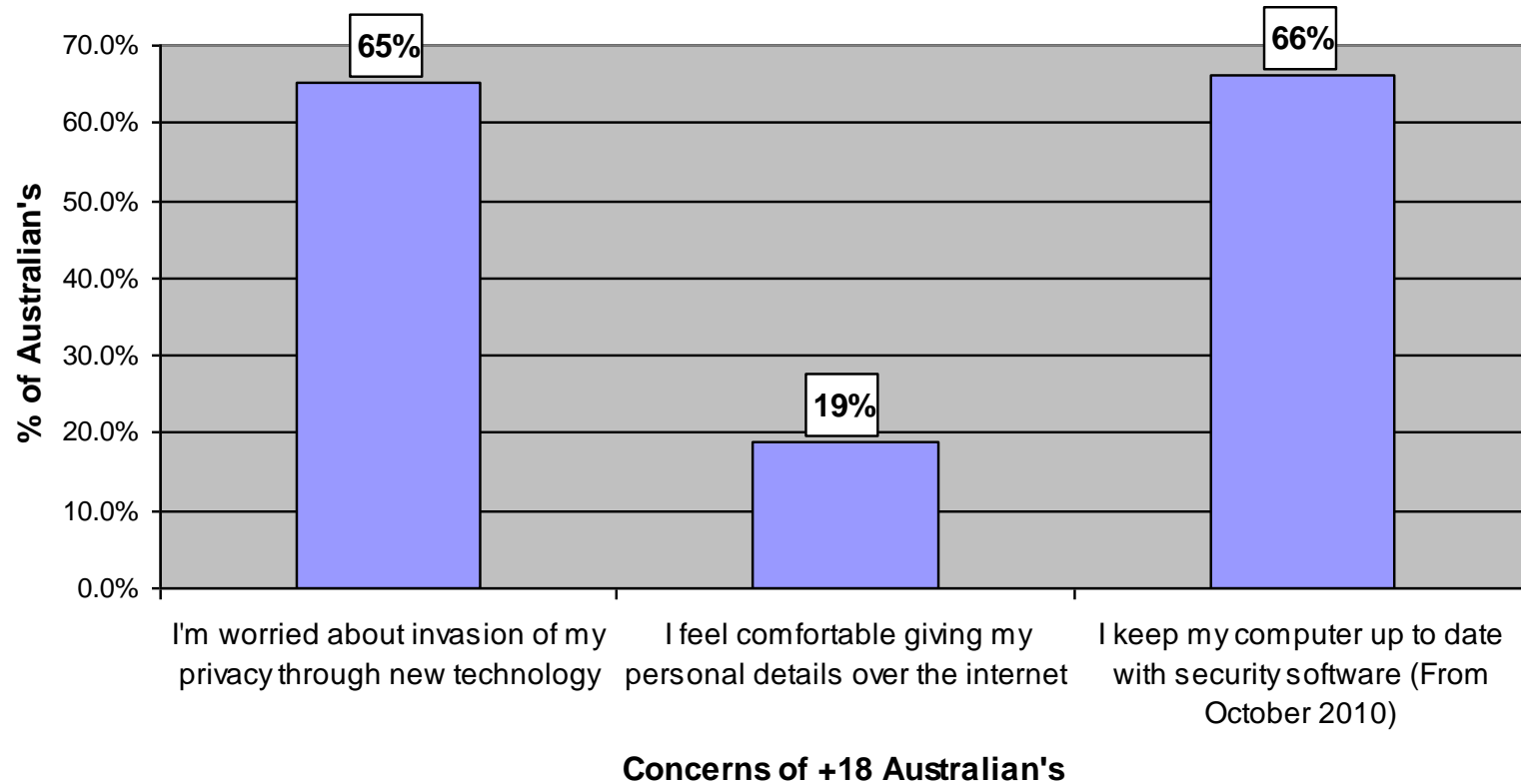
Core networking values we share:

**WHO VOTED
FOR LESS
PRIVACY?**



Privacy and Security

Technology Concerns of +18 Australian's



Base Aust Population aged 14+; Source: Roy Morgan Research n = 18135 (Jul11-Jun11)

Research and education



- 65% of Australian's state that "the internet is far more an information tool than an entertainment tool." Which begs the question – should we let the NBN end up being he new TV/Entertainment tool?

Family connections

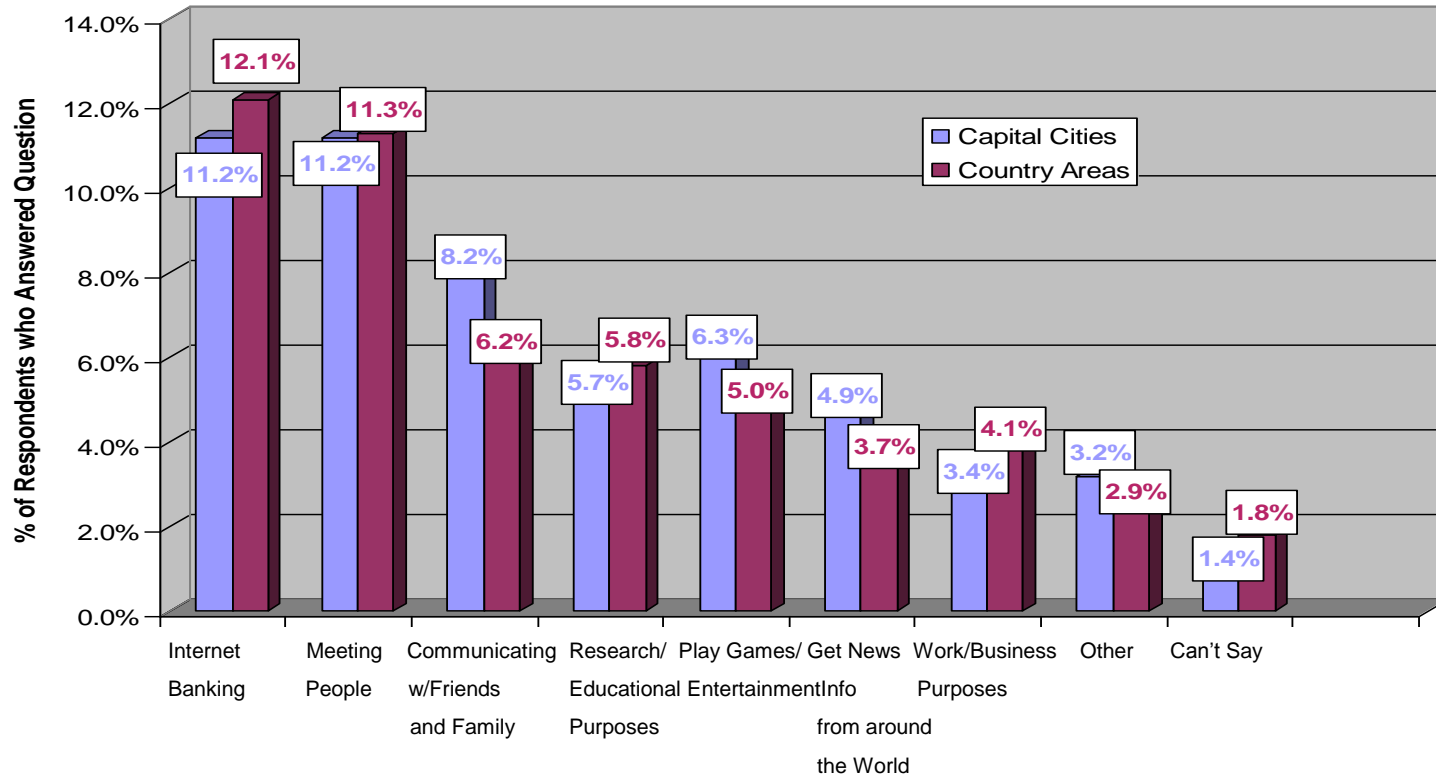


- I really enjoy going online to send and receive emails from family and friends. (75%)

Regional vs. Metro

Reasons Likely to Connect to the Internet

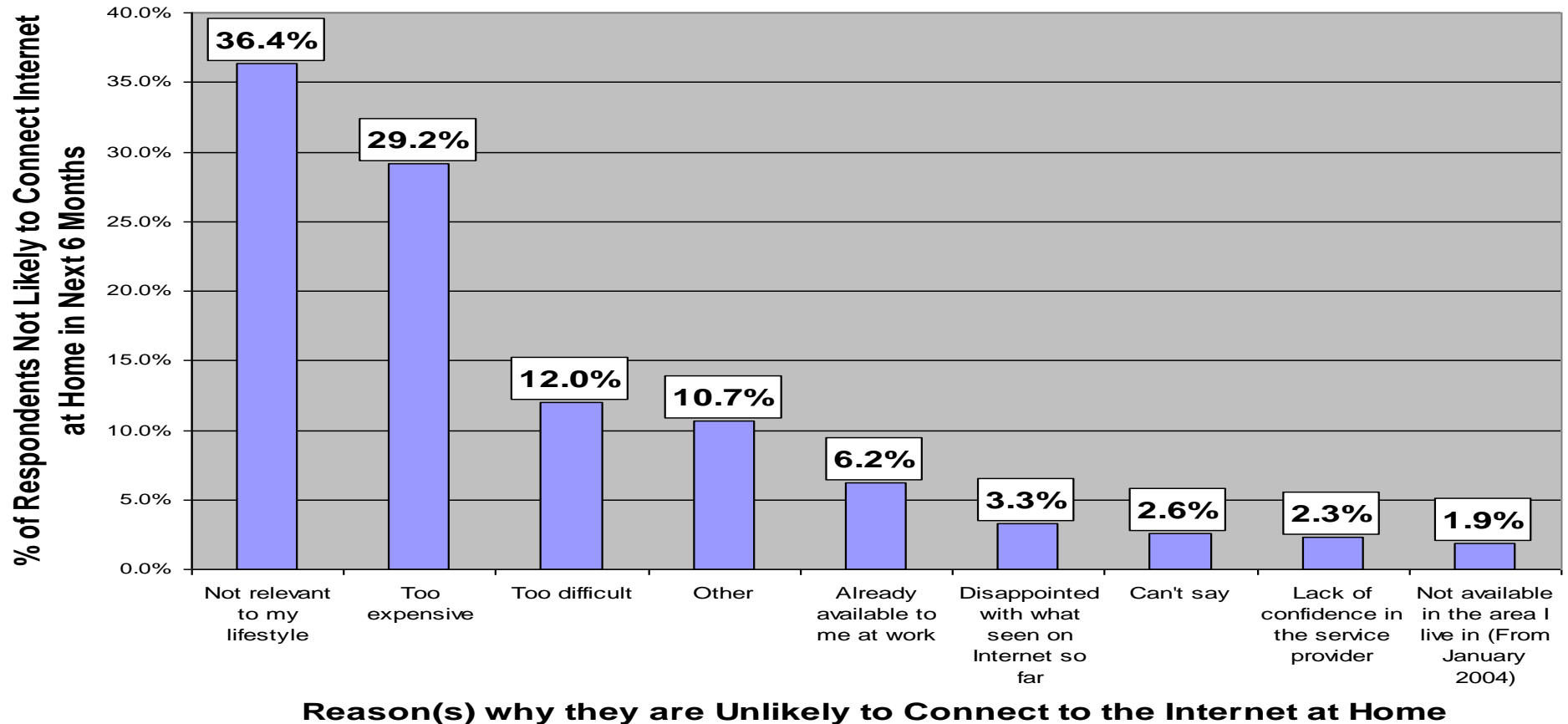
Australian Households without Home Internet Connection who are Likely to Connect to the Internet in the Next 6 Months - July 2010 to June 2011



Reason(s) Likely to Connect Internet at Home in the Next 6 Months

Reasons Unlikely to Connect to the Internet

Australian's Currently without Internet Connection who are Unlikely to Connect in the Next 6 Months - July 2010 to June 2011

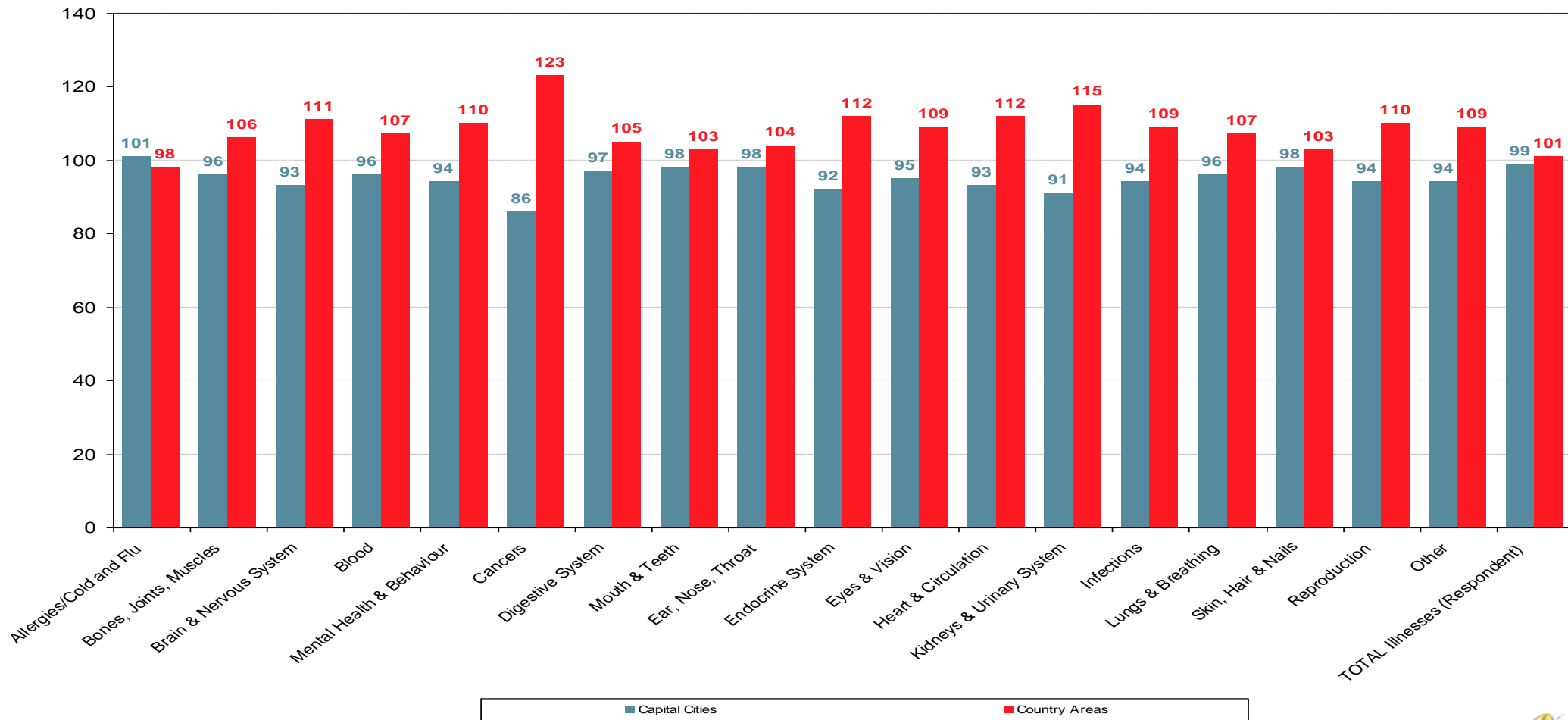


Digital Premium - Health

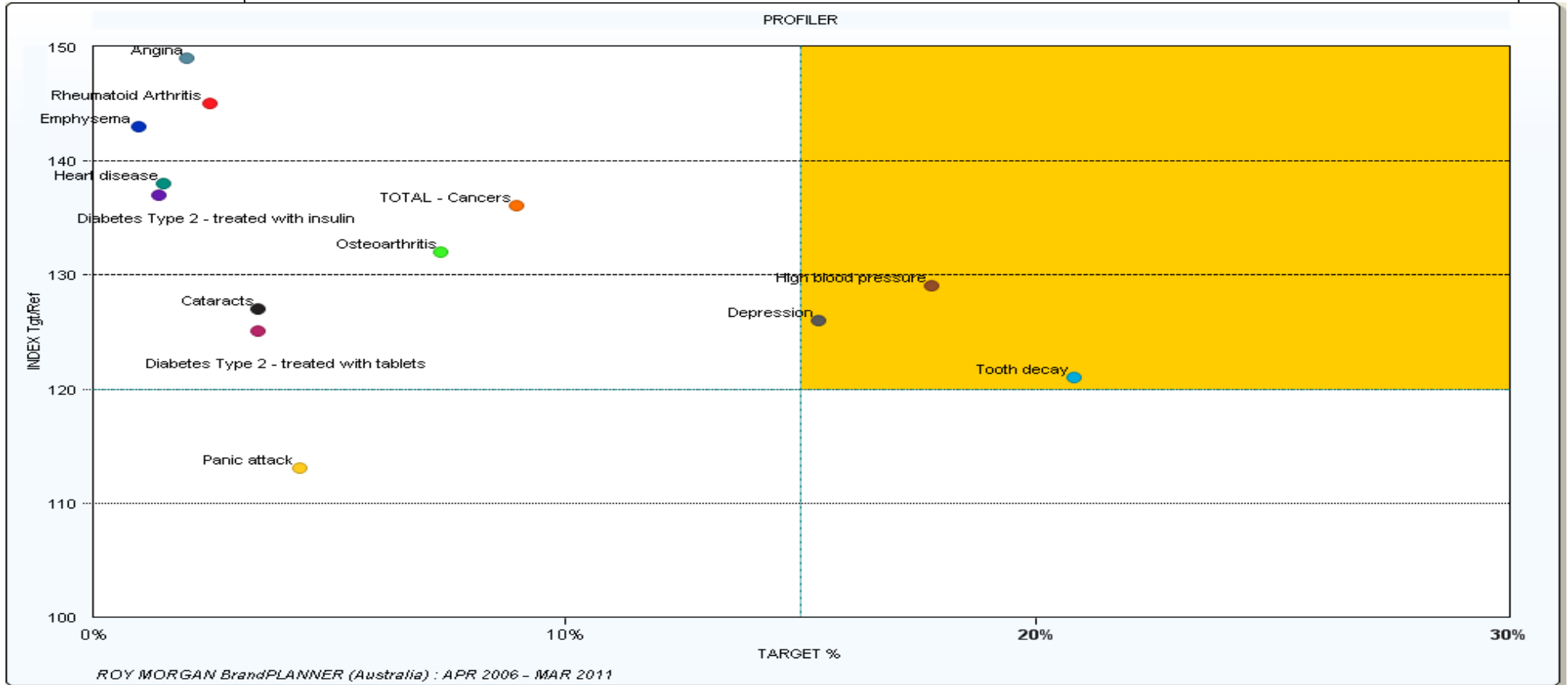


Discover your edge

- The chart below shows the huge difference between the health problems country v metro

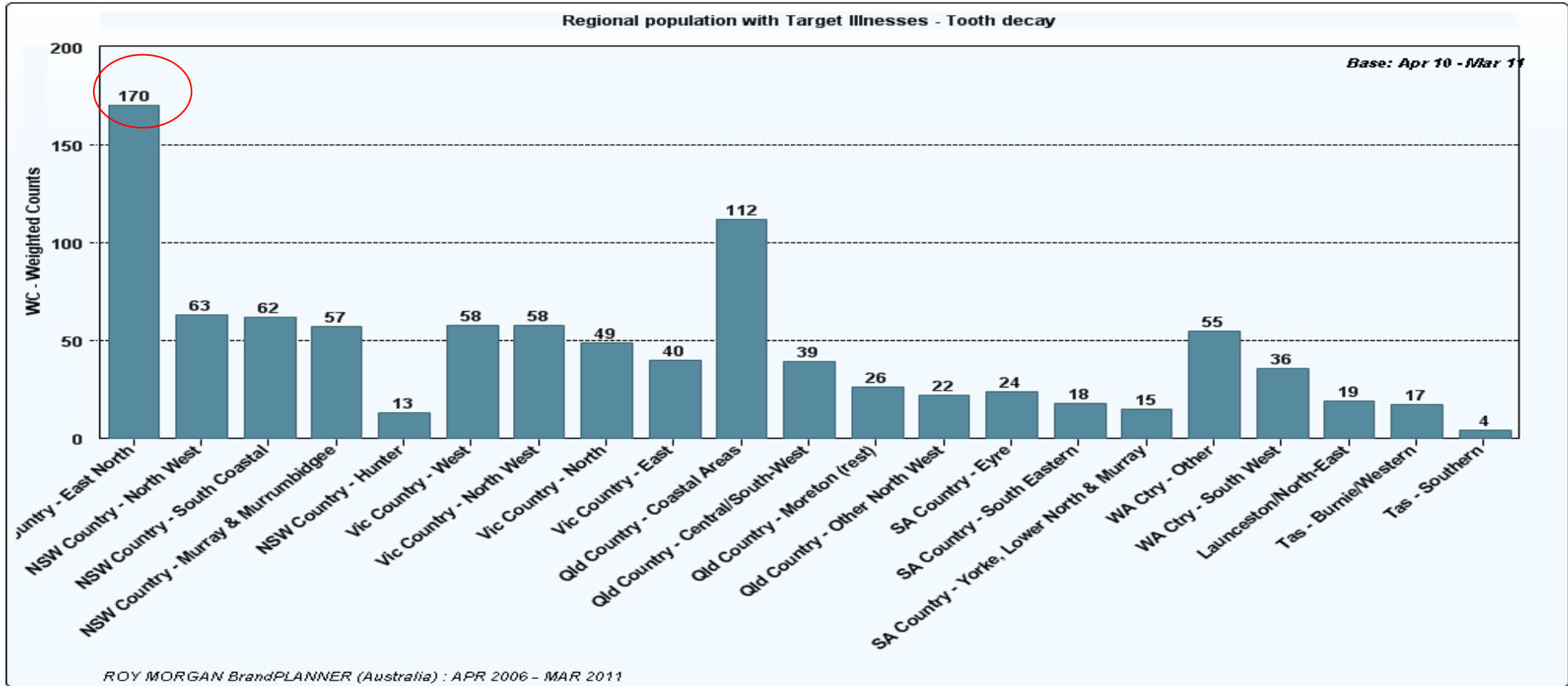


Incidence of selected illnesses reported by rural Australians: Over index vs. incidence reported by city dwellers



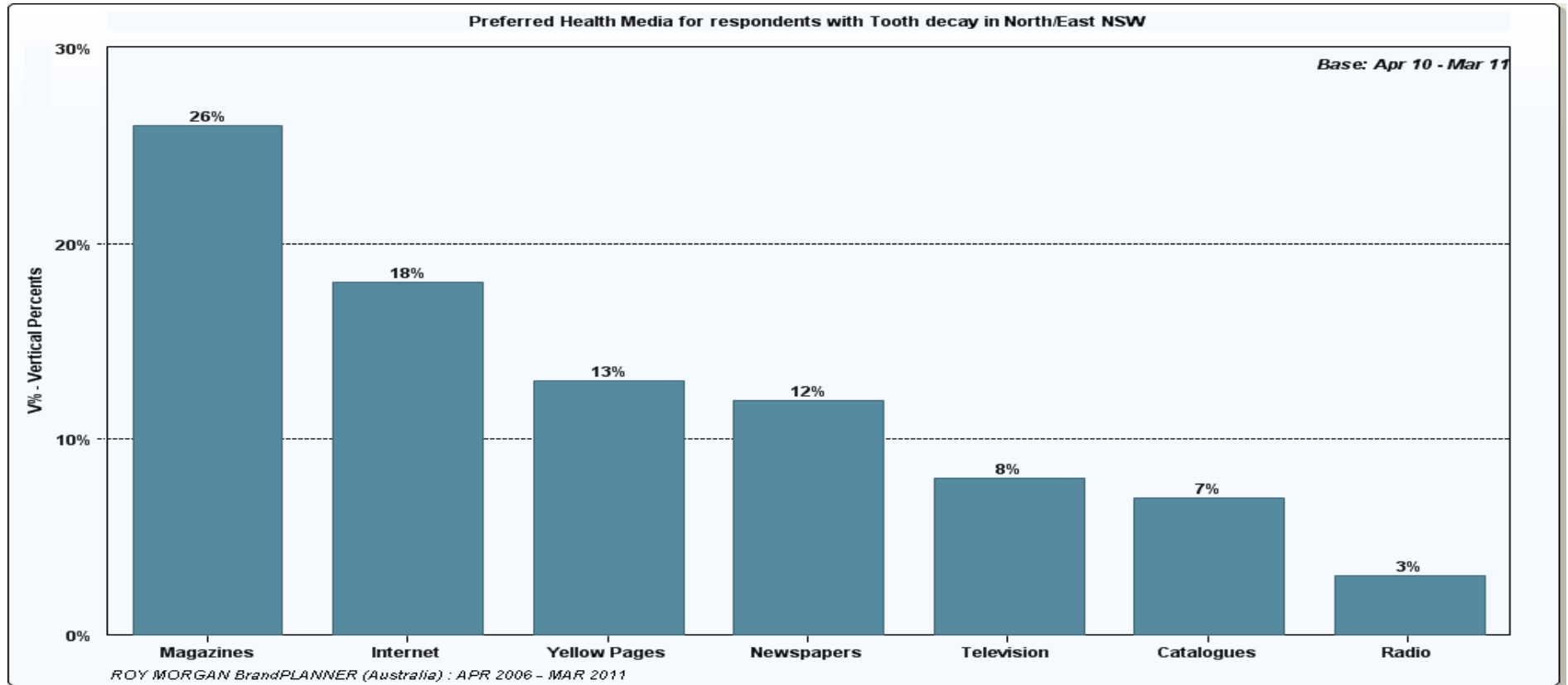
Single Source enables profiling and detailed segmentation of Australians with selected NHRA priority illnesses/conditions, in rural areas of each state, to be monitored and compared.

Respondents reporting Tooth decay by regions: Weighted Count '000s



Single source also reports on gum disease & teeth sensitivity. Oral health metrics can be segmented by demographics and preferred health media channels.

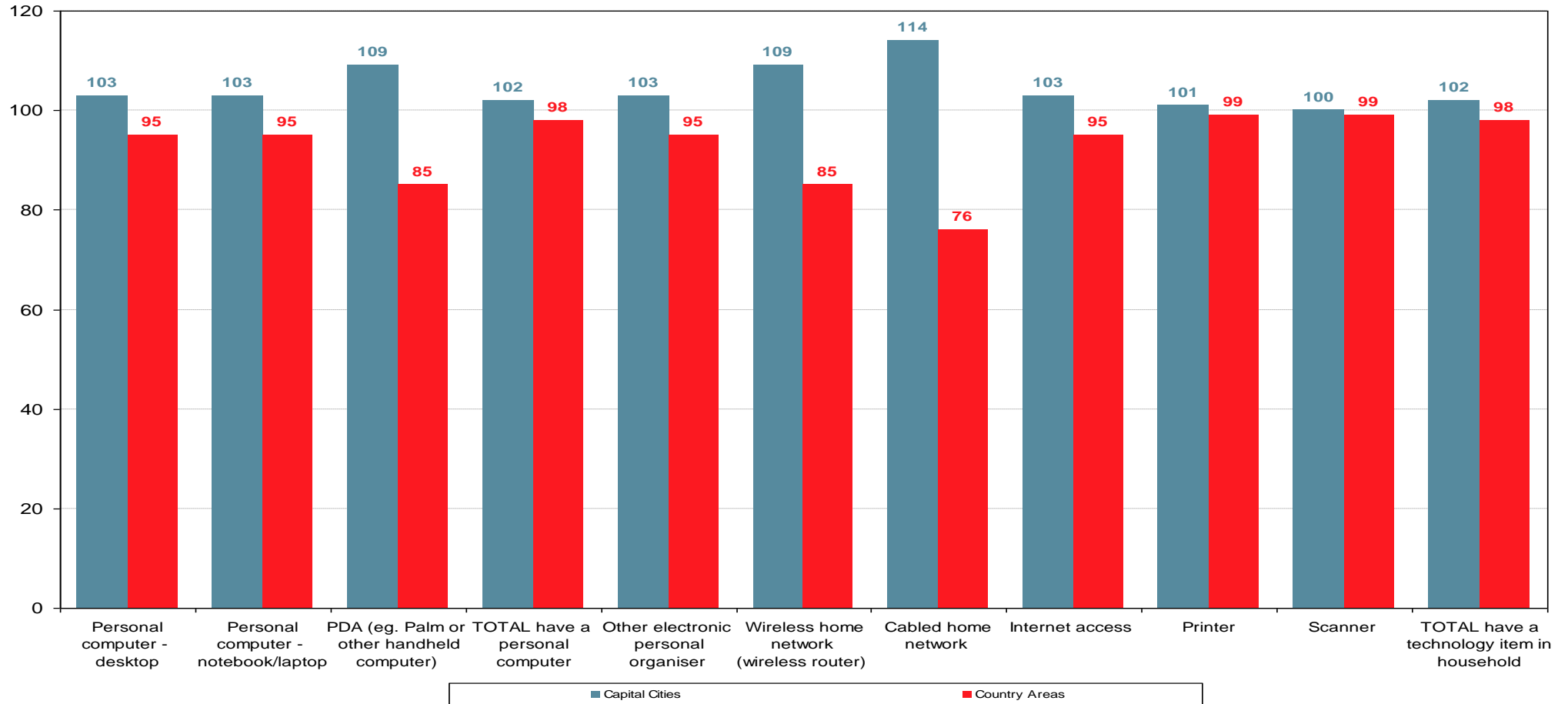
Preferred Health Media channels for respondents with Tooth decay in North /East NSW



Broad Brush on preferred Channels for Health Media amongst target population -guides more detailed media planning to optimise reach & frequency for specific segments eg gender & age group

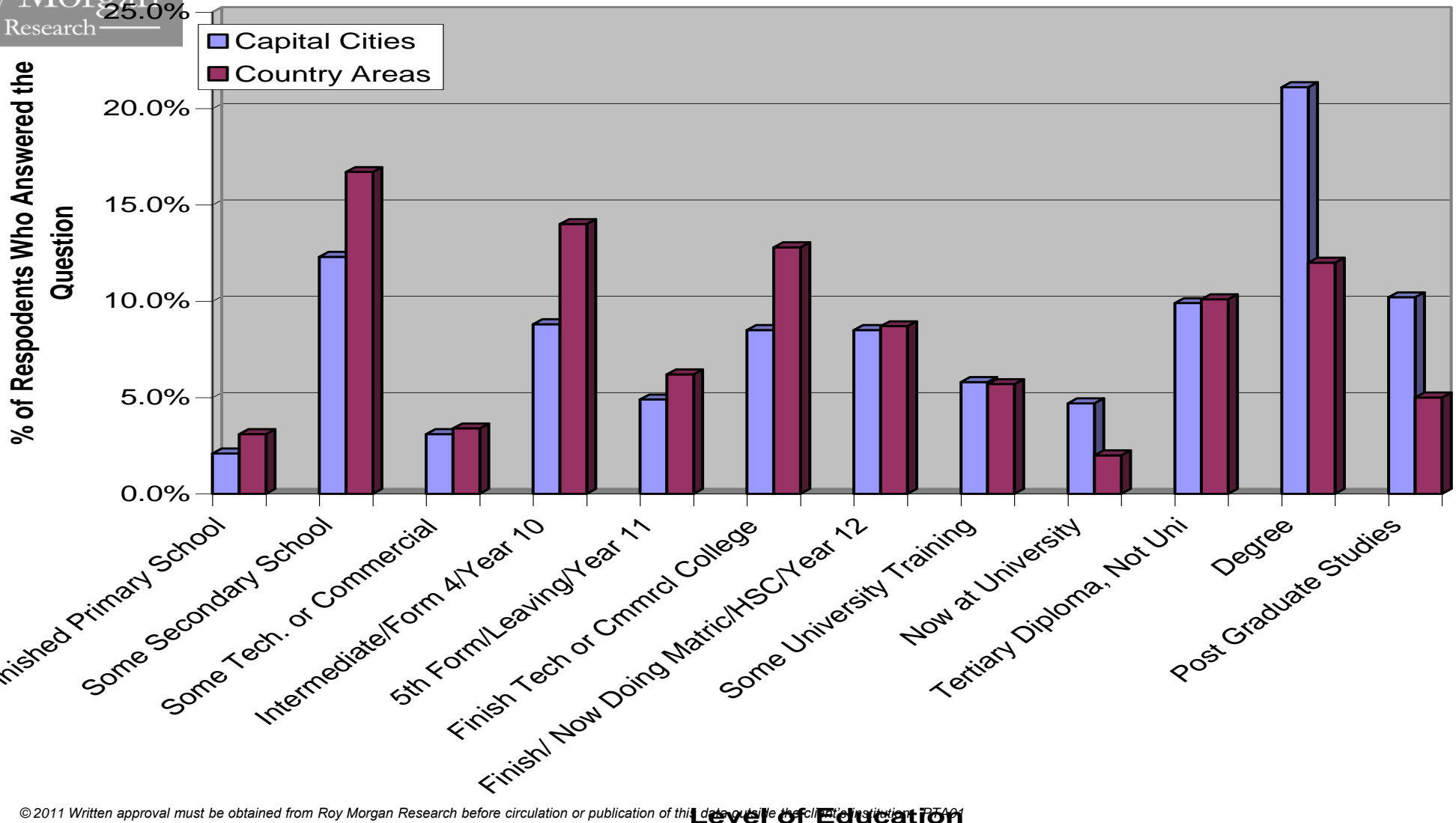
e.g. 58%of target population prefer Print media channels

Device Ownership Country Versus Metro



Highest Level of Education - Capital Cities vs. Country Areas - Apr 10 to Mar 11

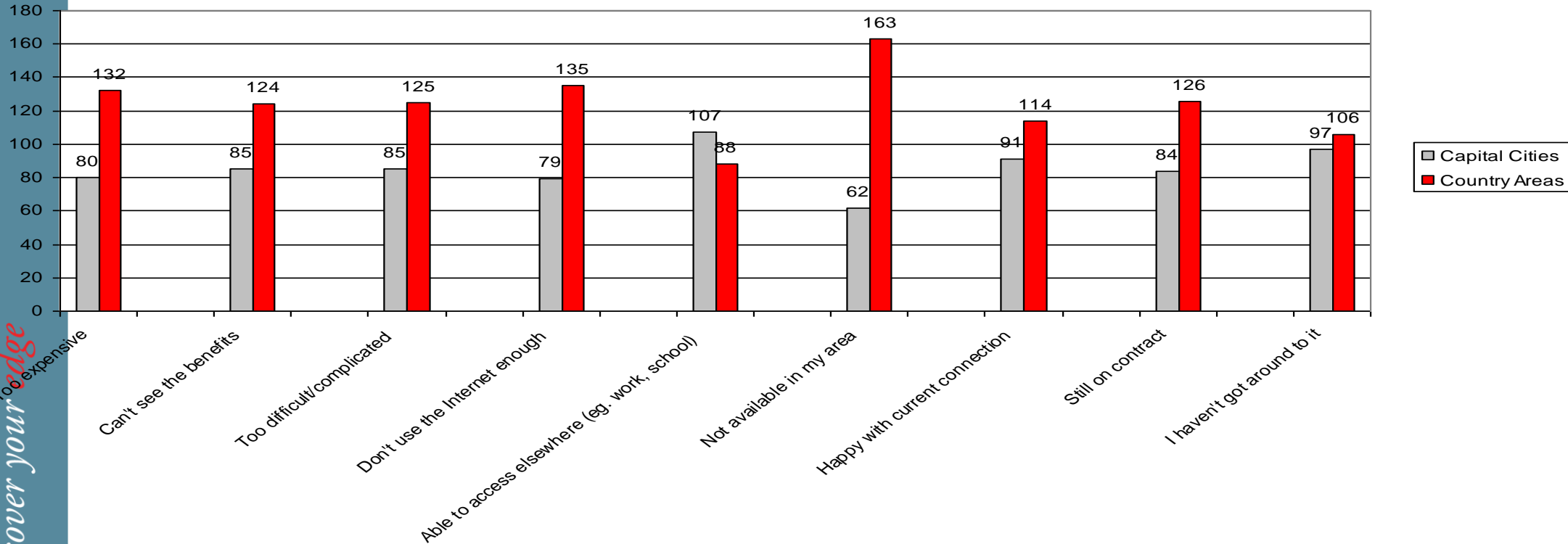
Roy Morgan
Research



Discover your edge

Marketing Challenges – City v County example

Reasons not connected to Broadband



Discover your edge

Business

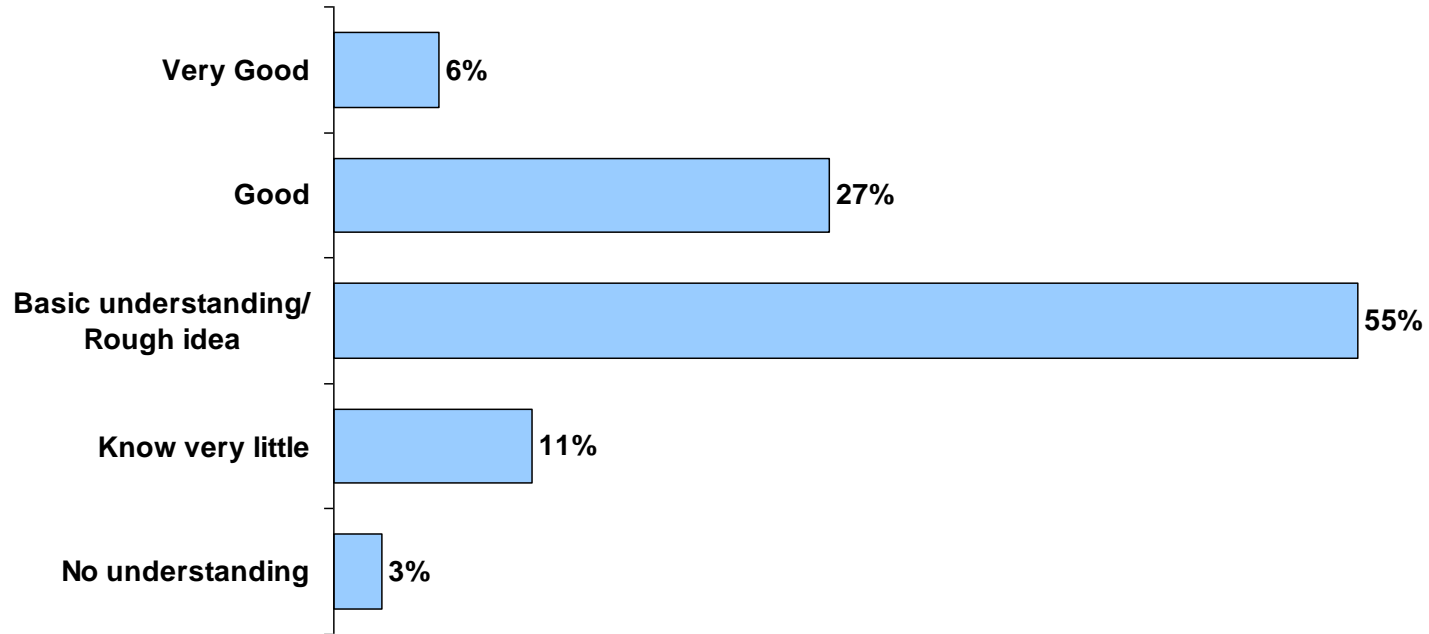
Business to Business Survey

- What we did;

- 449 Business Respondents
- Online and Phone Interviews
- Screened Method = Reliable
- 55% City/ 45% Rural Split
- 6 Key Findings

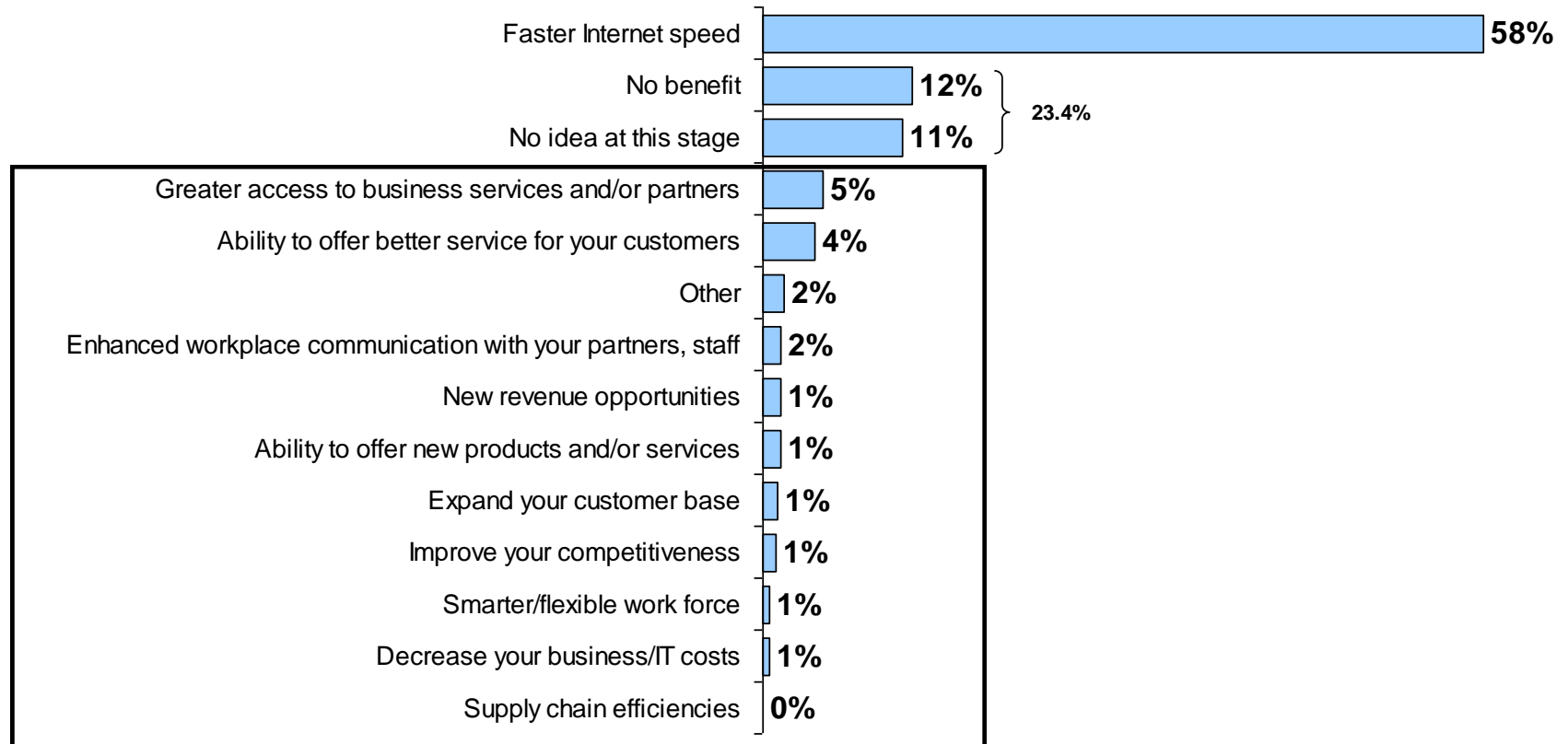
Business Understanding of NBN

Australian Business rate their understanding of NBN rollout



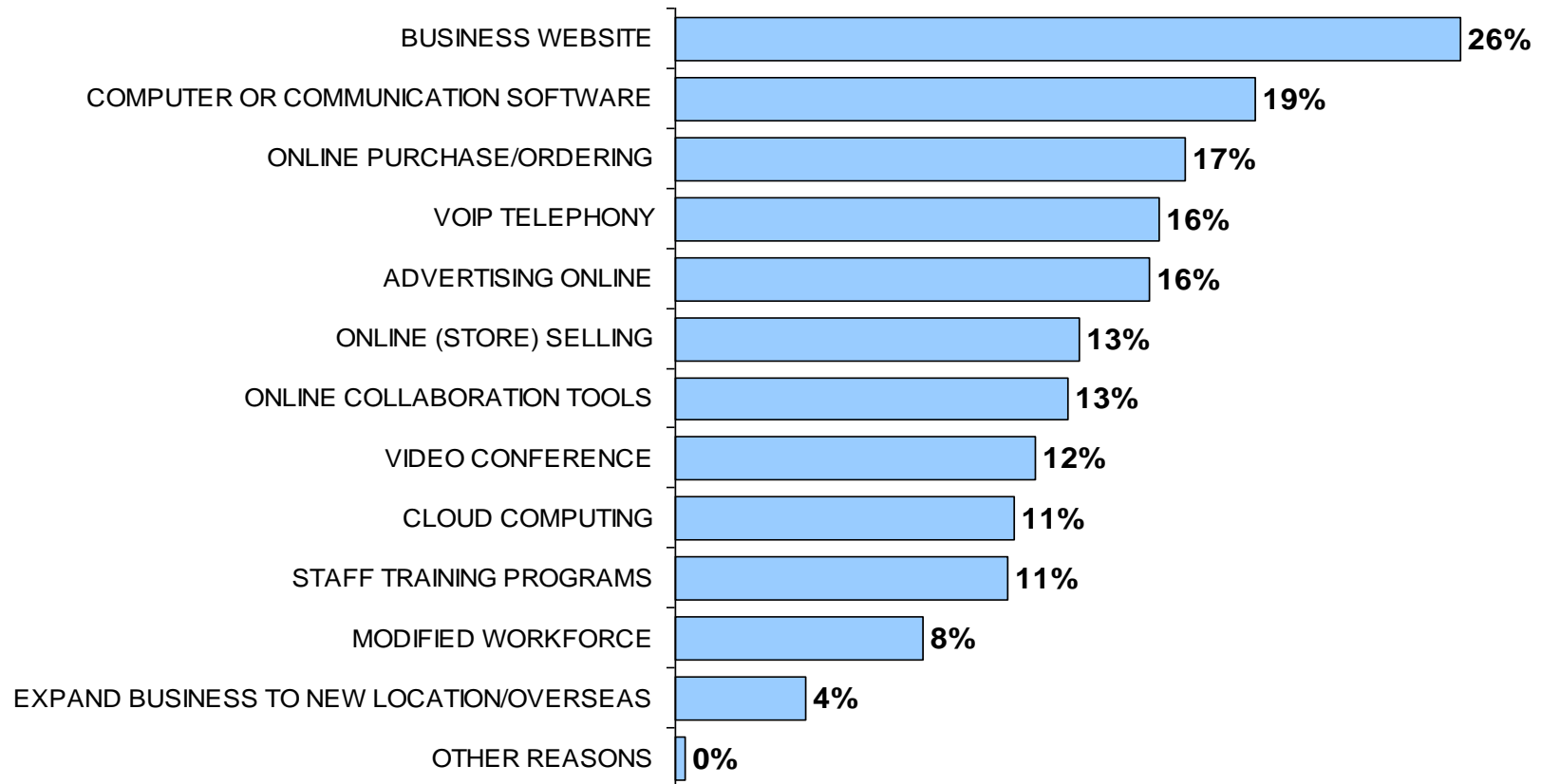
Perceived Benefits

What do Australian Businesses see as the main benefit of NBN?



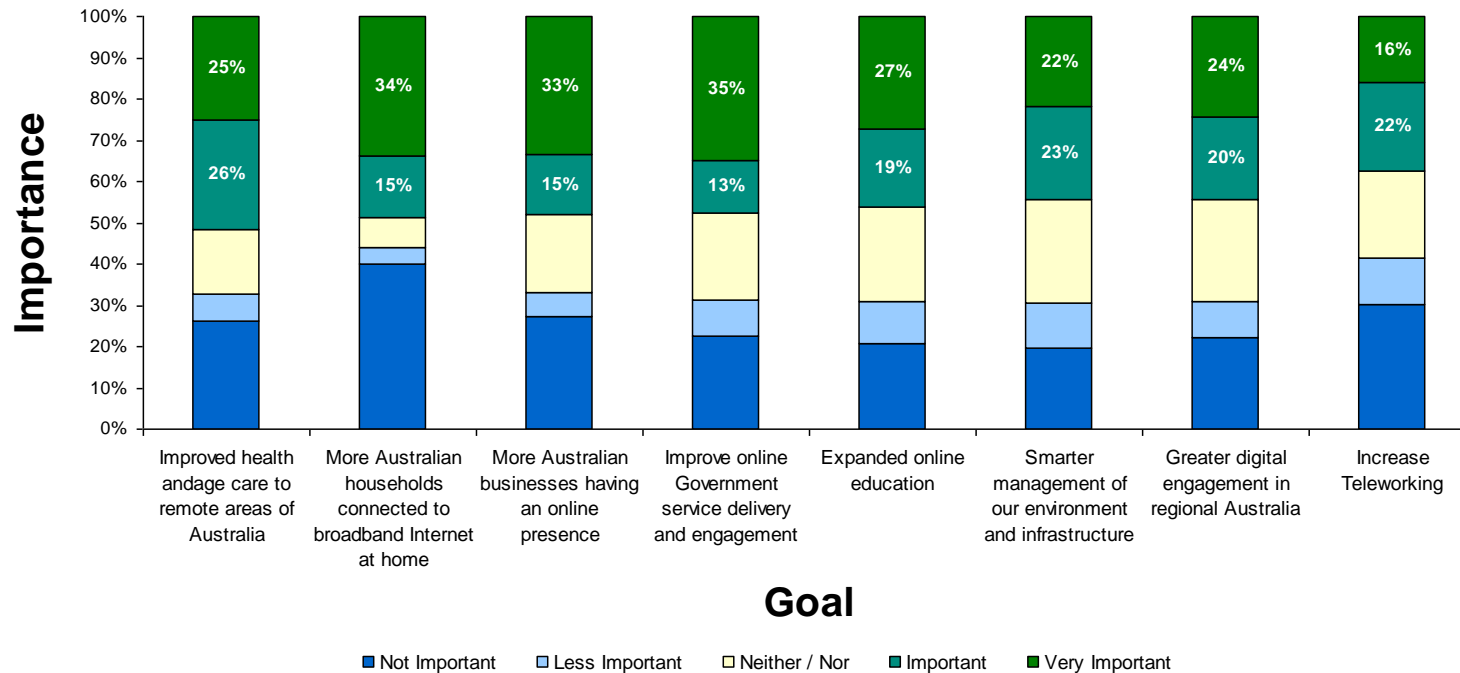
Business Investment

As a result of the NBN Rollout Australian Businesses will invest in the following...



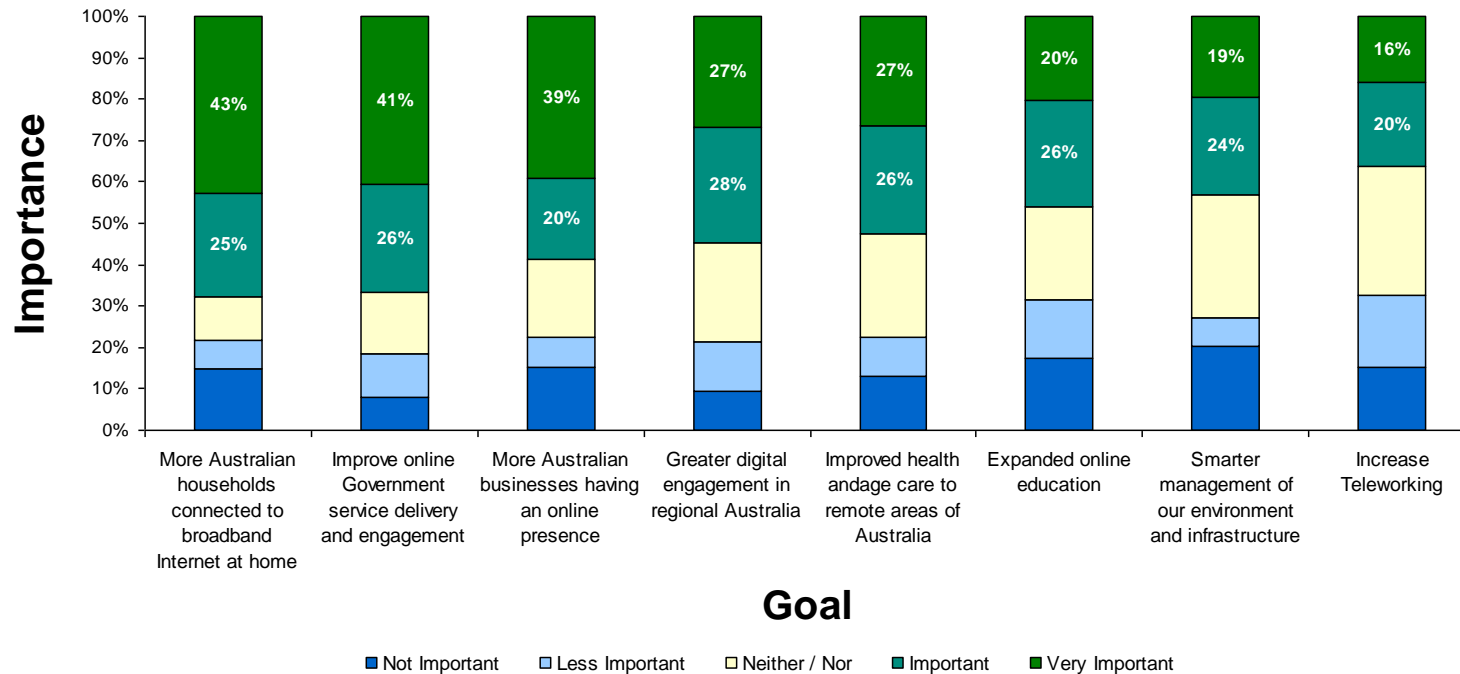
Metro Opinions

Metropolitan Australian Business rating Governemments Goals for NBN



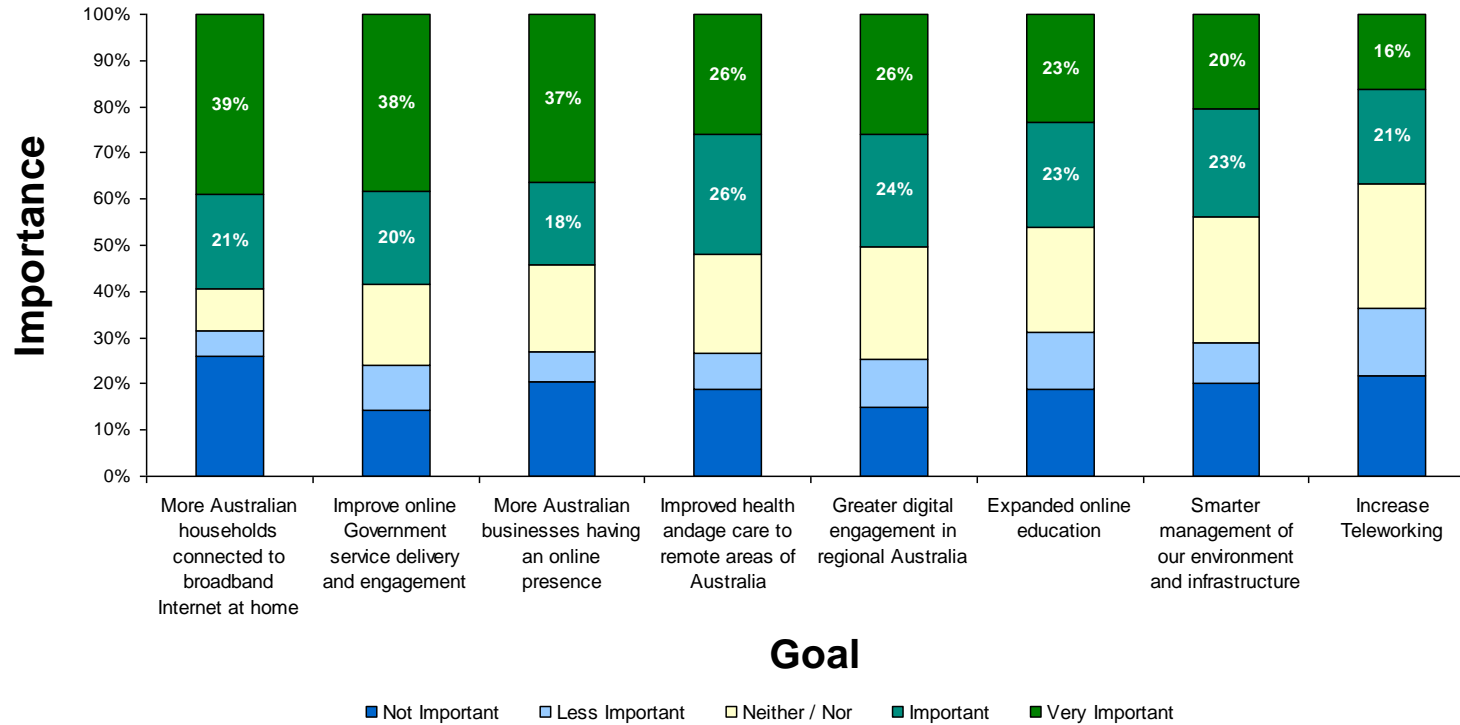
Rural Opinions

Regional Australian Business rating Governemnts Goals for NBN



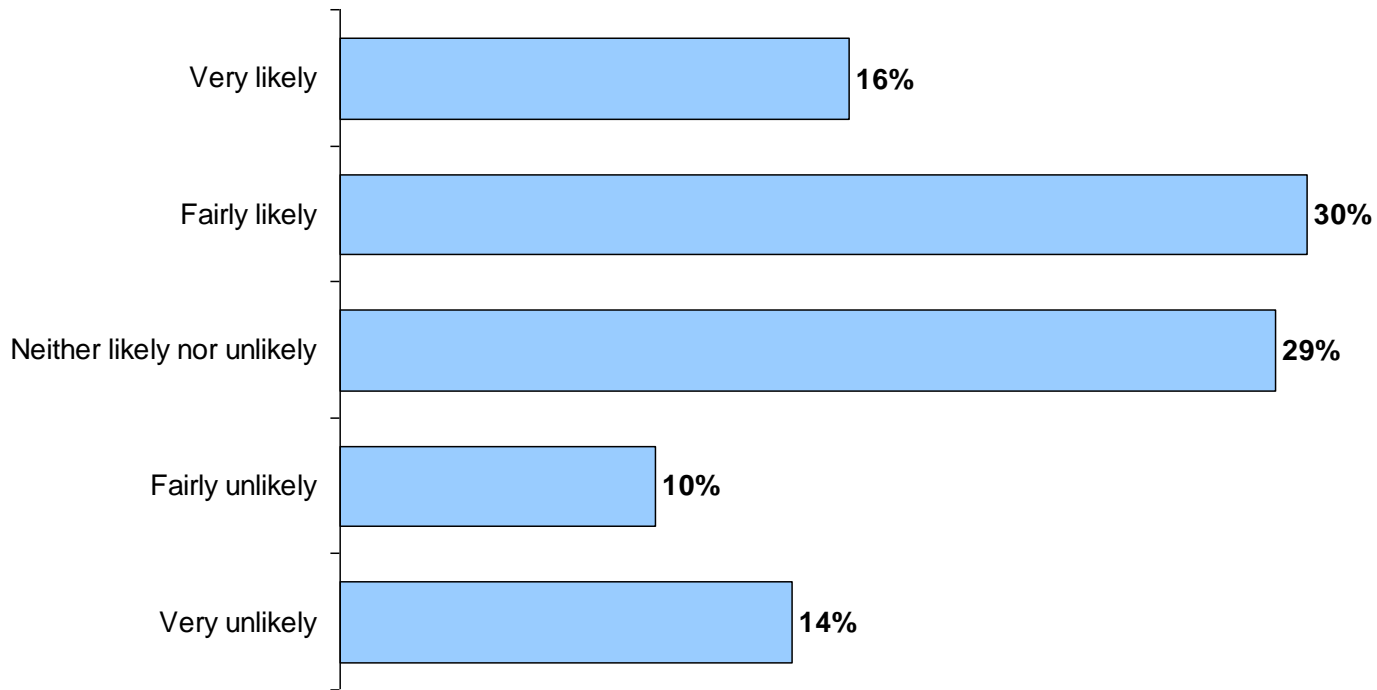
All Opinions

Australian Business rating Governments Goals for NBN



Business Take Up of NBN

Will Australian Businesses take up NBN when available?



Conclusion

- Roy Morgan conducts the biggest and most extensive market research survey in Australia
- Roy Morgan is able to profile every Australian into a customer value segment
- We know who is and isn't connected and why.
- Roy Morgan's data is purchased/utilised by all of the major banks and many more large and small businesses and organisations
- We know the market and we know your current and future customers

What We Offer

- The Surveys
 - An Establishment Survey that interviews 50,000 Australian's every year.
 - A Single Source Survey with 20,000 respondents per annum
 - Media Diary
 - Customised Surveys to suit your needs and costs
- How
 - ASTEROID Database – One Off/Subscription
 - Specialised/Customised Reports
 - Online Reports from our Online Store - <http://www.roymorganonlinestore.com/>
 - Geographic Extension

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