



# Rental Connect Research Study

Issues faced by renters in Australia's phone  
and internet market

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## Executive summary

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The findings of this study can be summarized as below.

- Only 14% of renters are not connected to the Internet or a landline
- 78% of all renters have a fixed internet line and 27% are have a landline
- Barriers to getting fixed connections are low, with 61% of those with a fixed connection who had no problem
- Only 2% of all renters without a fixed connection were refused permission to get installation for fixed services
- 63% of renters without a fixed connection did not try to get one, and 45% of those who did not try eventually did not see a use for it
- Renters who encountered barriers and are not connected are most likely to have had timing or costing issues
- Of those who are connected, a cabling issue that needed installation or repair was most likely to be a barrier
  
- 57% of all renters use mobile internet or Wi-Fi from another source and 78% use a mobile phone at home
- Mobile telephone and internet services are extremely important to renters without a fixed connection, but also to renters with fixed lines
- Those without a fixed connection are more likely to say they prefer mobile services than to state a barrier to getting fixed services
  
- Mobile services are nowadays prevalent and replace fixed services in a growing number of rented households
  
- Mobile services are more adapted to renters' situation for being flexible and for providing autonomy
  
- Renters' needs of telecommunication services are changing with the growing availability of mobile offers and obsolescence of other services (such as landlines)

## Background

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The Australian Communications Consumer Action Network (ACCAN) is Australia's peak body for consumer representation in communications. ACCAN represents small businesses and residential consumers, including not-for profit organisations. ACCAN focuses on goods and services relating to the converging areas of telecommunications, the internet and broadcasting, including both current and emerging technologies.

ACCAN has observed a lower proportion of fixed Internet service uptake in rented households, as well as reports relating to barriers about access to this type of service. These barriers are often due to the imbalance of power between renters and landlords. This is a concern for ACCAN, who have raised questions around the proportion of rented households who have deliberately chosen mobile services for their home. The Rental Connect research project kicked off in February 2018 to address the issue. It focusses on scenarios that have led to renters being connected or unconnected as well as the reasons for these situations. The project sheds light on the size of the issue and the amount of protection needed in the field of private connection for rental households.

## Research Objectives

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The research design – including methodology and questionnaire – was developed to both understand and interpret the below objectives.

### Research Aim

To better understand the uptake of both fixed and mobile Internet/telephone services among renters, along with their reasons for choosing each option.

#### OBJECTIVE 1

Measuring the proportion of renters with and without fixed and mobile Internet and telephone services in the household

#### OBJECTIVE 2

Comparing needs and actual use of various telecommunication options in renters' households

#### OBJECTIVE 3

Understanding the barriers to accessing telecommunication options – in particular fixed Internet services – their causes and consequences

Results should assist ACCAN in addressing the following key issues:

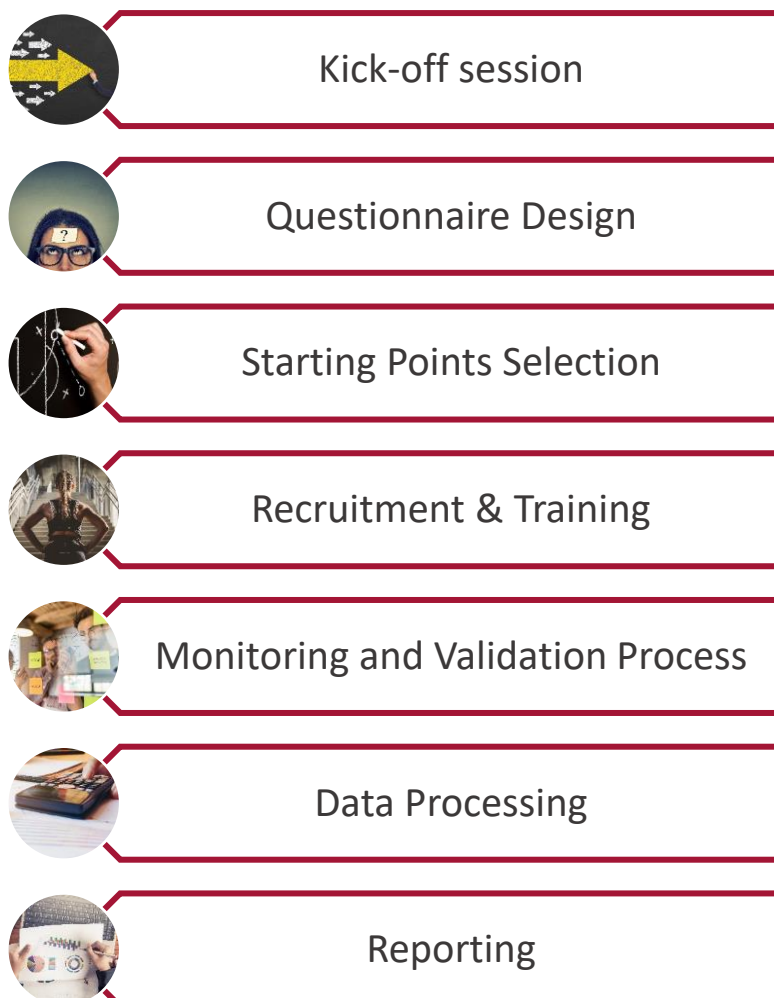
- Do renters face issues when trying to access Internet and phone services connected to their premises?
- How prevalent are these issues?

## Research Methodology

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A unique research methodology was applied for this project. A face-to-face component involved knocking on all doors of selected clusters across the country. Respondents were selected among renters living in suburbs meeting location and socio-economic criteria according to quotas. Interviewers were trained to follow specific routes and knock on each door. If occupants didn't answer the door interviews could knock up to three times. Respondents were selected based on two screening questions and given a self-completion questionnaire either on paper or online.

At the end of the project, a total of 419 renters were interviewed, including 339 who had fixed Internet or telephone services in their home and 80 who did not. Those who had fixed services in their home filled the green questionnaire and those who didn't filled the yellow questionnaire.





### Starting-off the project

This session allowed us to fully understand the research objectives before designing the survey questionnaire. The questionnaire was drafted by Lonergan and reviewed by ACCAN for common agreement on the issues to address and appropriate phrasing to use.

### Selection and training

Starting points were selected according to criteria in order to reach a representative sample of renters across the country. In this case, distribution across states, remoteness levels and socio-economic levels were key, as well as a good representation of social and public housing estates. All interviewer recruited received thorough training on the screening questionnaire and fieldwork process.

### The survey

The ACCAN Rental Connect survey is an 8 to 10-minute self-completion survey that could be completed either online or on paper. Interviewers asked two screening questions to ensure respondents qualified for the survey. The first being whether they rented their household and the second, (which determined which questionnaire they received), whether they had a fixed internet or television in their home. The rest of the questionnaire was entirely self-completed by respondents. An incentive was used for this survey. Respondents had the option to take part in a competition to win one of two cash prizes worth \$250.

### Respondent selection

A face-to-face approach was designed for this project to minimise selection biases linked to the telecommunication services used in each household. Selected respondents were those renting their household in the area, regardless of the communication services used in their household. This allowed us to reach a truly representative sample of renters in Australia, including respondents who would normally not engage in online or telephone surveys.

### Monitoring and validation process

The work of interviewers and data entry they processed were validated afterwards using three techniques:

- Google Timelines and photos – showing the path taken during the fieldwork and ensuring the addresses registered were in the correct area
- Respondents who took part in the competition were called to verify that they have taken the survey and are still willing to participate in the prize draw
- Over 70% of the data was validated by double data entry and or checked against the original version

### Data Processing

The final dataset was merged, cleaned and weighted. All data from Question 10 onward in both the questionnaires was merged. Data for other questions was analysed separately for each questionnaire, segmenting those with and without fixed services at home.

Cleaning the data consisted of deleting entries where respondents were identified as providing inconsistent or non-representative answers.

The data was weighted to location (states), remoteness (metropolitan area vs non-metropolitan), public housing or not and household income to ensure representativeness of the final figures.

### Reporting

The reporting phase strives to answer all objectives stated in the brief and the proposal and follows accessibility guidelines.

## Sample Composition

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### Who did we talk to?

The sample achieved is made of 419 renters.

- 339 of them have some sort of connection:
  - Use a fixed internet connection n=311
  - Use a fixed phone connection n=115
- 80 of them are not connected to any fixed line

Overall, 127 respondents are based on New South Wales, 55 live in Victoria, 113 in Queensland, 25 in South Australia, 59 in Western Australia and 40 in Tasmania and Northern Territory.

347 respondents live in major urban areas and 72 live in more remote parts of the country.

126 respondents are less than 30 years old, 121 are aged 30 to 39, 73 are aged 40 to 49 and 90 are 50 years or older.

80 respondents are renting in public housing.

Lower income brackets are over-represented with 146 respondents whose household earn \$40,000 or under.

All working status are represented with 148 respondents working full-time, 72 working part-time, 78 unemployed or stay-at-home parents, 43 retired and 56 students.

In the context of this report, rented households with a fixed connection to internet and/or a landline are called “**connected households**”. Those who don’t have any of these and rely on alternative solutions are called “**unconnected households**”.

## Key Findings

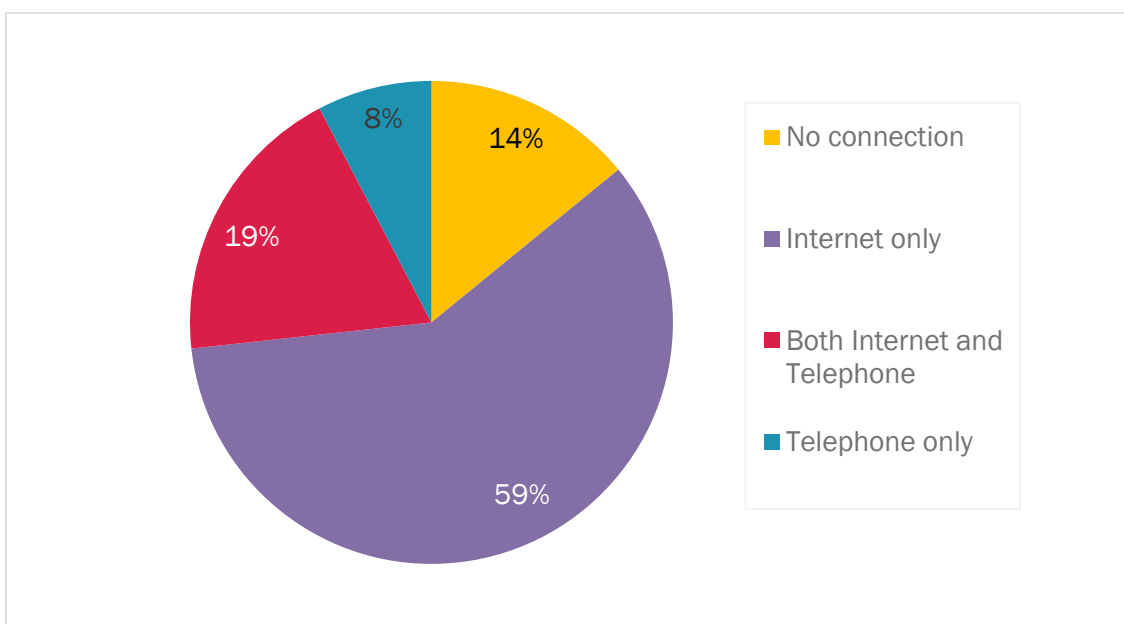
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### A minority of renters are completely unconnected, the majority are connected to the internet

Most rental households in Australia are connected to some sort of fixed connection, either telephone or Internet, or both. Overall, 86% of renters are connected, broken down as below:

- 59% only use a fixed Internet connection
- 8% only use a fixed telephone connection
- 19% use both

This equates to 78% of rented households having at least the Internet at home and 27% having at least a telephone landline.



**Figure 1 - Incidence of fixed connection types<sup>1</sup>**

Only 14% of rented households are unconnected. 99% of these unconnected households use either mobile phones, mobile Internet or Wi-Fi from a different source at home.

In the next section we will understand:

- Who are the renters who rely on mobile or alternative solutions?

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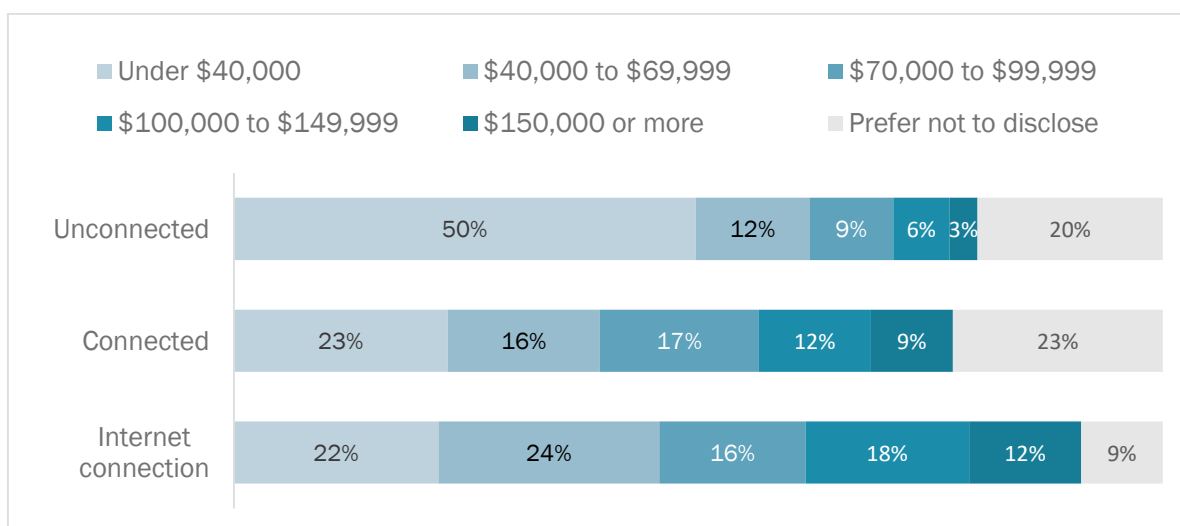
<sup>1</sup> Screening 2. Do you currently use a fixed Internet and/or connection here? & Q0\_G. Do you currently use a fixed Internet and/or telephone connection here?

- Are there any demographic patterns that help us better predict an unconnected household situation?

**Socio-economic level, a strong determinant of unconnected homes**

The socio-economic level of renters living in unconnected households is clearly lower than those in connected homes. Demographic variables linked to socio-economic level confirm this pattern, such as household income, social housing rental, type of dwelling and working status. The contrast is even clearer when compared to households with fixed internet connections.

- 50% of the unconnected households earn less than \$40,000 while connected households (internet and/or landline) are half as likely to be in this income bracket
- Connected households are three time as likely to earn \$150,000 or over as unconnected households. Those specifically connected to the internet are 4 times as likely to do so



**Figure 2 - Household Income Brackets by Connected and Unconnected households<sup>2</sup>**

26% of tenants without fixed connection are renting social housing compared to 10% who have a fixed connection. Tenants with a fixed internet connection are more likely to be living in a house, and those with no fixed connection or a landline only are more likely to live in townhouse unit or apartment.<sup>3</sup>

<sup>2</sup> Q21. Which of the following best describes your household’s annual income from all sources, before tax? Base: Renters in unconnected households (n=80), Renters in connected households (internet and/or telephone) (n=333), Renters with a fixed internet connection (n=306)

<sup>3</sup> Refer to detailed chart in Appendix 1 – Renters profile by connection type

71% of tenants who are connected are currently working full time or part-time, whilst 33% of those who are **not** connected are working and 21% are unemployed (4% of those connected are unemployed).

Age is another important demographic variable. Those with a fixed internet connection skew towards higher socio-economic levels and younger people. Those with a landline skew towards older people and retirees. Those with a landline account for 22% of retirees, while 5% of those with an Internet connection and 15% of those unconnected are retired.

## Backgrounds influencing connection types

### Older renters

Retired renters are much more likely to have a landline or no connection at all. Although financial considerations may explain these demographic contrasts, habits and use of technologies in the household can have an influence on the decision to get a fixed line.

Older people are more likely to be unconnected with 24% not having any connection, but they are even more likely to be unconnected from the internet with 46% not having the internet (this includes those with landlines). The pattern is growing as renters get older, except for an increase in in lack of connection among those less than 30, likely due financial reasons.

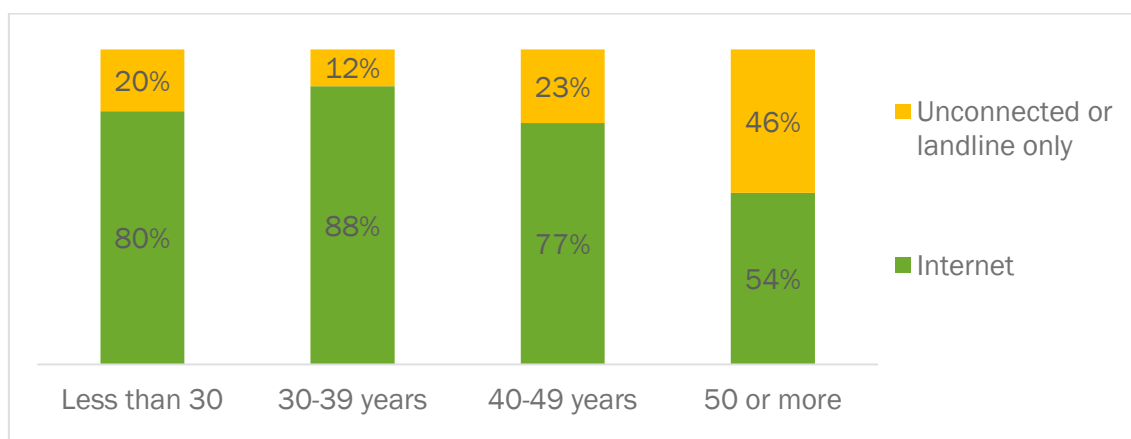


Figure 3 - Connection type by age of renters<sup>4</sup>

Life stage, strongly linked to age, is consequently another determinant. For example, 94% of families with mainly school aged children living at home and 95% of couples with no children are connected. On the other hand, 34% of single people living with their parents or other family members and 25%of retirees are unconnected.

<sup>4</sup> Q16. How old are you? Base: Renters aged less than 30 (n=126), aged 30 to 39 (n=121), aged (n=73), aged 50 years or more (n=90)

**Education level**

Educational level also seems to have some influence, as 45% those who have a university degree are likely to be connected, compared with 30% of those without a university degree. On the other hand, 27% of those with no connection have not passed the Year 12 level. This is 15% among those with a connection.

In summary, those unconnected tend to come from lower socio-economic levels, with lower income, less work, sometimes retired, and less likely to live in a house. They also tend to have lower levels of education. Connected households, especially with a fixed internet connection, show opposite demographic trends. Financial and usage factors are certainly involved in the decision process. However, these elements do not allow to draw sure conclusions regarding the motivations for remaining unconnected.

## Issues in getting fixed connection in rental households

To understand the barriers of getting a fixed connection at home, we explored different scenarios renters went through when they moved into their rented home. To better understand the prevalence of each barrier type we explored the steps of a renter from the moment they ask, to the moment they get connected or not, through to all the barriers they might encounter.

### Most unconnected renters did not ask about connections when they moved in, although a relatively high proportion were told it works

It was seen that renters placed a higher priority on asking about a fixed internet connection than a phone connection. Overall, 57% of renters asked about a fixed internet connection when they first moved in their current home and 31% asked about a landline connection.

Unconnected households are less likely to have asked whether connection services were available. 55% did not ask whether fixed internet and/or phone services were available, whereas 29% of connected households did not ask. Asking is a first step in getting connected. The fact that unconnected households do not ask is an indicator that a connection may be unimportant to them.

The answer that renters got when asking about getting connected greatly affects the next steps they take and it was uncovered that renters are rarely warned of potential barriers. Very few renters were told that the internet connection did not work when they moved in. Only 4% of all rented households received confirmation that fixed internet connections were not available. This is 3% among those without an internet connection. Consequently, a much higher proportion was told connections worked. 30% of all renters who don't have the internet were told that their connections worked. What happened then to those still unconnected? It seems that even among those who asked and were confirmed internet connections worked, 51% did not try to get one<sup>5</sup>.

25% of unconnected households tried to get an internet connection, and 25% tried to get a landline connection. Overall, 37% of unconnected households tried to get some sort of fixed connection in their home at some point.

This is an opportunity to investigate the reasons for not trying to get connected and the reasons why connection attempts failed.

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<sup>5</sup> Note this figure is based on a very low base (Base unconnected renters who were confirmed that the internet connection worked n=18) – please use as indicative only.



### Mobile services are preferred over fixed services

It is uncommon for any unconnected households to be refused from getting a phone and/or internet fixed connection (2%).

Most of those who did not try to get a landline connection do not have any use for it. The most common reason for not trying to get internet fixed services is a preference for mobile services. Only 5% do not use the internet at all and 4% use the internet elsewhere.

Overall, reasons linked to timing are the most likely to justify this decision. They include:

- The wait for getting a fixed connection is longer than mobile (29%)
- They are too mobile to commit for the duration of a fixed contract (21%)
- They were waiting for the NBN to be rolled out (8%).

Following timing, costs can be prohibitive to renters, from upfront (13%) to ongoing costs (22%), or the overall cost of contracts (18%).

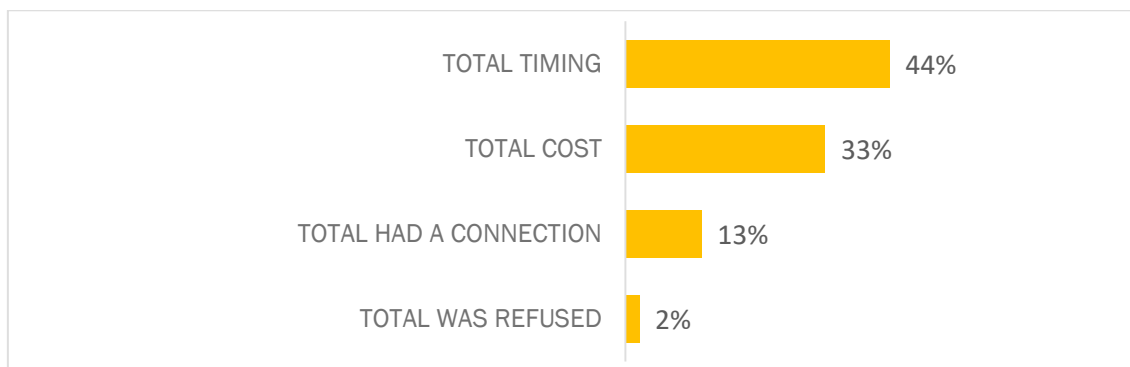
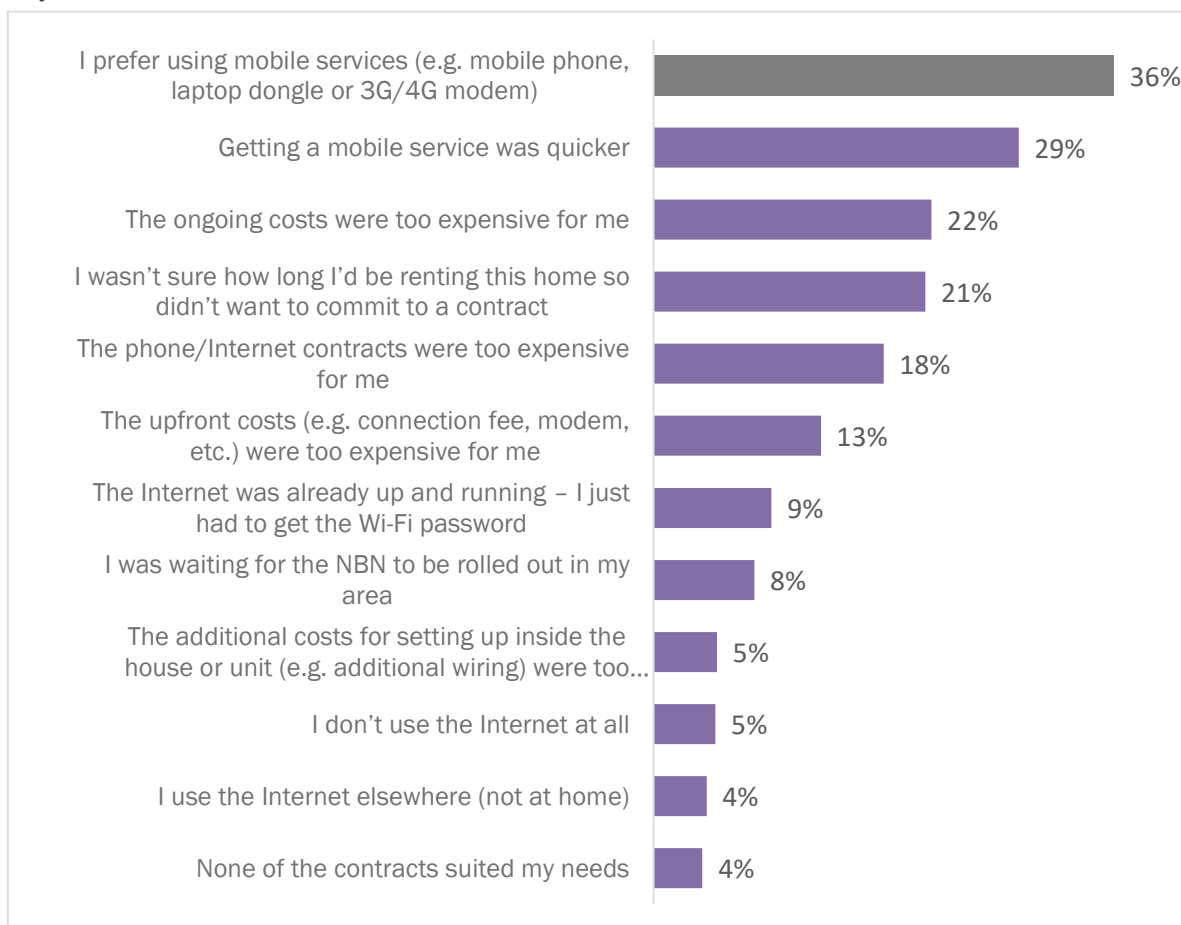


Figure 4 - Reasons (merged by group) for not trying to get a fixed internet connection (filtered to those who did not try to get an internet connection) <sup>6</sup>

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<sup>6</sup> Q7\_Y. Why did you not try to get any fixed phone and/or Internet services connected? Base: Unconnected renters who did not try to get a fixed internet line (n=53)

However, unconnected renters are more likely to state they prefer mobile solutions than any of the stated reasons.



**Figure 5 – Detailed reasons for not trying to get a fixed connection (filtered to those who did not try to get an internet connection)**

This tells us that over any other reason, unconnected renters are generally happy with mobile internet services. Of the minority who encountered other types of barriers, it seems that physical cabling fixing were the main issues.

## Installation and repairing issues are the main reasons for choosing mobile solutions

### Barriers to unconnected renters who tried to get fixed connections

38% of unconnected rental households stated that they had no issue, implying that they are unconnected by choice. Beside these, the most common barrier was needing new cabling/hardware to be installed (44%), followed by financial issues (29%) and need for repair (21%).

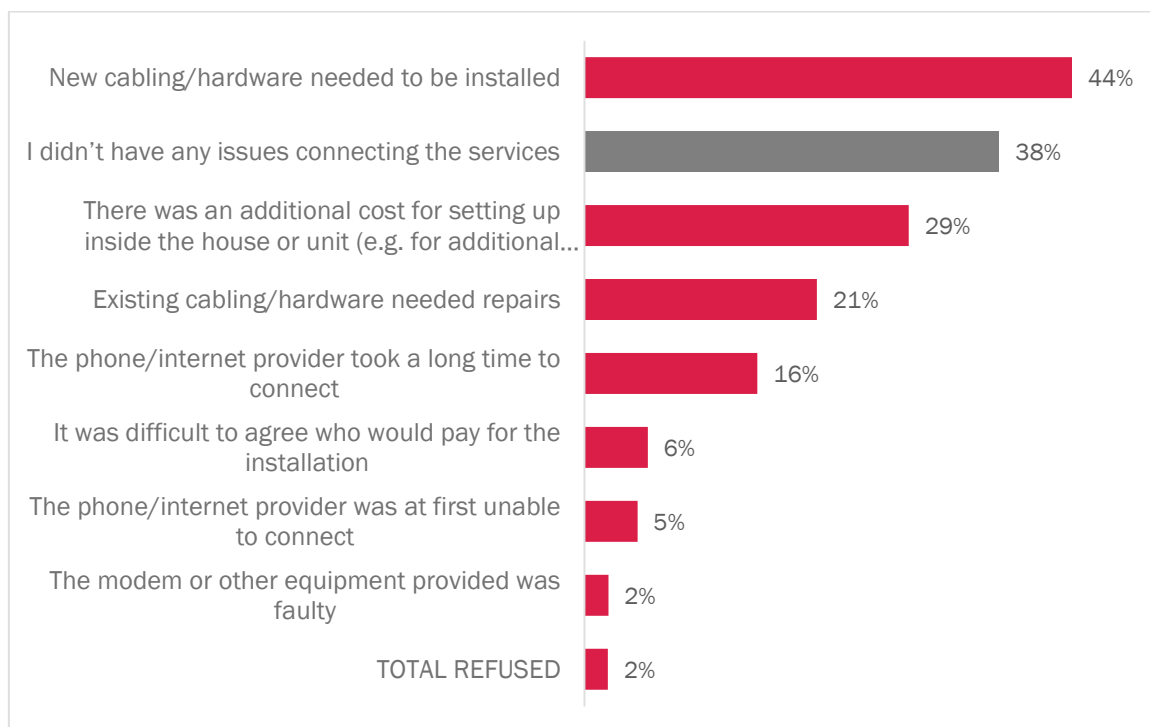
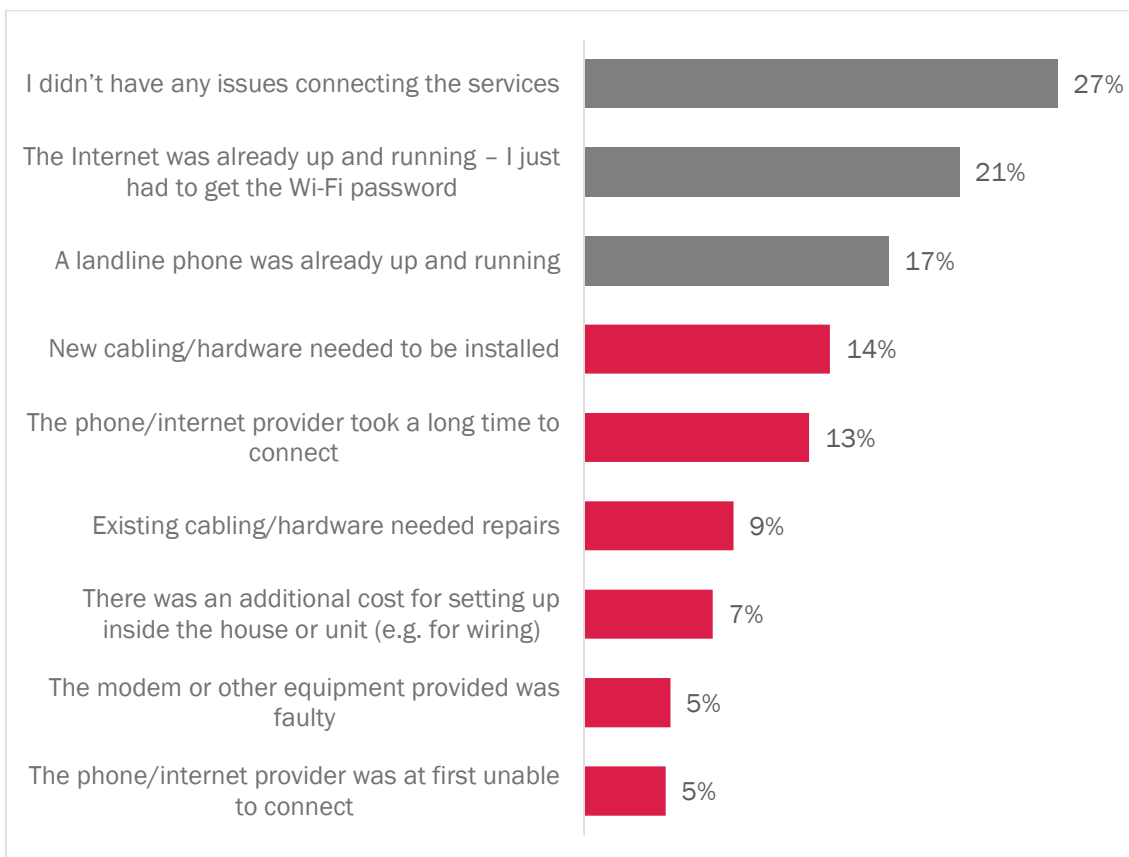


Figure 6 - Barriers when trying to get connection among unconnected renters<sup>7</sup>

### Barriers to connected households at the time of getting installations

60% of connected households did not have any issue getting their fixed phone and/or internet line connected. Of those who had issues, challenges mostly included installation of new hardware/cabling (14%), the phone/internet provider taking a long time to connect (14%), or existing cabling/hardware needing repair (8%). Only 8% faced financial issues. 0% experienced refusal to get their internet and/or phone connection.

<sup>7</sup> Q6\_Y. When you tried to have your fixed phone and/or Internet connected, which of the following happened? Base: Unconnected households who tried to get a fixed internet and/or telephone line (n=27) – Caution, low sample size, please use results as indicative only



**Figure 7 - Barriers when trying to get connection among connected renters<sup>8</sup>**

In summary, barriers are higher for those unconnected than those connected, although they are of the same type. Cabling issues are usually solved by renters if a connection is needed, and a lot of unconnected households preferred opting for mobile than having to face these issues.

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<sup>8</sup> Q2\_G. When you arranged to have your fixed phone and/or Internet connected, which of the following happened? Bae: Renters with fixed connections at home (n=335)

### Equally motivating reasons for getting fixed or mobile services

In total, 77% of all unconnected rented households either did not try to get connected or tried and had no issue but are now disconnected.

Of the connected rental households, 61% did not have any issue connecting fixed services and 39% eventually found a solution to get connected. This implies that barriers, whether they are high or not, do not prevent a high proportion of renters from getting fixed connections in their home.

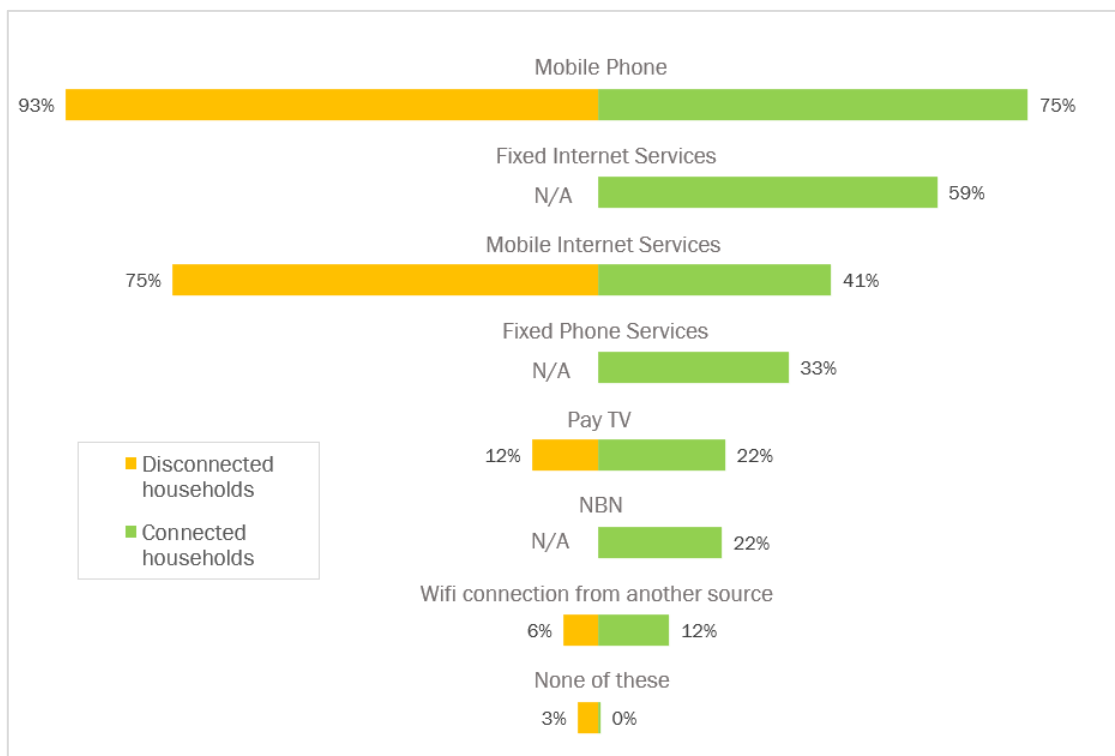
We previously saw only a few unconnected households tried to get connected because mobile services serve as an alternative. Mobile services are extremely important within unconnected households and renters seem to adapt very well to what is most easily available to them.

### Mobile services are widely used by all renters, not solely as an alternative, and extremely important

#### Use of mobile

Unconnected renters use mobile services heavily to ensure they stay connected. They are much more likely to use mobile phones (93%) and internet services (75%) than connected households 75% and 41% respectively.

The data shows mobile phones are heavily used by connected households as well. 75% of them use mobile phones. This means mobile data is not only an alternative to those who do not have fixed connections, but they are simply part of the everyday life of all renters, no matter what the connection situation is at home.



**Figure 8 - Usage of each service by household with and without fixed connections<sup>9</sup>**

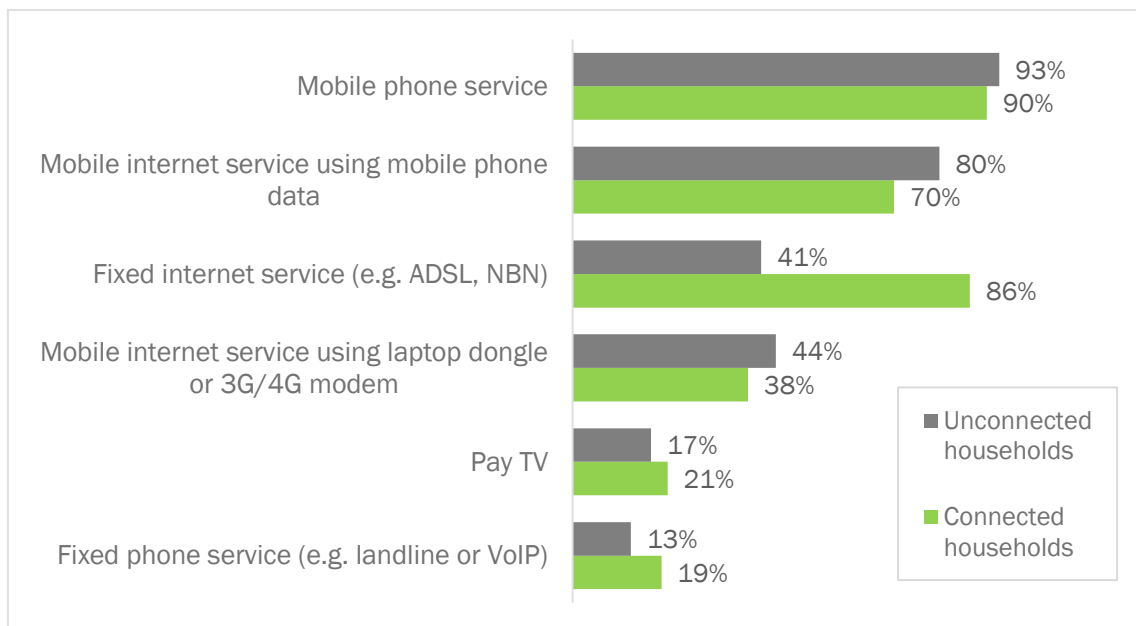
Given the wide popularity of mobile data, it is unsurprisingly used as exclusive telecommunication source in some households. In some instances, it is an even better solution due to the constraints in cost and timing. For example, those who are unconnected who share their dwelling with other renters are much less likely to have tried to get a fixed connection (4%), compared to those who rent the whole dwelling (34%)<sup>10</sup>. Autonomy of internet data and ability to remain mobile may be more important in their situation.

**Importance of fixed and mobile connections**

Mobile phone services are extremely important to all renters, regardless of what connection type they use with at least 90% of household tenants finding this important or very important. This is followed by 80% of unconnected renters and 70% of connected renters who find mobile internet services that use mobile data is important.

<sup>9</sup> Q7\_G&Q2\_Y. And which of these services do you currently use at home? Base: Renters in connected households (n=337) and renters in disconnected households (n=79)

<sup>10</sup> Caution – low sample sizes, please use as indicative only



**Figure 9 - Proportion of those who rated the importance of each connection service 4 or 5 out of 5<sup>11</sup>**

From importance to action, just over half (55%) of unconnected renters who consider fixed internet connections important tried to get one. These renters are still unconnected, although they are just as likely as other unconnected renters to have encountered barriers (new cabling/hardware installation 48%; cf. average 44%; additional costs 28%; cf. average 29%; cabling/hardware needing repair 19%; cf. average 21%)<sup>12</sup>.

Of those unconnected who did not try, 39% did not because they realised they had no use for it, 33% had a timing issue and 34% a cost issue<sup>13</sup>. Overall, almost all of them (98%) use either their mobile phone or mobile internet at home.

### Renters adapt to what is available to them

It seems that renters get used to what they have, especially when they do not have fixed services. We could clearly observe the importance of fixed services decrease among non-users, whereas the importance of mobile services decreases to a much lesser extent among users of fixed services.

<sup>11</sup> Q8\_G. For each of the following services, please indicate how important it is for you to have them available in your home. Base: Renters of connected households (n=331)

Q3\_Y. For each of the following services, please indicate how important it is for you to have them available in your home. Base: Renters of disconnected households (n=78)

<sup>12</sup> Note the base size for these numbers is extremely low (n=13) – please use these results as indicative only. Base definition: unconnected renters who consider fixed internet services to be important and tried to get a connection

<sup>13</sup> The base size for these numbers is also very low (n=16) – use as indicative only. Base definition: unconnected renters who consider fixed internet services to be important but did not try to get connected

### Importance of fixed services by usage of all connection types

Fixed services are generally important to those who have them but not so much to those who don't. The importance of fixed internet services illustrates this well. 93% of those who use a fixed connection find it important but just 42% of renters who don't use it find it important. 87% of those who use both mobile and fixed services consider fixed services important.

Pay TV and landline services generate the least interest, even among those who use them.

Of those who use...	% T2B	Find important to have at home
Fixed internet service (all)	93%	Fixed internet services (all)
Mobile internet services and are connected	87%	Fixed internet services (all)
Mobile internet services and are unconnected	42%	Fixed internet services (all)
Fixed phone services (e.g. landline or VoIP)	44%	Fixed telephone services
Mobile phone and are unconnected	13%	Fixed telephone services
Mobile phone and connected & but no landline	4%	Fixed telephone services
Pay TV	53%	Pay TV
No pay TV (and connected)	11%	Pay TV

Figure 10 - Importance of each fixed connection type by usage

### Importance of mobile services by usage of connection types

When it comes to mobile, importance decreases among users of fixed services but remains extremely high. 94% of those who use mobile phones (whether they are connected or not), consider mobile phone services important. 88% of those who use landlines have the same opinion. 88% of those who use mobile internet and 72% of those who use any type of fixed internet services consider mobile internet data to be important.

Of those who use....	% T2B	Find important to have at home
Mobile phone services (and connected)	94%	Mobile phone services
Mobile phone services (and unconnected)	94%	Mobile phone services
Landline phone services	88%	Mobile phone services
Mobile Internet (e.g. mobile phone or laptop dongle or 3G/4G modem) and unconnected	88%	Mobile internet service using mobile phone data
Mobile Internet (e.g. mobile phone or laptop dongle or 3G/4G modem) and connected to the internet	73%	Mobile internet service using mobile phone data
NBN or other fixed internet service	72%	Mobile internet service using mobile phone data

Figure 11 - Importance of each mobile connection type by usage



## Conclusions

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The reasons pushing renters to adopt alternatives to fixed services are different for internet and telephone services. First, we can draw conclusions around landline services by observing the profile of renters using them compared to those who aren't. Renters using fixed telephone services tend to be older and have lived in their household for longer. Other renters tend to dismiss landlines. Importance is low, with very few currently using them or actively trying to get them.

Mobile phones are mostly responsible for this. They are used by all renters, regardless of what type of connection they have in their home, and are extremely important.

This is not just true for telephone services. It seems that mobile data is also growing in rented homes, even where Wi-Fi services are connected. Because of financial reasons, but also timing issues and usage, mobile data is a better option for a lot of renters. Some demographic segments make such little use of the internet that mobile is enough. Otherwise, the financial incentive to get mobile rather than fixed services may be high enough to adapt their data consumption to mobile capacity.

Therefore, we can see mobile data users skewing towards lower socio-economic levels. Age and life stage, are certainly strongly linked to financial capacities and also has an influence on the likeliness to get fixed internet services. Older users are less likely to have a fixed internet connection because they are usually lower capacity users or happy to use alternative sources. As the age of renters goes down, the likeliness to use fixed internet services goes up, except for those less than 30 years old, although they are heavy users.

These renters have a lower purchasing power and live in their rented home for less time. This limits them in taking up fixed contracts that are costly and have timing constraints in terms of time to set up and contract duration. These constraints are a high enough incentive to exclusively rely on mobile data and users adapt well.

Preference to use mobile data is the first reason, before any other barrier stated by unconnected renters, to not try to get fixed services. This positive change and attitude in choice of telecommunication services for rented homes undermines the barriers encountered by renters because of their mobile situation and often lower financial leverages.

Is the calculation of renters in the balance of benefits they gain or lose by opting for mobile right? How much less internet can they use? How much more money do they spend for a similar level of usage? These questions can be answered by observing closer the offers on the market and most popular choice. Many factors play a role, from reliability of mobile and fixed networks, to costs of data, through to timing constraints or duration of locked contracts. In any case, most renters do not seem to feel they are missing out a great deal.

Consumer protection is certainly needed for niche situations where remoteness does not allow fixed connection or where the need for heavy internet usage is very important but it is only relevant for a small minority. However, we found how critical it has become for all renters and most likely all Australians to have access to mobile data. This may be a new field of investigation to understand whether the offer is adapted or not.

## Authors

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### About Lonergan Research

This report was written by Alice Goeury (Consultant) and Floyd McMillan (Director) at Lonergan Research.

Lonergan Research was founded in 2009 by Chris Lonergan. Chris was frustrated with the status quo of the research industry, which demonstrated an over-reliance on black box thinking and a blindness to the benefits of data and technology outside of traditional methodologies.

Lonergan Research is full service boutique research agency, offering both quantitative and qualitative approaches. Their clients can be found in the commercial, government and NPO areas. Quality is very important to Lonergan at every stage of the research process. Lonergan are full members of AMSRS and have ISO 20252 accreditation.

Lonergan balance methodological rigour with common sense Lonergan put ourselves in our client's shoes: every decision is made with our client's best interests in mind. Lonergan are not constrained by traditional techniques or what has been done before, but simultaneously don't stray from the principles of robust, representative data and evidence-based insights. Lonergan are guided by proven theoretical frameworks

Lonergan do what is right, not what is popular. They believe research exists to help inspire lasting, positive change in others. It's about understanding what motivates people and how to harness the power of brands to achieve a greater vision for mankind at every level. Lonergan are guided by the truth, not by what our clients want to hear. Lonergan have an opinion and don't sit on the fence

Lonergan support socially responsible organisations. They don't claim to save the world but do have a strong passion for sustainable and ethical issues. Lonergan actively offer discounts to non-profit clients, and do their bit to help make the world a better place

## Appendix

### Appendix 1 – Additional Profiling

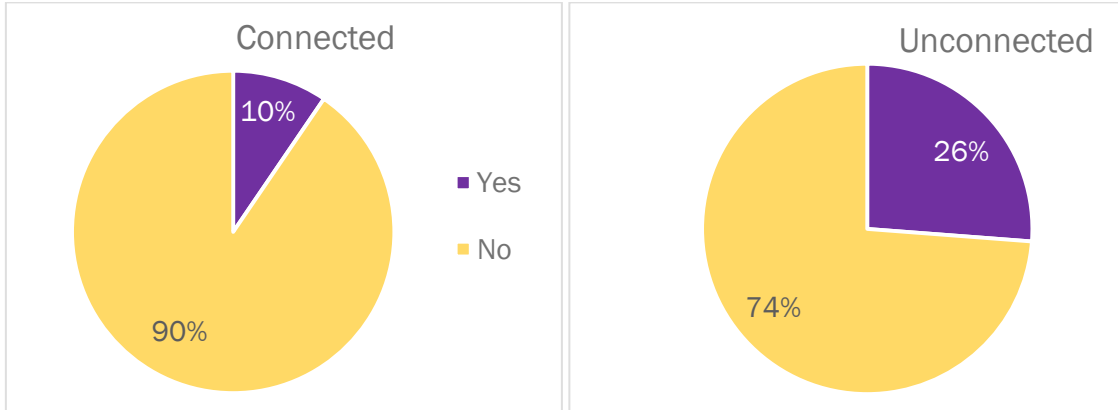


Figure 12 - Incidence of Social Housing among Connected and Unconnected households

Q13. Are you currently renting in public housing? Base: Connected renters (n=329) and Unconnected renters (n=80)

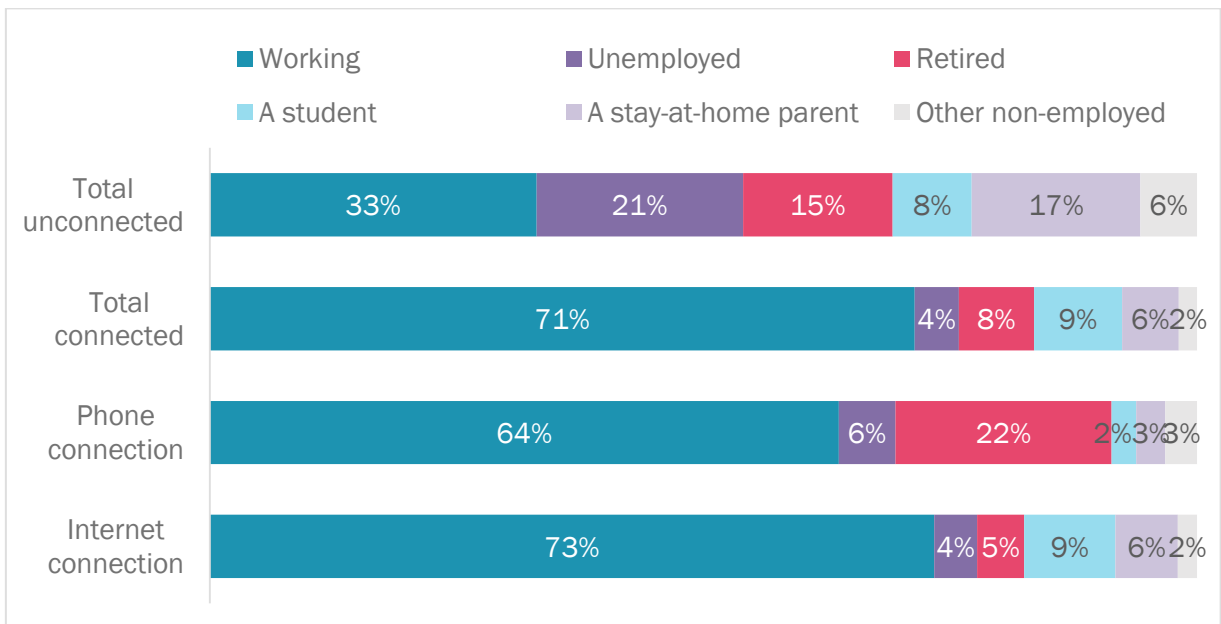


Figure 13 - Working Status by Connection Type

Q20. Are you currently predominantly...? Base: Unconnected renters (n=80), Connected renters (n=333), Renters with landline (n=114), Renters with internet (n=305)

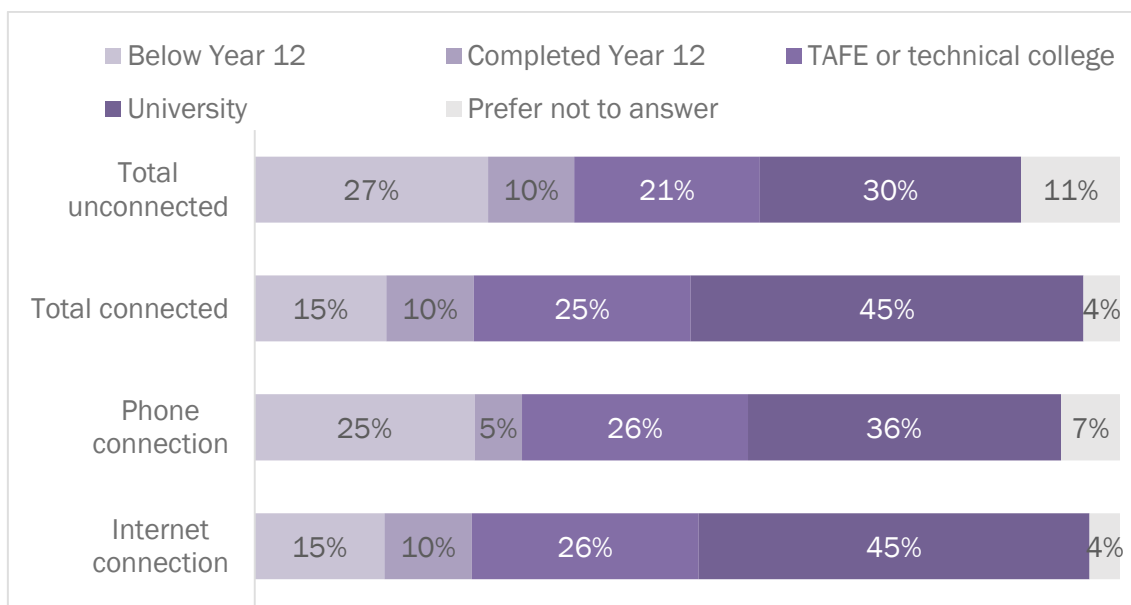


Figure 14 - Education Level by Connection Type

Q19. Which of the following best describes the highest level of education you have completed? Base: Unconnected renters (n=80), Connected renters (n=335), Renters with landline (n=114), Renters with internet (n=308)

## Appendix 2 – Scenarios when moving in

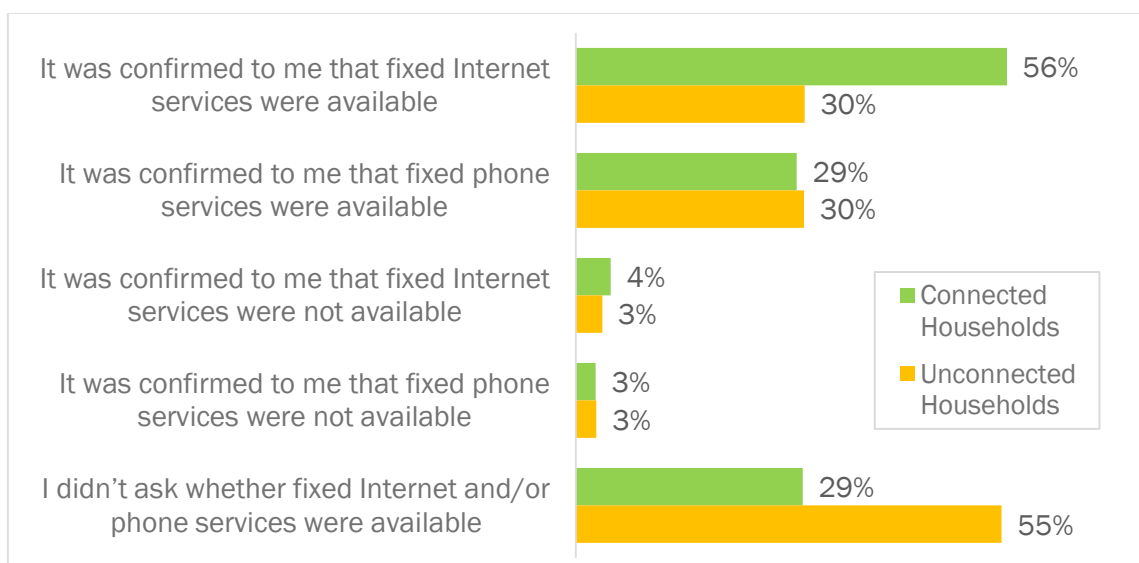


Figure 15 - New renters scenarios and confirmation of availability

Q1\_G/Q4\_Y. Thinking back to the time before you moved in here. Which of the following applies best? Base: Renters with a fixed connection (n=336), Renters with no fixed connection (n=77)

## Glossary

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**Fixed Services:** refers to Internet or telephone fixed services, that require cabling to install a WIFI connection or landline services.

**Connected households:** refers in this context to rented households who do have fixed internet or telephone services at home

**Unconnected households:** refers in this context to rented households who do not have fixed internet or telephone services at home and rely on mobile connections or no connection at all

