

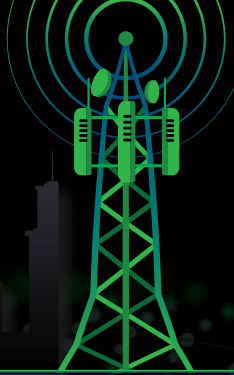


## Connectivity is calling: The economic and social benefits of expanded regional network coverage

Vodafone

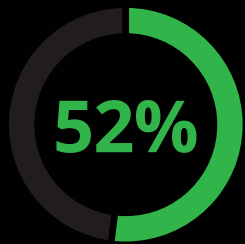
2026

# Vodafone's network expansion

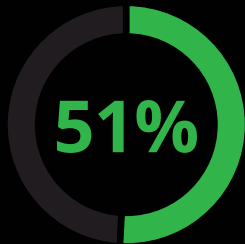


## Connectivity in regional areas trails behind urban centres

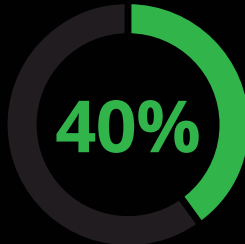
Top complaints about all mobile services from surveyed Australian users



Coverage dropouts



High plan prices



Slow or inconsistent download speeds



In January 2025, a network sharing agreement between Optus and Vodafone significantly expanded Vodafone's regional network



Increase in sites available to users on the Vodafone network, as of December 2025

## Vodafone's network expansion has brought immediate improvements to coverage and speed across regional Australia

### Coverage



Square kilometres of additional coverage across Australia

Now totalling 1 million square kilometres and reaching 98.5% of the population



Or an extra 3% of Australians now fall within Vodafone mobile coverage

### Speed



Increase in average download speeds for regional customers

### Methodology

Results are based on analysis by Deloitte Access Economics using data provided by Vodafone and a survey of 1,070 Australians. Findings in this infographic are drawn from the body of the report; references are provided within.

# Enhanced connectivity delivers a range of economic and social benefits to regional Australia



## The perceived value of the network expansion to Vodafone customers exceeds prices paid for plans

\$89 per existing Vodafone customer per year



\$182 per regional customer joining to Vodafone per year



\$1.1 billion benefit of the agreement over the five years to 2030



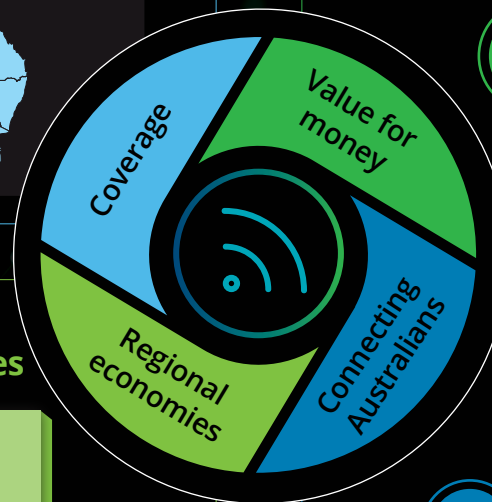
## The introduction of Vodafone connectivity to parts of regional Australia has resulted in...



A **29% increase** in monthly connections joining Vodafone from other networks

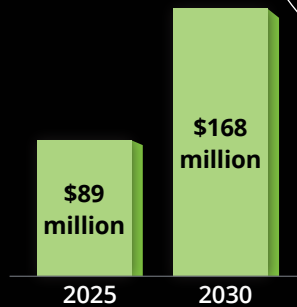


Up to an estimated **\$328 in annual mobile plan cost savings** for an average regional household that has joined Vodafone



## Faster Vodafone download speeds<sup>1</sup> translate to productivity benefits for regional economies

- ✓ Fewer disruptions
- ✓ Expedited online tasks
- ✓ Access to AI platforms
- ✓ Remote work capability



Estimated contribution to GDP based on Deloitte modelling

<sup>1</sup> Implies less buffering at lower speed.

## Better connectivity enhances equity for regional communities

For surveyed Vodafone customers, the network expansion has led to...



**More online service use**  
36% have used more online services



**Greater connection to family and friends**  
24% increase in regional calls made



**An increase in regional mobility**  
60% feel more confident travelling to regional areas

# Executive summary

## The Vodafone regional network expansion

Mobile connectivity underpins Australia's economic and social wellbeing. Yet for some regional communities, mobile coverage has historically been unreliable, expensive or unavailable, limiting access to essential services, constraining business productivity and reducing connection to family, friends and community.

In early 2025, Vodafone significantly expanded its regional network through a network sharing agreement with Optus. This regional network expansion agreement (also referred to as the Multi-Operator Core Network or MOCN) allows Vodafone to use Optus's existing regional infrastructure, providing significant improvements to regional Vodafone connectivity without duplicative infrastructure investment. As a result of this agreement, Vodafone significantly expanded its regional network reach, doubling its national footprint and introducing a new mobile choice in many regional areas for the first time. This regional network expansion has significantly expanded coverage, lifted network speeds and improved value for money for Vodafone customers, introducing a genuine third mobile network option in many regional areas and strengthening competition across regional and metropolitan mobile markets.

## A significant change in regional coverage and performance

The launch of the regional network expansion has provided Vodafone customers with access to more than three times the number of mobile sites in regional Australia. National coverage for Vodafone customers more than doubled, expanding from around 400,000 square kilometres to over 1 million square kilometres, and population coverage increased from 95.4% to 98.5%. This has enabled over 800,000 additional Australians to fall within Vodafone's mobile coverage footprint.

Vodafone network performance has also strengthened markedly. As a result of improved access to 4G and 5G services, average download speeds for regional Vodafone customers have increased by around 350% since January 2025. The benefits extend beyond people who live in regional communities to the millions of Australians who travel through regional areas for work, leisure and to connect with family and friends. Because regional coverage is a key competitive dimension in mobile markets, these changes are felt nationally, improving choice and value for mobile customers across Australia.

## The value of expanded connectivity: \$341 million a year

Expanded network coverage and service quality are delivering value to Vodafone customers nationwide. Deloitte Access Economics estimates that enhanced mobile connectivity is worth \$341 million per year to Vodafone customers, based on what customers say improved coverage is worth to them above the price they currently pay for mobile services.

Survey results show that, on average, Vodafone customers would be willing to pay an additional \$89 per year for expanded coverage. This value applies across Vodafone's entire customer base — including both those living in newly covered regional areas and customers who benefit from improved coverage when travelling — reinforcing that the value of regional connectivity is national, not local.

Better connectivity is allowing businesses and communities to access essential services such as healthcare and education, stay connected with family and friends, and participate more fully in digital tools and innovation, including research and development activities.

## Better value for money is driving switching and savings

By increasing choice available to consumers, Vodafone's regional network expansion has improved value for money for its regional customers. It is conservatively estimated that monthly connections joining Vodafone from other networks increased by 29% following the expansion compared with the year prior, with value for money the primary driver.<sup>(a)</sup>

Surveyed regional customers who joined Vodafone reported saving up to \$182 per year in mobile plan costs, or up to \$328 per year for an average household. Deloitte Access Economics estimates that customers who joined Vodafone following the expansion derive a total benefit of \$4.6 million per year, reflecting both direct price savings and the additional value they place on expanded coverage and service quality.

*(a) Based on port-ins to Vodafone from other networks in the year to January 2026, compared to the year to January 2025. This is a conservative estimate, as it does not count the likely-higher increase in those joining who previously relied on other forms of internet (e.g., satellite).*

# Executive summary

## How customers are using the expanded network

Faster, more reliable mobile services have driven increased use of Vodafone's regional network. Since the expansion, calls per user have increased by 24%, while data usage per user has risen by 119%, demonstrating greater reliance on mobile connectivity for work, services and everyday life.

## Productivity, economic and social benefits

More reliable mobile connectivity is delivering economic benefits. Deloitte Access Economics estimates that productivity gains enabled by the regional network expansion contributed around \$89 million to the Australian economy in 2025, with this contribution projected to grow to \$168 million by 2030 as regional 5G deployment continues.

Alongside the economic benefits, stronger mobile connectivity is delivering wider social outcomes. Regional Vodafone customers report better access to essential services — including healthcare, education and government services — as well as stronger social connections and greater feelings of safety due to more reliable mobile coverage.

These impacts are illustrated throughout this report through detailed case studies of regional Australians and businesses, showing how expanded mobile connectivity is changing life and work. The case studies include **healthcare workers** delivering essential services across vast regions, **small business owners** and **agricultural producers** using faster, more reliable connectivity to improve productivity, and mobile reliant service providers such as **Brewtech**, whose technicians depend on consistent coverage to service customers across regional and remote Australia.

They also include the experiences of individual customers. **Andrea, an engineer and mountain biker based in regional Tasmania**, reported halving her phone bill after joining Vodafone while retaining comparable regional coverage, enabling her to live and work remotely. In Trinity Beach, **Simone** described how her family of nine people moved to Vodafone, attracted by better value and more reliable connectivity that supports both everyday life and work in regional Queensland.

Together, these case studies show how Vodafone's regional network expansion is being experienced by Australians in their everyday lives.

## A significant benefit for Australians

Overall, Deloitte Access Economics estimates that Vodafone's regional network expansion will deliver a total benefit of \$1.1 billion to Vodafone customers over the five years to 2030. This reflects the value placed on expanded connectivity by existing customers, the benefits to those who have joined Vodafone, and the productivity gains supported by faster and more reliable mobile services.

Taken together, the evidence in this report shows that Vodafone's regional network expansion is delivering clear economic and social benefits, improving choice and affordability, and helping to narrow the gap in mobile connectivity between regional and metropolitan Australia.

## How this report was developed

A year on from the network expansion, Vodafone asked Deloitte Access Economics to value the social and economic impacts of this increase in regional connectivity on Australian mobile users. To assess these impacts, Deloitte Access Economics has used:

- A survey of 1,070 Australian mobile users
- Case studies of businesses and consumers that have been impacted by the network expansion, informed by consultations<sup>(a)</sup>
- Data provided by Vodafone on changes in coverage, download speeds, and the user base, both regionally and nationwide
- Modelling of the value of the expansion to consumers, both existing customers and those joining from other providers, and the economic value of productivity gains underpinned by improved download speeds.

Through this work, Deloitte Access Economics has combined modelling with evidence from mobile users to understand how better connectivity has enabled work and lifestyle opportunities, improved business productivity, helped customers save on mobile plans, and enabled users to stay in touch with family and friends. Together, the evidence and case studies in this report show how regional connectivity is shaping communities across Australia.

<sup>(a)</sup> The case studies included in this report reflect individual and businesses experiences. They were selected by Vodafone and Deloitte Access Economics. Other individuals and businesses may have different experiences. The purpose of the case studies is to highlight how improved coverage can influence economic and social outcomes.



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# A note on interpreting modelled benefits in this report

The Vodafone network expansion is valued by users of Vodafone and regional economies more broadly, culminating in significant economic and social benefits. In this report, benefits reflect a value of the network expansion above and beyond the price that mobile network customers pay. The table below describes how to interpret the various benefit figures quoted in this report.

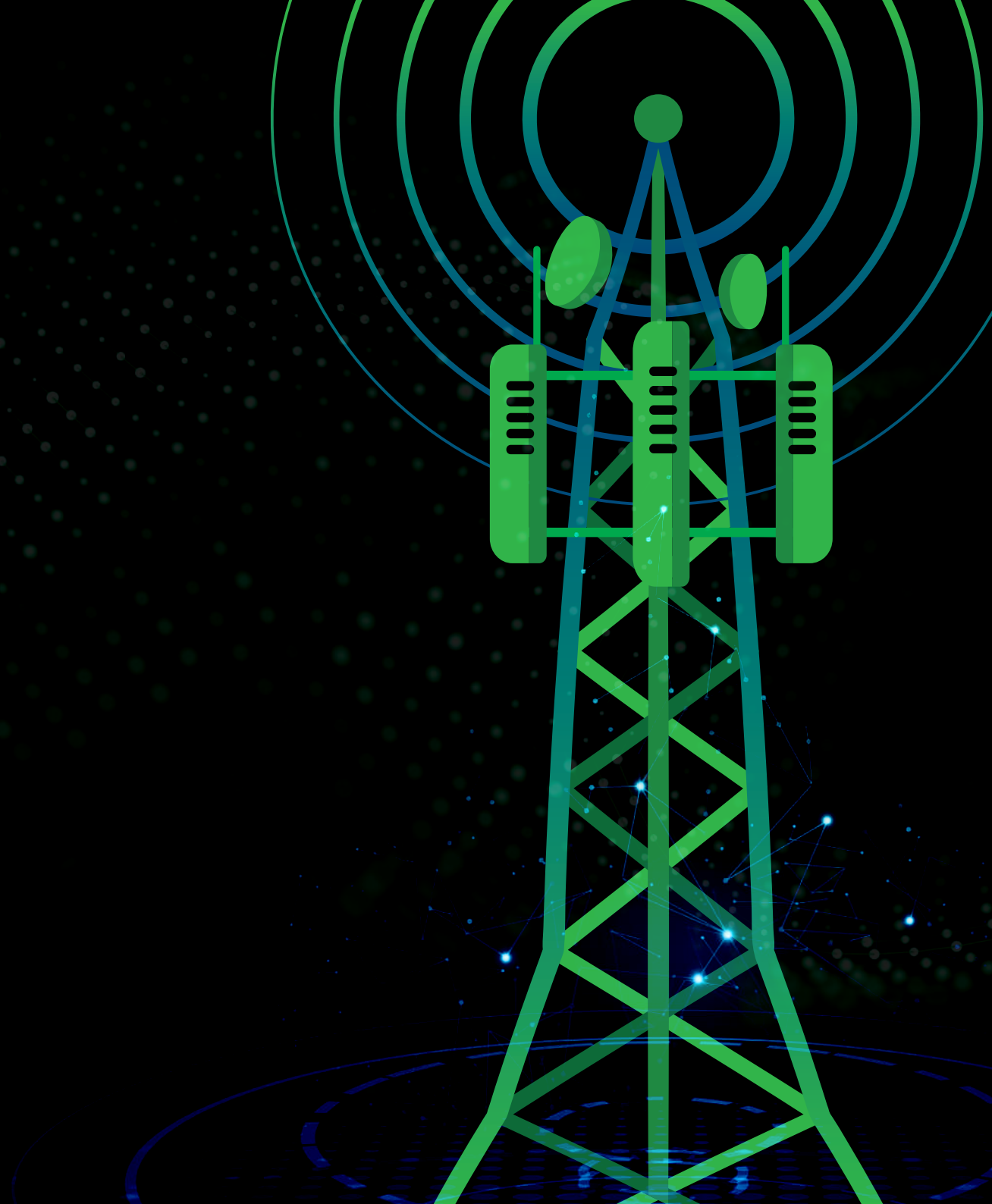
Measure	Definition
\$89 benefit per year to existing Vodafone users	Measured as the maximum willingness-to-pay per year for the network expansion from existing Vodafone customers, over and above the price they currently pay for their Vodafone mobile plan.
\$341 million benefit in 2025 of the network expansion to existing customers	The total benefit to existing Vodafone users as a result of the value they place on the network expansion over and above the price they pay for their mobile plan (as described above), applied to Vodafone's existing user base prior to the network expansion in January 2025.
\$182 per year saved per additional regional customer joining Vodafone	The average price per year for mobile plans saved by regional customers that joined Vodafone from another mobile network following the network expansion.
\$4.6 million benefit of the network expansion to those joining from other networks	The value to new customers, including both price directly saved (as described above) in addition to their maximum willingness-to-pay for additional features they have received through a new plan with Vodafone (e.g., more data), over and above the price they pay for their plan. This value is applied conservatively only to the 29% increase in the monthly volume of mobile connections that ported to Vodafone following the network expansion (i.e., from February 2025 to January 2026), above those that ported in the comparable year prior to the network expansion.  <i>The calculation of this value is explained further in Appendix D.</i>
\$1.1 billion total benefit to Vodafone customers over the five years to 2030	The total benefit of the network expansion to Vodafone customers over the first five years of the network expansion, from 2025 to 2030. It is calculated as a sum of the \$341 million benefit to existing customers and the \$4.6 million benefit of the network expansion to those joining from other networks, applied for every year between 2025 and 2030 and adjusted by a 10% annual discount rate to account for time preferences.
\$89 million contribution to the Australian economy in 2025 / \$168 million contribution to the Australian economy in 2030	The estimated GDP contribution associated with increased mobile download speeds for regional Vodafone customers, as enabled through the network expansion. This GDP contribution is driven by the productivity benefits of increased mobile download speeds.  <i>The calculation of this value is explained further in Appendix C.</i>

# Glossary

Term	Definition
<b>ABS</b>	Australian Bureau of Statistics
<b>ACCC</b>	Australian Competition and Consumer Commission
<b>ACT</b>	Australian Capital Territory
<b>AI</b>	Artificial Intelligence
<b>APAC</b>	Asia-Pacific
<b>ARPU</b>	Average Revenue Per User
<b>Directly impacted</b>	Refers to an area that falls under the regional areas covered by the 2025 regional network agreement between Vodafone and Optus.
<b>GDP</b>	Gross Domestic Product
<b>IoT</b>	Internet of Things
<b>Mbps</b>	Megabits per second
<b>Mobile network</b>	Refers to the system of physical infrastructure that enables wireless voice and data communication between mobile devices.
<b>Mobile provider</b>	Refers to any company that offers mobile services to end users, including both MNOs and MVNOs.
<b>MOCN</b>	Multi-Operator Core Network, which refers to a network sharing arrangement in which two or more MNOs share infrastructure while each maintaining their own separate network. This includes the Vodafone and Optus network sharing agreement.
<b>MNO</b>	Mobile Network Operator, which refers to a company that owns and operates the physical network infrastructure used to deliver mobile services. In Australia these are TPG Telecom, Optus and Telstra.

Term (cont.)	Definition
<b>Network expansion</b>	Refers to the increased network connectivity available to Vodafone customers through the Vodafone and Optus network sharing agreement.
<b>NSW</b>	New South Wales
<b>NT</b>	Northern Territory
<b>OECD</b>	Organisation for Economic Cooperation and Development
<b>QLD</b>	Queensland
<b>R&amp;D</b>	Research and Development
<b>Productivity benefit</b>	Refers to the estimated contribution to GDP resulting from improvements in download speed.
<b>SA3</b>	Statistical Area Level 3
<b>TPG</b>	TPG Telecom Limited (Vodafone's parent company)
<b>VIC</b>	Victoria
<b>WTP</b>	Willingness to pay, which refers to the maximum amount a customer would be prepared to pay for a product or service. When the price charged is lower than the willingness to pay, the difference is known as a consumer surplus.
<b>4G</b>	Refers to the fourth generation of mobile network technology.
<b>5G</b>	Refers to the fifth generation of mobile network technology.

# 1. Introduction



# Mobile connectivity is an ongoing concern for regional Australians

## Mobile connectivity is not a luxury, but a necessity in today's digitally-driven world

Mobile services underpin the economic and social wellbeing of regional communities across Australia. Connectivity enhances quality of life, supports community resilience, and ensures that regional Australians have equitable access to the same essential services as people living in urban areas.

Mobile connectivity is especially critical in regional Australia, where communities often rely on mobile networks as their main form of connectivity, given the limited availability of fixed broadband services. Additionally, the nature of many regional industries, such as agriculture, mining, and tourism, means workforces are frequently on the move, further increasing reliance on mobile technology.<sup>1</sup> Mobile coverage is critical not just for enabling industries to continue to operate, but also to enable them to capitalise on emerging technologies such as AI, which could add as much as \$127 billion to the Australian economy in 2034.<sup>2</sup>

This dependency makes mobile connectivity especially important for regional populations. Nonetheless, lower infrastructure availability means that regional users often do not have the same access to mobile services as urban users, **with 72% of surveyed mobile users agreeing that there is currently a regional-urban divide in access to quality mobile service.**<sup>3</sup>

## Mobile service quality in regional Australia lags behind metropolitan areas

Regional mobile users report facing dual concerns of a **lack of mobile coverage** and **poor value for money** (see Figure 1.1). In contrast, for surveyed urban users, price (54%) is the main concern, with coverage ranking considerably lower (41%).<sup>4</sup>

According to the Digital Inclusion Index, digital access in regional areas has improved since 2020, although it still lags urban areas.<sup>5</sup> Affordability is also an issue for regional residents; despite having a greater reliance on mobile data, regional users face fewer options of providers with adequate connectivity and thus often pay higher prices.

## A lack of connectivity is a handbrake to regional wellbeing and prosperity

Poor mobile connectivity can disadvantage regional communities in a variety of ways, including:

1. Creating **inequity of access to essential services**, such as healthcare (including telehealth and mental health services), education, banking, and government services.
2. Hampering **business operations**, such as reducing communication with suppliers and customers, connecting with global markets, limiting remote work opportunities, and accessing online services.
3. Limiting **connection to friends, family and community**, which reduces social cohesion and acts as a deterrent to those seeking to relocate to the regions.

These impacts ultimately reduce quality of life and economic opportunity in regional areas and can widen the gap between urban and regional Australia.

**Figure 1.1:** Top complaints with all mobile services in regional Australia from surveyed mobile users



Source: Deloitte Access Economics (2026) survey of mobile users. N=415.

# The Vodafone and Optus network sharing agreement can overcome prohibitive barriers to mobile service expansion and investment, enhancing regional connectivity

In recent years, mobile revenues have declined in real terms, with Australia's three mobile network operators earning a combined \$5 billion less per year compared to a decade ago (see Chart 1.1), while telecommunications prices have fallen by more than 18%.<sup>1</sup> This reflects a combination of structural factors. Increased efficiency has delivered greater value for consumers – such as through larger data allowances and improved speeds – yet has limited operators' ability to sustain pricing power, as services have become increasingly commoditised.<sup>1,2</sup> Thus, investment to support rapid growth in data usage has not translated into proportional revenue growth. At the same time, operators face rising capital costs.<sup>1</sup> Together, these dynamics compress margins and weaken the commercial returns on investment.

Demand for mobile data continues to grow, having more than doubled from 2019 to 2025,<sup>3</sup> placing ongoing pressure on operators to improve coverage, capacity and quality. While investment has remained strong – reflecting the need to compete on network performance – meeting these expectations in regional areas, particularly through 5G, requires significant investment. Investment costs are driven by Australia's large and dispersed geography, as well as the characteristics of 5G technologies which require a denser network of infrastructure due to their shorter range.<sup>4</sup>

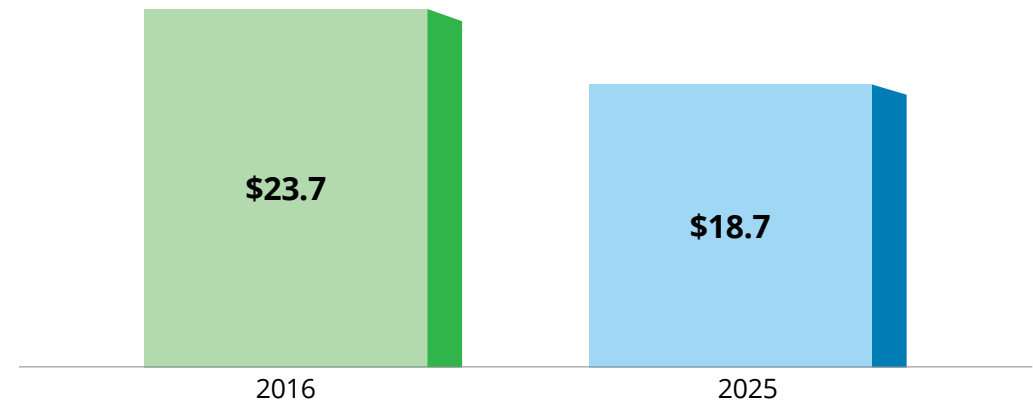
## The 2025 Vodafone and Optus network sharing agreement presents a cost-effective expansion to regional connectivity

In early 2025, Vodafone significantly expanded its regional network reach through a \$1.17 billion network sharing agreement with Optus. This regional network expansion agreement (also referred to as the Multi-Operator Core Network or MOCN) allows Vodafone to use Optus's existing regional infrastructure, providing significant improvements to regional Vodafone connectivity without duplicative infrastructure investment. Enabled through Optus' existing regional network, this arrangement resulted in an increase from around 700 to 2,535 regional 4G sites, and an additional 702 regional 5G sites available to Vodafone customers between January and the end of December 2025. This reflects a significant regional network expansion.

**Investments such as the 2025 network sharing agreement are important to securing quality mobile services.** Network sharing arrangements can help improve service quality without requiring prohibitive capital investment. Existing evidence indicates that markets which allow network sharing can experience 8.7% higher mobile network investment compared to markets without network sharing.<sup>5</sup> Over time, this additional investment can translate into **improved coverage and speeds and increased competition that can lower prices** across national mobile markets.

The network sharing agreement was not opposed by the Australian Competition and Consumer Commission (ACCC), which cited that it will “allow TPG Telecom [the parent company of Vodafone] to provide better coverage in regional areas, which will enhance its ability to compete... improving choice for regional consumers”.<sup>6</sup>

**Chart 1.1:** Mobile industry revenues, Australia (real \$2025 billions)



Source: Frontier Economics (2026).<sup>1</sup>

## Regional connectivity investment continues to be a government priority

Given current regional connectivity concerns and constraints on the ability of mobile providers to invest in regional infrastructure, the federal government has committed significant financial resources to improve regional mobile connectivity in partnership with mobile providers. The government has allocated \$400 million over five years from 2022-23 to expand mobile coverage along roads and in underserved regional communities. Additionally, an updated Universal Service Obligation will see outdoor mobile coverage made available across Australia using low-earth orbit satellites.<sup>7</sup>

Mobile network operators play an important role in supporting these priorities not only by partnering in publicly funded initiatives, but also by adopting innovative and efficient approaches to enhance coverage and service quality. This can be facilitated through arrangements that support spectrum flexibility and shared investment.

# Vodafone's regional network expansion resulted in immediate improvements to connectivity, speed and choice for regional Australians

## The benefits of the regional network expansion

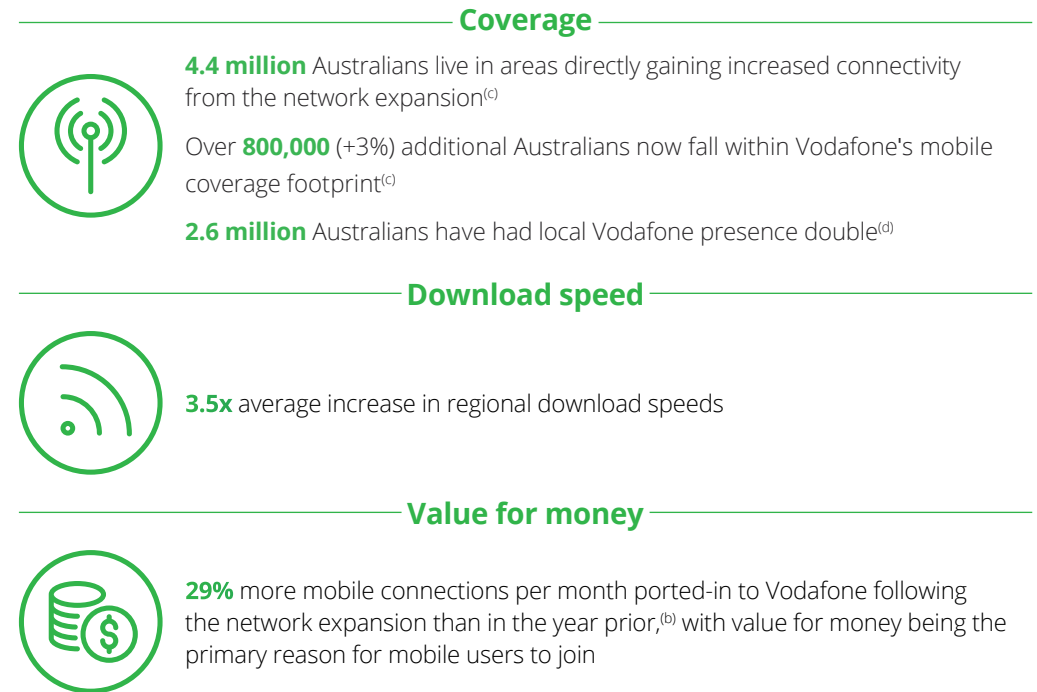
The network expansion has significantly impacted three elements of mobile services in regional Australia: coverage, speed, and value for money.

- **Coverage more than doubled nationwide** from approximately 400,000 square kilometres to over 1,000,000 square kilometres (or from 95.4% to 98.5% of the population). Enhanced coverage improves the social connectivity and wellbeing of regional Australians, as well as the mobility of urban Australians.<sup>(a)</sup>
- **Download speeds have increased by an average of 350%** from January 2025 to March 2026 for Vodafone's existing regional customers, driving productivity gains across the economy.
- **The introduction of a third mobile network operator to regional areas previously only covered by the Optus and Telstra networks has increased value for money** for Australians. This has put downward pressure on prices across the market relative to a scenario where the agreement did not occur. Further, it is conservatively estimated that it encouraged 29% more mobile connections per month to join Vodafone from other networks.<sup>(b)</sup>

These improvements have translated to significant changes for Vodafone users across the regional network, who have on average **increased calls by 24% and data usage by 119%** in the year since the expansion.<sup>(c)</sup>

The economic and social benefits of these changes, across regional households, businesses, and economies, are explored in detail throughout this report.

Figure 1.2: What changed with the Vodafone regional network expansion?



Source: Deloitte Access Economics (2026).

<sup>(a)</sup> The Australian Communications and Media Authority (ACMA) will require mobile operators to publish standardised mobile coverage maps from 30 June 2026, supporting greater transparency and comparability.<sup>1</sup>

<sup>(b)</sup> Based on port-ins to Vodafone from other networks in the year to January 2026, compared to the year to January 2025. This is a conservative estimate, as it does not count the likely-higher increase in those joining who previously relied on other forms of internet (e.g., satellite).

<sup>(c)</sup> Affected populations are defined as those estimated to have new or expanded connectivity within the network expansion 4G area, using a June 2025 population basis.

<sup>(d)</sup> Those with a doubling of Vodafone presence are determined based on changes in the number of Vodafone sites in their local postcode.

<sup>(e)</sup> Based on Vodafone network data across all TPG brands, using a like-for-like comparison of week ending 19 Jan 2025 to week ending 18 Jan 2026.

# This report details the benefits of the network expansion on Australian businesses, consumers, and the economy

## Purpose and scope of the report

The purpose of this report is to demonstrate the role that Vodafone's network expansion has and will continue to play in shaping the Australian telecommunications landscape, providing insights into the value of increased connectivity, and highlighting the key benefits that coverage expansion can deliver for end users.

The report captures the impacts of the agreement on the prosperity of Australian businesses, consumers, and the broader economy. This report illustrates these benefits through a discussion of:

- The improvement in **coverage and service quality** and the value that this represents for Vodafone customers.
- The effects of increased competition in regional markets on **price and value for money** for Australian mobile users.
- The **productivity benefits** that flow from faster and more reliable coverage in regional areas.
- The **social impact of improved connectivity**, such as improved access to services and greater social connection.
- **Case studies** of the importance of connectivity and the network expansion on regional individuals and businesses.

The analysis contained in the report is based on data from public sources, proprietary data from Vodafone,<sup>(a)</sup> a consumer survey of 1,070 Australians including 574 existing Vodafone customers (see Appendix B), and consultations.

## Data sources used in this report

- **Survey data** from a sample of 1,070 Australian mobile users including 574 Vodafone customers (see Appendix B)
- **Consultations** with businesses and consumers on the Vodafone network (to inform case studies)<sup>(b)</sup>
- Proprietary **Vodafone data**<sup>(a)</sup> on changes in coverage, download speeds and user count before and after the network expansion, both regionally and across the entire Vodafone network
- Deloitte modelling of the value of the expansion to consumers, including both existing consumers and those joining from other networks, as well as the economic value of the productivity increase through improved download speeds.
- **Existing literature and market reports** to support analysis, which is cited throughout the report where used.

## This report...

### Assumptions and limitations

### ... illustrates the benefits of the expansion

This is not a full assessment of the benefits and costs of the network expansion, for example on competitive dynamics within the mobile market, which can be uncertain. The ACCC noted that, while the network sharing arrangement is expected to improve network investment, it could have complex implications which are difficult to anticipate, as it represents "a significant change in the structure of the mobile market".<sup>1</sup>

### ... quantifies impacts on Vodafone users only

In this report, only the impacts of the network expansion on users of the Vodafone brand are quantified. It is recognised that these benefits are enabled through Optus' existing regional network. Further, while not quantified in this report, the network sharing arrangement can also have significant benefits for customers of other providers on the Vodafone network, in addition to Optus users.

(a) Information provided by Vodafone has not been independently verified by Deloitte Access Economics.

(b) The case studies included in this report reflect individuals' and businesses' experiences. They were selected by Vodafone and Deloitte Access Economics. Other individuals and businesses may have different experiences. The purpose of the case studies is to highlight how improved coverage can result in better economic and social outcomes.

## 2. The value of improved connectivity



# Vodafone users value improved connectivity significantly, with an estimated benefit of \$341 million over the first year of the arrangement

Better mobile connectivity is valuable to Vodafone users for a variety of reasons.



**For the community**, it means more equitable access to essential services such as health and education; improved safety via connection to support networks and emergency services; greater travel convenience in regional areas; and better value for money plans stemming from increased competition.



**For businesses**, it means better connectivity with customers and suppliers, access to new markets, support for new internet-connected technologies; and more opportunities for innovation and R&D initiatives.

The benefits that stem from better connectivity are valued by Vodafone customers across the network. However, it is difficult to measure this value in dollar terms, as Vodafone did not introduce a new fee for the network improvements associated with the expansion. As a result, much of the value generated accrues as consumer surplus – that is, the additional benefit customers receive above and beyond the price they pay for their service.

## Estimating the value of improved connectivity

Vodafone's expanded regional coverage delivers tangible benefits to its customers, who now receive more value from their service at no extra cost. Survey results indicate that, on average, **Vodafone customers would be willing to pay an additional \$89 per year for the improved regional coverage.**<sup>(a)</sup> This means customers are enjoying increased connectivity and coverage benefits, without experiencing a price rise.

The value placed on these improvements is not limited to Vodafone's regional customers; it extends to the broader base of urban customers who rely on regional coverage when travelling. In total, for all Vodafone customers who experienced enhanced connectivity as of January 2025, **the collective benefit is estimated at \$341 million in the agreement's first year.** This demonstrates that the network expansion is delivering substantial additional value to customers, over and above what they pay for their current plans.

# \$341 million

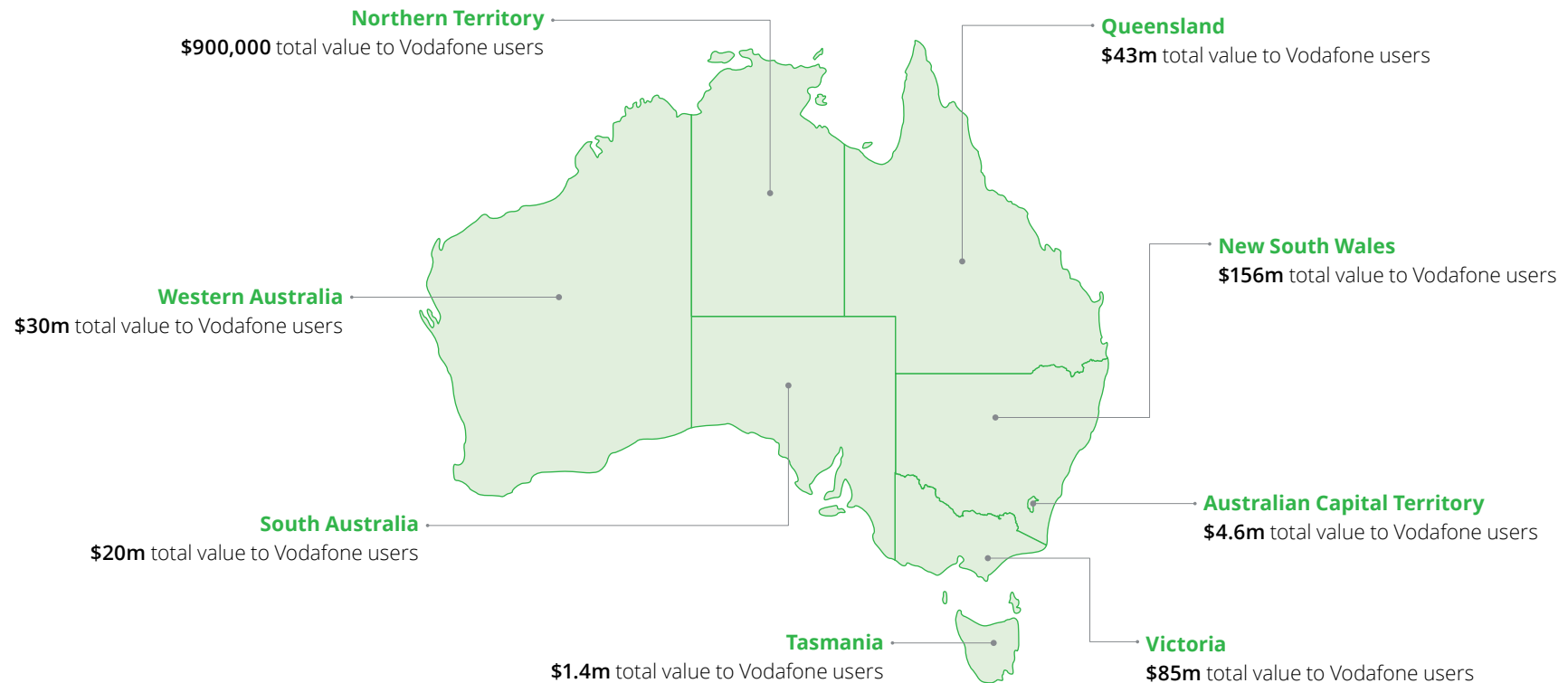
Estimated benefit of the network expansion to existing Vodafone customers, over the first year of the agreement

<sup>(a)</sup> Based on an average willingness-to-pay for network expansion across 574 customers who used Vodafone before and after the network expansion.

# The network expansion is valued by Vodafone customers across all corners of Australia

With benefits both for those in regional areas with directly expanded coverage and Vodafone's significant urban user base, existing Vodafone users across all corners of the country place a significant value on access to the network expansion. This value ranges from **\$900,000 annually for Northern Territory users** to **\$156 million annually for New South Wales users**.<sup>(a)</sup>

**Figure 2.1:** The value of network coverage increase to existing Vodafone users, by state and territory



Source: Deloitte Access Economics (2026).

Note: Urban/regional areas are aligned, where possible, to ABS regionality classifications, noting limitations given that modelling was completed at a SA3-level.

<sup>(a)</sup> Calculated based on average surveyed willingness-to-pay, applied to number of users. Separable average willingness-to-pay was calculated for Queensland, NSW, and Victoria, while other states/territories were aggregated due to sample size limitations.

# The total benefit of the network expansion to Vodafone customers is estimated at \$1.1 billion to 2030

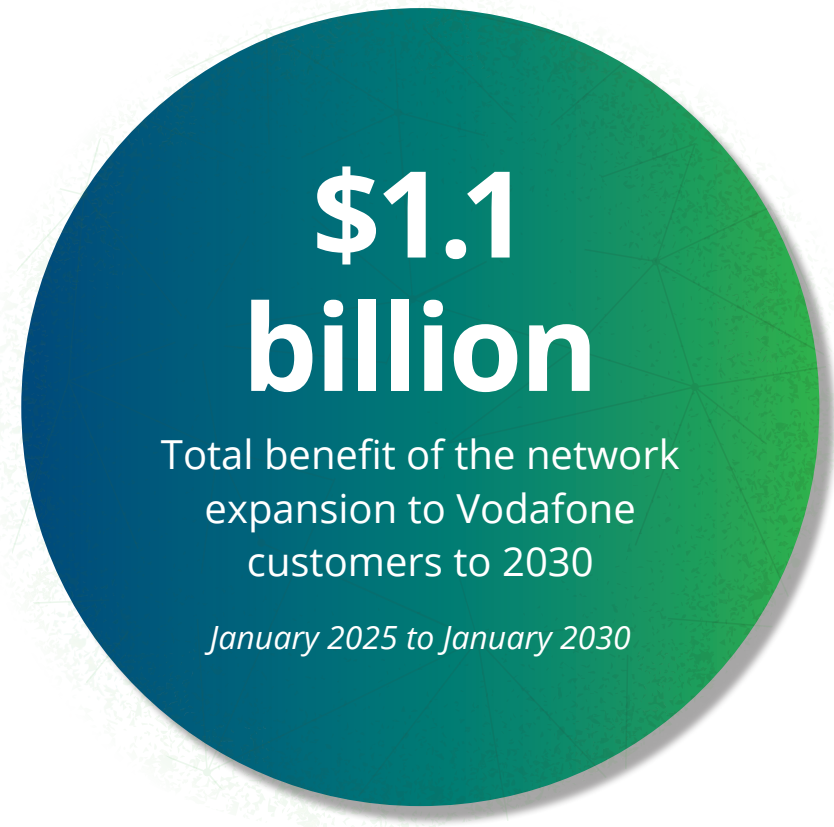
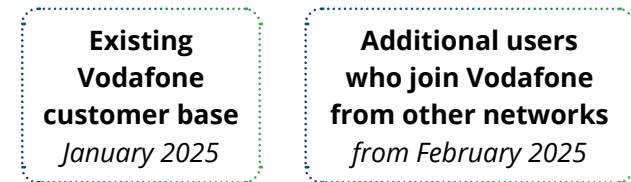
The value of the network expansion to Vodafone customers is expected to persist beyond just its first year, as users continue to benefit from improved coverage.

There are two distinct cohorts of users who experience the network expansion, and whom have been surveyed to place a significant value on the network expansion above the price paid for their plan:

- **Vodafone's existing customer base.** The additional value for these customers arises from improved regional connectivity on their existing Vodafone plan. This total benefit is estimated at \$341 million over the course of the first year since the network expansion (see page 1).
- **Users who join Vodafone, influenced by the agreement.** The additional value for these users arises from improved quality, features, or overall price savings compared to their previous provider. This benefit is estimated at \$4.6 million annually from additional users who joined in the first year post-expansion (see page 24). This benefit is expected to continue to grow over time as more customers take up a plan with Vodafone, incentivised by the network expansion.

This analysis applies an annual attrition rate to both cohorts to account for users who are expected to leave Vodafone over the lifetime of the agreement and thus will no longer receive value from the expansion.<sup>(a)</sup> A 10% discount rate is also applied.<sup>(b)</sup>

Across existing Vodafone customers in January 2025 that experienced this connectivity increase, as well as the users who are expected to join Vodafone from other networks, **the total benefit of the network expansion to current and future Vodafone users is estimated at \$1.1 billion to 2030.**<sup>(c)</sup> This is a net benefit to Vodafone customers which is distinct and additive to the value of Vodafone's investment in the network sharing arrangement.



<sup>(a)</sup> The attrition rate is an annual churn of 14.4% as reported by TPG Telecom for FY25.<sup>1</sup>

<sup>(b)</sup> This higher discount rate has been adopted to reflect that the arrangement is private sector activity and is subject to uncertainty across its lifetime, in line with Infrastructure Australia guidelines.<sup>2</sup>

<sup>(c)</sup> This analysis does not include new Vodafone customers that joined from other providers on the Vodafone network, given they would have access to the network expansion benefit regardless of their use of Vodafone.

# The top towns and regions positively affected by the network expansion

The regional network expansion brought a significant increase in Vodafone connectivity across Australia, with the top 20 impacted regions being spread across all states and territories in the country except for the ACT.

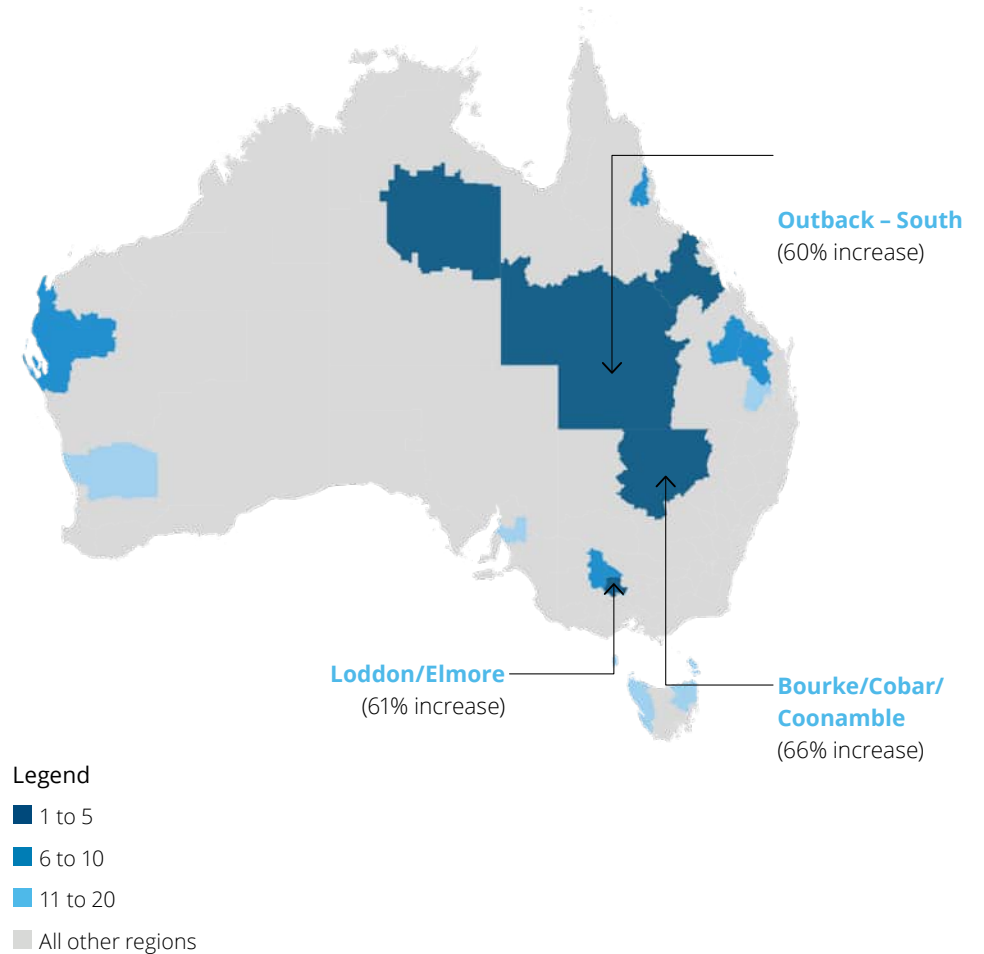
**Table 2.1:** Top 20 regions with the largest increase in population covered by Vodafone<sup>(a)</sup>

Region	State	Increase in population covered by Vodafone
Bourke - Cobar - Coonamble	New South Wales	66%
Loddon - Elmore	Victoria	61%
Outback - South	Queensland	60%
Bowen Basin - North	Queensland	59%
Barkly	Northern Territory	59%
Tablelands (East) - Kuranda	Queensland	54%
Biloela	Queensland	49%
Burnett	Queensland	46%
Murray River - Swan Hill	Victoria	46%
Gascoyne	Western Australia	42%
North East	Tasmania	39%
Lower North	South Australia	38%
West Coast	Tasmania	38%
Darling Downs - East	Queensland	36%
Wheat Belt - North	Western Australia	34%
Far North	Queensland	33%
Tumut - Tumbarumba	New South Wales	32%
Maryborough - Pyrenees	Victoria	32%
East Arnhem	Northern Territory	31%
Gippsland - South West	Victoria	31%

Source: Deloitte Access Economics (2026), analysis of coverage data provided by Vodafone.

<sup>(a)</sup> Defined as the percentage increase in the Statistical Area 3 (SA3) population, as of January 2025, who gained access to Vodafone following the network expansion.

**Figure 2.2:** Top 20 regions with the largest increase in population covered by Vodafone



Source: Deloitte Access Economics (2026), analysis of coverage data provided by Vodafone.

# Mt Bera Vineyards & Leap Australia | Enabling flexible work through improved connectivity



Greg Horner is the managing director of two businesses in distinct industries. Mt Bera Vineyards is a boutique producer of single vineyard wines with a cellar door and restaurant in the Adelaide Hills, and Leap Australia is an engineering software business with offices in Sydney, Brisbane, Melbourne, Perth and Auckland. Greg often works hands-on in the vineyard in the Adelaide Hills, operating farming machinery and ensuring smooth production. While at the property, Greg also manages Leap operations and staff remotely.

For Greg, managing staff across geographies, connecting with customers and suppliers, and accessing online services has been challenging in the past, particularly at Mt Bera where steep and hilly terrain causes connectivity shadows. Noticing a particular drop in connectivity in late January 2025, Greg contacted Vodafone customer support, who informed him that coverage was about to improve significantly as Vodafone activated its new shared regional network with Optus. Greg noted that the change in coverage quality before and after the network expansion in Mt Bera was 'like night and day'.

*"With the expanded coverage of Vodafone, even in the hollows all around our property, I can still get connection, make phone calls, and even data connection."*



This increase in mobile connectivity has already impacted business operations across Mt Bera Vineyards and Leap Australia, contributing to safety, more flexible work arrangements, better connectivity on-site and communication with staff, and opportunities to leverage technology to improve productivity.

Increased mobile connectivity has enhanced on-site safety, considering workplace risks typical of agricultural operations including heavy machinery use and the presence of snakes and other hazards around the property, with employees often exposed to these risks as they work in the fields by themselves. Greg noted that the ability to call in the event of an accident is not only critical in times of crisis, but also offers greater peace of mind to Greg and his staff. For Greg, knowing his team can reach out for help in an instant can alleviate daily concerns, allowing the team to focus on their work without concerns.

Furthermore, the network expansion has enabled Greg to work more flexibly across geographies. Equipped with a 4G SIM-enabled laptop, Greg can conduct business in more places with expanded coverage – for example, in transit in a car or outdoors in the vineyard. It has also allowed Greg to stay connected to customers, staff and suppliers even when working in the vineyard, which was previously not possible. Greg also stays connected with staff when travelling overseas for work by leveraging international roaming without the need to change SIM.

# Mt Bera Vineyards & Leap Australia | Enabling flexible work through improved connectivity



Expanded regional connectivity can also bring significant productivity benefits for businesses. These benefits can be particularly important for Mt Bera as a regional business involved in primary production, where without mobile connectivity those in certain areas of the vineyard would not have access to the internet. Better on-site connectivity has allowed Greg to make more data-driven decisions, have greater control over energy generating assets, and communicate more seamlessly with staff. These factors can play a pivotal role in improving the efficiency of business operations and quality of service to customers.

Agriculture is increasingly reliant on IoT technologies to drive efficiency and sustainability. At Mt Bera, Greg has already deployed a network of remote sensors using radio communications to collect crucial data on weather, soil moisture, evapotranspiration, and more. These sensors transmit information to a central hub, allowing Greg to monitor vineyard conditions and control irrigation remotely via a mobile app – empowering real-time, data-driven decisions that optimise water use and improve grape quality. With these foundations in place, there is also a significant opportunity to further leverage the potential of mobile network IoT solutions, enabling even broader connectivity, more advanced analytics, and seamless integration across the vineyard.

Since the network expansion, Greg also has helped to facilitate on-site solar energy generation and storage. The multiple solar arrays across the property are connected to Vodafone, which allows Mt Bera to monitor electricity generation and storage remotely. Access to this data helps the business save on electricity costs by better utilising energy generated from solar. Internet-enabled inverters also allow the electricity distributor to control energy feed-in to the grid during times of high renewable generation and low grid demand, which can help to maintain overall grid stability.

Further, improved regional connectivity also allows improved communication between staff across the vineyard. Staff at Mt Bera use Vodafone, which allows them to keep in contact with each other and Greg as they carry out operations. This allows staff to ask for help and resolve issues more quickly, update on progress and communicate any safety concerns, which helps day-to-day operations run more smoothly. For Greg, seeing the vineyard thrive in part thanks to smarter technology and fewer hurdles to communications with staff is a daily reminder of how technology can transform agricultural industries.

.....  
*“My whole life revolves around having a computer and phone that’s connected to the network, and being able to work that way is really important.”*  
.....

### 3. Improving value for money



# The expansion is expected to deliver improved value for money for users who join Vodafone, as well as broader price and quality benefits for other Australian mobile users

**By increasing the number of regionally connected providers, the network expansion can benefit not only users who join Vodafone, but other Australian mobile users through increased competition.**

The network expands Vodafone's coverage footprint across Australia, introducing an additional provider to many regional markets. By increasing the number of regionally connected network choices available to consumers, the arrangement strengthens competitive dynamics in the mobile telecommunications market without requiring duplicative infrastructure deployment. Given regional coverage is valued by mobile users nationwide, including those in urban areas, these competitive effects are not confined to regional markets but are felt at a national level. This increase in competition gives rise to two key effects:



There are **benefits to users who join Vodafone** following the network expansion, as indicated by an average reported price saving for those who have joined, and additional value placed on Vodafone plans above what is paid.



There are **broader competition benefits to mobile users beyond just Vodafone customers**, both regional and urban. Given the value of regional coverage to all Australians, the expansion has the potential to increase competitive pressures across the national market.

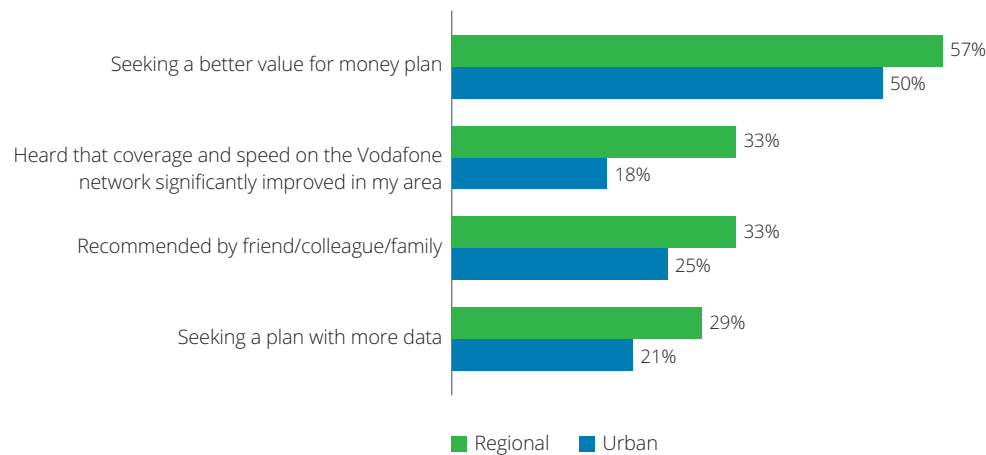
This chapter discusses the expected scale of these effects, both to-date and into the future.



# The rate of mobile connections porting to Vodafone increased by 29% in the year following the network expansion, with customers reporting they were primarily seeking better value

Vodafone's entry into regional markets was linked with an increase in the volume of mobile users joining Vodafone. It is conservatively estimated that 29% more mobile connections ported-in to Vodafone from other networks in the year following the network expansion, compared to the year prior.<sup>(a)</sup> Surveyed customers who joined Vodafone reported they were primarily driven by **better value for money**, indicating that Vodafone's improved regional coverage was a key motivator to join and enabled consumers to act on price advantages. This was reinforced by stronger awareness of local coverage and speed improvements amongst regional users, contributing to greater rates of porting in directly impacted areas.

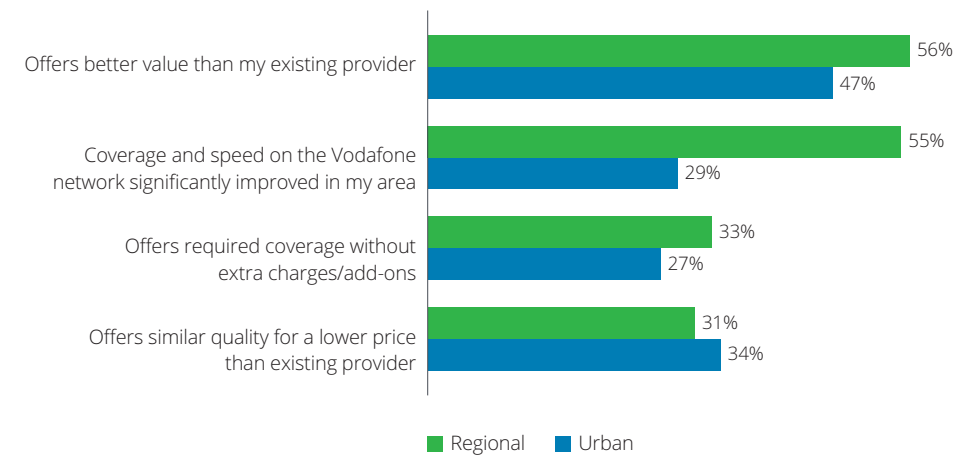
**Chart 3.1:** Top reasons for joining Vodafone, for those who ported-in since January 2025



Source: Deloitte Access Economics (2026) survey of mobile users. N=80.

Further to those who have already joined, there is also opportunity for this cohort to continue to grow, with **69% of customers who currently use other providers stating they are more likely to join Vodafone as a result of the network expansion**. This intent is primarily driven by perceptions of better value compared to their current provider, alongside improved coverage and speed – particularly amongst regional users – indicating that the network expansion continues to strengthen Vodafone's appeal as an option in directly impacted areas.

**Chart 3.2:** Top reasons customers using other providers are considering joining Vodafone since January 2025



Source: Deloitte Access Economics (2026) survey of mobile users. N=181.

<sup>(a)</sup> How new Vodafone users are counted in this analysis

This report considers subscribers who have joined the Vodafone following the network expansion. Given the expansion impacts users not just the Vodafone brand, but the entire TPG Telecom network, users who have joined Vodafone from another TPG Telecom brand have not been counted as new customers. Following the network expansion, the number of monthly mobile connections porting to Vodafone increased by 29%. Note this does not translate precisely to a number of new customers, as one customer can move multiple connections to the Vodafone brand. This estimate is likely conservative as it does not count the likely higher increase in those joining who previously relied on other forms of internet (e.g., satellite). Further, it only includes known port-ins of numbers from other networks, and not those who also changed numbers when moving to Vodafone.

# Those who moved to Vodafone due to the network expansion value the change at a total of \$4.6 million per year

Customers who took up a plan with Vodafone following the network expansion reported saving an average of \$63 per year relative to their previous provider.<sup>(a)</sup> For those in directly impacted regional areas, this saving was up to \$182 per year (see Chart 3.3).<sup>(a)</sup> On a household basis, this can mean savings from joining Vodafone of up to \$328 per household for an average household in directly impacted regional areas.<sup>(b)</sup> While significant, these results are subject to some uncertainty given the small sample size on which they are based.<sup>(a)</sup>

Reported price savings may be driven by the introduction of a new provider into markets that were previously characterised by limited choice and thus higher prices.

But the benefit isn't just about price. **For some customers, the value of joining Vodafone is greater than just the change in price paid.** New customers also reported gaining greater quality and features: 40% upgraded their plan's data in the process of joining Vodafone, and 23% joined for greater flexibility and features. This is evidenced by new customers indicating in survey data that they would be willing to pay more than they currently do for their plan. This additional value, also referred to as the additional consumer benefit resulting from joining Vodafone, is on average 65% higher than price savings, and amounts to \$4.6 million per year across all new customers, based on survey data.

**Chart 3.3:** Average price saving per year for regional users in directly impacted areas who joined Vodafone



Source: Deloitte Access Economics (2026). N=20.<sup>(a)</sup>



<sup>(a)</sup> Analysis of new customers who ported to Vodafone is based on a N=80 sample, including N=20 survey respondents in directly impacted areas who reported joining Vodafone from another mobile provider after January 2025, in addition to N=60 survey respondents in urban areas who reported joining Vodafone from another mobile provider. The total benefit of \$4.6 million to new customers is derived from the full sample of 80 survey respondents as outlined in Appendix D. Results do not consider consumers who left Vodafone after the expansion and should be interpreted with caution given the sample size.

<sup>(b)</sup> Considers an average household size of 1.8 adults.<sup>3</sup> Individual price savings and household sizes may vary.

<sup>(c)</sup> The value of joining Vodafone is estimated using the maximum additional willingness-to-pay for those who joined Vodafone for their Vodafone plans before they would have stayed with a competitor. This has been calculated through a Gabor-Granger choice experiment on N=80 surveyed respondents who joined Vodafone since the network expansion (see Appendix D for further detail of methodology).

# The expansion can drive improved price and quality outcomes beyond just Vodafone customers

At its core, the network expansion is a network and spectrum sharing arrangement that supports competition by **enabling an additional mobile network in areas where only two operators previously competed, and improving the allocation of spectrum**. Over time, competitive pressures can continue to grow as the arrangement encourages further investment in regional coverage and quality. Increased competition can place downward pressure on prices and improve average service quality. **International evidence has linked network sharing with market-wide price and quality<sup>(a)</sup> improvements:**

- Jung and Katz (2022) estimate that allowing spectrum sharing policies is associated with a 1.4% reduction in mobile prices. Jung and Katz also find that allowing spectrum sharing is associated with a 2.4% increase in mobile coverage after two years.<sup>1</sup>
- A national network sharing agreement in the Czech Republic was linked to a 10.8% price reduction<sup>(b)</sup> and a 10.6% increase in consumer surplus.<sup>2</sup>
- Allen et al. (2017) conducted a cross-market study drawing data from Europe, the US, and Oceania, to estimate that the addition of a national mobile network operator to a market is associated with a 7% price<sup>(b)</sup> reduction.<sup>3</sup>
- Both the Organisation for Economic Cooperation and Development (OECD) and the Australian Competition and Consumer Commission (ACCC) have advocated for greater infrastructure sharing in Australia's mobile markets, particularly in regional areas, to improve consumer prices and quality.<sup>4,5</sup>

**Regional coverage is a key competitive dimension in mobile markets, with relevance beyond just regional users.** Regulators including the ACCC have identified network coverage, including in regional areas, as a crucial point of differentiation for mobile service providers.<sup>4</sup> Close to four in five (78%) Australians rate regional network coverage as important or very important when choosing a mobile plan.<sup>6</sup> Given coverage is competed on and valued by consumers, changes to coverage can, through increasing viable provider options to consumers, alter market competition and deliver price and network quality benefits.

## Implications of the network expansion on price and quality outcomes for Australia's mobile market

Prior to the network expansion, there was less competition for consumers who valued regional coverage. By expanding Vodafone's coverage, the agreement enables more Australians to consider three viable networks when selecting a mobile plan, resulting in:



Downward pressure on mobile service prices



Upward pressure on quality outcomes for mobile services

### What does downward pressure on mobile prices mean for overall prices and investment?

Price and quality outcomes above are considered against what the market would have looked like without the network expansion, rather than prices before the agreement. While mobile prices have risen across the market in recent years, the arrangement is expected to result in lower price increases across the market than would otherwise have occurred.

Further, as increased retail competition places downward pressure on prices and thus margins, it may reduce incentives for future network investment. However, at the same time, by increasing infrastructure utilisation, network sharing improves margin per tower and thus incentivises 5G investment (see Chapter 4). Moreover, enhanced competition over regional coverage can encourage investment. Thus, while the relationship is complex, existing evidence generally indicates that spectrum sharing agreements are associated with greater investment.<sup>1</sup>

<sup>(a)</sup> The ACCC noted that, while it is expected that network sharing can improve network investment, such arrangements can have complex implications which are difficult to anticipate, as it represents "a significant change in the structure of the mobiles market".

<sup>(b)</sup> Proxied by average revenue per user (ARPU) and assumes medium usage of calls, texts and data. Price reductions increase with higher usage.

<sup>(c)</sup> Proxied by average revenue per user (ARPU).

# Andrea | Reliable coverage powering opportunity and connectivity for regional Tasmania



Andrea's story is one of the possibility unlocked by connectivity. Having relocated from bustling Melbourne to the remote Tasmanian town of Maydena, she initially found herself often cut off from others. Vodafone wasn't an option, and her previous provider's patchy service in regional Tasmania left much to be desired. "When I first moved here, there actually wasn't any options at all, like just nothing worked." This situation changed over the years as connectivity across providers began to improve. Following the Vodafone network expansion, a friend recommended that Andrea try Vodafone again. After joining, Andrea immediately saw the tangible cost-of-living benefit of Vodafone's regional expansion.

*"I literally got half of my bill off, switching both phones over for the exact same coverage and the exact same amount of data. So, I was quite happy."*

Now, Andrea enjoys seamless connectivity with no dropouts, no interruptions, and no difference between her regional Tasmanian home and Melbourne. She describes a sense of parity with metropolitan Australia in Maydena that simply didn't previously exist: "I have the same connection. We haven't had any lags or glitches... It's not a concern anymore."

For Andrea, reliable mobile coverage is more than convenience - it's an imperative. As a remote engineer for an international business, she depends on her mobile network to hotspot and work entirely from home, with no fixed internet connection. The quality of Vodafone's connection means she can participate in video meetings, field calls from colleagues across time zones, and deliver work from her mountain-side home just as effectively as from a city office.

Andrea is clear that her ability to live and work in Maydena hinges on reliable connectivity - without it, she would be forced to return to city life, rather than continuing the regional lifestyle she loves. Her mobile network is her sole connection for both work and personal life, providing the backbone for back-to-back Teams meetings and urgent calls with international colleagues, all from her home in regional Tasmania.

# Andrea | Reliable coverage powering opportunity and connectivity for regional Tasmania



Vodafone's connectivity impact for Andrea goes far beyond work. As the founder of Tas Gravity Girls, a non-profit with the aim of encouraging women to take up mountain biking in what is traditionally a male-dominated sport, Andrea relies on her mobile connection to run social media, livestream events, and build community. This was particularly prominent as Andrea livestreamed her progress during the grueling six-day Trans Tasmania Enduro. "[With mobile streaming] I was able to update my stories... you were able to follow along literally everywhere I was for that whole week." Thanks in part to the group's continued strong online presence, the Tas Gravity Girls has nearly tripled its participation at races since 2022, making mountain biking more accessible for women across Tasmania.

Andrea still remembers when travelling to a mountain biking event in Maydena meant hitting a connectivity "wall" – where there were only a few specific spots where you could stand to send a text. Now, the difference is night and day, making it possible for visitors, locals, and event organisers to stay connected and safe in Tasmania's most adventurous environments.

Today, the sense of isolation that once shadowed mountain biking in Maydena has been replaced by connectivity, fueled by the certainty that you can reach out, share, and belong – no matter where you are in the local landscape. Expanded coverage for Vodafone customers allows accomplishments to be celebrated widely, support networks to stay connected, and new voices to echo across the community.

For Andrea and so many others, mobile connectivity isn't just about a better signal; it enables her to live and work in Maydena, and has allowed her to forge connections that empower and inspire. Andrea's experience illustrates the importance of mobile connectivity for those who live in regional Australia. Further, her experience demonstrates how the Vodafone network expansion has enabled customers living in regional areas to both save on their mobile plans and stay connected both at home and on the move, improving the accessibility and affordability of mobile coverage.

*"Being able to be connected is what allows me to stay out here."*

# 4. Contributing to regional economies



# Mobile connectivity is driving economic growth and transformation in regional Australia

Mobile connectivity is fundamental to the economic vitality and future growth of Australia, with **95% of Australians using mobile phones to access the internet**.<sup>1</sup> Connectivity is particularly important in regional areas, where there is a higher reliance on mobile as a primary point of access to the internet.

Further, as the use cases of mobile across industries continue to expand, the importance of mobile access will continue to grow. Some of the largest industries in regional economies – including agriculture and construction – are evolving rapidly, with an increasing dependence on mobile-enabled technologies such as IoT sensors and real-time communication tools (see Figure 4.1 overleaf). These advances are transforming how regional businesses operate through streamlining processes, improving productivity, and enabling new ways of working that were previously out of reach.

## Network expansion can increase the capacity of regional economies

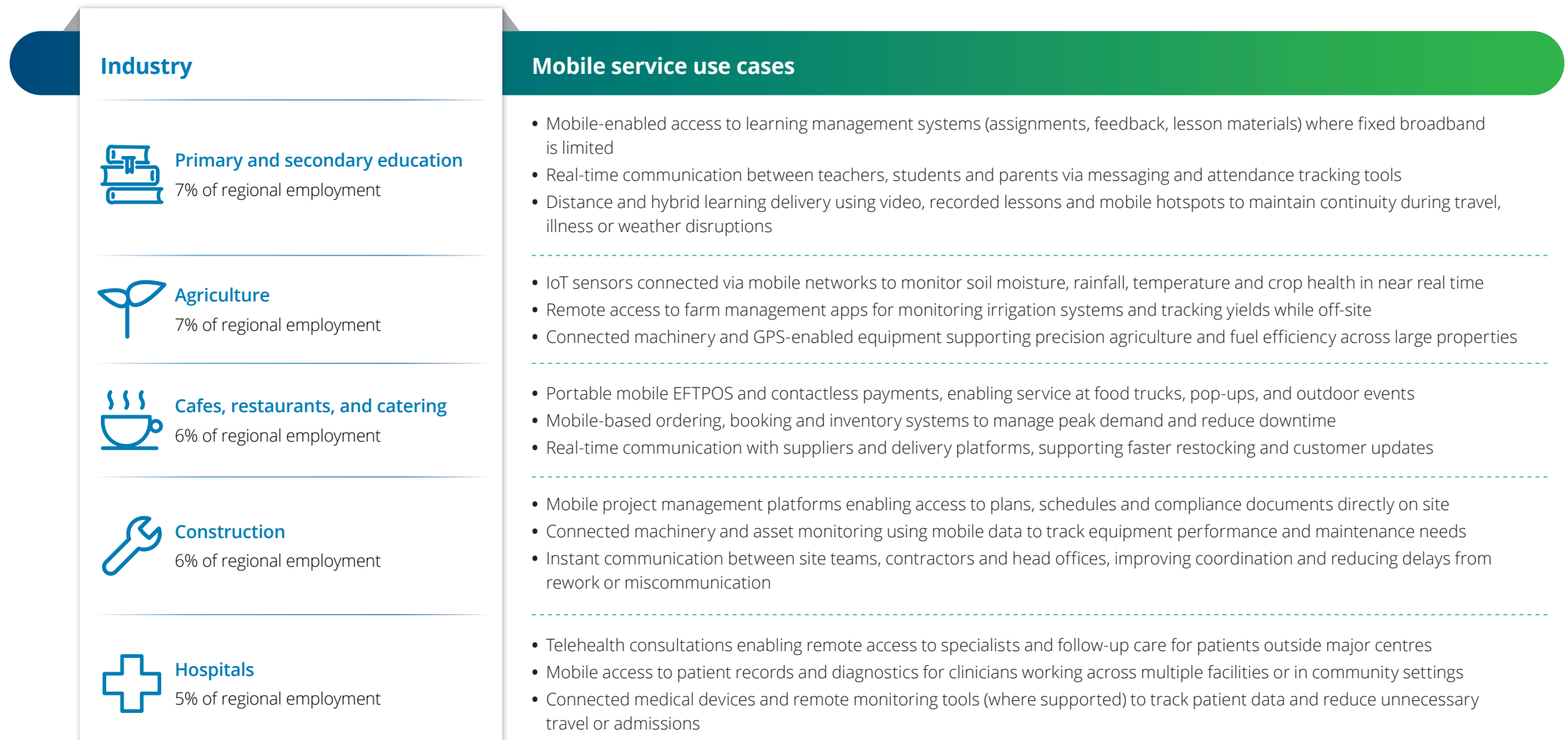
The recent expansion of the Vodafone network can drive significant positive change for regional communities and businesses. From January 2025, regional Vodafone customers living in directly impacted regional areas experienced an immediate uplift in local 4G and 5G access. This included improved download and upload speeds, enhanced call quality, and fewer connection dropouts. Further, while the network expansion has the greatest impact on those who live in regional areas, it can also deliver faster and more reliable access for urban users while on the move.

Network improvements that deliver increased connectivity can create significant opportunities for regional economies. With mobile connectivity being core to the operations of many regional industries and the productivity of regional labour forces, increases in connectivity and speed can provide opportunities for regional industries to expand, innovate, and remain competitive with those in urban areas. Importantly, enhanced mobile connectivity enables access to remote work and digital education, allowing more people in regional areas to pursue careers and learning without relocating. This is critical for retaining youth and young families in regional communities, supporting local prosperity and reducing urban flight.



# Mobile connectivity is driving economic growth and transformation in regional Australia

**Figure 4.1:** Indicative mobile service use cases in Australia's largest regional industries



Note: Industry classifications are based on ANZSIC-2 levels.

Source: Deloitte Access Economics (2026) based on Australia Bureau of Statistics (ABS), 2021 Census of Population and Housing.

# The expansion increased the number of Vodafone’s regional 5G sites, supporting an average 350% download speed increase across regional areas

The network agreement has not only expanded Vodafone’s coverage, but has also given thousands of regional customers increased access to 5G, supporting faster download speeds and reduced lag.

The network expansion included a significant investment from Vodafone into Optus’ 5G network, improving download speeds across regional Australia.

As a result of this funding, an additional 702 regional 5G sites have become available to Vodafone customers, as of December 2025. Additional increases in Optus’ regional 5G network continue to accrue over time, accelerated by Vodafone’s funding.

### More than just network coverage – how spectrum sharing has boosted network quality

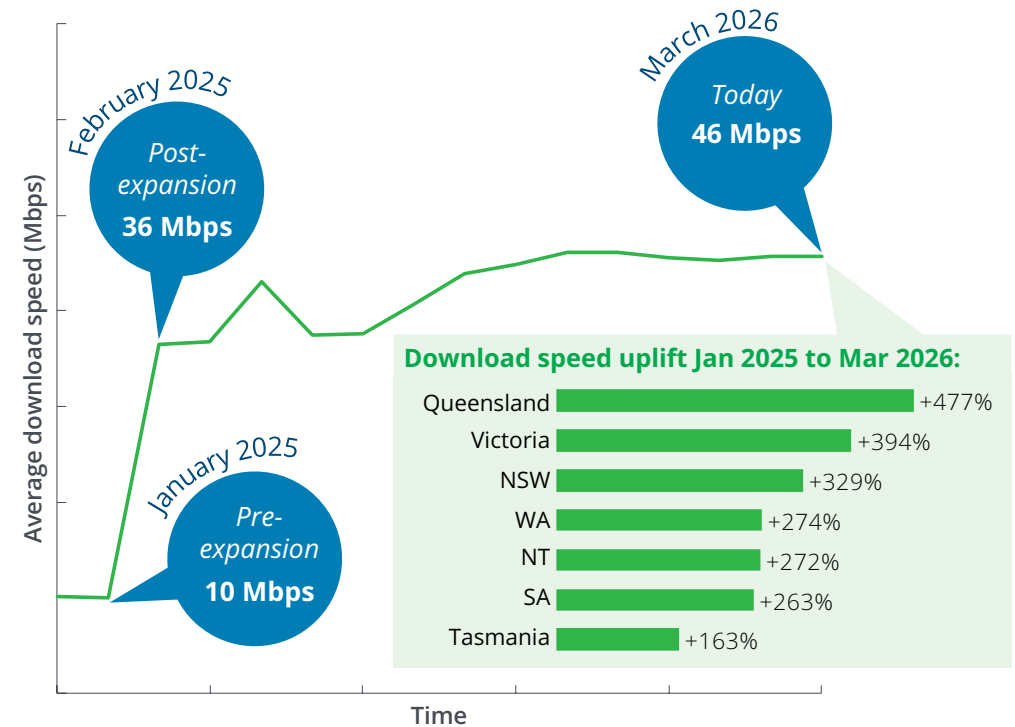
In addition to sharing mobile infrastructure, including additional 4G and 5G towers in regional areas, the network expansion has also resulted in Vodafone sharing regional spectrum with Optus in regional areas. Spectrum refers to the invisible radio “lanes” that connect mobile devices to towers — much like lanes on a highway. With fewer lanes, traffic can build up, leading to congestion, dropped calls, slower downloads, and inconsistent performance.<sup>1</sup> By pooling their spectrum, Vodafone and Optus effectively expand the number of available lanes, boosting 4G and 5G network capacity and delivering faster, more reliable speeds for all users.<sup>2</sup>

**Vodafone regional customers who lived in regional network coverage areas in January 2025 have gained an average 350% increase in download speeds since January 2025,<sup>(a)</sup> significantly improving user experience.<sup>(b)</sup>** Regional Vodafone download speeds rose by 262% immediately post-expansion. Since then, speeds have climbed a further 25% to a national average of 46 Mbps (Figure 4.2), or 350% above pre-expansion levels. This download speed increase enables significant improvements in customers’ ability to use mobile coverage for day-to-day tasks including streaming, video calls, and file transfers.

<sup>(a)</sup> Based on network sharing agreement funding from Vodafone directly tied to the rollout of the regional Optus 5G network.

<sup>(b)</sup> Download speeds are presented as averages based on Vodafone data. Individual experience may vary.

**Figure 4.2:** Average Vodafone monthly download speed in regional areas covered by the network expansion



Source: Deloitte Access Economics (2026), based on Vodafone data.

### Who benefits from improved download speeds?

All Vodafone users who live in regional areas impacted by the network expansion directly benefit from improved speeds. However, the benefit extends to many more customers, including urban customers who travel regionally. Three times more customers accessed mobile data in these regions than the number of people living there in an average week in December 2025.

# By unlocking regional productivity, the expansion is estimated to have contributed around \$89 million to the Australian economy in its first year

Faster download speeds can boost productivity for households and businesses across regional Australia by making tasks easier and quicker:



For **consumers**, faster download speeds can make daily tasks easier and quicker. Time savings may stem from quicker data and information access, seamless communication and collaboration, faster access to services when on the go, or fewer workflow interruptions. Vodafone customers in directly impacted regions have reported numerous examples of how improved network speeds are already translating into productivity gains (see Figure 4.3).



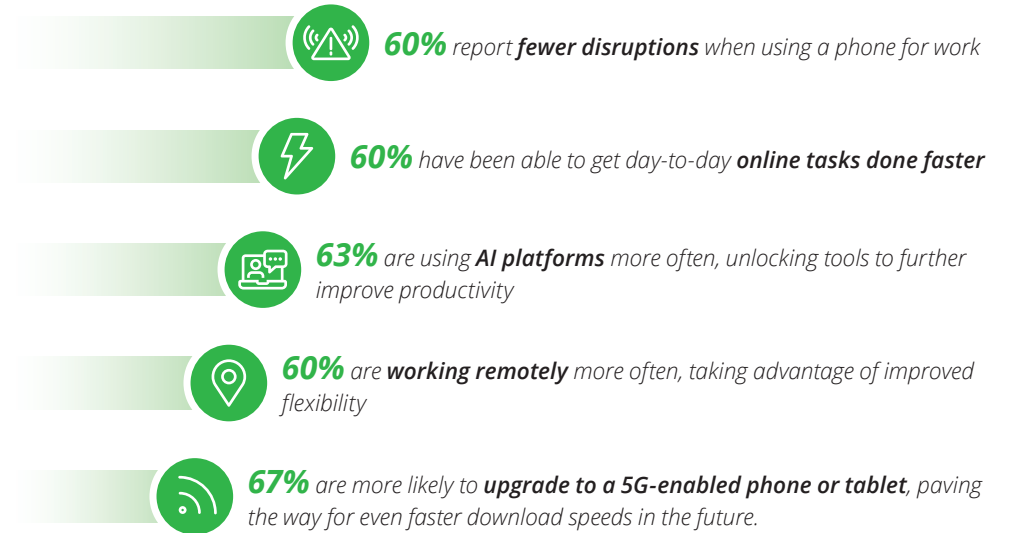
For **businesses**, faster download speeds and productivity share a clear economic link backed by empirical studies: higher speeds directly reduce latency in data-intensive tasks, increasing time spent on 'value-adding' activities like analysis and collaboration.<sup>1</sup>

## Regional download speeds were on average 29 Mbps higher over the first year of the network expansion, and reached up to 46 Mbps higher by March 2026

Given the importance of download speeds to productivity outcomes, increases in download speeds can have wide-ranging impacts on regional and national economies. For example, previous research has found that each 1 Mbps increase in nationwide download speed is associated with a 0.04% increase<sup>(a)</sup> in GDP.<sup>2</sup>

Economic modelling for this report leverages this relationship, specifically for mobile data usage of regional Vodafone customers, to estimate the economic opportunity associated with the average 29 Mbps download speed uplift enabled through the year by the regional network expansion (see Appendix C for further detail). This opportunity is framed in terms of productivity gains, or the estimated additional economic output (GDP) supported through increased productivity. Overall, Deloitte modelling estimates that **productivity gains from the network expansion have contributed an estimated \$89m to the Australian economy in 2025 alone.**

**Figure 4.3:** Productivity opportunities for regional Vodafone customers from the network expansion



# \$89 million


Contribution to the Australian economy through productivity gains in 2025

Source: Deloitte Access Economics (2026). N=153. See Appendix C for modelling methodology.

<sup>(a)</sup> As this relationship captures overall download speed, only a portion of the estimated value has been attributed to mobile data.

# As the regional 5G rollout continues, the economic contribution of increased regional download speeds is expected to grow to \$168 million by 2030

While the network expansion provided an immediate boost in 5G access for Vodafone customers, it also accelerates Optus' rollout of 5G sites across regional Australia by two years. Vodafone's **investment in 5G<sup>(a)</sup> across 2026 to 2028** is expected to enable its regional 5G network to increase to 1,500 sites by 2028, with a forecast 2,444 sites by 2031.<sup>1</sup>



**Vodafone's investment**

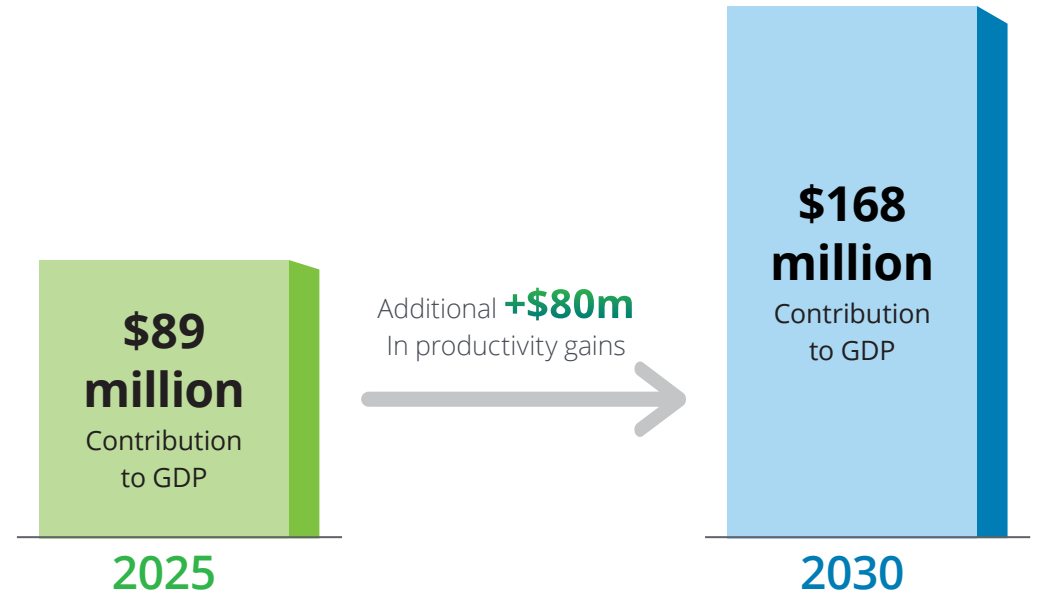
Through the network expansion, Vodafone has committed millions of dollars towards the deployment of 5G sites in regional Australia. This investment not only funds immediate tower builds but also supports long-term capacity growth, driving sustained productivity gains and social benefits for regional users.

The combined approach between Optus and Vodafone is expected to accelerate 5G rollout compared to standalone efforts. International evidence supports this, showing that flexible spectrum policies like network sharing can boost long-term investment in mobile infrastructure.<sup>2</sup>

A faster and more widespread 5G roll-out can unlock productivity gains through higher speeds in addition to improved network capacity and reliability. This enables more consistent use of data-intensive applications — such as cloud services, real-time collaboration, and digital workflows — supporting sustained efficiency gains across both businesses and households.<sup>3</sup>

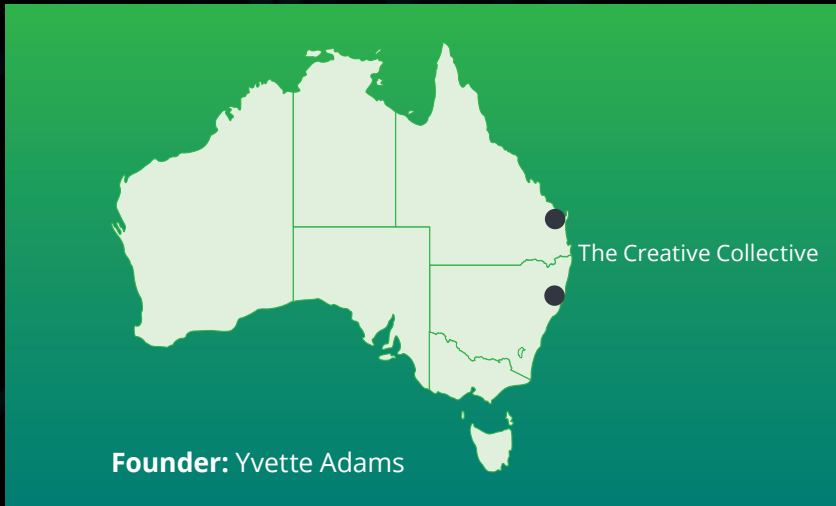
Overall, projected download speed increases alone are estimated to result in **productivity gains for Vodafone users from the network expansion growing from \$89 million in 2025 to \$168 million in 2030**, based on Deloitte modelling.

**Figure 4.4:** Long-term regional productivity benefit from increased regional download speeds (2025 to 2030)



Source: Deloitte Access Economics (2026). See Appendix C for further modelling detail.

# The Creative Collective | How mobile connectivity powers a modern marketing agency



Mobile connectivity is central to running The Creative Collective, a full-service marketing agency servicing clients across Australia and New Zealand, with offices in regional towns on the Sunshine Coast and in Newcastle. Yvette Adams, the agency's founder, describes herself as "an early adopter"; she started her business in 2007, moved fully to the cloud by 2009, and built it all initially while working from home around two young children.

Today the business has grown considerably. Yvette and her team operate out of commercial premises in their respective cities, and as an empty nester, she has more freedom to juggle work and play. Her phone, and her ability to hot spot with a good connection, remains integral to both. Being able to book travel, work, or complete life admin on the go on her phone, and pick up exactly where she left off on her desktop means she can stay productive wherever she is - something she says is essential for managing cognitive fatigue and running a business that never really stops.

*"I can work first thing in the morning from bed or at breakfast or after my morning walk, whenever I've got an idea and I want to work on it, I can do it at an optimal time on my phone."*

For Yvette and her team of marketing and digital specialists, a mobile phone is far more than a communication tool; it's an enabler of productivity and flexibility. It's how they message each other on internal threads, check client emails, join video calls, manage complex projects, and stay connected at events, airports and cafes via personal hotspot. She reflects that Vodafone connectivity was crucial during the years she ran the business around school pick-ups and her children's sport, while delivering training programs in a range of rural, remote and regional locations across Australia.

Further, as the business has expanded from a sole director operation to a business partner, 12 staff and around 30 contractors across Australia, so too has her reliance on reliable mobile coverage.



# The Creative Collective | How mobile connectivity powers a modern marketing agency



As a full-service marketing agency, The Creative Collective's ability to deliver work across all aspects of marketing, training and AI depends significantly on reliable connectivity. For Yvette, her mobile phone acts as both a communications tool and a portable workspace, allowing her to capture ideas, collaborate with clients and access AI tools wherever she is. Those workflows then continue seamlessly across to her PC for deeper analysis, editing and delivery. Yvette tests and deploys a multitude of AI tools — large language models (LLMs), note-takers, image generation, video editing and digital marketing tools — across both mobile and PC. For example, she might facilitate a consultancy session, photograph the whiteboard, upload it to an AI app from her phone before her first coffee, then refine the outputs on her desktop to produce a strategic recommendations report for a client once she is at the office (or wherever her place of work is for the day), in a fraction of the time it once took.

*"You're kind of going between two worlds all the time... and I'm optimising my productivity with the phone."*

Today whilst developing and delivering AI training for a wide range of organisations and industry bodies, Yvette also helps clients and participants get real value from new tools enabled by reliable mobile connectivity and cloud-based working. She downloads and tests new apps across both mobile and computer, with those that pass the test making it into training materials as comparison tables, screenshots, demos and step-by-steps. She gets a genuine kick out of watching 'lightbulbs go off' as the people she trains realise they too can handle business functions and life admin seamlessly across their devices – whether they are at home, in the office or travelling – leaving them motivated, empowered and a little surprised by the possibilities.

Improvements to Vodafone's coverage have given Yvette and her team greater confidence travelling to continue delivering training in a range of locations. Yvette's work regularly involves moving between conferences, webinars, client meetings and flexible workspaces across Australia and New Zealand. In one recent two-week period, she travelled between Cairns, Brisbane and New Zealand. Across these locations, Vodafone has enabled her to remain connected to clients and her team throughout. As a consultant, speaker and strategist presenting across Australia and New Zealand, reliable connectivity isn't a convenience for Yvette, it's what makes her work and business model possible.

The Creative Collective's experience demonstrates the fundamental role mobile connectivity now plays for businesses that need to operate flexibly and productively — and for Yvette, Vodafone's expanding network has meant not just staying connected herself, but being better placed to help others do the same.

# Improved mobile connectivity can catalyse regional entrepreneurship and innovation

Further to the benefit of increased download speeds, mobile connectivity can be a foundational enabler of entrepreneurship and innovation. Enhanced connectivity allows individuals and businesses to better embrace the digital economy, extend operations to new markets, and connect with fewer barriers to customers and suppliers across Australia. Thus, network expansion can have multifaced benefits for regional economies:

- **Enabling digitalisation:** Improved connectivity encourages access to digital tools, which are essential inputs for business creation and the scaling of innovative enterprises. Over **85% of Australian businesses stated that improved connectivity helped unlock innovation through using AI and IoT.**<sup>1</sup> This is important given that over 60% of firms believe that smarter facilities incorporating IoT and connected devices are essential for improving efficiency.<sup>2</sup>
- **Creating efficiencies:** Enhanced connectivity streamlines business operations by enabling employees to access critical data and resources from anywhere. Evidence shows that **better mobile internet access for employees is closely linked to higher labour productivity.**<sup>3</sup> This flexibility supports more agile decision-making and smoother communication.
- **Growing business activity:** Improved connectivity opens up access to new markets and allows businesses to diversify their service offerings. Studies show that small and medium **firms with advanced digital engagement are 50% more likely to achieve revenue growth and are 14 times more likely to introduce new products or services,** highlighting the critical role of digital infrastructure in supporting business expansion and innovation.<sup>4</sup>
- **Unlocking potential:** Widespread mobile broadband adoption is closely linked to increased rates of entrepreneurship.<sup>5</sup> Recent UK research reveals that **60% of entrepreneurs depend on connectivity to operate their businesses,** with further improvements projected to support the creation of 49,000 new businesses by 2036.<sup>6</sup> This demonstrates how enhanced digital infrastructure can unlock new opportunities and drive economic growth.

As Vodafone's network reach grows, these entrepreneurship and innovation benefits are expected to accelerate the diversification and competitiveness of regional economies.

## The regional network expansion propels innovation

The network expansion is already supporting a step change in how regional businesses and communities embrace innovation. The improved reach and quality of the network enables more seamless access to digital technologies and platforms, making it easier for entrepreneurs and established firms alike to pursue new ideas and scale their operations. Among regional Vodafone customers in the workforce, 61% stated that they are now able to better complete digital creative work, while 47% stated they are more likely to start a new business venture in a regional area. As digital tools and mobile services become more accessible, regional enterprises are better positioned to adopt advanced solutions and participate in emerging markets, supporting the continued diversification and growth of regional economies.



# Brewtech | Keeping mobile coffee machine technicians connected



**Brewtech**  
National

 **35 mobile technicians based across four states**

**Managing director:** Craig Milton



Brewtech is an Australian business specialising in the servicing of professional coffee machines and barista equipment, with operations spanning urban and regional areas in Victoria, New South Wales, Queensland, and Western Australia. The company services a network of over 4,500 coffee machines nationwide, including a significant and growing presence in regional areas. Brewtech employs around 35 highly mobile technicians that traverse the east coast corridor – from Melbourne through Sydney and Brisbane to the Sunshine Coast – in addition to Perth and surrounds, to ensure professional coffee machines continue operating smoothly throughout the day.

For Brewtech's team, smooth operations on the road is essential to enabling local cafes to continue to serve regional populations. There's pressure to minimise coffee machine downtime, especially for small businesses in regional towns where a broken machine can mean lost income and foregone customers. With approximately 85% of Brewtech's workforce operating outside of traditional offices, the business is highly mobile. Brewtech's Australia-wide technicians are mobile-reliant, using mobile devices while on the move to manage day-to-day workflows, customer communication, and job scheduling. For Brewtech, stable mobile connectivity isn't a luxury, it's business-critical.

In the past, network blackspots in regional areas have meant that Brewtech's central office has been unable to contact their technicians, which can worsen efficiency, cause navigation problems, and reduce their ability to undertake urgent requests. Improved connectivity has made it easier for Brewtech to operate efficiently across regional areas. With more reliable coverage and greater bandwidth, technicians have been able to complete day-to-day tasks faster, including downloading large manuals and updating machine software in real time. Now, Brewtech's team can respond faster to urgent calls, keep clients informed, and solve problems on the spot – helping small business owners breathe easier when things go wrong.

Craig Milton, Managing Director at Brewtech, highlighted how improved regional connectivity on Vodafone is already noticeably impacting his business. Citing an example of a technician who regularly services machines on-route between Sydney and Melbourne, he noted how technicians are now accessing more consistent network coverage along regional routes, enabling them to complete everyday tasks such as communicating with clients and accessing support with fewer hiccups.

*“Communication is absolutely essential and there has been an incredible improvement in network coverage.”*

# Brewtech | Keeping mobile coffee machine technicians connected



Reliable mobile coverage is quickly becoming a vital enabler for Brewtech's future growth, empowering the company to deliver seamless, intelligent service wherever customers need it. Brewtech's growth story increasingly hinges on its ability to leverage IoT technology for smarter, more efficient service – an opportunity which is often only possible with robust mobile coverage. Brewtech currently services roughly 4,500 coffee machines, including 200 to 300 which are now connected to Brewtech technicians at all times via IoT technology. 70 of these IoT machines are connected via the Vodafone mobile network, often in regional areas with lower access to Wi-Fi.

IoT can allow for real-time remote diagnostics and troubleshooting, reducing the need for unnecessary travel and enabling proactive maintenance. In a recent example, a recurring issue with a coffee machine losing temperature during the day was initially believed to be a fault with the machine itself. However, by connecting the machine via IoT, it was identified that the steam pressure drop coincided with hot water being used elsewhere in the kitchen, providing a level of operational insight that was previously not possible. For café owners, it means fewer disruptions and more certainty – allowing them to focus on customers instead of potential technical problems. As IoT technology continues to accelerate and cafe culture continues to expand across regional Australia, Brewtech is expecting its regional IoT opportunity, fueled by Vodafone, to grow exponentially.

Vodafone's expanded regional coverage has enabled Brewtech to deliver faster response times, improve route planning, enhance overall service efficiency, and leverage its IoT opportunity. These improvements have reduced downtime for regional customers and allowed Brewtech to place greater emphasis on building strong client relationships. More broadly, Brewtech's experience illustrates the transformative role of reliable, high-speed connectivity for mobile-reliant and IoT-enabled businesses, supporting not only immediate operational gains but also long-term growth. Aided by Vodafone's network expansion, Brewtech is well positioned to deliver consistent, high-quality service across both urban and regional Australia.

*"20% to 30% of Brewtech's IoT machines are connected through the Vodafone network, an opportunity we can pursue for the business and profitability."*

# 5. Better connecting regional Australians



# Improved connectivity is addressing the regional-urban mobile access gap

Following the regional network expansion, Vodafone users have access to three times the number of mobile sites in regional areas (see Figure 5.1), extending national network coverage by 600,000 square kilometres nationwide to over 1 million square kilometres. Vodafone users believe that coverage expansion has improved equity of service access; 55% of those in directly impacted regions believe that improved coverage helps to close the regional-urban mobile access divide.<sup>(a)</sup> Improving equity for regional communities is a core objective of the Australian Government’s Better Connectivity Plan for Regional and Rural Australia which includes over \$1.1 billion investment to improve regional mobile connectivity.<sup>1</sup>

The network expansion has substantially improved regional Australians’ experience with mobile connectivity. Overall, regional Vodafone users have reported a marked improvement in service performance following significant investment in expanded coverage, reporting an **average 25% decrease in time spent without connectivity (Figure 5.1)<sup>(b)</sup>**.

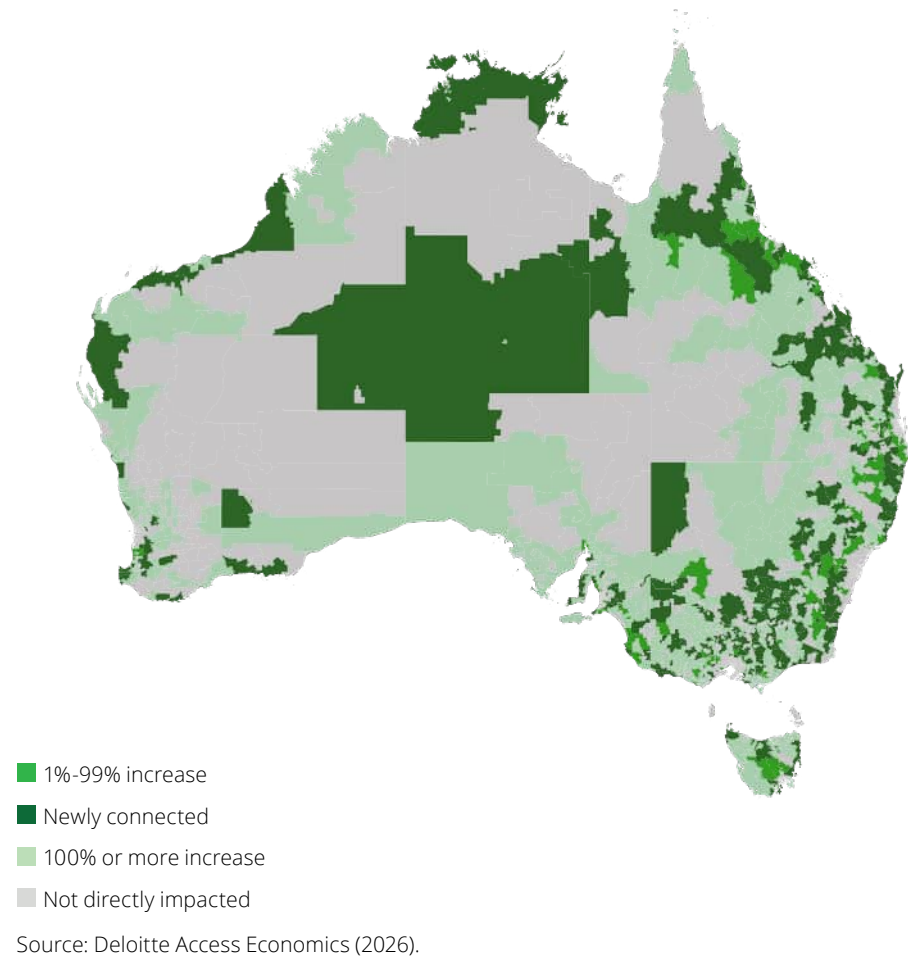
**Figure 5.1:** Change in mobile experience post-network expansion



Source: Deloitte Access Economics (2026). See Appendix C for further modelling detail.

More reliable mobile connectivity is strengthening the connections of regional Vodafone users with friends, family, and the broader community. In impacted regional areas, **42% of users reported feeling more able to participate in community events, and 47% of users reported being able to talk to family and friends more often**, driving a 24% increase in calls since the network expansion. More reliable connection to support networks has contributed to improved perceptions of safety, with 35% of regional Vodafone customers reporting that they feel safer due to improved connection to friends and family, underscoring the broader social benefits of improved connectivity.

**Figure 5.2:** Change in Vodafone coverage (cell towers) by postcode



<sup>(a)</sup> Respondents were asked the extent to which they agreed with the statement that “I feel I have increased access to the same opportunities available in urban areas.”.

<sup>(b)</sup> Findings should be interpreted with some caution, as they are based on self-reported behaviour from a survey sample of 161 Vodafone customers, and may not be fully representative of all users.

# Improved connectivity has increased digital services use in regional Australia

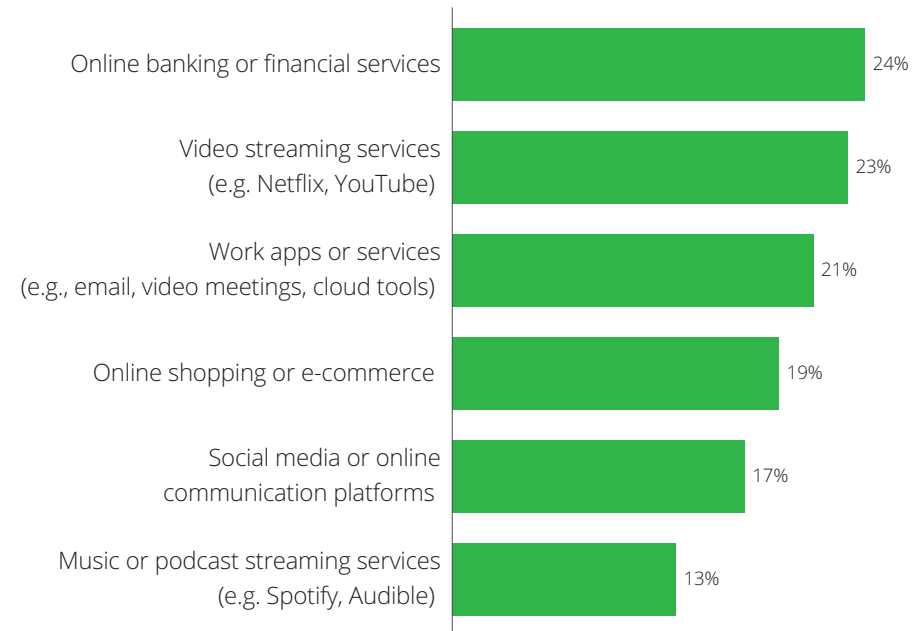
Improved mobile connectivity can increase access and use of digital services, including those essential to social wellbeing. Digital service access is particularly important for people in regional areas who face additional barriers to access in-person services, including distance, time, travel costs and lack of public transport.<sup>1</sup>

Following the network expansion, Vodafone users in directly impacted regions report a clear increase in digital engagement. **Over a third (36%) indicate that their use of online services has increased**, with around a quarter accessing online banking and financial services more frequently, alongside greater use of video streaming and work-related applications (see Chart 5.1).

This behavioural shift is reflected in Vodafone's network data. The total volume of data downloaded by regional users has **increased by 90% across all states and territories** since the network sharing agreement. Growth has been particularly pronounced in the Northern Territory, where data usage rose by 188% between January 2025 and January 2026—an important outcome given that regional NT communities have historically recorded digital inclusion levels well below the national average.<sup>2</sup>

Overall, increased service use can reduce geographic disadvantage and improve quality of life in regional communities, in addition to supporting improved social outcomes, including for health and education (see overleaf).

**Chart 5.1:** Share of Vodafone users in directly-impacted areas that have increased use of selected online services



Source: Deloitte Access Economics (2026), survey of mobile users. N=169.

# Improved connectivity has increased digital services use in regional Australia

## Increasing access to essential services for regional Australians

Beyond access to entertainment, social media, and e-commerce, Vodafone customers in directly impacted regional areas have gained increased access to essential services since the network expansion:

- **12%** have accessed **government services more**
- **13%** have increased their use of **telehealth or online health services**
- **12%** of students and those in the workforce have accessed **more online education or training**.

Better digital service access can improve socio-economic outcomes for those in regional areas. For example, health outcomes can be improved by connecting regional patients to specialists via telehealth,<sup>1</sup> while online learning and skill development can improve employment and further education prospects.<sup>2</sup>




Online service access is particularly valuable for older cohorts in regional areas, who often face mobility barriers accessing essential services in person. Improved mobile connectivity helps overcome these constraints by enabling more reliable digital access. Among those **aged over 55** in directly impacted regional areas, **31% report accessing government services more frequently**, while **25% report increased use of telehealth or online health services** following the network expansion.



# Jesse | Expanding access and connection in regional Victoria



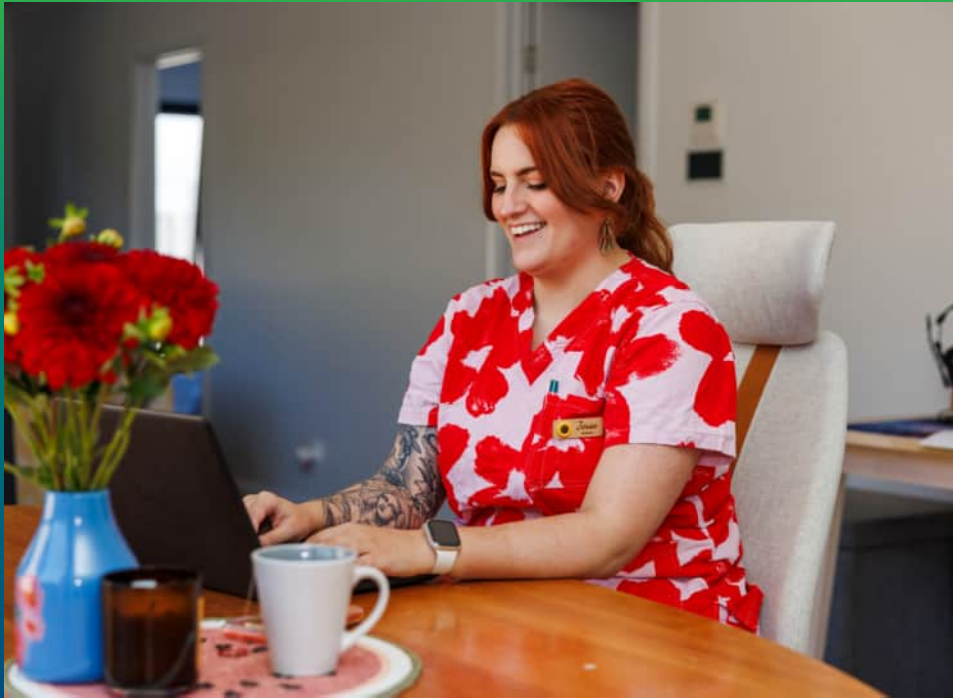
## What improved connectivity means for Jesse

-  Enabling essential healthcare services
-  Supporting social cohesion
-  Facilitating work and further study

After relocating from central Sydney to Mildura, midwife Jesse has relied on Vodafone for over a year to support her work across the broader Sunraysia region, while also maintaining social connections and regular contact with family. Her role involves extensive travel – sometimes upwards of 300 km in any direction – to provide home-based care to new mothers across Buronga, Dareton, Wentworth, and surrounds, including many from Aboriginal and Torres Strait Islander communities who may not have access to private transport. For these families, who can live up to 35 km from the nearest hospital, reliable mobile connectivity is not just convenient but essential for accessing timely healthcare.

Jesse's decision to join Vodafone was initially driven by practical considerations: aligning with her partner's provider, consolidating bills, and securing a better deal for internet and mobile services. However, as she notes, her experience as a regional Vodafone customer has exceeded expectations – particularly in Dareton, a small town with known coverage challenges. While colleagues on other networks have struggled to get a signal inside the local primary health clinic, Jesse can make calls directly from her desk, ensuring continuity of care and the ability to escalate for help quickly if required.

# Jesse | Expanding access and connection in regional Victoria



## 12%

of regional Vodafone customers who are studying or in the workforce have accessed more online education or training<sup>1</sup>

Beyond enabling essential services, Vodafone's expanded coverage has had a marked impact on the social wellbeing of its customers. The importance of this ongoing connection is heightened in cases such as Jesse's, where relocation to a new regional town has disrupted established support networks and led to increased risks of isolation.

Vodafone's expanded regional coverage has also supported continued professional development. While working full-time, Jesse is undertaking a graduate certificate in primary maternity care online, accessing lectures and submitting assignments using her mobile connection. Jesse highlights the flexibility and confidence enabled by reliable connectivity, explaining that she often listens to university tutorials while driving home from work. This ongoing study directly enhances her professional practice. For example, it has increased her ability to access important resources such as the Pharmaceutical Benefits Scheme in her work, supporting more informed decision-making and improving patient care outcomes.

*"My partner and I have no connections [here]... it's easy to feel isolated... but that connectivity – like [my partner's] weekly call with his dad – improves your mental health, your social life, your everything."*

# The network expansion has enhanced regional mobility

## The network expansion increases travel comfort for both regional and urban residents

Beyond the direct benefits of increased connectivity for people in regional areas, the network expansion also reduces barriers for all customers – urban and regional alike – to travel regionally more for work, leisure and connecting with family and friends. Indeed, three times more customers accessed mobile data in these regions than the number of people living there in an average week in December 2025.

Improved mobile coverage increases regional mobility in Australia by addressing the psychological and practical barriers to regional travel. More consistent and reliable coverage decreases the perceived risk of remote travel, such as from a lack of roadside assistance services, which can encourage more frequent and longer-term exploration of regional areas.<sup>1</sup> This occurs through:

- **Better access to reliable navigation tools** such as maps, which reduces the perceived and actual risk of becoming lost. Since the network expansion, around 60% of Vodafone customers feel more confident navigating and travelling to regional areas with better network coverage.
- **Connection with loved ones.** Ease of staying connected with friends, family and other support networks is a primary reason why over half of Vodafone users (55%) in regional areas feel safer following the network expansion.
- **Access to emergency or repair services.** Around 71% of mobile users feel safer in dangerous situations when they have their mobile device.<sup>2</sup> Reliable signal ensures a 'lifeline' is always available, reducing the perceived risk of travel.<sup>3</sup>

Overall, **42% of surveyed Vodafone customers stated that they have felt more able to travel regionally** due to increased coverage, underlying the importance of mobile connectivity in the choice to travel. On average, Vodafone customers reported undertaking an additional 1.3 regional trips in the past year. While significant, this result is subject to some uncertainty given it is based on self-reported behaviour and may not be fully representative of all users. Additional regional travel can provide a meaningful boost to regional economies, with Australians estimated to spend an average of \$382 per trip in regional Australia.<sup>(b)</sup>

Another enabler of greater regional mobility is the ability to work remotely, with **60% of regional Vodafone users stating that expanded network coverage has enabled them to work remotely more frequently**. When combined with the lifestyle and leisure benefits of regional areas, improved connectivity can help attract and retain residents by making remote work a more viable long-term option.

**Figure 5.3:** Change in Vodafone customer travel and tourism to regional areas

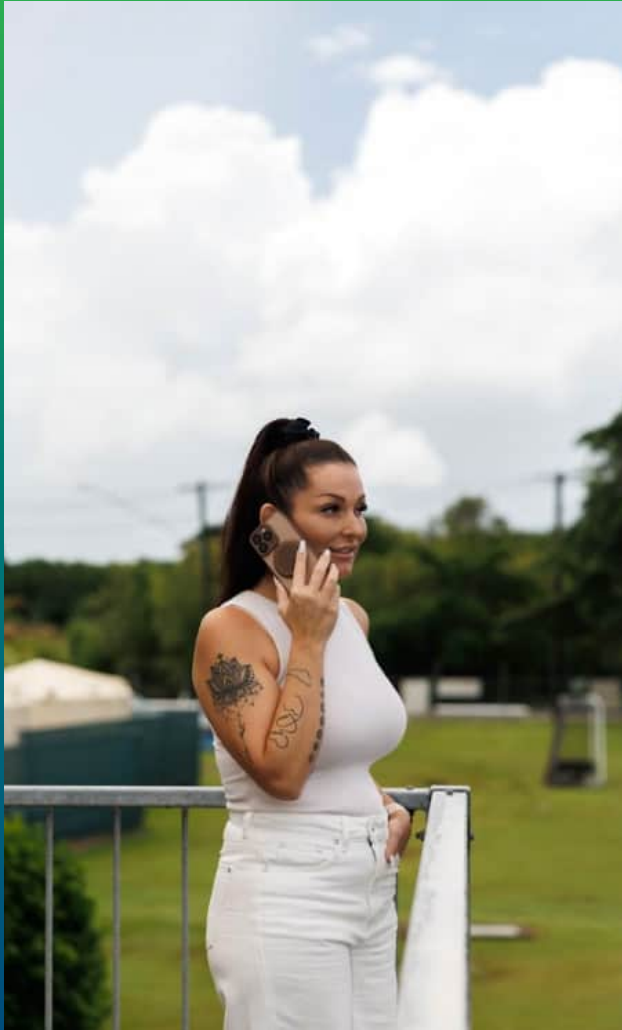


Source: Deloitte Access Economics (2026) survey of mobile users (N=759).




<sup>(a)</sup> Findings should be interpreted with some caution, as they are based on self-reported behaviour from a survey sample and may not be fully representative of all users.

<sup>(b)</sup> Based on an average spend across both daytrips and overnight trips using Tourism Research Australia Domestic Travel Statistics data for September quarter 2025.

# Simone | Empowering mobility and safety in northern Queensland



## What improved connectivity means for Simone

-  Staying online in extreme weather
-  Working in regional communities
-  Clients and family always connected

Simone, a Trinity Beach resident, joined us to speak about the network expansion remotely as Cyclone Narelle made its way through north Queensland just outside her window. This was a fitting reminder of how critical connectivity is in regional Australia. Frequent weather events that can bring blackouts and disruptions to home internet connections mean that mobile access often isn't just a convenience, but a lifeline.

Simone joined Vodafone soon after relocating from Victoria to Trinity Beach, prompted by a family outing where she had no reception with her previous provider – while her father-in-law, on Vodafone, stayed connected throughout. Having reliable connectivity was a deciding factor in her decision to join Vodafone, especially given the frequent disruptions that weather can bring to regional Queensland.

Simone's lifestyle is in part enabled by Vodafone's coverage. She is the founder of Inamorata Studios, a wellness business in Trinity Beach where she brings together her skills as a qualified hairdresser, wigmaker, nutritionist and Pilates instructor, to support women and children through services focused on identity and empowerment. In addition to her business, Simone regularly travels to remote Indigenous communities, such as Pormpuraaw, to deliver children's programs, support women's shelters, and run mentoring initiatives. The ability to keep her business running from anywhere is essential to allowing Simone to undertake this critical work – helping women and children feel seen, heard, and empowered.

# Simone | Empowering mobility and safety in northern Queensland



Wherever she goes, Simone relies on her Vodafone mobile connection to stay in touch with clients for her business in Trinity Beach. Vodafone's connectivity allows her to maintain communication channels with clients, automate business activities, and digitise her services – such as offering online Pilates classes. "These days, if you're not online, you don't exist."

The benefits of reliable coverage extend beyond Simone herself. Her clients – many of whom face vulnerable situations such as battles with cancer – often need to reach her urgently or privately, preferring phone calls or online channels. Reliable mobile access lets Simone cater to these needs, attending to "very, very private, personal" matters without disruptions.

Today, Simone's entire family (of nine people) are with Vodafone. After seeing the benefits of reliable coverage and the compelling value of Vodafone, Simone encouraged her family to join, and her experience convinced them to make the move for connectivity and peace of mind.

Simone's experience demonstrates how reliable regional coverage enabled by Vodafone's regional network expansion allows her to stay connected and support her clients, no matter where her work takes her. Ultimately, expanded coverage has a key role in keeping Australians safe, connected, and mobile, even in the face of the country's vast geography and unpredictable weather.

*"Communication is the key to success in my book – so having those open channels for [my clients] to be able to connect with me at all times... is a non-negotiable."*

# Appendix A: Coverage changes and value to existing users, detailed



# Coverage change and value to existing users

**Table A.1:** Population coverage change and value to existing Vodafone customers, by state/territory and urban/regional classification

State/territory	Urban/regional classification <sup>(a)</sup>	Population living in areas with increased connectivity	Value to existing local Vodafone users (as of Jan-25) <sup>(b)</sup>
New South Wales	Regional	1,250,700	\$3,791,000
	Urban	22,600	\$152,183,000
	<b>Total</b>	<b>1,273,300</b>	<b>\$155,974,000</b>
Victoria	Regional	956,100	\$8,629,000
	Urban	26,200	\$76,325,000
	<b>Total</b>	<b>982,200</b>	<b>\$84,954,000</b>
Queensland	Regional	807,900	\$1,103,000
	Urban	72,900	\$42,376,000
	<b>Total</b>	<b>880,800</b>	<b>\$43,479,000</b>
South Australia	Regional	403,000	\$1,243,000
	Urban	16,700	\$18,929,000
	<b>Total</b>	<b>419,600</b>	<b>\$20,172,000</b>
Western Australia	Regional	445,200	\$1,269,000
	Urban	4,900	\$28,563,000
	<b>Total</b>	<b>450,100</b>	<b>\$29,832,000</b>
Tasmania	Regional	295,900	\$354,000
	Urban	9,900	\$1,094,000
	<b>Total</b>	<b>305,800</b>	<b>\$1,448,000</b>
Northern Territory	Regional	51,600	\$69,000
	Urban	4,600	\$846,000
	<b>Total</b>	<b>56,200</b>	<b>\$916,000</b>
Australian Capital Territory	Regional	NA <sup>(c)</sup>	\$0
	Urban	0 <sup>(c)</sup>	\$4,621,000
	<b>Total</b>	<b>0<sup>(c)</sup></b>	<b>\$4,621,000</b>
Australia	Regional	4,210,300	\$16,458,000
	Urban	157,800	\$324,937,000
	<b>Total</b>	<b>4,368,100</b>	<b>\$341,395,000</b>

Source: Deloitte Access Economics (2026), based on Vodafone connectivity data and Deloitte Access Economics (2026) survey of mobile users.

<sup>(a)</sup> Urban/regional areas are aligned to ABS regionality classifications, noting limitations given that modelling was completed at a SA3-level.

<sup>(b)</sup> This is a breakdown of the value of the Vodafone network expansion both to Vodafone users with increased connectivity and to Vodafone users who benefit from the expansion when travelling. This benefit totals \$341 million across Australia (see page 16 for further detail).

<sup>(c)</sup> While there are no ACT residents located within the network expansion area, ACT Vodafone users are still expected to benefit from the improved coverage when travelling outside the ACT. As such, while no population directly lives in areas with increased connectivity, a benefit value has been attributed to the ACT.

# Appendix B: Survey methodology



# A survey of mobile users was conducted to inform the analysis

## Approach

Deloitte developed a survey to understand the impacts of the regional network expansion on service quality, socio-economic outcomes, prices paid for mobile services, and impacts on the daily lives of mobile users.

Dynata was used to field the survey online and collect the data, which was analysed by Deloitte Access Economics. The survey was fielded from February 2026 to March 2026.

Quotas were used to broadly reflect population characteristics and to obtain a sufficient sample of mobile users affected by the network expansion. The sampling approach helped to improve representativeness of the sample and reduce the risk of bias. Quotas were used instead of weighting to reflect population characteristics.

## Survey

A total of 1,070 responses were collected, including 759 Vodafone users; 574 of these were Vodafone customers prior to the network expansion.

Survey responses were collected from respondents based in each state and territory (Table B.1), and broadly reflect the distribution of Vodafone users in each jurisdiction. New South Wales had the highest number of respondents (251), while the Northern Territory had the least (5). As a result of sample size limitations, any calculations performed on survey data were only done when sample size was greater than 100. For example, in calculating the value of the network expansion for existing users, an average value was used for 'other states' (including South Australia, Western Australia, Tasmania, NT and ACT) such that a sample size of over 100 was maintained.

In the survey, respondents were asked a series of questions about their views on mobile connectivity in regional areas, satisfaction with their current mobile provider and plan, amount paid for mobile connectivity and willingness to pay for improved coverage/speed, and mobile experience before and after the network expansion. Findings from the survey analysis are included throughout the report.

**Table B.1:** Sample size by state/territory

Grouping	Sample size
New South Wales	251
Victoria	301
Queensland	249
South Australia	105
Western Australia	108
Tasmania	39
Northern Territory	5
Australian Capital Territory	12
<b>Total</b>	<b>1,070</b>

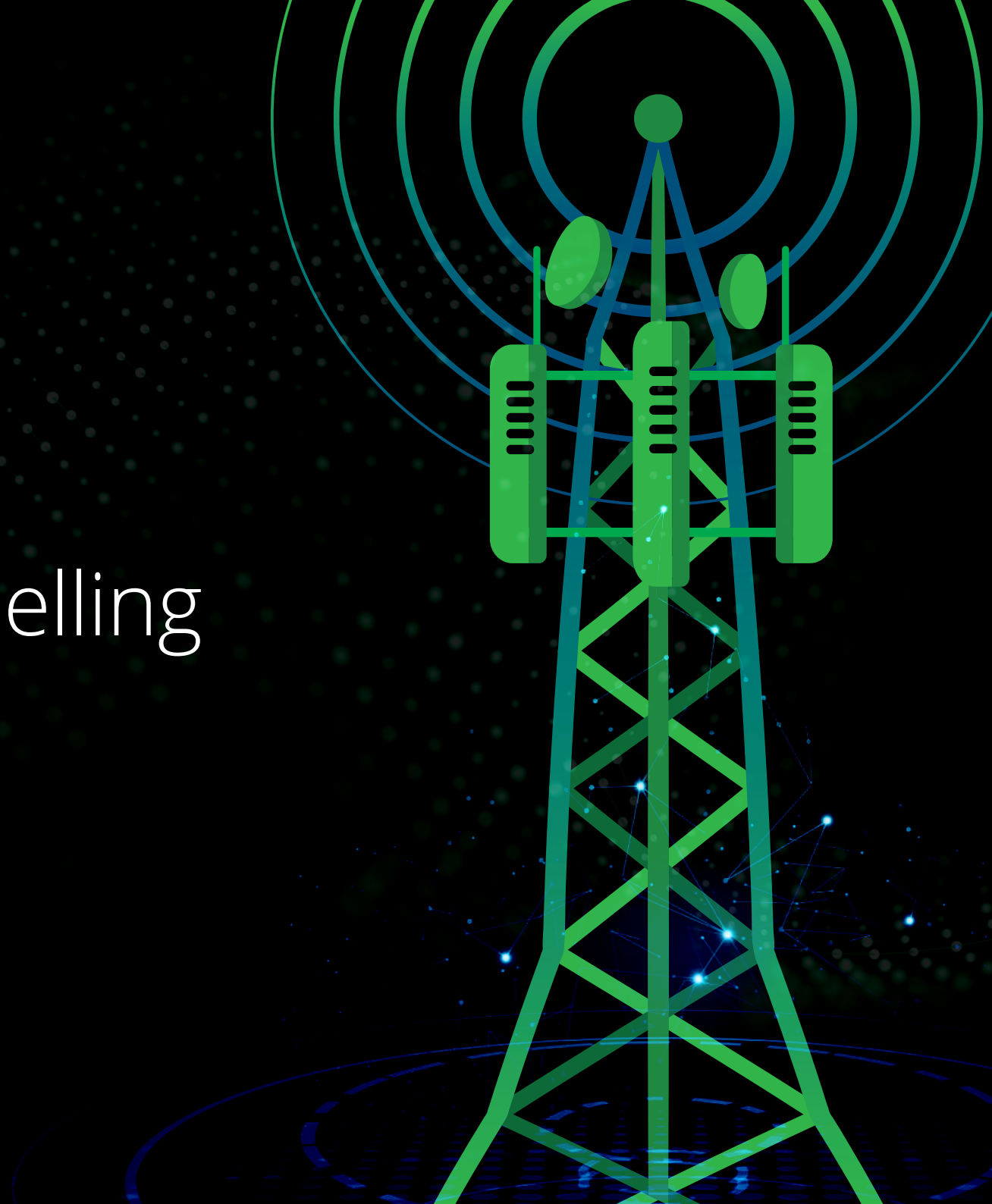
Source: Consumer Survey, Deloitte Access Economics (2026), n=1,070

**Table B.1:** Sample size by type of user

Grouping	Sample size
Vodafone	759
Non-Vodafone	311
<b>Total</b>	<b>1,070</b>

Source: Consumer Survey, Deloitte Access Economics (2026), n=1,070

# Appendix C: Productivity modelling approach



# Estimating the economy-wide impacts of faster download speeds

## Approach

This analysis draws on econometric modelling that was conducted for the NBN in 2024, which identifies a positive, statistically significant relationship between increases in average broadband speeds and GDP growth.<sup>1</sup> Specifically, this previous research has found that 1 Mbps increase in average broadband speed is associated with a 0.04% rise in GDP, averaged over the period 2012–2022.

The national average coefficient (0.04% per 1 Mbps) was adopted instead of a higher regional estimate given within the above study. This choice was deliberate, as Vodafone's speed uplift falls within the range where the model's diminishing returns curve aligns more closely with national-average GDP effects.

## Estimating the 2025 GDP impact for Vodafone impacted users

The following steps were undertaken to estimate the GDP impact in 2025:

### 1. Applied the post-network expansion speed increase to the download speed and GDP relationship

Vodafone's average mobile download speed increase in 2025 following the network expansion is estimated at 29 Mbps, on average, through the year. This figure is calculated as a weighted average of state-level speed increases, where weights reflect the number of directly impacted Vodafone users in each state, measured against pre-network expansion baseline speeds.

### 2. Determine the proportion of this uplift attributable to mobile

To isolate the Vodafone's mobile contribution, the total estimated GDP impact is disaggregated into a mobile and fixed component.

This share is estimated by weighting total data downloaded across each technology by the value of that data, proxied by the consumer price per GB. This comparison was calculated using ACCC data on the cost and usage across fixed and mobile data in 2024-25.<sup>2,3</sup> Using this approach, mobile data is assumed to be approximately five times the value of fixed connection data per GB. Weighting each technology's price per GB by total data downloaded from ACMA<sup>4</sup> yields a mobile share of 51% of total broadband value.

### 3. Isolate Vodafone's share of broader mobile market.

The mobile GDP uplift is further scaled by the ratio of Vodafone users in directly impacted regional areas to total active mobile connections in Australia using data from GSMA Intelligence.

### 4. Calculate dollar value

These scaling factors are applied to the ABS National Accounts seasonally adjusted GDP level for 2025 to produce the economy-wide benefit in 2025 dollar terms.<sup>5</sup>

## Forecasting the productivity benefit out to 2030

The longer-term regional productivity benefits from increased download speeds have been estimated for the period 2025 to 2030. This forecast is based on the ongoing rollout of Optus' 5G infrastructure in network expansion areas, including the completion of its planned 5G deployment by 2030. As a result, Vodafone's download speeds are expected to continue to rise over this period, leading to additional productivity gains. The projected rate of speed increase through to 2030 is assumed to remain consistent with the observed uplift between February 2025 (post-network expansion) and March 2026.

Importantly, diminishing marginal returns on internet speeds mean that higher absolute speeds generate progressively smaller productivity gains over time. To reflect this, the GDP uplift factor applied per 1 Mbps increase in download speed has been halved from 0.04% to 0.02% for impacts from 2026 onwards.

## Considerations

- The productivity impact estimates represent an impact to GDP above a counterfactual scenario whereby, in the absence of the network expansion, Vodafone would not have made significant investment in 5G infrastructure in regional Australia.
- Estimates are projected to 2030 only and, given uncertainties in projecting future download speed changes, are deliberately conservative. It is assumed that no step-change technological developments are introduced that would materially accelerate download speed improvements beyond those already forecast.

# Appendix D: Willingness-to-pay approach



# Measuring the willingness-to-pay for existing and new customers

## Overview

In this study, a stated preference willingness-to-pay (WTP) estimation method was used to quantify the value customers derive from the expansion. For existing Vodafone users, this is the amount they would be willing to pay for the connectivity changes enabled through the network expansion. For new users, this is estimated as the maximum additional amount they would have been willing to pay for their new Vodafone plan before opting to stay with a competitor. This gap represents the consumer surplus and is estimated based on a series of dichotomous choice questions included in the survey.

## Survey sample

For existing users, WTP estimation is based on a survey sample of N=574 customers who used Vodafone before and after the network expansion. Within the survey, these customers were presented with a map of the coverage changes enabled by the network expansion and directly asked how much they would be WTP for these changes. Responses were collected by state and territory to determine willingness-to-pay by state and territory, before being multiplied by the existing user base as at January 2025 to arrive at a \$341 million total value.

For new users, WTP estimation is performed on a N=80 survey sample of respondents who reported joining Vodafone from another mobile provider after January 2025. Respondents who subsequently left Vodafone after the expansion are not captured in the sample, and results should be interpreted with appropriate caution given the sample size.

For new users, given lower sample size and the greater theoretical complexity of the question, a Gabor-Granger price experiment was undertaken to understand WTP. In the first step, respondents were first asked the amount they currently pay for their Vodafone mobile plan and the amount they paid with their previous provider to establish a cost-saving baseline from which WTP questions were anchored. A 95% winsorization (trimming) was applied to the monthly mobile plan cost responses to handle outliers.

## Gabor-Granger price sensitivity experiment

WTP was measured using a Gabor-Granger price sensitivity experiment method, which asked respondents whether they would have still joined at a series of sequentially presented price points. The initial WTP question was:

*“You currently pay \$[current monthly mobile plan cost] for your Vodafone mobile service. If your Vodafone plan cost \$[current amount × increase factor], would you still have joined Vodafone?”*

The increase factor was randomly assigned at either 5%, 10%, or 20% of the respondent’s current monthly cost.

Respondents were then asked a follow-up question where if they accepted the proposed price increase, the next increase factor doubled; if rejected, it halved. This iterative structure converges on each respondent’s maximum acceptable price and the WTP interval bounds become the highest price accepted and lowest price rejected.<sup>1</sup>

For instance, a respondent paying \$50 per month who accepted a 10% increase but rejected a 20% price rise has a maximum WTP range between \$55 and \$60 per month for their Vodafone plan before they wouldn’t have changed providers.

Given WTP is known only within accept/reject bounds, rather than a single point, an estimation method must be applied to estimate actual WTP. In this study, survival analysis was used to estimate the WTP distribution across the sample and produces a survival curve showing the proportion willing to change providers at each price level (Chart D.1). From this, the restricted mean WTP is found, defined as the area under the survival curve up to a pre-specified maximum price increase.

**Table D.1:** Average additional price Vodafone customers would pay before not changing providers



Source: Consumer Survey, Deloitte Access Economics (2026), n=80.

The experiment found the range of values that users who joined Vodafone placed on the network expansion, above the price paid. Applying this WTP to the additional number of users who had ported to Vodafone due to the expansion using available data from February 2025 to January 2026 (based on the number of additional port ins compared to pre-expansion trends) yields a WTP figure of \$4.6 million.

Endnotes



# Endnotes

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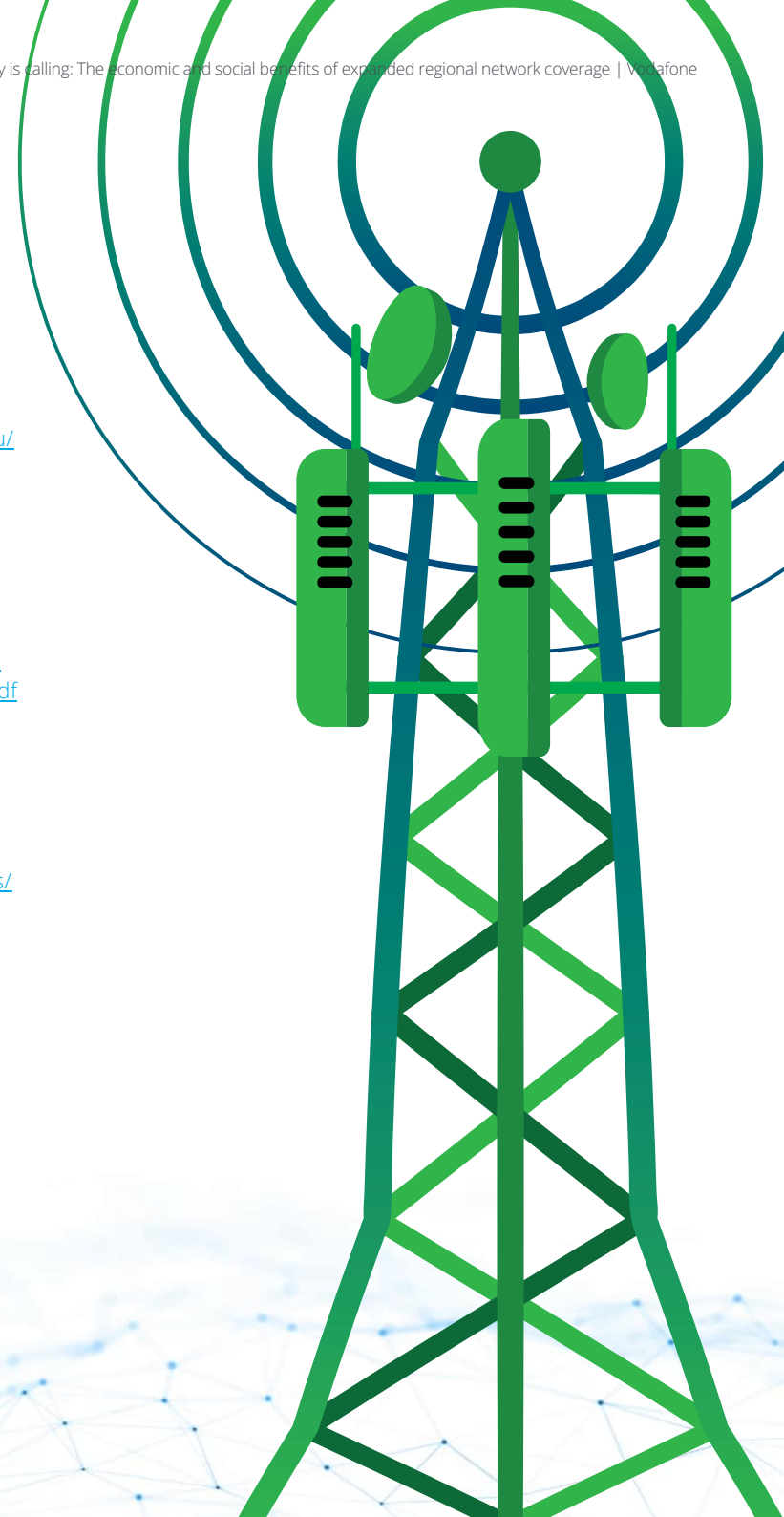
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