USER EXPERIENCE:

REPORT OF FINDINGS FROM QUALITATIVE AND QUANTITATIVE RESEARCH

COMMERCE COMMISSION NEW ZEALAND
Te Komihana Tauhokohoko

Ipsos New Zealand

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Ipsos

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BACKGROUND

One of the key issues identified in the **Improving Retail Service Quality Final Baseline Report** was the quality of customer service consumers receive from mobile and broadband providers.

In December 2022, the Commerce Commission published its **Customer Service Consultation Paper** which set out proposals for promoting improvements in customer service. This included monitoring and reporting on providers' performance and publishing providers' rankings against the aspects of service that matter most to consumers.

Customer service rankings were first published on the Commerce Commission's website in September 2023. The information provided in these rankings comes from a monthly customer satisfaction survey and covers all retail service provider (RSP) brands with a market share of greater than or equal to 5%.

The Commerce Commission is now conducting research to assess whether the published information is easy to understand, includes all important aspects, and is delivering to consumer needs.

OBJECTIVES

Purpose: Research to assess if the information provided in ranking charts are relevant to customers, easy to understand, usable & useful.

Objectives for this research:

- Validate and confirm the importance and usability of metrics used in the ranking charts, e.g. Net Promoter Score^{SM} (NPS®)
- Test the visuals of current charts against alternative display options
- Check that the published information and terminology on the page are clear
- Discover any information gaps
- Understand how relevant and valuable the ranking is to the consumer
- Understand how frequently consumers would use the ranking and in what situations
- Uncover consumers' information search and usage behaviours

Findings from this research will be used to inform any additional adjustments that need to be made to the metrics, design of the ranking page & the communications used to publicise the rankings.

__Note:__ Net Promoter®, NPS®, NPS Prism®, and the NPS-related emoticons are registered trademarks of Bain & Company, Inc., NICE Systems, Inc., and Fred Reichheld. Net Promoter Score^{SM} and Net Promoter System^{SM} are service marks of Bain & Company, Inc., NICE Systems, Inc., and Fred Reichheld.

METHODOLOGY & SAMPLE

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METHODOLOGY

Stage 1
Initial Project Setup

We held a project kick-off meeting between Ipsos & the Commerce Commission project team.

During this meeting we:

- Introduced the team members & determined the best approach for ongoing communications
- Finalised the approach of the research
- Finalised the research timetable
- Explored Commerce Commission's information requirements & work plans for questionnaire design / revision
- Met key Commerce Commission stakeholders to hear their views on the project

Stage 2
Qualitative

The qualitative stage involved individual depth user experience (UX) interviews with a range of n=10 mobile & broadband customers.

Across this sample we included a range of:

- Ages 18+
- Genders
- Ethnicities
- Occupations & life stages
- Mobile & broadband providers (in terms of current brand used & consideration)
- Recent switchers & non-switchers of providers

Fieldwork methodology included face-to-face & online interviews.

Stage 3
Quantitative

The quantitative stage surveyed the general population.

The methodology included:

- Recruiting respondents to complete online surveys from:
  - A blend of reputable NZ online panels
  - River sampling where respondents not on online panels are recruited via apps & sites
- Sample size of n=600

As the Commerce Commission has rankings for both broadband & mobile providers, the sample was split into two even streams to ensure consistency in the visuals shown to respondents.

Stage 4
Results & Debrief

We will deliver a comprehensive report that incorporates the results & findings from both the qualitative & quantitative stages. We will also deliver a presentation of the findings to the Commerce Commission & any key stakeholders.

If required, we will also hold a debrief meeting between Ipsos & the Commerce Commission teams. During this meeting we will:

- Discuss & provide any additional reporting deliverables (e.g. summary document, infographics) if needed
- Review each stage of the research process to ascertain what went well & what could be improved
- Discuss any requirements & considerations for future or follow-up research

QUAL

METHODOLOGY & SAMPLE DETAIL – QUALITATIVE

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Region	n=
Auckland	4
Bay of Plenty	2
Waikato	2
Wellington	1
Canterbury	1

Area	n=
Urban	3
Suburban	6
Rural	1

Age	n=
18–24	2
30–39	3
40–49	3
50–59	1
70+	1

Household	n=
Living alone	3
Couple, no kids	1
Household with mainly young kids	2
Household with mainly older kids	2
Sharing house with flatmates	2

Ethnicity*	n=
NZ European	7
NZ Māori	2
Cook Island Māori	1
Samoan	1
Southeast Asian	1

Speak English as a second language	2

- A total of n=10 participants were interviewed. They had either changed mobile and / or broadband providers in the last 12 months or were open to switching mobile and / or broadband provider in the next 12 months.
- Interviews took place either online via Microsoft Teams (n=6) or face to face (n=4) and were audio and / or video recorded.
- Face-to-face participants used their mobile phone to complete the interview tasks, while online ones used a laptop or desktop computer.
- Participants were recruited via a panel and received $100 incentive for a face-to-face interview and $90 for an online interview.
- Two Ipsos researchers moderated n=5 interviews each.
- Fieldwork took place from 11th December to 14th December 2023.

Note: Participants could identify as more than one ethnicity.

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METHODOLOGY & SAMPLE DETAIL – QUANTITATIVE

- Fieldwork took place from 21st February to 12th March 2024.
- Respondents were recruited from a blend of reputable NZ online panels. River sampling was used where respondents not on online panels were recruited via apps and sites.
- The survey involved n=600 respondents, with quotas to ensure a nationally representative sample.
- The use of quotas meant that no weighting of the data was needed to ensure that it accurately reflected NZ regional, age, ethnicity, and gender composition.
- The precision of Ipsos online surveys is calculated with a credibility interval with a survey of n=600 accurate to + / - 1.7 percentage points

As the Commerce Commission has rankings for both broadband and mobile providers, the sample was split into two even streams to ensure consistency in the visuals shown to respondents.

- Respondents with internet at home and a full or shared level of involvement in decision-making about selecting their broadband provider were assigned to the Broadband stream (n=302).
- Respondents with a mobile plan and a full or shared level of involvement in decision-making about selecting their mobile provider were assigned to the Mobile stream (n=298).
- Respondents who met the criteria for both streams were assigned to only one stream, on a least-filled basis.

SURVEY SAMPLE PROFILE

QUANT

600 respondents

GENDER	Total
Female	58%
Male	41%
Another gender	0%
Prefer not to say	1%

ETHNICITY	Total
NZ European	70%
Asian	16%
Māori	14%
Other European	9%
Pacific Peoples	6%
Other	4%

AGE	Total
18–24 years	12%
25–34 years	18%
35–44 years	16%
45–54 years	18%
55–64 years	16%
65+ years	20%

EMPLOYMENT STATUS	Total
In paid work	65%
Retired	16%
Unemployed	8%
Student	5%
Homemaker / stay-at-home parent	5%
Prefer not to say	1%

AREA	Total
A main city	62%
A provincial centre	22%
A rural area	15%
A remote area	1%

REGION	Total
Northland	3%
Auckland	33%
Waikato	10%
Bay of Plenty	6%
Tairāwhiti / Gisborne	1%
Hawke's Bay	3%
Manawatū-Whanganui	6%
Taranaki	2%
Wellington	13%
Nelson / Marlborough / Tasman / West Coast	3%
Canterbury	13%
Otago	5%
Southland	2%

HOUSEHOLD INCOME	Total
$50,000 or less	20%
$50,001–$100,000	31%
$100,001–$150,000	18%
$150,001–$300,000	18%
More than $300,000	2%
Prefer not to say	10%

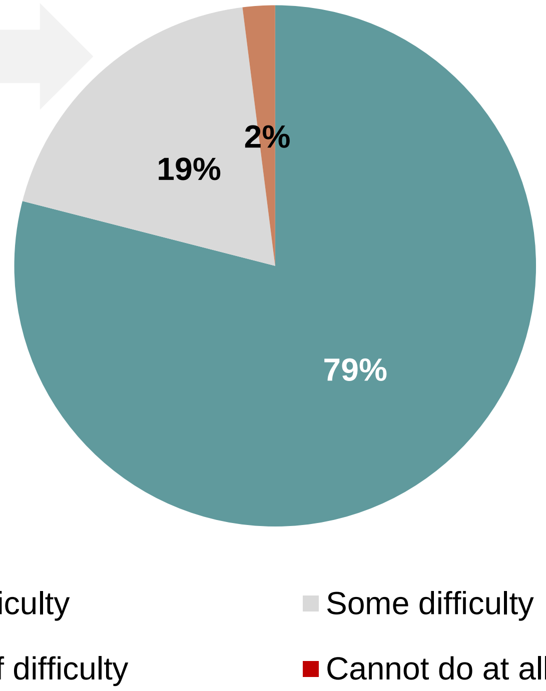
HOUSEHOLD TYPE	Total
Single / couple with children at home	27%
Single person living alone	17%
Couple with no children	17%
Single / couple with adult children who have left home	13%
Single person sharing / flatting with others	11%
Single / couple with adult children at home	6%
Single / couple living with parents	3%
Other	4%
Prefer not to say	2%

__S2:__ Are you…? (Gender) / __S4:__ Which ethnic group/groups do you belong to? / __S1:__ What is your date of birth? / __QDEMO3:__ What is your current employment status? / __S3:__ Where do you live? / __QDEMO1:__ Which of the following best describes the part of the country that you currently live in? / __QDEMO4:__ What is your total household income before tax? / __QDEMO2:__ Which of the following best describes your household? / __S5:__ In which industry do you work? __Base:__ Total sample (n=600)

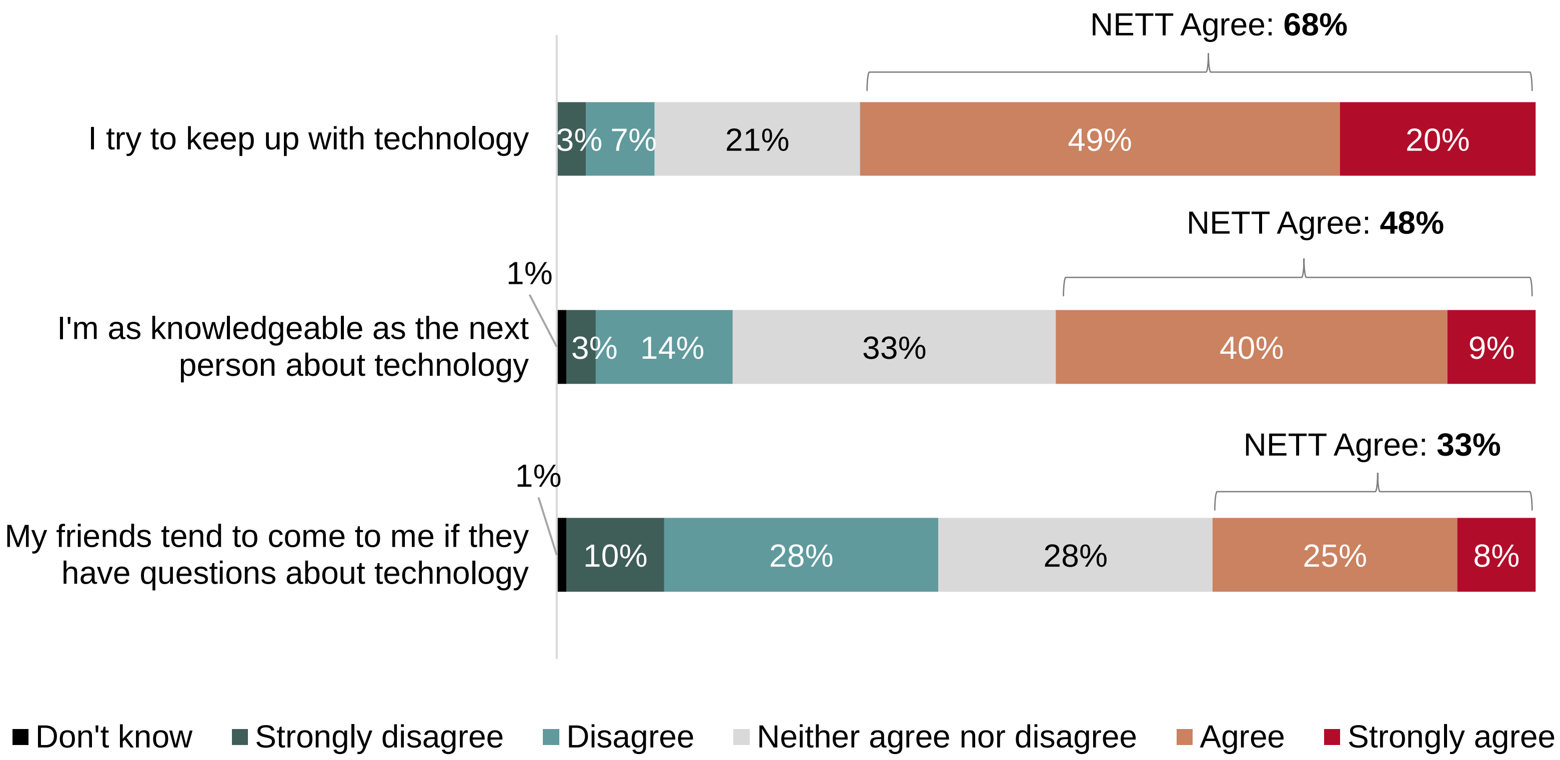
DEMOGRAPHICS

DIFFICULTY SEEING

NETT At least some difficulty seeing: **21%**



TECHNOLOGY AWARENESS

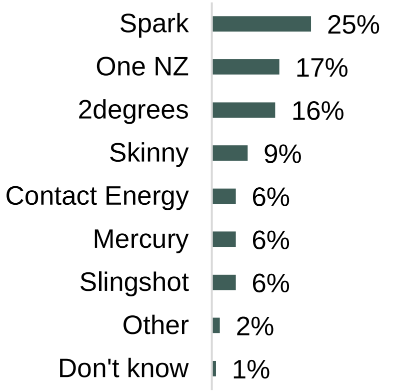


__QDEMO5:__ Do you have difficulty seeing, even if wearing glasses? / __QDEMO6:__ Please look at the different statements people have made about technology services… For each statement, please indicate how much you agree or disagree

***Base:** Total sample (n=600)*

CUSTOMER PROFILE

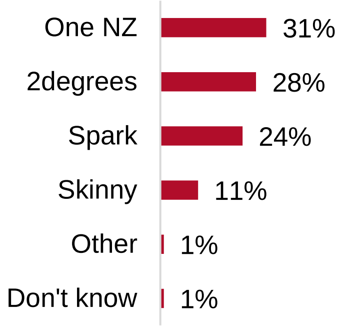
BROADBAND PROVIDER



Providers with ≤2% respondents

Orcon
Sky Broadband
Now
Nova Energy
Starlink
Electric Kiwi
Not sure / Don’t know
Bigpipe
Lightwire
Hotshot
Wireless Nation

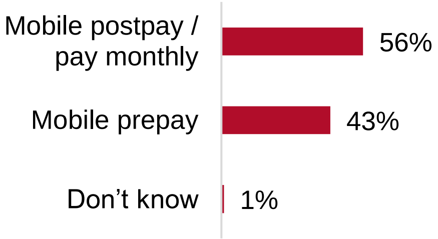
MOBILE PROVIDER



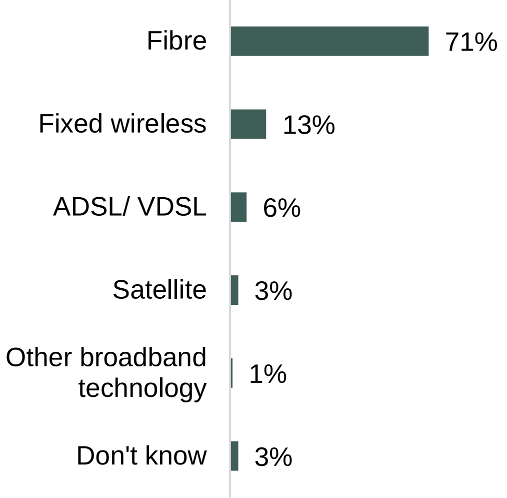
Providers with ≤2% respondents

Warehouse Mobile
Kogan
Mercury

MOBILE PLAN



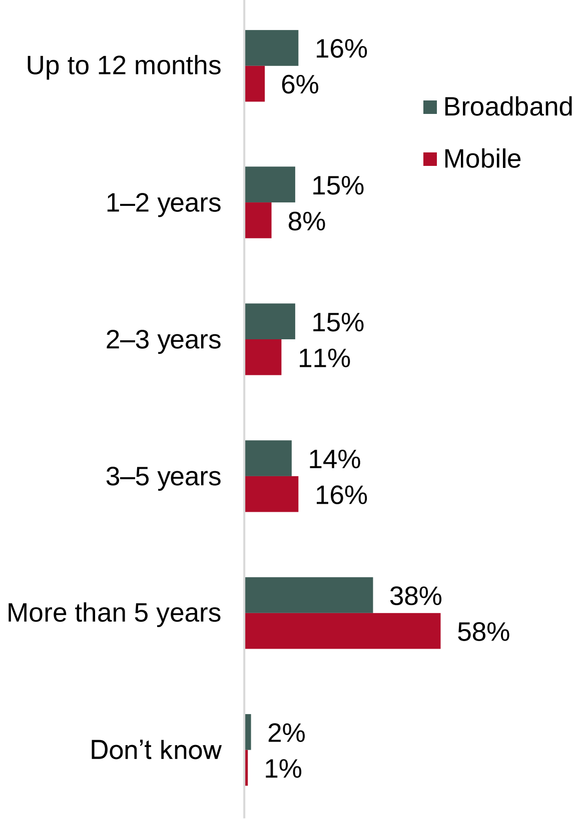
BROADBAND CONNECTION



Connections with <2% respondents

HFC
Hyperfibre
4G

LENGTH OF TIME AS A CUSTOMER



QA1a: Which telecommunication company do you use for your broadband / household internet? / QA1b: Which of the following broadband technologies is the main way you connect to the internet in your home? Base: Those with internet at home (n=559)

QA1c: About how long have you been a customer of [PROVIDER] for your broadband / household internet? Base: Those with internet at home who know their provider (n=554)

QA2a: Which telecommunication company do you use for your mobile? / QA2b: Which is the main mobile plan you have? Base: Those with a mobile plan (n=587)

QA2c: About how long have you been a customer of [PROVIDER] for your mobile? Base: Those with a mobile plan who know their provider (n=582)

KEY FINDINGS

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KEY FINDINGS (1)

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There is a good level of trust in the Commerce Commission and in the information it provides

- Public awareness of the Commission's role as an information source for customer satisfaction with telecommunication providers is limited. Awareness of the Commission's broadband and mobile provider customer service rankings is also very low.
- However, there is good appetite for this type of 'impartial' information, as it allows consumers to compare providers using 'trustworthy' data in one place.

  "I find it very helpful to compare. I don't know how forthcoming actual providers would be on their website."
- Additionally, the general feeling is that data provided by the Commission is robust and will have been collected in a valid way, with very few questions arising around research methodology, recency of data collection, or presentation of results.

The rankings' current order of metrics aligns with people's expectations and preferences

- Results show that *speed of resolution* and *staff knowledge & helpfulness* should be shown on top. *Customers with an issue* was placed third, while *NPS* was most commonly placed last, most likely due to lack of familiarity.

The rankings are regarded as a clear, easy-to-use, and helpful resource

- With the exception of *NPS*, all of the current metrics shown on the rankings were easy to understand and perceived as useful in forming a view on the customer service of telecommunications providers.
- *Staff knowledge & helpfulness* emerged as the top metric in both 'usefulness' and 'ease of understanding'. Some also view this metric as proxy 'overall' measure for customer service.
- *Speed of resolution* is perceived to be closely connected to *staff knowledge & helpfulness* and was identified as a key aspect of customer service and a priority metric.

NPS is not widely known or understood

- 80% of survey respondents were unfamiliar with NPS – 67% had never heard of it before, while 13% had heard of it but knew almost nothing about it.
- The metric was ignored by some qualitative participants, while those who visited the page expecting and wanting a 'quick answer' indicated that seeing this metric would be a deterrent to their engaging any further with the rankings.
- While most agreed that it is a useful metric once it was defined and explained, there was scepticism that it is a 'true measure' of customer service due to the fact that cost / pricing could influence one's likelihood to recommend.

KEY FINDINGS (2)

In most cases, results from the quantitative survey aligned with findings from the qualitative phase regarding alternative design preferences

- The *average score* display emerged as the preferred option, over the *numbered rankings* and the current display.
- When providers ranked equally, this was generally well understood. In terms of ordering, an almost equal proportion of people expected them to be ranked *alphabetically* or *by decimal points*.
- Adding a simplified table that allowed people to view providers' scores alongside each other for all metrics tested well and was the preferred choice.

The current metrics sufficiently cover customers' needs, with no major gaps identified

- However, there were some notable suggestions for additions to the rankings page:
  - **Average call wait time**
    The most commonly suggested metric to be added to the page was an average call wait time when contacting a provider. This was a top-of-mind consideration when customers were asked what they would most like to know about customer service, and was also rated highly amongst the list of suggested other metrics.
  - **Pricing information**
    Participants noted that they would want to look at customer service rankings alongside what providers offer in terms of pricing and products.
  - **Types of customer issues**
    Some participants would like further information on what types of issues people experience. This is because not all issues carry the same level of importance for a customer when making a decision about a provider.
  - **In-store customer service availability**
    The addition of details about store locations where in-person customer service is available was an important consideration for some customers.
  - **Location of call centres**
    Customers were interested in knowing whether they would be speaking with a customer service representative who is in New Zealand, when calling a provider for assistance with an issue.

The introduction text, fine print, and chart descriptions on the page provided all the information that is required by most customers

- We noticed high usage of the text explaining each metric during our qualitative interviews, with participants' default, unprompted behaviour being to read the description of the metric in order to better understand the chart they were looking at.

KEY FINDINGS (3)

The majority expected the rankings data to be updated at least quarterly

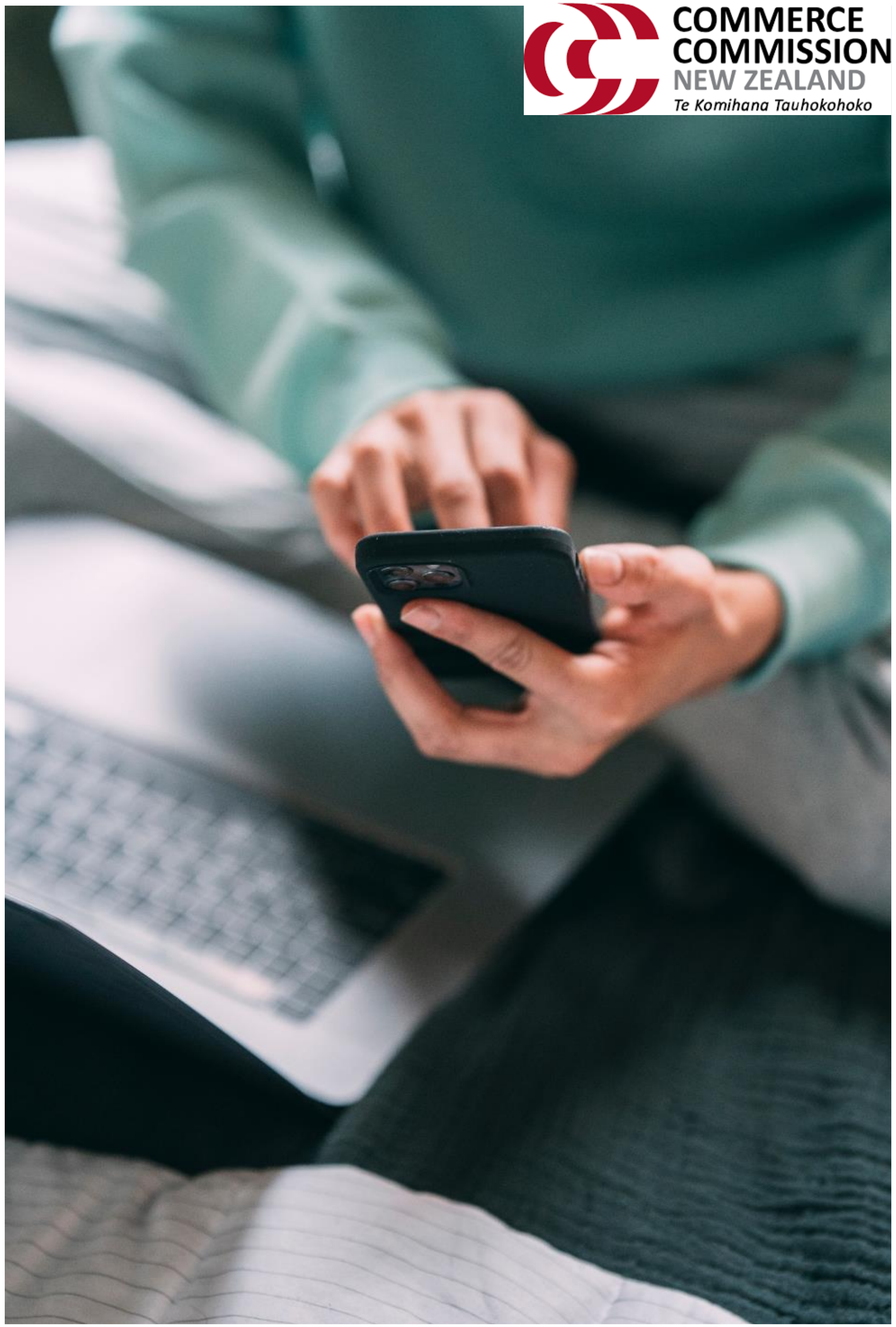
- The general feeling was that it would take more than a month for any large movements to be seen in the data. Qualitative participants who noted the time frame of the data collection when reading the text under the charts saw it as ‘current’.

  “It’s as recent as it gets, that’s good.”

Qualitative participants were generally unlikely to go back to the page frequently to check for updates

- Most qualitative participants would use the rankings only when considering a new provider and would be unlikely to check back to see any changes once they had switched providers.
- Some qualitative participants said that they would check back about once a year and would be unlikely to consider a new provider before their current contract had finished.

  “I kind of like on a yearly basis, will relook at all of our different things to see what’s out there.”



USER CONTEXT

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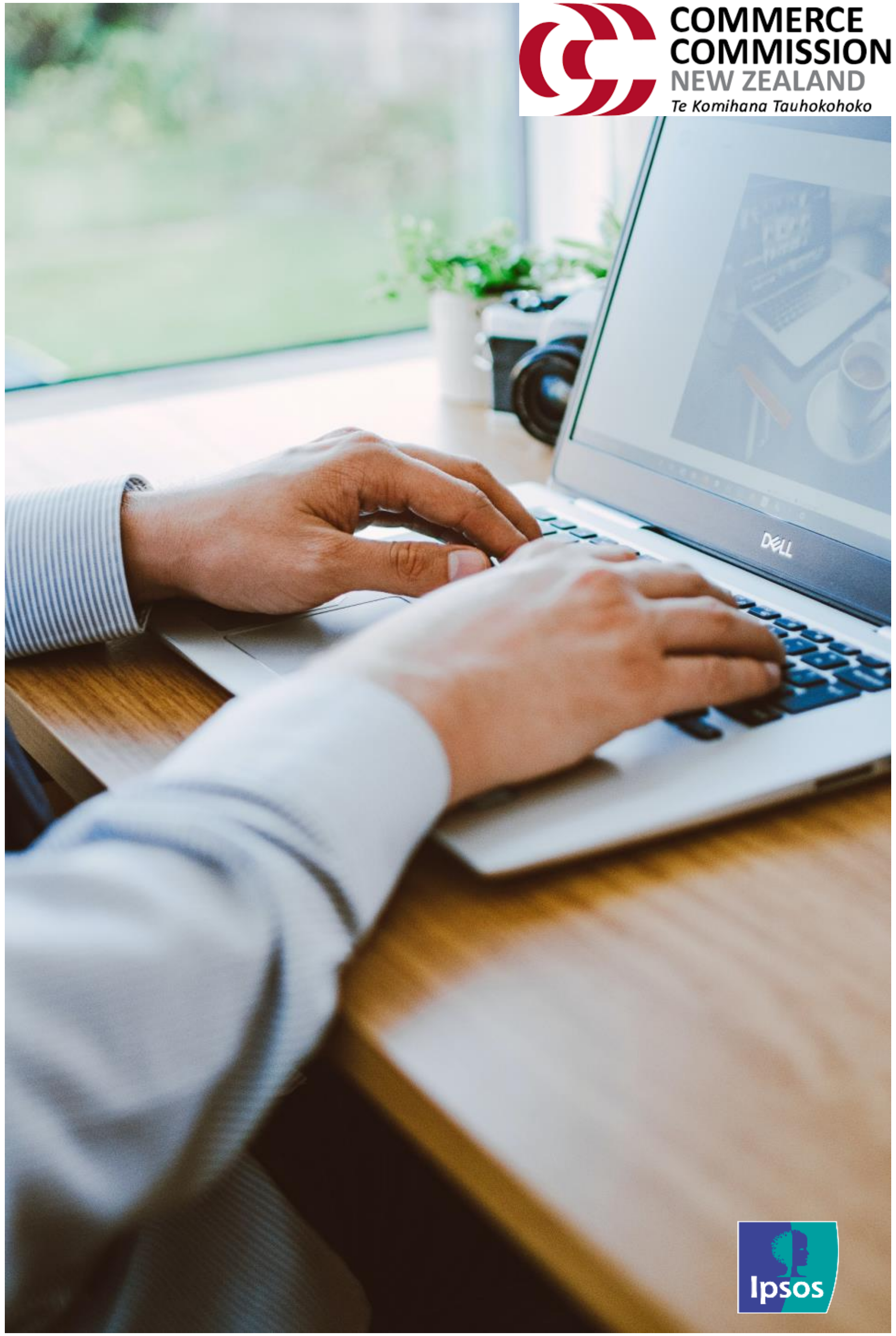
USER KNOWLEDGE & AWARENESS

- Our qualitative interviews found that most participants had limited-to-moderate awareness of the Commerce Commission's role as an information source for customer satisfaction with telecommunication providers. Some participants primarily saw the Commission as an organisation that exposes 'shady practices' or unfair dealings, with their only prior knowledge coming from news stories where the Commission has 'caught' or fined someone for doing the wrong thing.

- Notably, however, we also found there is a good level of trust in the Commission among the participants. Those aware of the Commission felt that any information provided by it would be fair and trustworthy, mostly because it is a government agency.

- While many were unaware that the Commerce Commission publishes rankings of providers (our quantitative research found that only 8% of respondents were aware of the rankings), they acknowledged that having this impartial information source about customer service was a **welcome addition**, as it allows consumers to compare providers using **trustworthy data**.

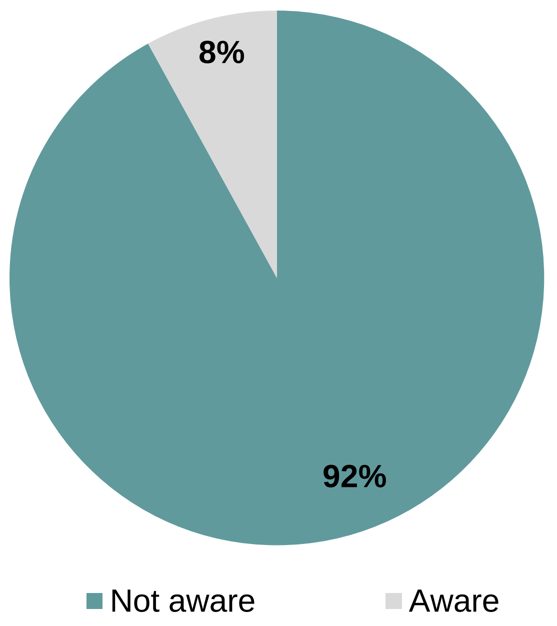
- Our quantitative research also found that just over half (55%) of those aware of the rankings have used them. This, along with the generally high level of trust in the Commission, indicates that there is a good opportunity for the rankings to be more widely used.



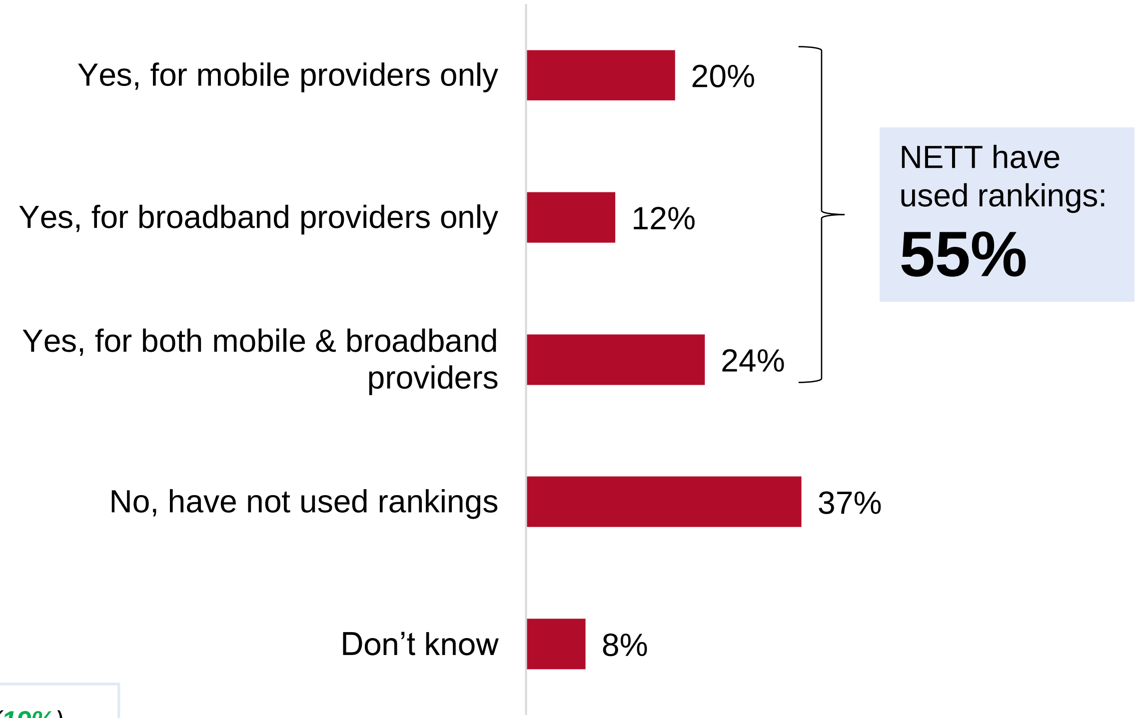
AWARENESS & USE OF RANKINGS

The vast majority of respondents have not heard of the rankings, with 18-24-year-olds more likely to be aware. Of those aware of the rankings, around half have used them.

AWARENESS OF RANKINGS



PRIOR USE OF RANKINGS



*Those significantly more likely to be aware of the rankings site are **aged 18–24** (19%).*

*Those significantly less likely to be aware of the rankings site say that their **friends do not tend to come to them with questions about technology** (4%).*

*QRA2: Before today, were you aware of these rankings? **Base:** Total sample (n=600)*

*QRA3: And have you viewed or used these rankings before? **Base:** Those aware of rankings (n=51)*

Significantly higher / lower than total at 95% level

DECISION-MAKING CONTEXT & PREFERENCES

QUAL

- Consumers considering switching providers or narrowing down their options as to which provider to switch to generally look at providers' offerings and take into account the cost, coverage, bundle options, frequency of issues, and issue resolution.
- When making a decision on switching providers, many participants read reviews that recommend providers, considering what others have to say about their experience with a provider before deciding. Common places where reviews were found by interviewees in this study include specific provider websites, Google reviews, and Facebook community group pages.
- Price and service comparison websites are widely used by consumers who are weighing different providers. Specific comparison websites mentioned by interviewees in this study were *nzcompare.com* and *glimp.co.nz.*
- Consumers often check in with friends and acquaintances to understand their experience of customer service. Some people will contact a call centre before committing to the provider, to get a 'feel' for the customer service.
- The household context plays a part in the approach to choosing a provider. For example, students or those with lower incomes may consider only the cheapest option available without much or any regard for the customer service offered, while those with more money to spend may be happier to look into more expensive provider options if they believe the customer service to be better.
- In some areas, especially rural and semi-rural, consumers are more limited in their choice of providers, meaning that customer service considerations may be de-prioritised.
- When looking at a web page, users display core differences in their behaviour, in terms of whether they prefer to:
  - get information from a quick glance vs reading details and depth
  - refer to numbers, percentages, and words vs relying on visuals such as lines, bars, and colours

> "*People rely on other people's experiences a lot.*"

> "*Is it cheap because it's nasty, bad quality? I would want to check if there's a valid reason that they're offering a deal.*"

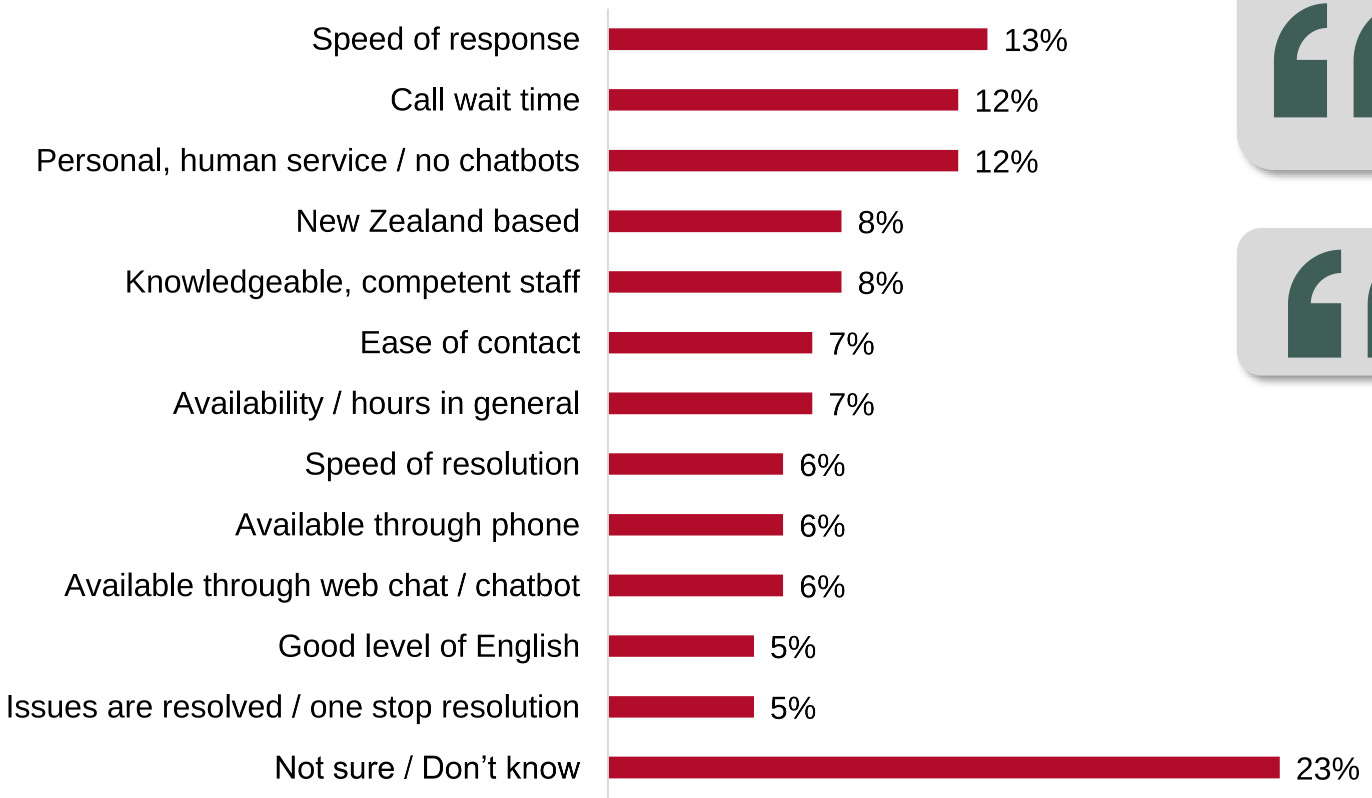
> "*I ended up with them [provider] because they could provide a wireless internet connection to our place out in the wops and no one else would.*"

ASPECTS OF CUSTOMER SERVICE

QUANT

Regarding what they would most like to know about a provider's customer service, respondents identified *speed*, *wait time & the ability to talk to real humans* as the top-3 aspects.

TOP ASPECTS TO KNOW ABOUT CUSTOMER SERVICE



> *"I would like to talk to someone who is able to resolve the issue immediately, not have to explain what the issue is and then have to wait for a call back and then have to explain the issue again."*

> *"Whether I can speak directly to a real person when I call them with a maximum 5 minute wait."*

> *"How contactable is their call centre? Will I have to wait long for a call to be answered?"*

> *"Good customer service to me means being able to speak to a human being when I have a problem that needs solving."*

***QRA1:** What would you most like to know about their customer service if you were selecting a new provider?*
***Base:** Total sample (n=600). **Note:** Responses below 5% not shown*

PERCEPTIONS & USABILITY OF METRICS

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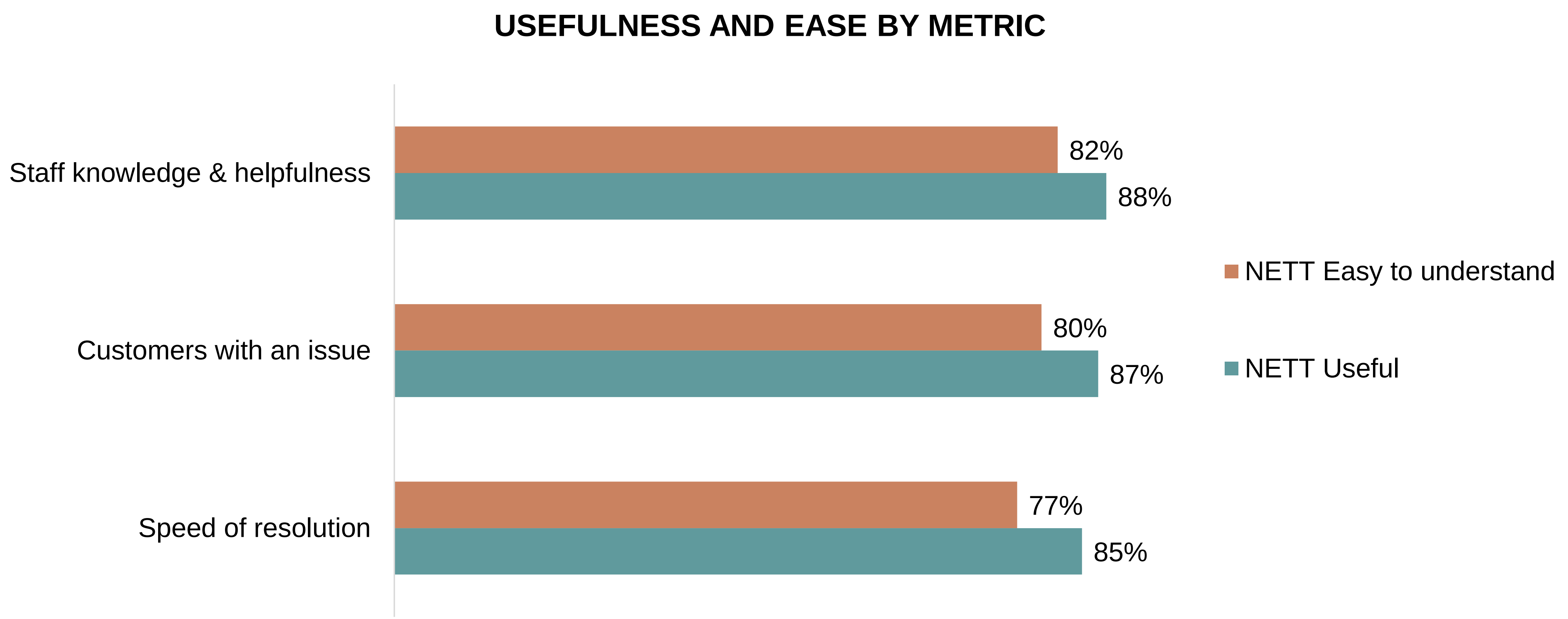
QUANT

USEFULNESS & EASE BY METRIC

All three metrics scored highly & comparably in terms of usefulness & ease of understanding, though *staff knowledge & helpfulness* came out slightly on top overall.



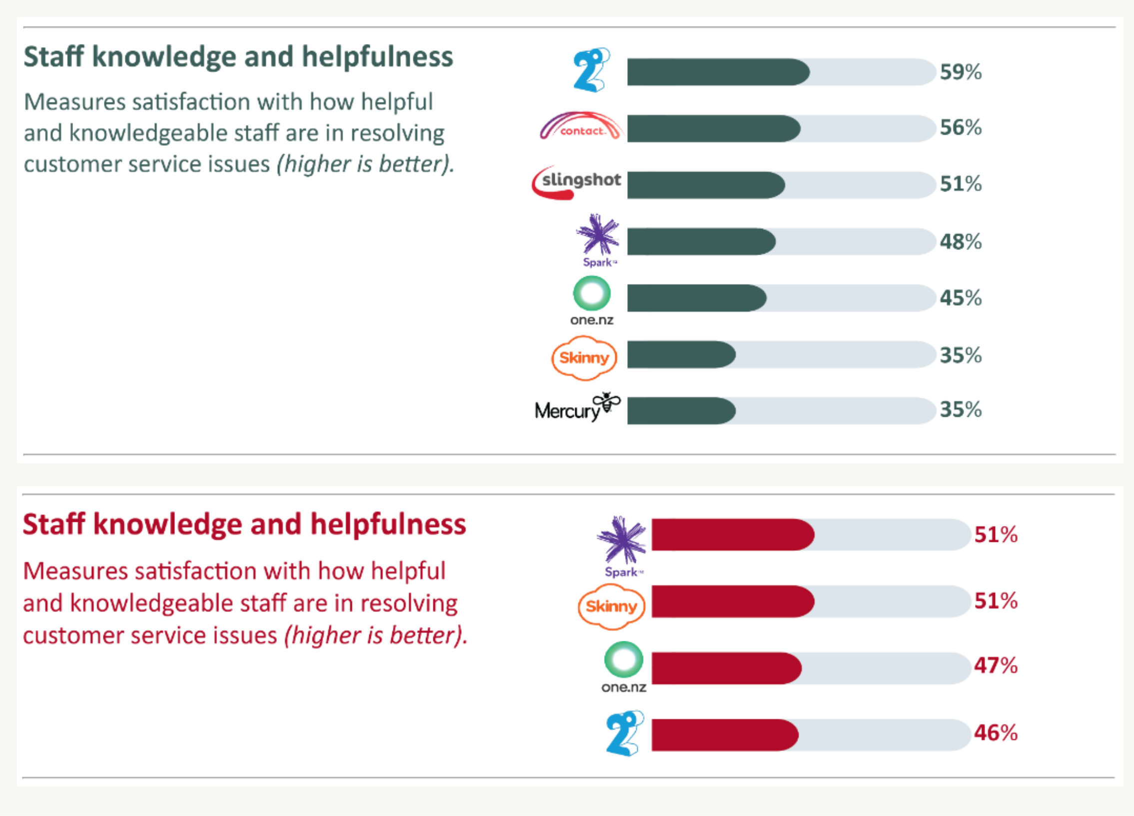
***QMB5+QMM5, QMB1+QMM1, QMB3+QMM3:** How useful is this metric? / **QMB6+QMM6, QMB2+QMM2, QMB4+QMM4:** And how easy is it to understand?*

***Base:** Total sample (n=600)*

QUAL

STAFF KNOWLEDGE & HELPFULNESS

This metric is often used to get an overall sense of customer service.



- Our qualitative research found that *staff knowledge and helpfulness* was often used as a proxy measure to get a more general idea of customer service (this was particularly prominent among those who are unfamiliar with NPS).

  "When I think of customer service, it's a conversation on a phone. Most people would prefer just to call someone and speak to someone directly."

- There were some implicit assumptions that this metric indicates how valued and listened to consumers feel, and it is used as a general gauge of a provider's warmth and customer-centricity.

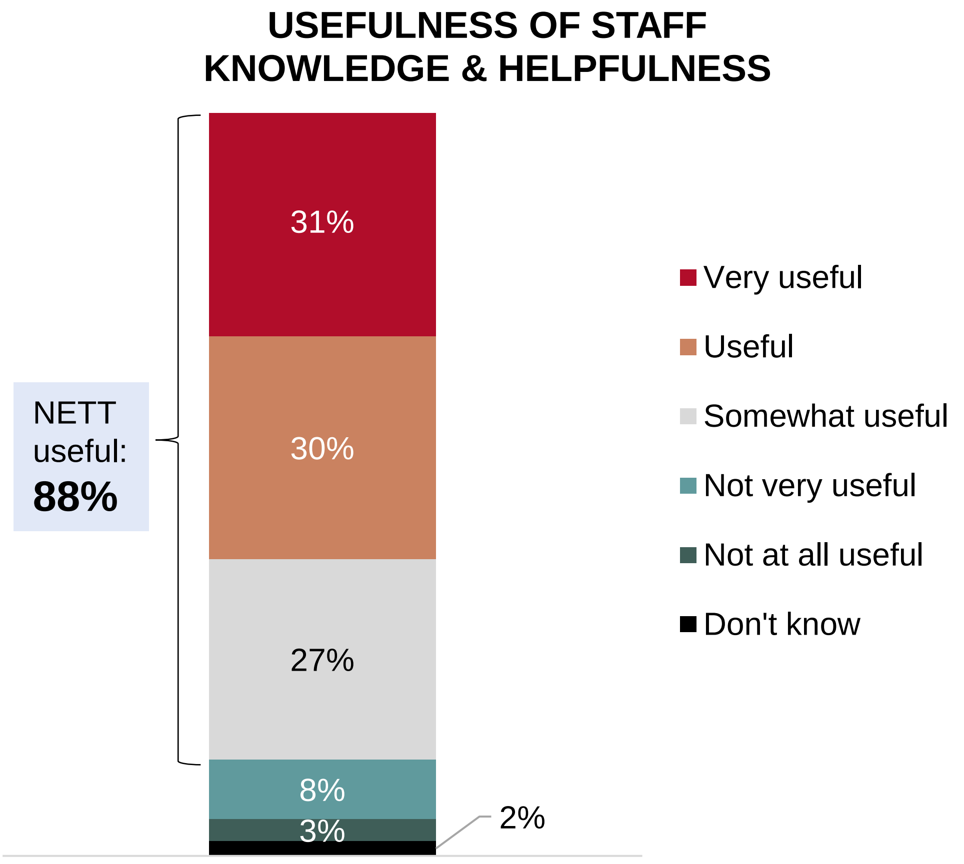
- Many participants commented that this measure fits naturally with *speed of resolution* – both work in tandem, given that the resolution is dependent on staff's knowledge and helpfulness.

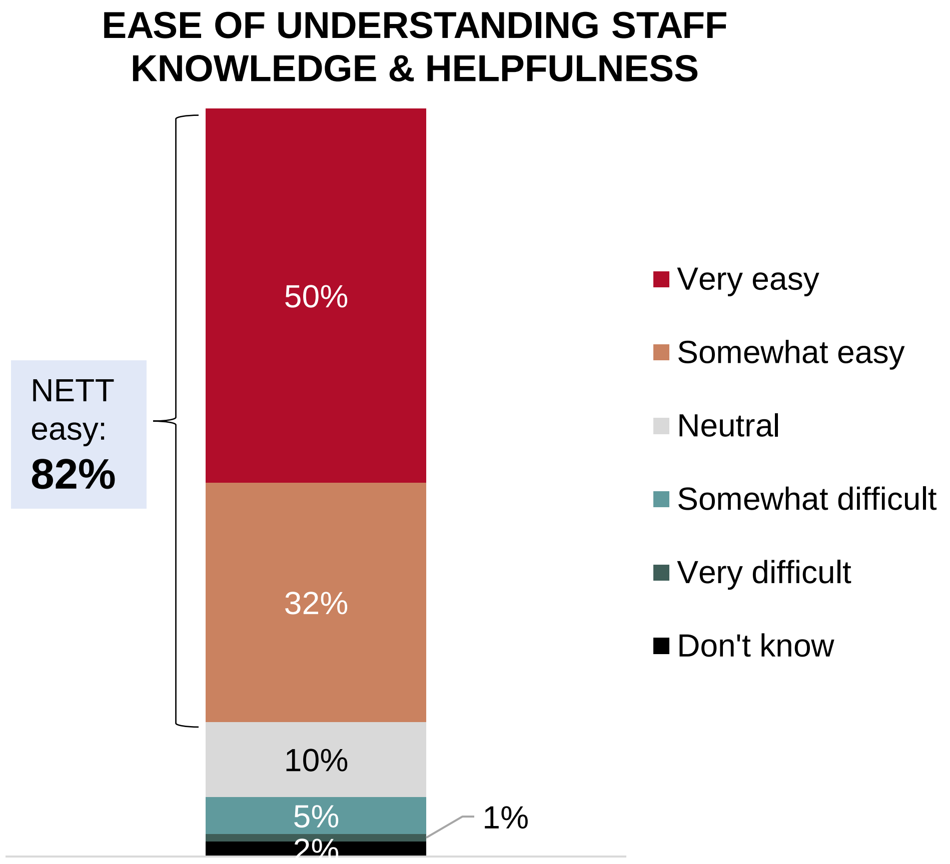
  "If there is a problem, they need the knowledge to solve it."

- Interestingly, some assumed that providers' customer service is generally good and that they would use this measure to get a sense of who is underperforming, rather than who is 'best'. Participants tended to start by looking at and discussing those who performed less well.

STAFF KNOWLEDGE & HELPFULNESS

Nearly 9 in 10 found this metric at least 'somewhat useful', while 8 in 10 stated that it easy to understand.





No significant differences in the perceived usefulness or ease of understanding of the staff knowledge and helpfulness *metric were found between demographic groups.*

QMB3+QMM3: *How useful is this metric? /* ***QMB4+QMM4:*** *And how easy is it to understand?*
Base: *Total sample (n=600)*

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CUSTOMERS WITH AN ISSUE

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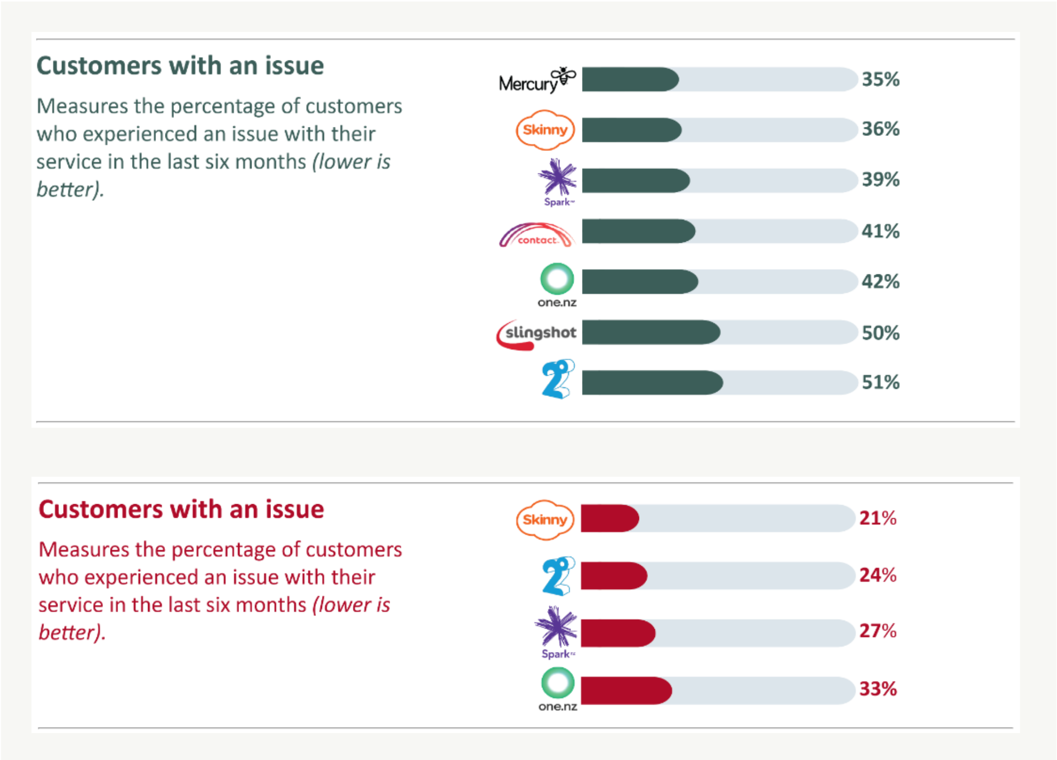
Overall, this is a helpful metric, although some would like more detail on the types of issues people experience.



- Most of our qualitative participants saw this metric as useful in their decision-making process:

  "I don't want issues, so if previous customers had issues, I would stay away. I'm looking for reliability."

- However, the general feeling was that more detail could be added on this metric. Some felt that *an issue with service* is too broad and that having information including the type or category of issue would be more helpful in choosing a provider, with the belief that some issues (e.g. network) are more important than others (which may not even be the fault of the provider – e.g. individual user issues). Equally, most did not think it would be fair for providers' scores to be impacted due to minor issues or issues that occur outside of their control.

- There were some suggestions around adding linked customer reviews and verbatim comments describing the issues from the customer's perspective. Some also wanted information on how many issues were ultimately resolved.

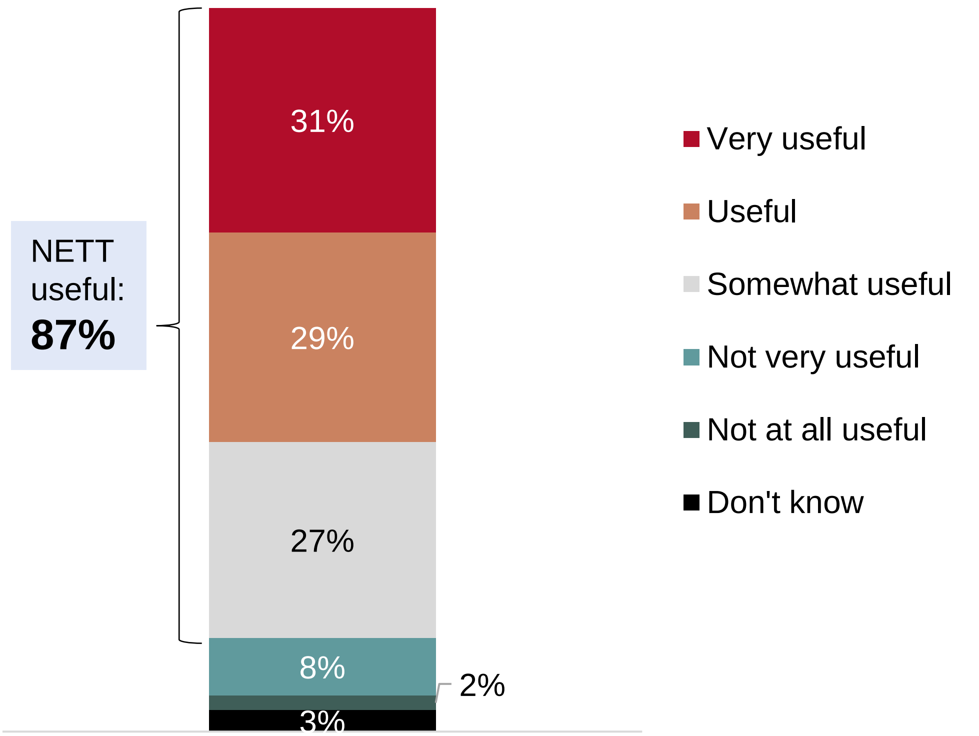
- The ranking order being opposite to that of the other charts (i.e. ascending vs descending) did not cause any confusion for most participants, with the explanation *lower is better* being noted and enough to remove any potential misunderstanding. However, users may miss this detail :

  "I guess because the last two were 'higher is better', 'higher is better', you're kind of thinking the top one's the worst one, if I was just having a brief look."

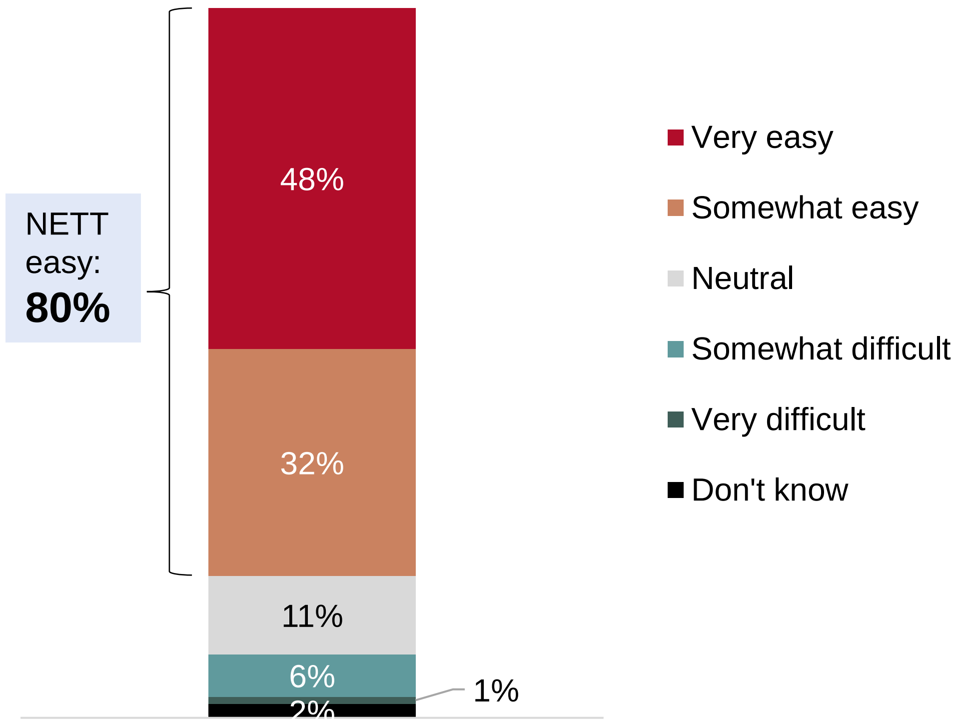
CUSTOMERS WITH AN ISSUE

This metric also scored highly in terms of usefulness & ease of understanding.

USEFULNESS OF CUSTOMERS WITH AN ISSUE



EASE OF UNDERSTANDING CUSTOMERS WITH AN ISSUE



No significant differences in the perceived usefulness or ease of understanding of the customers with an issue *metric were found between demographic groups.*

QMB5+QMM5: *How useful is this metric? /* ***QMB6+QMM6:*** *And how easy is it to understand?*
Base: *Total sample (n=600)*

QUAL

SPEED OF RESOLUTION

Speed is a non-negotiable & often picked as the most important metric.

- *Speed of resolution* was seen by some participants as the most informative and important measure when making a decision about providers. There is usually acceptance that ‘issues occur’ and ‘mistakes will happen’ across most providers, within reason. However, the speed and efficiency of the resolution of these inevitable issues is a metric that participants believed could set providers apart.

  “This captures all the other aspects of customer service.”

- Some stated that speed is subjective and will vary depending on users’ individual expectations. What might be a satisfactory speed to one customer, is not to another. A few suggested including:
  - the actual time taken to resolve issues
  - a breakdown of the categories of issues (e.g. resolution of network issues vs billing enquiries)

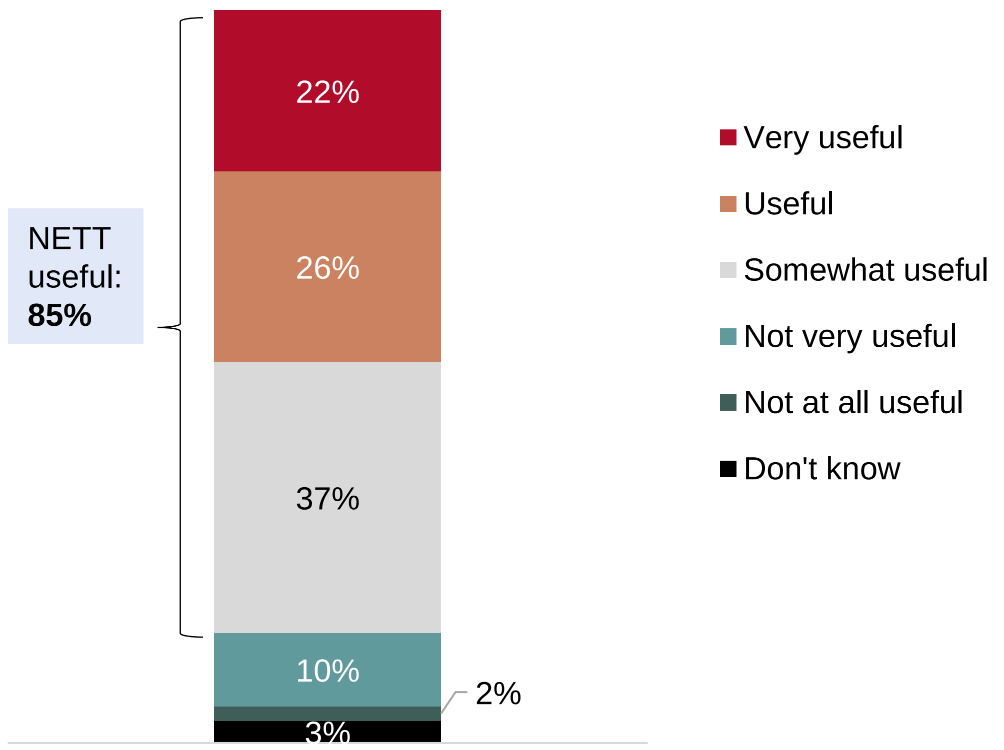
  This would take away subjectivity and allow users to see patterns in speed or resolution across issue types.

- Some participants mentioned that speed of resolution is context dependent and varies depending on channel – in-store, email, and phone. Whether or not the call centre is based overseas was seen as an important factor in speed of resolution.

SPEED OF RESOLUTION

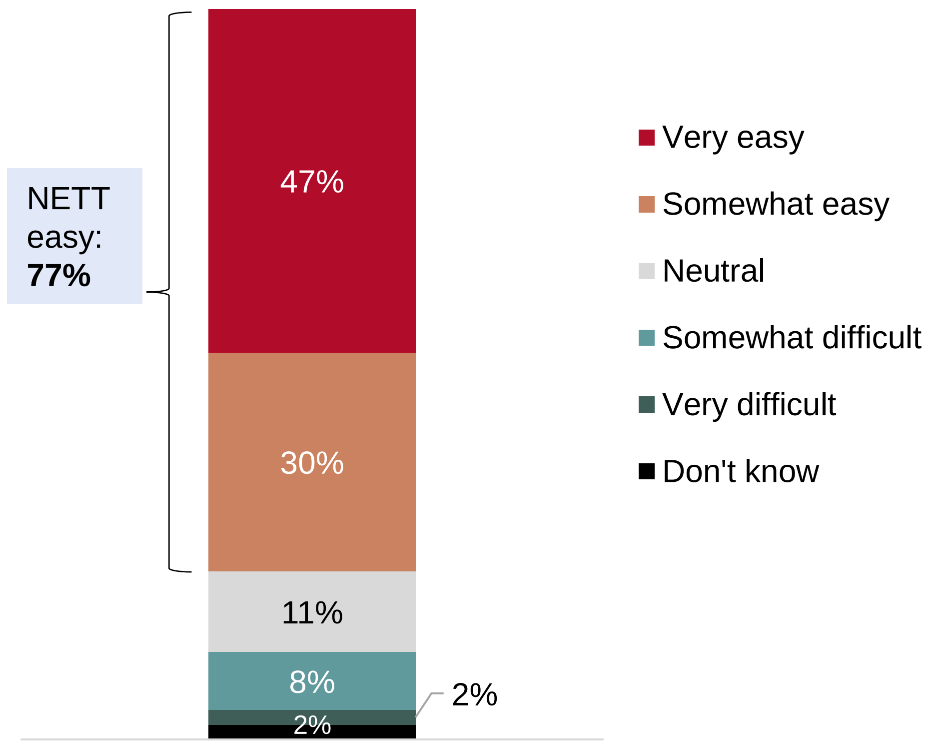
A slightly lower score for this metric's ease of understanding (compared to *staff knowledge & helpfulness & customers with an issue*) may be related to the idea that speed is subjective & context-dependent.

USEFULNESS OF SPEED OF RESOLUTION



*Those **aged 45–54** were **significantly more likely** to find the* speed of resolution *metric useful (**92%**).*

EASE OF UNDERSTANDING SPEED OF RESOLUTION



***Pacific people** were **significantly less likely** to find the* speed of resolution *metric easy to understand (**62%**).*

***QMB1+QMM1:** How useful is this metric? / **QMB2+QMM2:** And how easy is it to understand?*

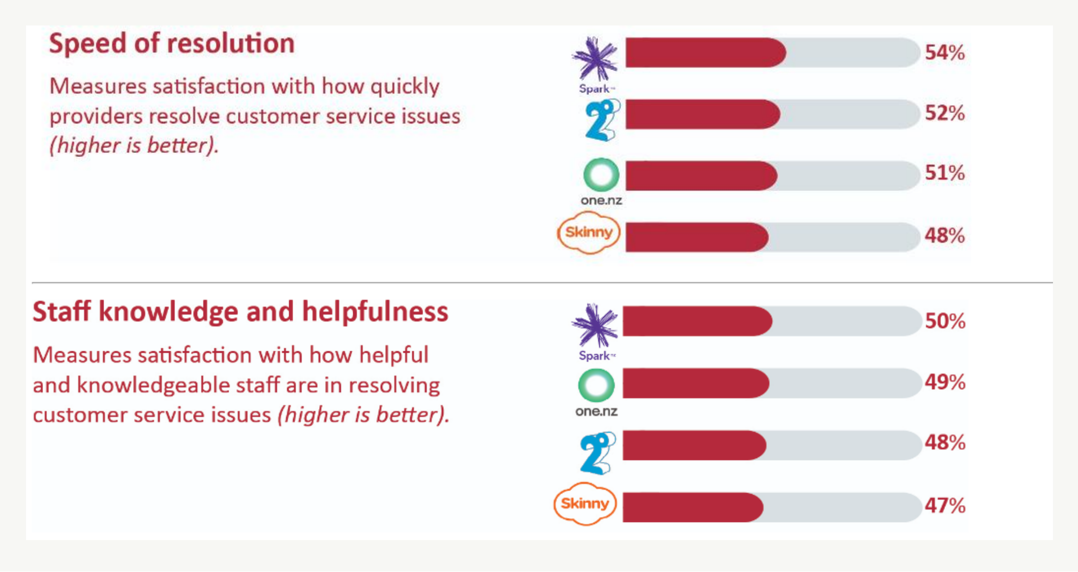
***Base:** Total sample (n=600)*

*Significantly **higher** / **lower** than total at 95% level*

SPEED OF RESOLUTION & STAFF KNOWLEDGE & HELPFULNESS

QUAL

These metrics are seen as the most helpful in decision-making.

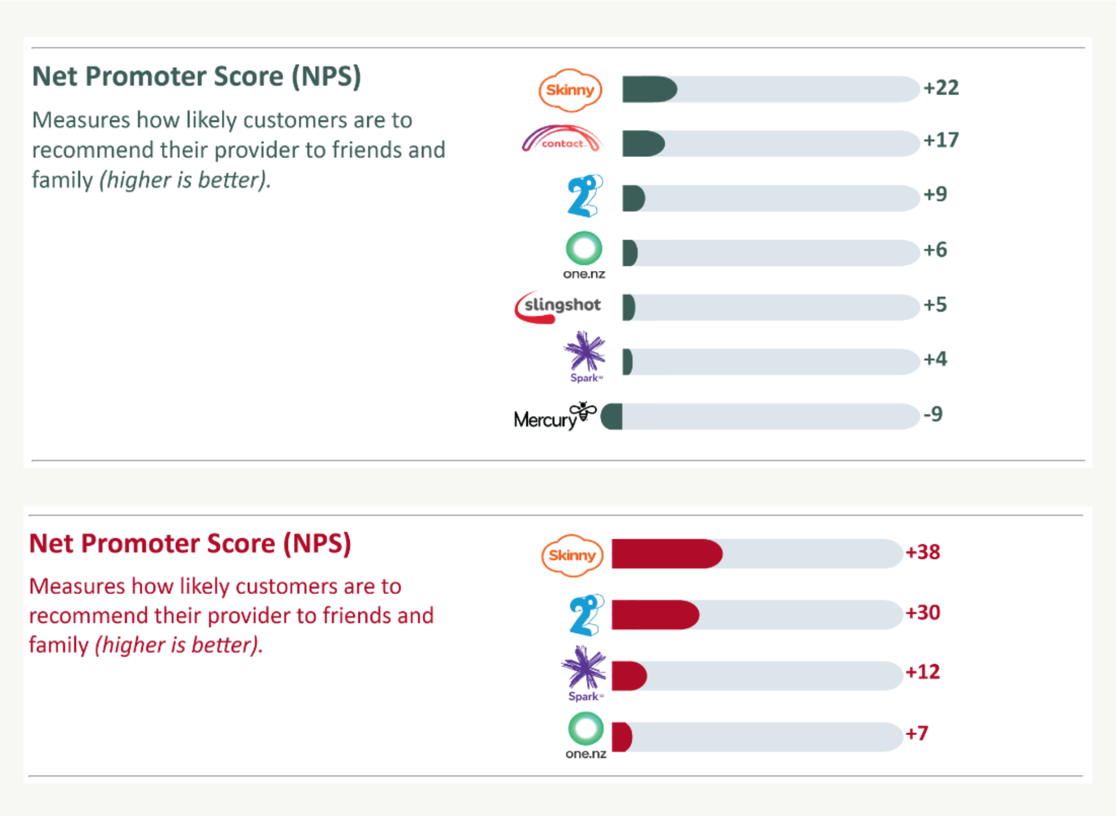


- When asked what they would like to see on the rankings page if only two metrics can be shown, our qualitative participants indicated that they would prefer to be shown *staff knowledge and helpfulness* and *speed of resolution*.
- Some participants felt that *staff knowledge and helpfulness* acts as an 'overall' measure for customer service, as it implies how valued and listened to customers feel. For this reason, it is very important to have it on the page.
- Although *speed of resolution* and *staff knowledge and helpfulness* were generally popular metrics, once introduced to *customers with an issue*, participants felt that all three metrics belong together on the page and would choose to include them all.

QUAL

NET PROMOTER SCORE (NPS)

NPS is a largely unknown metric & can be misunderstood or ignored.



- Our research found that NPS is not a widely known or understood metric. Without the written description below the heading, none of our qualitative participants knew what ‘Net Promoter Score’ meant and none had seen it before elsewhere – they either needed to read the explanation and tried to understand the score rating, or just ignored the metric.
- Additionally, only 9% of our survey respondents indicated that they were familiar with NPS, while 67% stated they had never heard of it.
- Due to its unfamiliarity, some qualitative participants stated they would leave the page if they saw this metric, because it did not mean anything to them. This was particularly true of those who visited the page expecting and wanting a ‘quick answer’.
- Some participants thought that the NPS must be an umbrella score of customer satisfaction over the top of the other three metrics. Some also believed that the cost of providers’ services would influence this score given that it seems to indicate an overall likelihood to recommend, which prompted scepticism that this is a true measure of customer service.
- NPS was perceived by some as a metric that is more likely to be shared by individual providers rather than the Commerce Commission.

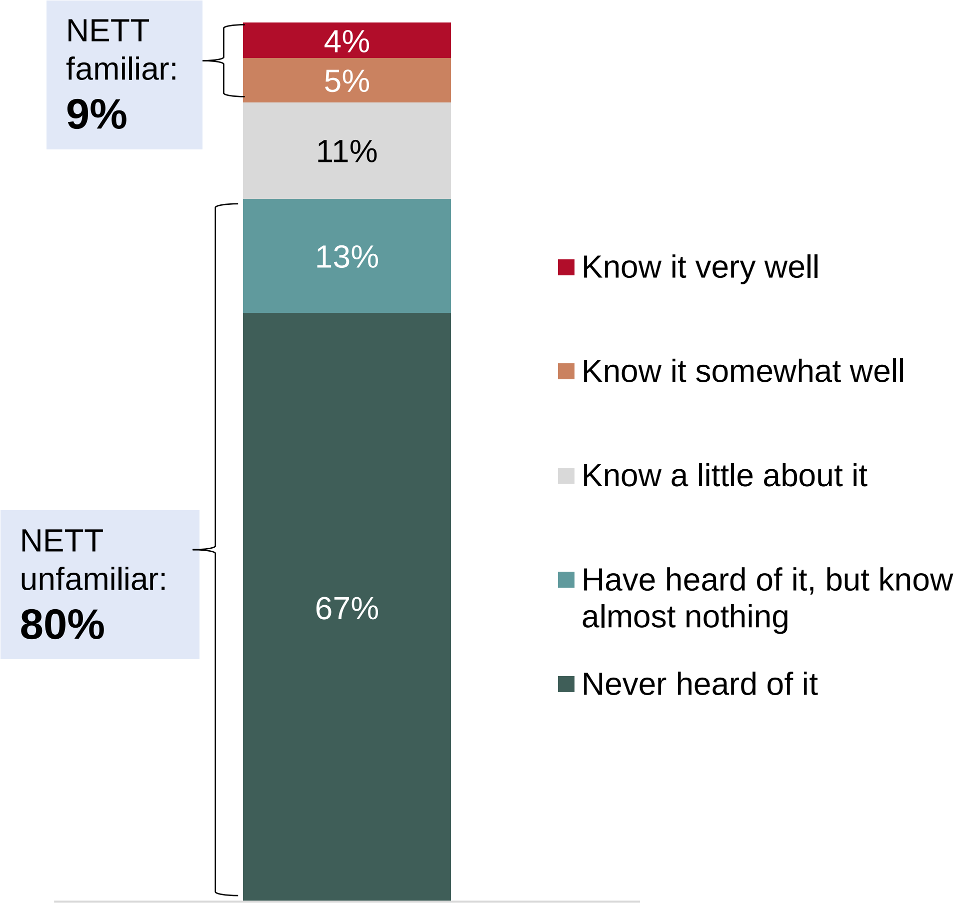
  “It’s something a company would do to boast about their score.”

QUANT

NET PROMOTER SCORE

Two thirds of respondents had never heard of NPS, while around 1 in 10 knew what it stands for.

FAMILIARITY WITH NPS



*Those **significantly more likely** to be familiar with NPS had a **household income of $150,001–$300,000** (22%) and **children in the household** (16%).*

*Those **significantly less likely** to be familiar with NPS were **aged 65+** (1%).*

NPS STANDS FOR…

Don't know	77%
Net Promoter Score	12%
Other response	11%

QMET1: Thinking about the different metrics that can help you get a sense of how good a provider's customer service is, how familiar are you with NPS? / QMET2: What do you think NPS stands for?

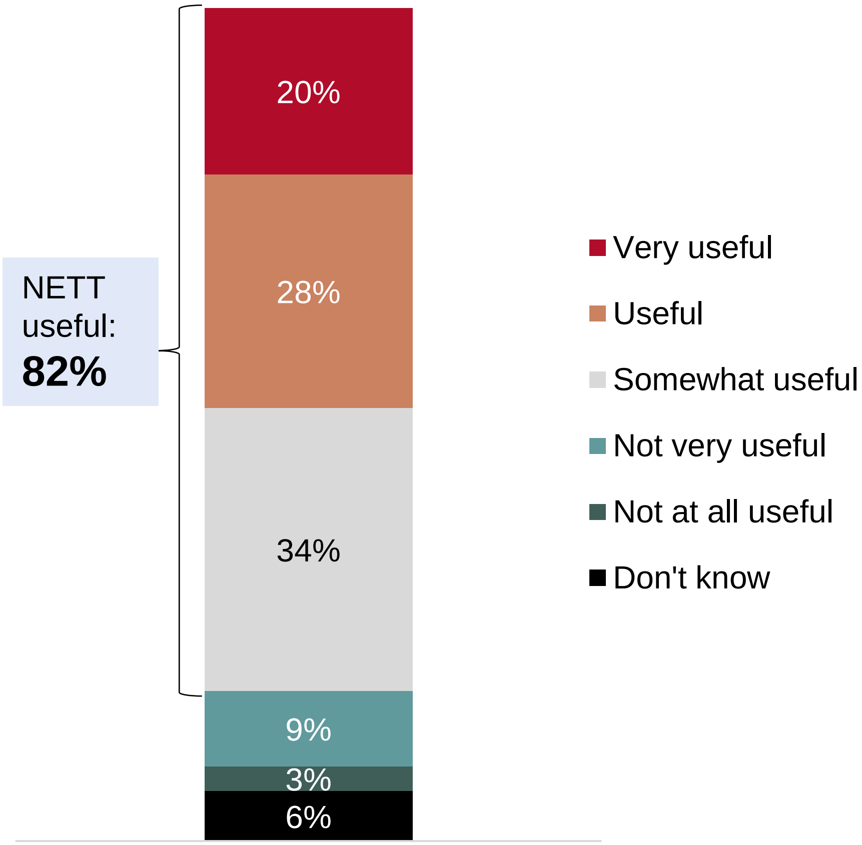
***Base:** Total sample (n=600)*

Significantly higher / lower than total at 95% level

NET PROMOTER SCORE

Customer satisfaction scores as an alternative metric would be well received.

NPS USEFULNESS
(once defined and explained)



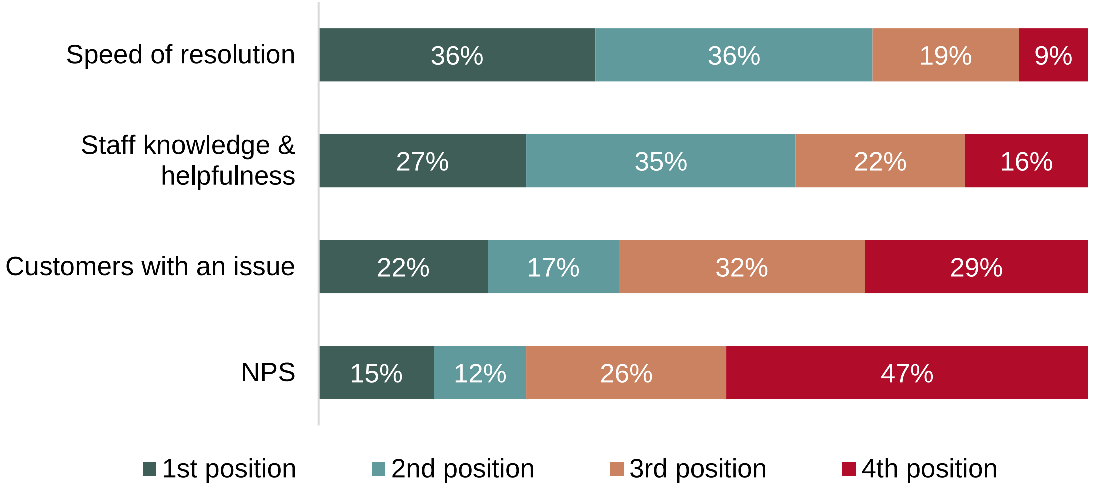
- Our research found that very few people were familiar with NPS; however, the metric appears to be relatively well understood once it was defined and explained.
- Qualitative participants who felt that they understood the metric after reading the description generally saw it as a good way of gauging customer service. Similarly, once defined, 82% of survey respondents indicated that NPS is at least ‘somewhat useful’ in determining a provider’s level of customer service.
- However, there is a risk that those who do not understand the metric will not spend the time trying to do so. It is also worth noting that while recommendations are key in decision-making for some, others like to do their own research and do not consider recommendations.
  “It’s kind of similar to going out and trying to find reviews. If customers are likely to recommend their provider, it means they’re having a good experience with it, so I’d say it’s pretty important. I’d definitely take that on board.”
- Many participants were more interested in seeing a customer satisfaction score, primarily because it is a metric that they are much more familiar with. Participants also believed that customer satisfaction is a simple metric that is easily and widely understood. A rating out of 5 stars was suggested as an easy-to-understand measure of customer satisfaction.
- It is worth noting that there may be a risk in employing a customer satisfaction score, as users may be more likely to excessively favour this score as the sole metric to evaluate customer service, over the other metrics on the page.

QMET3: *If you were ranking the customer service of a provider, how useful would NPS be for you to be able to determine what level of customer service you would get?*
Base: *Total sample (n=600)*

ORDER OF METRICS

Most would prefer *speed of resolution* & *staff knowledge & helpfulness* to appear at the top of the rankings & *NPS* at the bottom. The low positioning of *NPS* is consistent with people's lower level of awareness & familiarity with the metric.

PREFERRED POSITION FOR EACH METRIC



Staff knowledge & helpfulness

***Significantly less likely** to be ranked **1st** by those **aged 18–24** (**14%**) or **25–34** (**17%**) or **of Asian ethnicity** (**17%**).*

***Significantly more likely** to be ranked **4th** by those aged **18–24** (**29%**) or **of Asian ethnicity** (**26%**).*

NPS

***Significantly more likely** to be ranked **4th** by **retirees** (**57%**).*

- **Speed of resolution**
  Most participants asked for this to be higher in the order. There is an understanding that things will go wrong, but a provider's capacity to fix issues quickly is usually a high priority.
- **Staff knowledge and helpfulness**
  Participants felt that this metric and *speed of resolution* should go together. Most participants' preference was to have this as the first or second of the charts shown on the page.
- **Customers with an issue**
  A middle spot was appropriate for this metric, as it is considered important and useful but not usually the first metric that participants were drawn to.
- **Net promoter score**
  Many put this last in their preferred order, because the metric was often confusing and new to them.
  - When participants considered customer satisfaction as an alternative measure, however, they generally put it first, because it was seen as an overall measure.

QMET4: Thinking back to all of the metrics and charts you've seen and what you think are the most helpful to you when comparing providers' customer service levels when people need help with an issue, in which order would you like to see these different metrics displayed?

***Base:** Total sample (n=600)*

Significantly higher / lower than total at 95% level

SUPPORTING TEXT & INFORMATION

6

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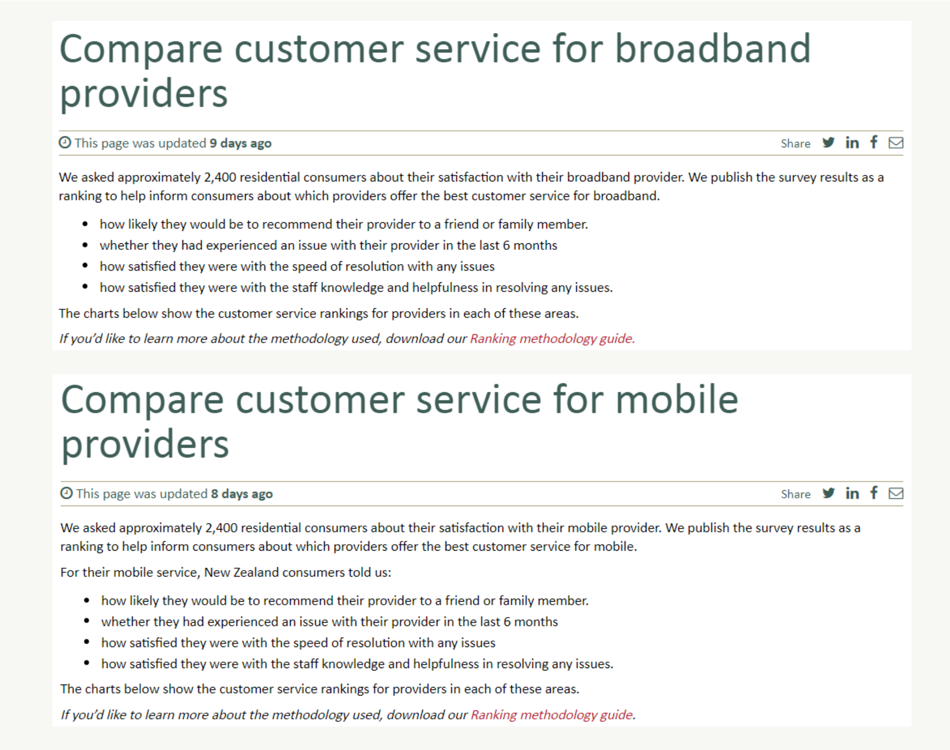
QUAL

RANKINGS INTRODUCTION TEXT

The text works well as both an introduction & a reference point.



Compare customer service for broadband providers

This page was updated **9 days ago** Share

We asked approximately 2,400 residential consumers about their satisfaction with their broadband provider. We publish the survey results as a ranking to help inform consumers about which providers offer the best customer service for broadband.

- how likely they would be to recommend their provider to a friend or family member.
- whether they had experienced an issue with their provider in the last 6 months
- how satisfied they were with the speed of resolution with any issues
- how satisfied they were with the staff knowledge and helpfulness in resolving any issues.

The charts below show the customer service rankings for providers in each of these areas.

If you'd like to learn more about the methodology used, download our Ranking methodology guide.

Compare customer service for mobile providers

This page was updated **8 days ago** Share

We asked approximately 2,400 residential consumers about their satisfaction with their mobile provider. We publish the survey results as a ranking to help inform consumers about which providers offer the best customer service for mobile.

For their mobile service, New Zealand consumers told us:

- how likely they would be to recommend their provider to a friend or family member.
- whether they had experienced an issue with their provider in the last 6 months
- how satisfied they were with the speed of resolution with any issues
- how satisfied they were with the staff knowledge and helpfulness in resolving any issues.

The charts below show the customer service rankings for providers in each of these areas.

If you'd like to learn more about the methodology used, download our Ranking methodology guide.

- Some participants took time to read the text in detail, while others skipped over it and used it as a reference only once they had looked over the graphs. More could be done to highlight important key words and numbers (e.g. the reference to 2,400 residential customers) to make navigation of the text faster and easier.
- Participants would like to see more information about the regions the data was collected from. Without this information, some participants assumed that the survey could have been answered only by people in urban areas or Auckland, not nationwide and including rural areas.

  "It would be interesting to know if it was nationwide. Does it cover people out in the country?"
- Participants generally did not expect a lot of detailed information about the data collection methods here. Some saw the hyperlink to research methodology but chose not to click, because either:
  - the fact that the link was there was enough to reassure them that the methodology was legitimate
  - or they were not interested and did not want to know more about the methodology

  Those who did click on the link commented that the style of the additional information was not as user-friendly as that of the main page, but had a more detailed level of information that gave them a greater understanding, particularly the *Definition of issues* table.
- There was some confusion about the number 2,400 and how it relates to the percentages in the charts – are the percentage amounts based on all respondents or only those who are customers of each supplier?
- The page's upload 8 days ago immediately signalled to participants that the information was current.
- One participant noticed that the broadband introduction appears to be missing some text in the second paragraph that is present on the mobile page: *"The bullet points came out of nowhere."*

FINE PRINT

This section was usually missed & should be placed at the top of the page.

In publishing these results, we are not giving advice or making recommendations. Rankings are updated regularly based on the previous 6 months' survey results and only providers with a market share of 5% or more in our survey are shown. Smaller providers who are not listed offer their own level of customer service and may be able to provide you with a more personalised service.

These rankings reflect the results of monthly surveys conducted from May – October 2023

- After looking at the rankings, some participants questioned why providers were missing, which was the most sought-after information when reading the fine print under the charts.
- Most did not notice or read the fine print at the bottom of the page until prompted, and some felt that this text should be added into the introduction text for better clarity.
- A small number of participants did not understand what '5% of market share' meant. Some were confused by the explanation that smaller providers 'offer their own level of customer service'. Using this as a rationale for not including them in the survey left some confused. We may need to do more to explain this.
- Participants who had used other provider comparison websites in the past mentioned that these websites tend to show more providers than the Commerce Commission's rankings. This led to an expectation that all provider comparisons include providers with less than 5% market share.

  "I'm surprised [Provider x] is not there, I thought [Provider x] was more popular. When I used Glimp (comparison website) it showed [Provider x] ."

QUAL

NAVIGATION

Participants usually missed this link, but found the option to navigate between pages useful.

- Participants noted that they would not have known how to navigate to the page without being prompted. When searching on Google, the page is not within the first few results that come up.
- Participants did not notice the links to the separate mobile and broadband comparison pages until prompted to look around the page for them.
- Once prompted to find the link to the other rankings (from broadband to mobile and vice versa), participants considered this to be a useful component on the page.
- One participant saw the broadband rankings page appear as a result of the Google search when looking for the mobile page.
- A few participants commented that the Commerce Commission should make the rankings page easier to find and advertise it in more places because they would be unlikely to find it otherwise.

ALTERNATIVE DESIGNS

7

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ALTERNATIVE DISPLAY OPTIONS

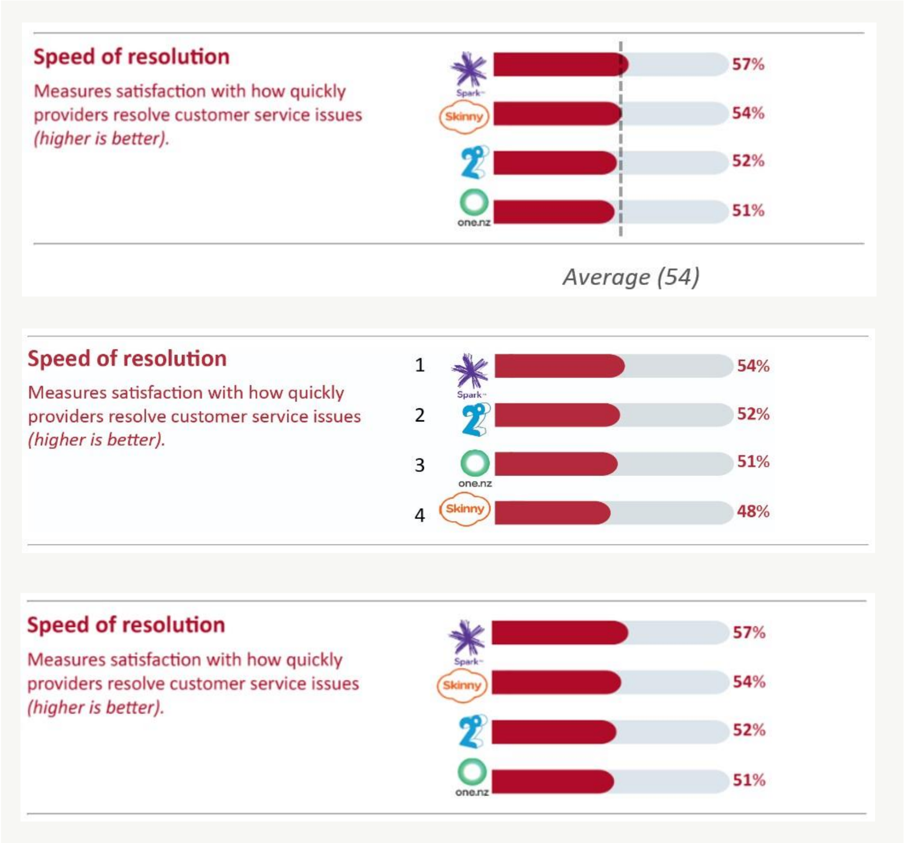
- Alternative display options of the rankings were explored in the qualitative phase of the research. Participants were shown a range of alternative designs during their interviews and were asked to share their views on each option and to indicate their preferences.
- A selection of these alternative displays were subsequently included in the quantitative survey, where respondents were asked to indicate their preference out of three display options. The table on the right outlines the options shown during each phase of the research.
- In most cases, results from the quantitative survey aligned with the findings of the qualitative phase. However, differing opinions on the *average score* display option have emerged between the two.
- Given the greater robustness (i.e. sample size and make-up) of the quantitative survey, our recommendation in this instance is to prioritise the quantitative findings.

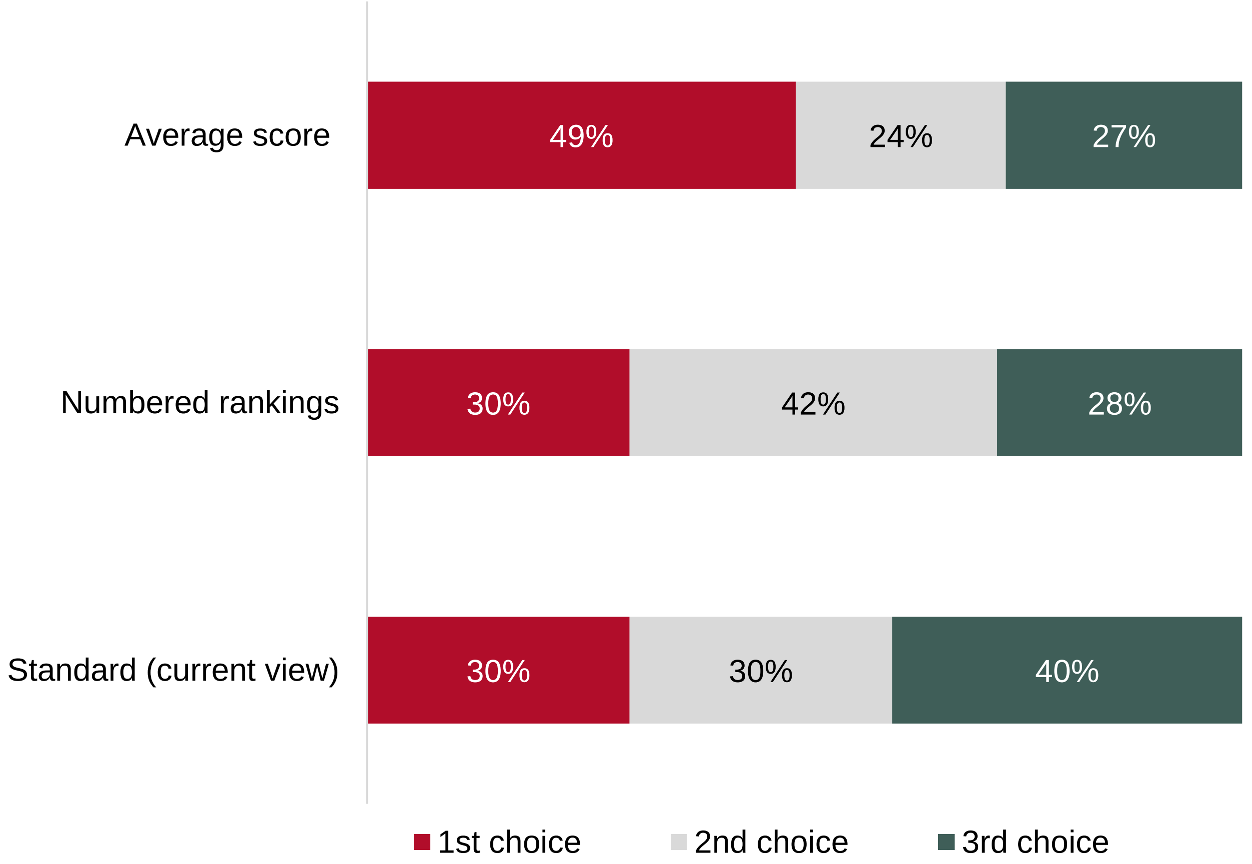
	Qualitative	Quantitative
Average score	✓	✓
Numbered rankings	✓	✓
Horizontal view	✓	
Mobile & broadband rankings displayed side-by-side	✓	
Ranking movement symbols	✓	
Ranking movement score / % points	✓	
Previous month comparison	✓	
Table*	✓	✓

***Note:** A simplified design of the table was shown in the quantitative survey.

PREFERRED ALTERNATIVE CHART DESIGNS

The design showing the *average score* emerged as the preferred choice, followed by the *numbered rankings*. While the same proportion of respondents selected the *current view* as their first choice, considerably more indicated it is their least preferred.



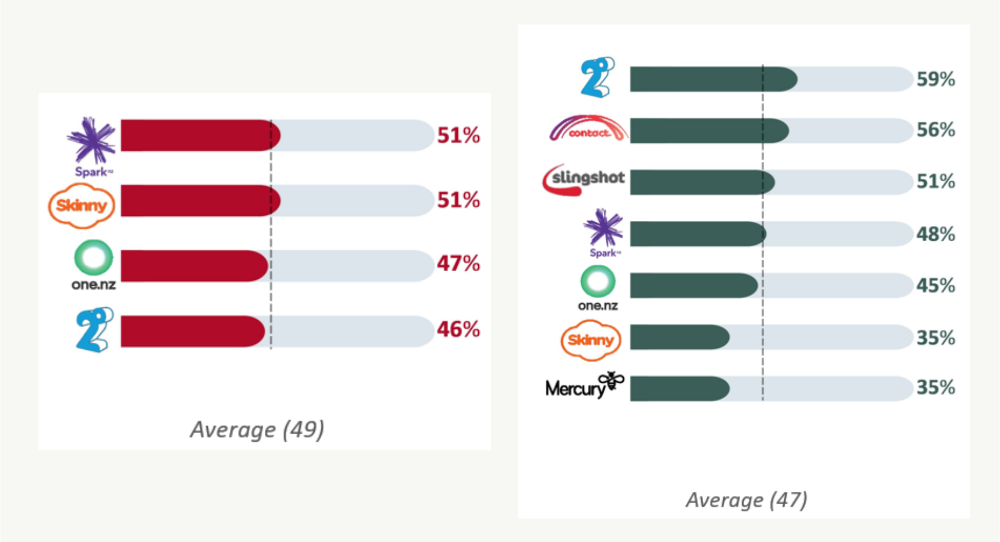


QDB1+QDM1 / QDB2+QDM2 / QDB3+QDM3: *If you were comparing customer service levels of broadband providers, which of the following display options do you prefer?*

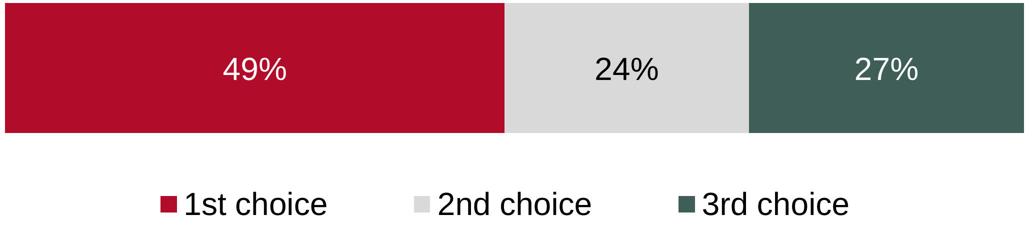
Base: *Total sample (n=600)*

AVERAGE SCORE

Perceptions of the *average score* display differed between qualitative & quantitative respondents.



DISPLAY PREFERENCE – AVERAGE SCORE



- Most qualitative participants viewed the addition of an average as generating confusion and not including useful information. Interestingly, results from the quantitative survey contradict this, with nearly half of survey respondents indicating this display as their preferred option (considerably more than the other two options).
- It is also worth noting that for a small set of participants, the line acted as a consideration demarcation point, where they intuitively dismissed anyone below the line as 'bad' and reduced their consideration to only those above the average line, effectively penalising providers whose scores sit below the average line. As this is a misconception and an inaccurate interpretation of the measure, our initial advice was not to include it.
- However, the average score may have provided survey respondents with an easily recognised reference point which they can use to help read and interpret the data, regardless of how accurately they understand its meaning or role on the chart.

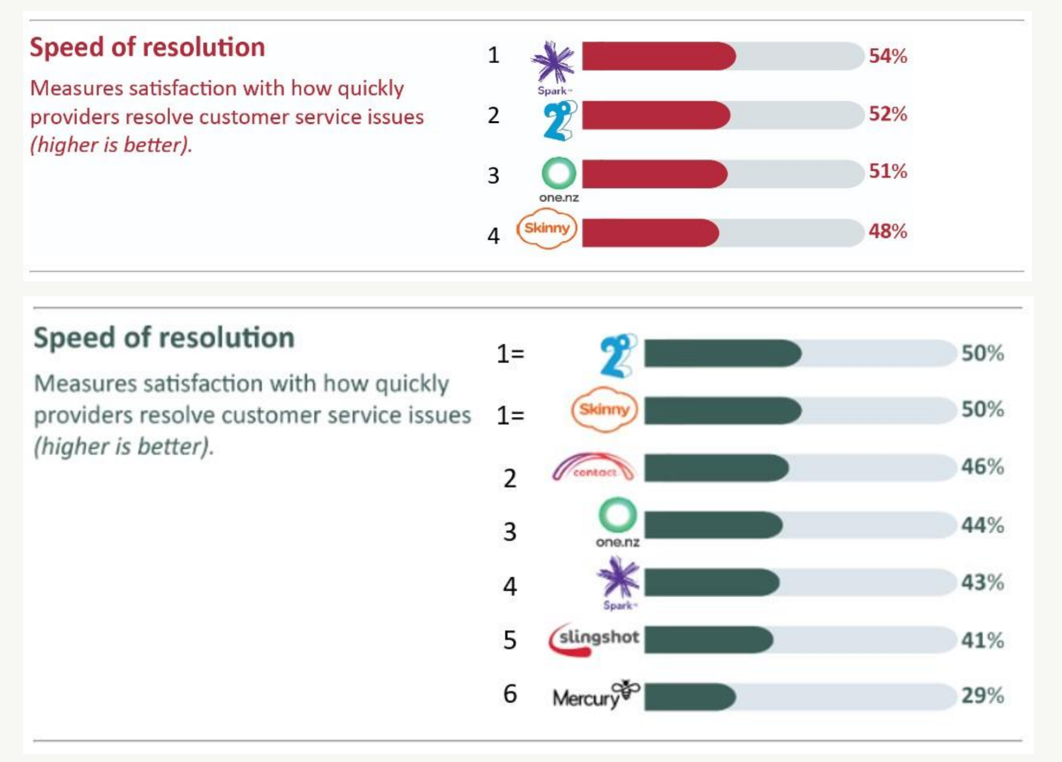
QDB1+QDM1 / QDB2+QDM2 / QDB3+QDM3: If you were comparing customer service levels of broadband providers, which of the following display options do you prefer?
***Base:** Total sample (n=600)*

QUAL

QUANT

NUMBERED RANKINGS

Numbered rankings are a ‘nice to have’, but not essential for comprehension of the charts.



- Numbered rankings were viewed positively by qualitative participants, but more of a ‘nice to have’ and not necessarily a high priority. Most participants cross-referenced the numerical ranking with the chart anyway, making it somewhat redundant.

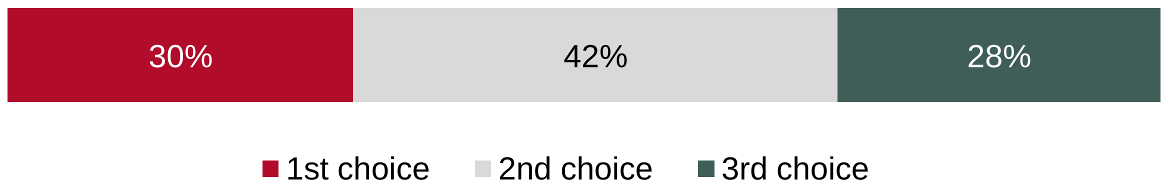
  “Anybody that can read doesn’t need the extra explanation.”

- Additionally, some participants saw the = sign as adding unnecessary confusion and slowing them down in their understanding of the metric.

  “I don’t need a ranking – a picture paints a thousand words. Having the graph is enough. Having the equals sign just adds confusion.”

- Results from the quantitative survey aligned with this sentiment, with respondents placing numbered rankings as their 2nd preferred display option most often (42%).

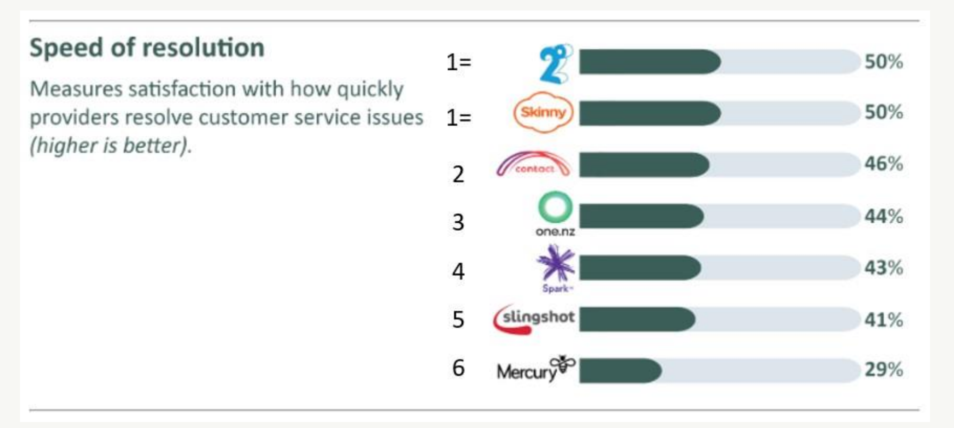
DISPLAY PREFERENCE – NUMBERED RANKINGS



QDB1+QDM1 / QDB2+QDM2 / QDB3+QDM3: *If you were comparing customer service levels of broadband providers, which of the following display options do you prefer?*
Base: *Total sample (n=600)*

ORDER OF NUMBERED RANKINGS

Equal rankings were well understood. In terms of ordering, an almost equal proportion of people expected them to be ranked *alphabetically* or *by decimal points*.

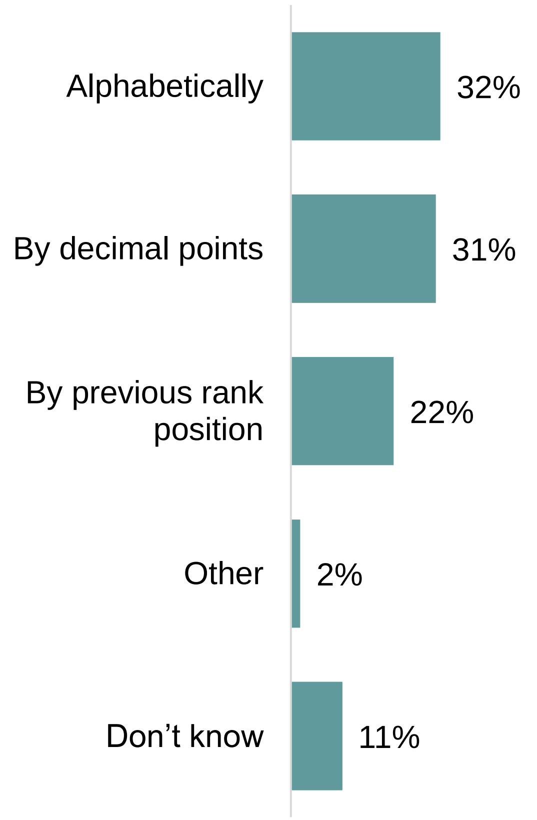


- Equal rankings were generally understood by qualitative participants, but there was an expectation that the order was decided alphabetically rather than one score being slightly higher than another. One participant suggested including a note at the side to explain this or adding decimal points to the percentages.

  "I assume it would be alphabetical, but then [Provider x] is higher than [Provider y], so I don't know."

- Survey respondents had varying opinions, with around a third expecting providers with equal rankings to be ordered alphabetically and by decimal points.

RANKING ORDER EXPECTATION



*Those **aged 65+** were **significantly more likely** to expect* alphabetical order *(**42%**).*

QMET5+QMET6: *When more than one provider has the same score, how would you expect them to be ranked on the list?*
Base: *Total sample (n=600)*

Significantly higher / lower than total at 95% level

QUAL

TABLE WITH SIGNIFICANT DIFFERENCES

This format has too many variables & is too confusing at first glance.

Ofcom: Comparing customer service: mobile, landline and home broadband

	Average mobile[1]	BT	EE	giffgaff	iD mobile	O2	sky	TESCO mobile	3	Virgin	vodafone
Satisfaction with service overall	87%↓	N/A	87%	95%	N/A	85%↓	88%	95%	83%	81%	86%
Satisfaction with reception or signal strength	81%	N/A	80%	83%	N/A	78%	79%	92%	75%	75%	84%
Satisfaction with value for money[2]	82%↓	N/A	74%	93%	N/A	79%	N/A	95%	84%	81%*	76%
Customers with a reason to complain	12%↑	18%	12%↑	11%	4%	9%	14%↑	7%	21%	12%	17%↑
Overall satisfaction with complaint handling	53%	N/A	55%	52%	N/A	53%	54%	50%	50%	54%	56%
Complaints to Ofcom per 100,000 subscribers	8↓	14↑	6↑	N/A	10↓	10↑	5	5↑	9↓	12↓	9↓
Average call waiting times (mm:ss)	2:23↑	1:45↑	3:41↑	N/A	1:52↑	2:33↓	1:51	1:05↓	0:47↑	1:39↓	2:03↓

XX Statistically significantly better than the sector average at the 95% confidence level for market research results.

XX Statistically significantly worse than the sector average at the 95% confidence level for market research results.

↑ ↓ Significantly higher or lower than the previous year (2021) at the 99% confidence level for the Customer Satisfaction Tracker and the Reasons to Complain Tracker, and at the 95% confidence level for the Complaints Handling Tracker. Arrows also indicate the figure is higher or lower than the previous year (2021) for operator data.

- This display was generally dismissed because while it provided more detailed information, it was initially complex and difficult to understand.

  "I can imagine that would be useful, but I don't automatically know how to read it. I feel like it would be easy to read if it came with instructions."

- Some participants stated that they would not be willing to try to look at the information on the page, as it is too confusing.

  "If I opened that page I'd just close it."

- Most participants spent time trying to understand the meaning behind the varying metrics. Some mentioned that using percentages, time stamps, and non-percentage numbers all at once in the same table was confusing; however, for some it could be useful to have a lot of detail available on one page.

  "I guess with this one you can access a lot more information in a smaller space because this one's got seven different aspects down the side."

- A simplified version of a table was subsequently shown in the quantitative survey. Respondents were also asked separately for their views on the additional metrics shown on this display.

TABLE VIEW OF METRICS

QUANT

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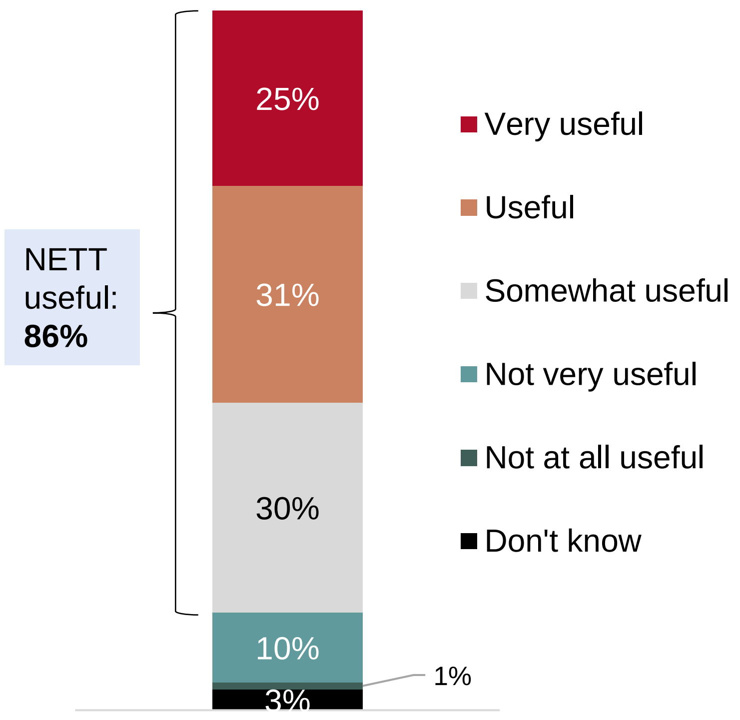
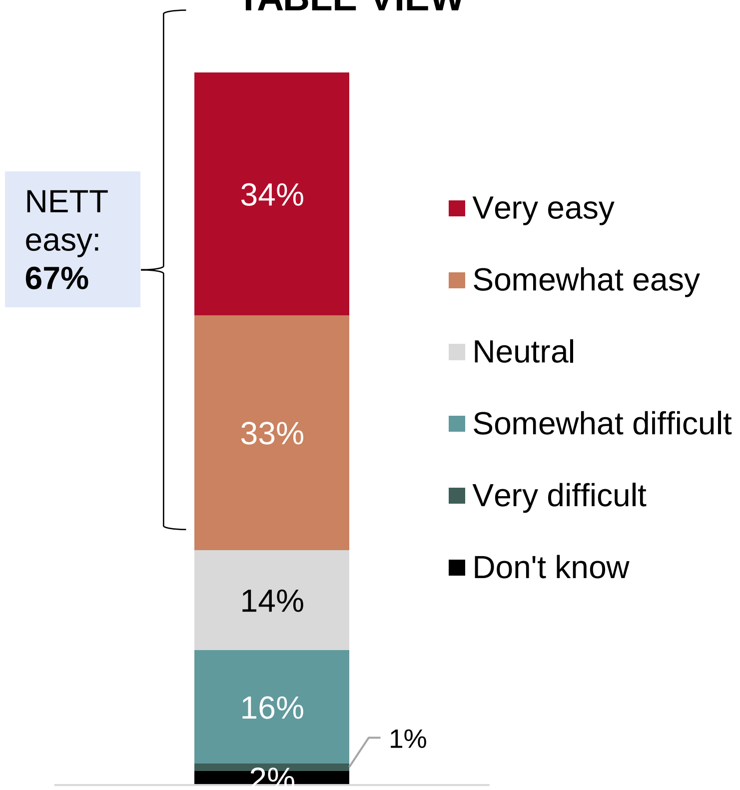
Two thirds found a simplified version of the table (with fewer metrics & significant differences not shown) easy to understand, allowing customers to view providers alongside all 4 metrics. The vast majority also found this view useful.

USEFULNESS OF TABLE VIEW



EASE OF UNDERSTANDING TABLE VIEW



	Speed of resolution	Staff knowledge and helpfulness	Customers with an issue	NPS
	52%	48%	27%	30
one.nz	51%	46%	24%	7
Spark	57%	47%	33%	12
Skinny	54%	51%	27%	38
Average	53%	48%	27%	18

*Those **aged 18–24** were **significantly less likely** to find the table view easy to understand (**54%**).*

__QALT1:__ Here's another way of looking at the metrics. Is it useful for you to look at the providers alongside all of the metrics? / __QALT2:__ And how easy is this display to understand?

***Base:** Total sample (n=600)*

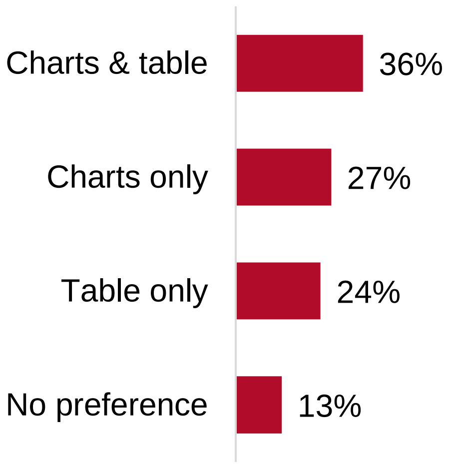
Significantly higher / lower than total at 95% level

Ipsos

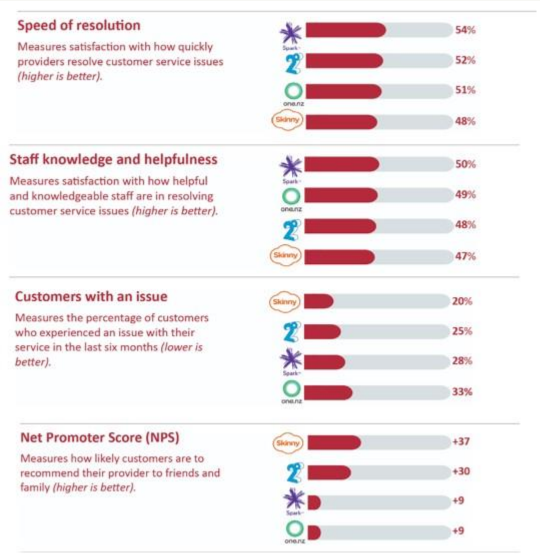
PREFERRED LEVEL OF INFORMATION

The most popular option showed both the charts & the table on the page.

CHOICE OF INFORMATION SHOWN ON PAGE



Charts only



*Those **aged 25–34** were **significantly more likely** to prefer the* chart only *view (**39%**).*

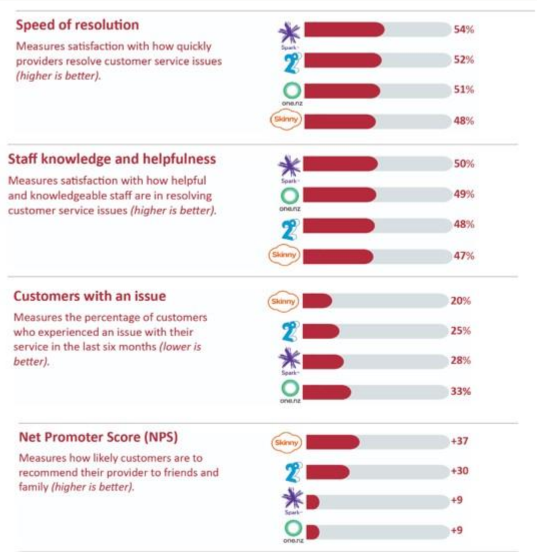
Table only

	Speed of resolution	Staff knowledge and helpfulness	Customers with an issue	NPS
2	52%	48%	27%	30
one.nz	51%	46%	24%	7
Spark	57%	47%	33%	12
Skinny	54%	51%	27%	38
Average	53%	48%	27%	18

*Those **aged 65+** were **significantly more likely** to prefer the* table only *view (**37%**) or have* no preference *(**23%**).*

***Students** were **significantly more likely** to prefer the* chart and table *view (**57%**).*

Charts & table



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***QALT3:** Which of the following displays do you prefer? Please select the one which would give you the level of information you would need to understand the customer service levels of a provider.*

***Base:** Total sample (n=600)*

Significantly higher / lower than total at 95% level

QUAL

HORIZONTAL VIEW

Having all information presented across the page can make some feel overwhelmed.

- Most participants would prefer to keep the information in a vertical format because it is easier to read on the page.
- Some stated that information presented in this way was too much to take in all at once, while others preferred this display for comparison purposes.

  "It's easier to compare as you look across, as long as the 'higher is better' stays the same."
- The few participants who preferred the horizontal view did so because it made it easier to see where an individual provider ranked across each of the 4 metrics. Some suggested retaining the vertical format and including an option to click on a provider, which then shows users where that provider ranks on all 4 metrics.
- This format may be more useful to those who have a provider in mind that they want to switch to and want to check the service.
- On a mobile, participants felt they'd have to enlarge the page and scroll across to be able to see all the charts, but mentioned that it would be easy to see on a laptop or a downloaded PDF version of the rankings.

QUAL

MOBILE & BROADBAND SIDE BY SIDE

Some like the idea of comparison in principle, but struggle with the busy page.

- Most participants saw this as a busy, crowded page. It was off-putting for some, while a few others still valued being able to see mobile and broadband providers side by side.
- Opinions were mixed on whether this display made comparison of providers easier. There was some confusion around the reason for showing providers side by side when the same providers are not shown for mobile and broadband.

  "With the different providers, at a glance, it's pointless."
- There was some pushback that the mobile and broadband categories are too different for the comparison of scores for one provider across both categories to be useful. Additionally, the display did not prompt any participants to consider switching both mobile and broadband providers.
- Some participants went further and asked for some indication of which providers have a bundle service, which is another important aspect to some consumers' decision-making process.

QUAL

RANKING MOVEMENT SYMBOLS

Being able to infer additional information from trends is helpful to some, while others only want the ‘here & now’.

- This design was more divisive than the others.
- Some participants liked the idea of seeing trends and wanted this included, as it helped them to infer what was going on at a provider – e.g. maybe their performance has slipped because of less staff training.
- Reasons for preferring *not* to see the move in rankings differed:
  - Some thought the ranking movements cluttered the page.
  - Others were more interested in the ‘here and now’.
- If trend information were to be used, we would recommend that customers have more detailed information about what the issues are, otherwise they will try to infer this themselves and may make assumptions that are not based on fact.

  “If the speed of resolution is going down, I’ll start to think, ‘why?’ Maybe they have started to lay people off?”
- There was some confusion about the label wording used for the ranking movements:

  “Should it say ‘change in ranking position’?”

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RANKING MOVEMENT SCORE / PERCENTAGE POINTS

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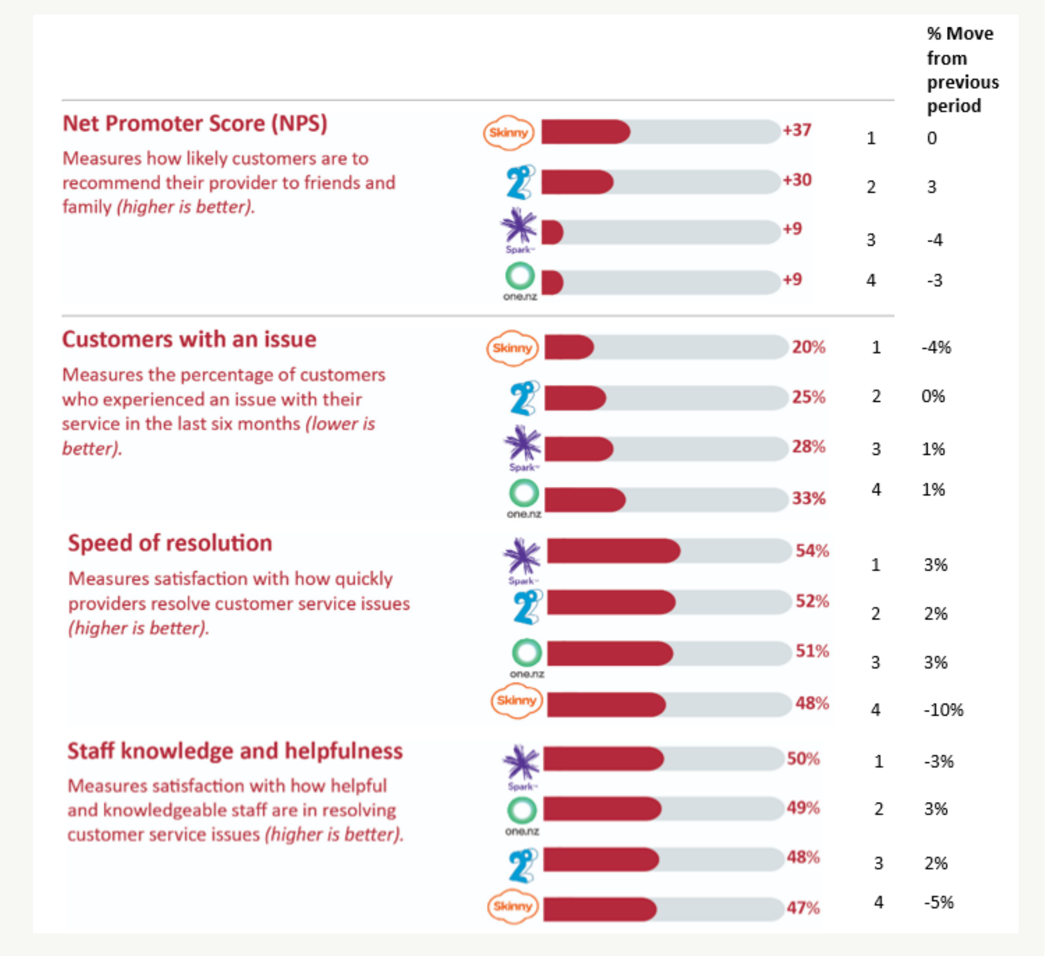
The two types of percentages on the page cause confusion.



- Most commented that the ranking movement symbols rather than the percentage move were easier to comprehend at a glance.
- As with the reactions to the movement symbols design, some participants saw the movement in scores from the previous period as unnecessary clutter on the page, with a preference for seeing current data only.

  “There’s a lot going on. This isn’t as relevant, I want to see the most recent.”
- The extra percentages add complexity – some commented that there were ‘too many percentages on the page’, and it was not immediately clear what the percentage is referring to.
- One participant mentioned that it would be helpful to see a + sign in front of the numbers that are positive, for clarity and consistency with the negative numbers.
  - It should be noted that the movements in scores are measured in percentage points rather than percentages and we recommend that that label be changed to reflect this.

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PREVIOUS MONTH COMPARISON

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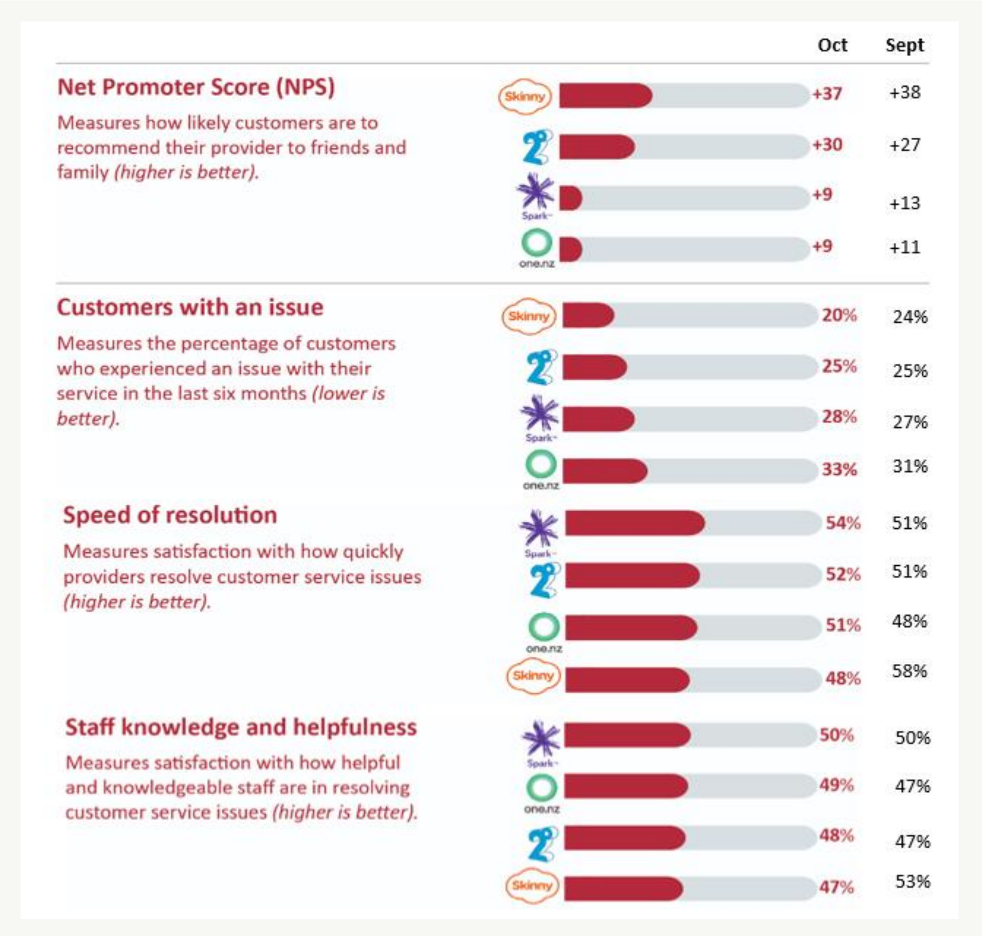
Month-by-month time frames are perceived as too short for any noteworthy movements to occur.



- Most participants stated that a 6-month time frame was the preferred period to measure changes with providers.
- Participants generally felt that there is not enough happening across a month to make any material difference in their decision of who to switch to, unless the difference was unexpectedly large.
- Similar to the other movement displays, the extra detail would not be necessary here for some consumers.

  "It's really going into specifics, isn't it, whereas if I'm looking for a new provider, I kind of just want an overall."

POTENTIAL GAPS & ADDITIONAL INFORMATION

8

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OTHER METRICS

Few respondents indicated that another metric would be helpful, suggesting that the current metrics are sufficient for customers' needs.

OTHER METRICS THAT WOULD HELP DECISION-MAKING

No other metric	60%
Average call wait time	7%
Cost, prices in general	4%
Number of times to contact before issue resolved	4%
Customer reviews	2%
Ease of use	2%
Frequency of issues experienced	2%
Other scores / rankings	2%
Location, whether NZ based	2%
Other	7%
Don't know	8%

"No, I think you've got it covered. Any more and you'd risk over complicating things."

"Maybe speed in which you are connected with a provider? I'm constantly on hold and would be nice to know how long I'll be on hold for."

"Value for money comparison would be an interesting metrics exercise. I think in today's tight economic climate many people would be guided by the mighty dollar first. Then they could check out the other graphs and see what else was important to them."

- Some qualitative participants expected that rankings would include information about price or commitment to consumer laws, as these were seen as the main focus of the Commerce Commission's role. It was suggested that links to this type of additional information could be added to the customer service rankings pages.

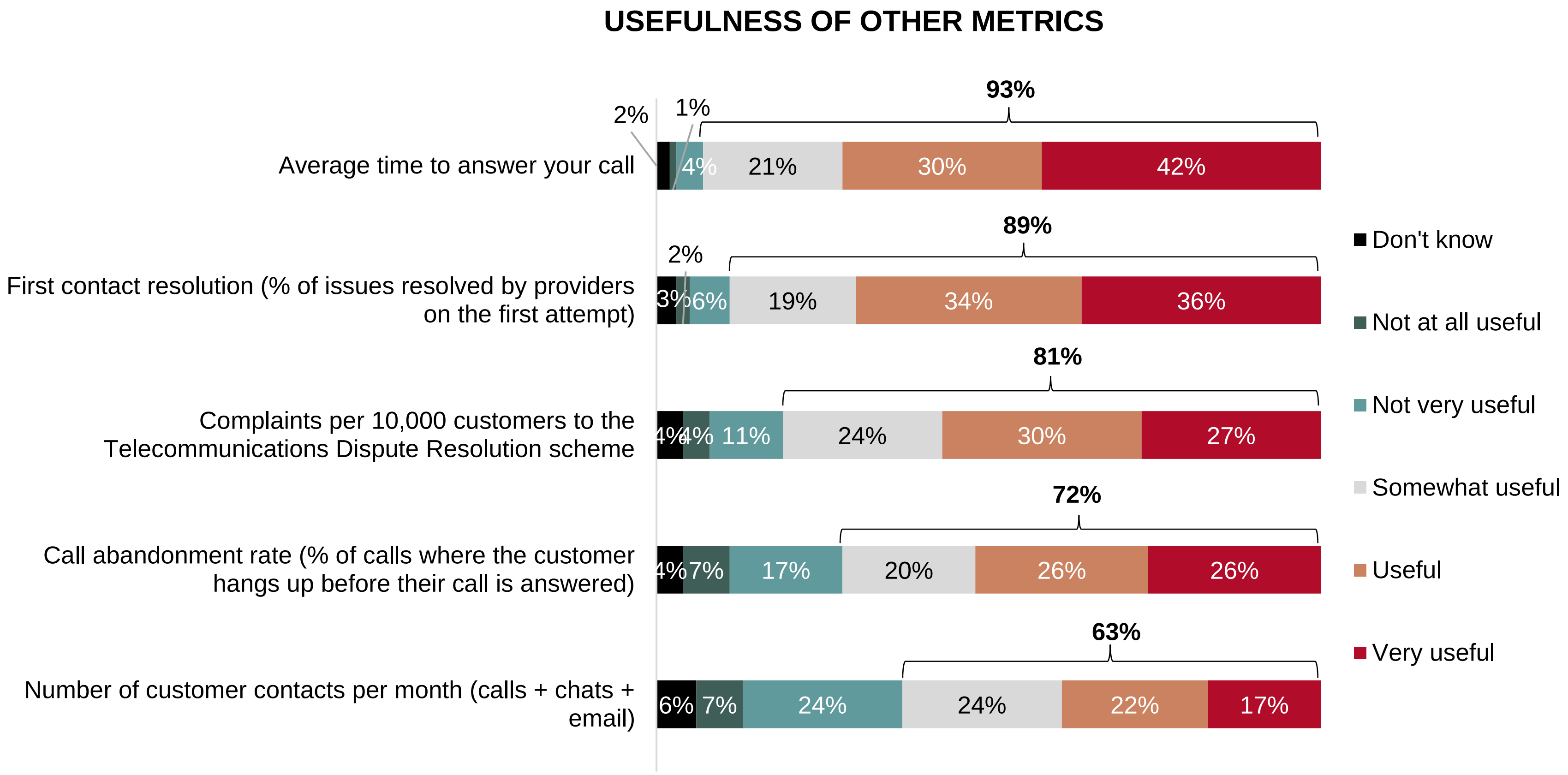
***QALT4:** Are there any other metrics that would help you make a decision when looking at a provider's customer service (in assisting you with an issue)?*

***Base:** Total sample (n=600)*

USEFULNESS OF POTENTIAL OTHER METRICS

QUANT

Average time to answer call & first contact resolution scored the highest for usefulness.



No significant differences were found for the perceived usefulness of the average time to answer call *or* first contact resolution *between demographic groups.*

Complaints per 10,000 customers *is* ***significantly more likely*** *to be considered useful by those with a* ***household income of $150,001–$300,000*** *(69%) and* ***male customers*** *(65%).*

Call abandonment rate *is* ***significantly more likely*** *to be considered useful by* ***male customers*** *(63%).*

Number of customer contacts *is* ***significantly more likely*** *to be considered useful by* ***Māori*** *(50%) and* ***male customers*** *(48%), and* ***significantly less likely*** *by those* ***aged 45–54*** *(28%).*

QALT5: *How useful would you find these alongside the other metrics that you've seen so far?*

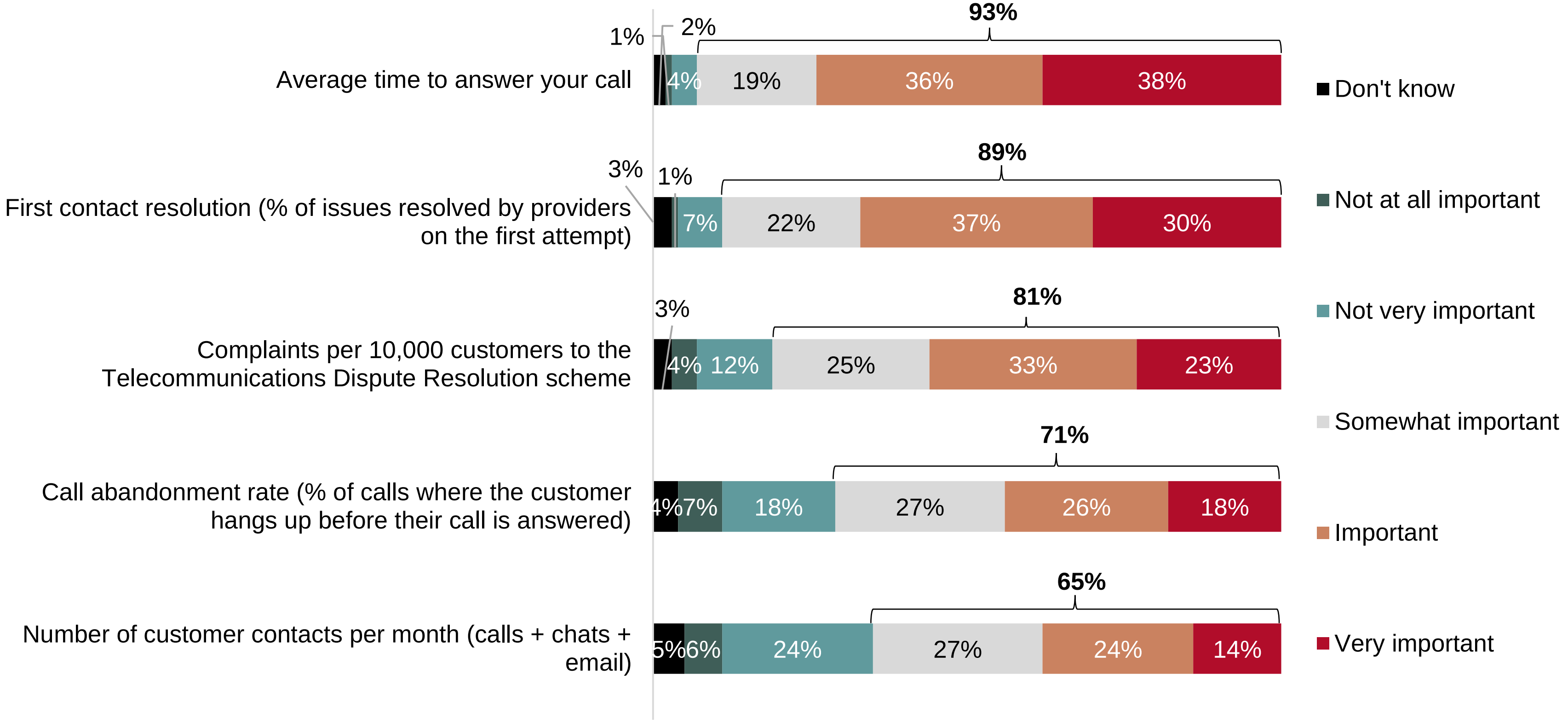
Base: *Total sample (n=600)*

Significantly ***higher*** */* ***lower*** *than total at 95% level*

IMPORTANCE OF POTENTIAL OTHER METRICS

As well as being scored the most useful, *average time to answer call & first contact resolution* were rated highest for importance. This is consistent with what respondents identified (unprompted) as what they would most like to know about providers' customer service.

IMPORTANCE OF OTHER METRICS



No significant differences were found for the perceived importance of the average time to answer call *between demographic groups.*

First contact resolution *is **significantly more likely** to be considered important by those **aged 55–64** (**78%**).*

No significant differences were found for the perceived importance of complaints per 10,000 customers *between demographic groups.*

Call abandonment rate *is **significantly more likely** to be considered important by **male customers** (**57%**) and **significantly less likely** by those **aged 45–54** (**30%**).*

Number of customer contacts *is **significantly more likely** to be considered important by those **aged 35–44** (**52%**).*

***QALT6:** And how important are they in helping you compare the level of customer service of providers?*
***Base:** Total sample (n=600)*

Significantly higher / lower than total at 95% level

ADDITIONS TO THE PAGE

The majority do not feel that anything needs to be added to the pages, with a small number of respondents wanting to see more information on *cost & call wait times*.

Most of the information here is very helpful and informative. I also find the layout to be particularly pleasing to look at which helps with making a decision."

ANYTHING ELSE TO INCLUDE

Nothing, everything is provided	61%
Cost, prices in general	5%
Average call wait time	4%
Don't know	8%

Cost for mobile and/or broadband plans so we can decide if a cheaper price is worth having bad reviews on customer service."

Maybe time from start of a call to how long to actually speak to an operator."

QPAGE2: *Is there anything else you would like to see included in these rankings?*
Base: *Total sample (n=600).* ***Note:*** *Responses 2% and under not shown.*

QUANT

OTHER SUGGESTIONS FOR RANKINGS PAGE

While most felt that nothing needed to be removed from the rankings page, some respondents had some suggestions, which echoed findings from our qualitative interviews.

ANYTHING TO BE REMOVED

Nothing, everything is provided	**78%**
NPS	4%
Don't know	7%

"NPS - waste of time as most people don't understand what it is or how it works."

"Not sure that I would put too much faith in the NPS score."

"All the providers listed, not just 'top'."

"Is the service being provided locally or outside New Zealand?"

"Maybe an overall score based on the rankings."

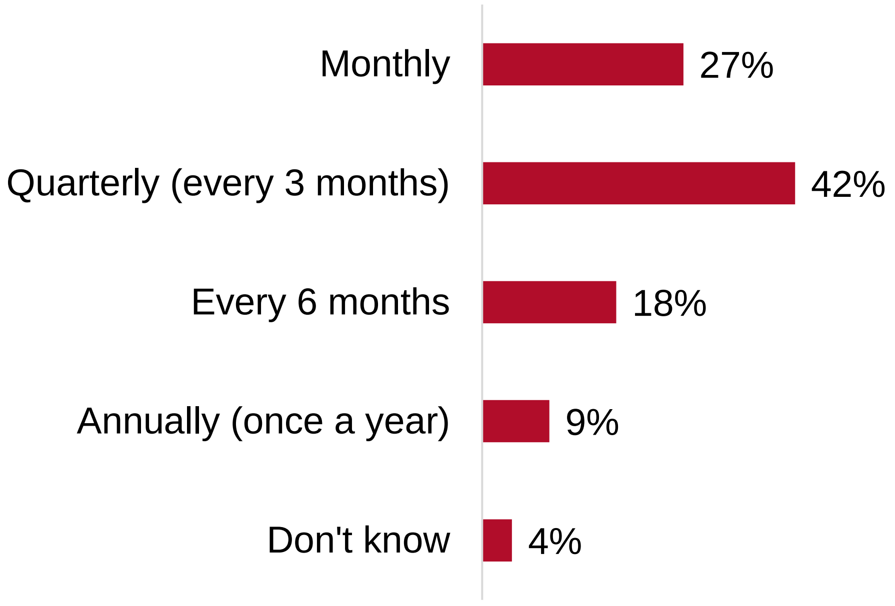
"Looking at the graphs, speed of resolution and staff knowledge and helpfulness, they seem to be very similar."

***QPAGE2:** Is there anything else you would like to see included in these rankings? / **QPAGE3:** Is there anything you would like to see removed from these rankings?*
***Base:** Total sample (n=600). **Note:** Responses 2% and under not shown.*

REGULARITY OF UPDATES

Most users would expect information to be updated at least every quarter, though almost a third would like to see more frequent updates.

EXPECTED UPDATE TIME FRAME



*Those **of Asian ethnicity** are **significantly more likely** to expect an update every 6 months (**32%**).*

*Those with a **household income of $150,001–$300,000** are **significantly less likely** to expect an update monthly (**18%**).*

***QPAGE1:** How regularly would you expect these rankings to be updated?*
***Base:** Total sample (n=600)*

Significantly higher / lower than total at 95% level

QUAL

CONNECTING MULTIPLE SOURCES OF INFORMATION

- After seeing the rankings, many participants felt that these customer service metrics would be suitable to be shown on individual providers' websites because this is where they often go for information on providers; however, a few were doubtful that providers would be willing to do this if their scores were not high.
- Participants noted that they would want to look at customer service rankings alongside what providers offer in terms of pricing and products. Some would like to see an overall ranking with customer service and price taken into account, while others would like to be able to see customer service, pricing, and other metrics all on a website together to compare.
- It was commonly mentioned that other websites showing reviews or comparisons of mobile and broadband providers' costs and services could include these customer service rankings, perhaps with a link to the Commerce Commission page. This would enable consumers to compare providers based on a more holistic view of their service and offering.

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THANK YOU

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