

# Customer Satisfaction Monitoring

## Telco SAT Tracking

6 MONTHLY REPORT (JANUARY – JUNE 2023)





# Contents

	<u>Research Methodology</u>	4
01#	<u>Residential Insights</u>	5
02#	<u>NPS &amp; Satisfaction</u>	6
03#	<u>Tenure &amp; Switching Behaviour</u>	10
04#	<u>Performance Issues &amp; Response</u>	17
08#	<u>SME Insights</u>	20
09#	<u>NPS &amp; Satisfaction</u>	21
10#	<u>Tenure &amp; Switching Behaviour</u>	25
11#	<u>Performance Issues &amp; Response</u>	32
	<u>Demographics &amp; Firmographics</u>	35

© 2023 Perceptive and Commerce Commission. No part of the data contained in this report may be edited in any way without the permission of Perceptive.

# Purpose of this research

The purpose of this research is to monitor satisfaction with Retail Service Quality (RSQ) among consumers of Retail Service Providers (RSPs) across mobile and broadband. Allowing the Commerce Commission to gather consumer insights to identify future RSQ matters for improvement and to measure the success of the Commission's RSQ solutions.

As part of the RSQ Programme, the Commerce Commission has worked with Perceptive to implement this ongoing monitoring programme to meet the requirements of section 9A of the Telecommunications Act, 2001. The aim of this programme is to provide information to consumers, gain consumer insight to identify future RSQ matters for improvement, and measure the success of RSQ solutions.

By publishing this data, the Commission aims to increase competition and transparency among providers and empower consumers to include service quality in their decision-making, which will in turn impact the acquisition and retention of poorly performing RSPs.



Additional information and data may be available on request, including the questionnaire.

# RESIDENTIAL INSIGHTS



# Methodology

## Sample criteria

 <b>Residential</b>	 <b>SME</b>
<p>Main decision maker OR shared responsibility for making decisions</p> <ul style="list-style-type: none"> <li>For internet at home.</li> <li>For mobile phone plan / monthly payment / pre-pay.</li> </ul> <p>Broadband / household internet OR mobile are currently telecommunication products and services paid for and make decisions about.</p> <p>Current broadband or mobile provider is known.</p>	<p>Main decision maker OR shared responsibility for making decisions.</p> <ul style="list-style-type: none"> <li>For Internet at the business/company you work for or own.</li> <li>For mobile phone plan / monthly payment / pre-pay (for the business/company you work for or own).</li> <li>Business has its own business plan with broadband provider .</li> <li>Business has its own business plan with mobile provider.</li> <li>For Internet at the business/company OR mobile are currently telecommunication products and services the business / company is paying for and make decisions about</li> <li>Current broadband or mobile provider is known.</li> </ul>
<ul style="list-style-type: none"> <li>18+ years old.</li> <li>Live in New Zealand</li> </ul>	<ul style="list-style-type: none"> <li>Owner or decision maker for a business.</li> <li>Business has less than 50 employees.</li> </ul>
<ul style="list-style-type: none"> <li>All residential data is weighted by Nat Rep New Zealand (gender, age, region).</li> </ul>	

## Total sample size\*

	Residential Broadband	Residential Mobile	SME Broadband	SME Mobile
<b>Jan-Jun 23</b>	2,933	3,040	1,026	1,054

\*Total sample reflects all weighted respondents, including those who have selected 'other' provider than the providers listed. However, they have not answered specific brand questions further.

## Additional notes:

**(T4B) Top 4 box** is the percentage of respondents that fall into the top four categories on the 10-point scale.

**Demographic/firmographic call outs** throughout this report reference the largest skews.

**A large range of sectors** have been included in the SME sample, please see firmographics slides for the full list.

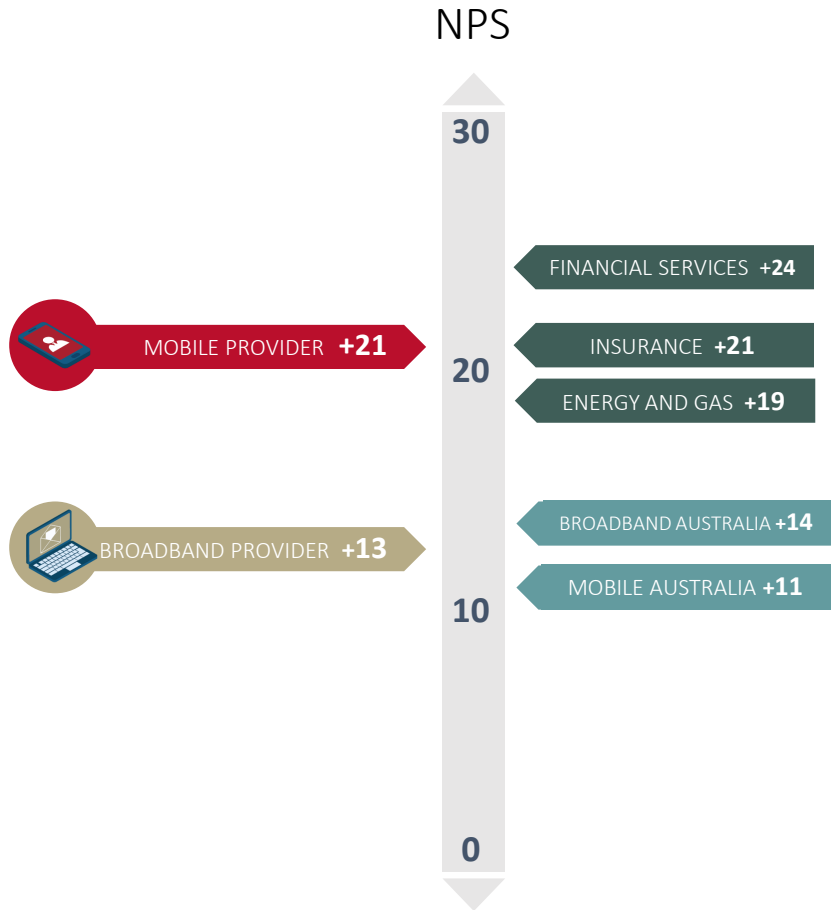
## RESIDENTIAL INSIGHTS

# NPS & Satisfaction



# NPS

Both mobile and broadband post a positive NPS. Mobile performs in line with similar New Zealand industries, while broadband is in line with Australian results.



Mobile providers sit at a favorable NPS score of 21. Whilst broadband providers have a positive NPS of 13, they are yet to meet the favourable threshold of 20.



## Mobile

- Lower NPS:
  - +17 – consumers under 55
  - +18 – consumers of European descent.
- Higher NPS:
  - +28 – consumers 55+
  - +24 – consumers of Māori and Pasifika descent.



## Broadband

- Lower NPS:
  - +7 – consumers aged 45-64 years old.
- Higher NPS:
  - +22 – consumers aged 65+.

NPS measures the loyalty of customers to a company, based on their ratings on a 0-10 scale, customers are classified into three categories: Promoters (9-10), Passives (7-8), Detractors (0-6). NPS is then calculated using the following formula:  $NPS = (\text{Percentage of Promoters} - \text{Percentage of Detractors})$ .

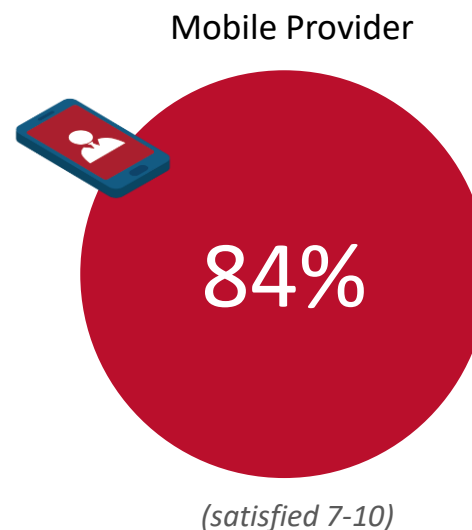
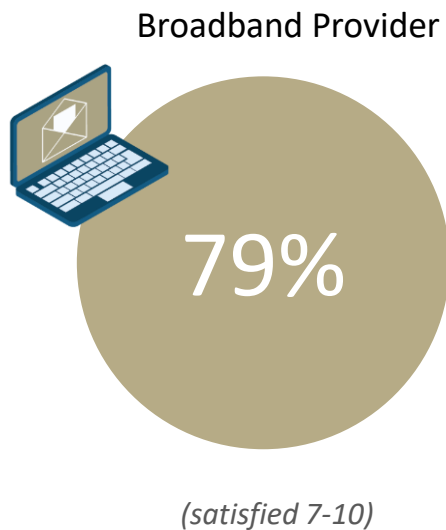
NPS scores range from -100 (all customers are detractors) to +100 (all customers are promoters). Bain & Co, the creators of the NPS metric, consider a score above 20 is favourable, above 50 is excellent, and above 80 is world class.

**Q** Considering your experience with your provider, how likely would you be to recommend them to a friend or family member? (Scale 0-10)

# Overall satisfaction

Across broadband and mobile consumers, over three quarters of respondents said they were satisfied with their provider, this leaves close to a quarter of consumers not satisfied.

Mobile consumers are slightly more satisfied than broadband consumers.



## Mobile

- 89% of mobile consumers aged 65+ are satisfied compared to 82% of mobile consumers aged under 65.



## Broadband

- 81% of fibre consumers (includes fibre and hyperfibre) are significantly more satisfied compared to 75% of non-fibre users.
- 90% of broadband consumers aged over 75 are satisfied.

**Q** Overall, how satisfied or dissatisfied are you with your provider for your broadband/ household internet service / mobile service? Please take into account their products and services, as well as your experience of dealing with them. (Scale 0-10).



# Satisfaction

Many consumers are satisfied with their mobile and broadband coverage and availability, however there is room for improvement in all areas, particularly in customer service and pricing.

Mobile consumers hold a higher level of satisfaction compared to broadband consumers in six areas.

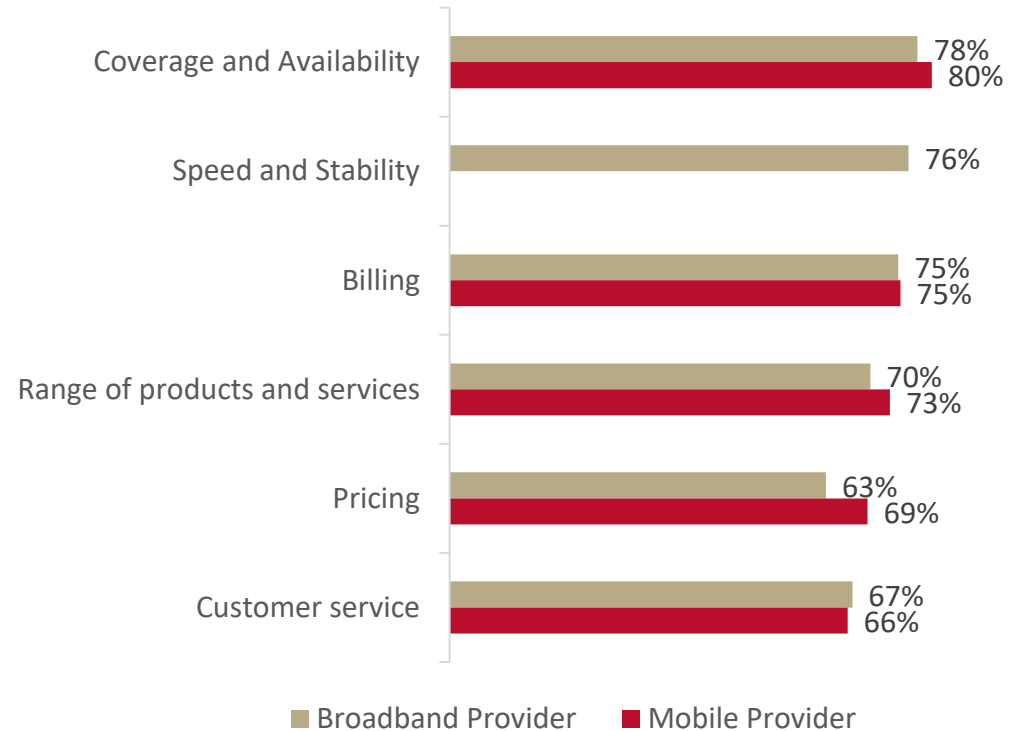
Coverage and Availability is the service both broadband and mobile consumers are most satisfied with, while Pricing and Customer Service score the lowest.



Older consumers (65+) have higher in satisfaction across all six areas of mobile and broadband. Below are where there are significant differences:

- **Coverage and Availability:** broadband 84%, mobile 87%.
- **Billing:** broadband 84%, mobile 80%
- **Speed and Stability:** broadband 82%
- **Range of products and services:** broadband 75%
- **Customer service:** broadband 71%, mobile 72%

Satisfaction (satisfied 7-10)



Q And how satisfied or dissatisfied you are with your provider for your broadband/ household internet service/ mobile service in relation to the following aspects? (Multiple Response (MR))

RESIDENTIAL INSIGHTS

# Tenure & Switching Behaviour

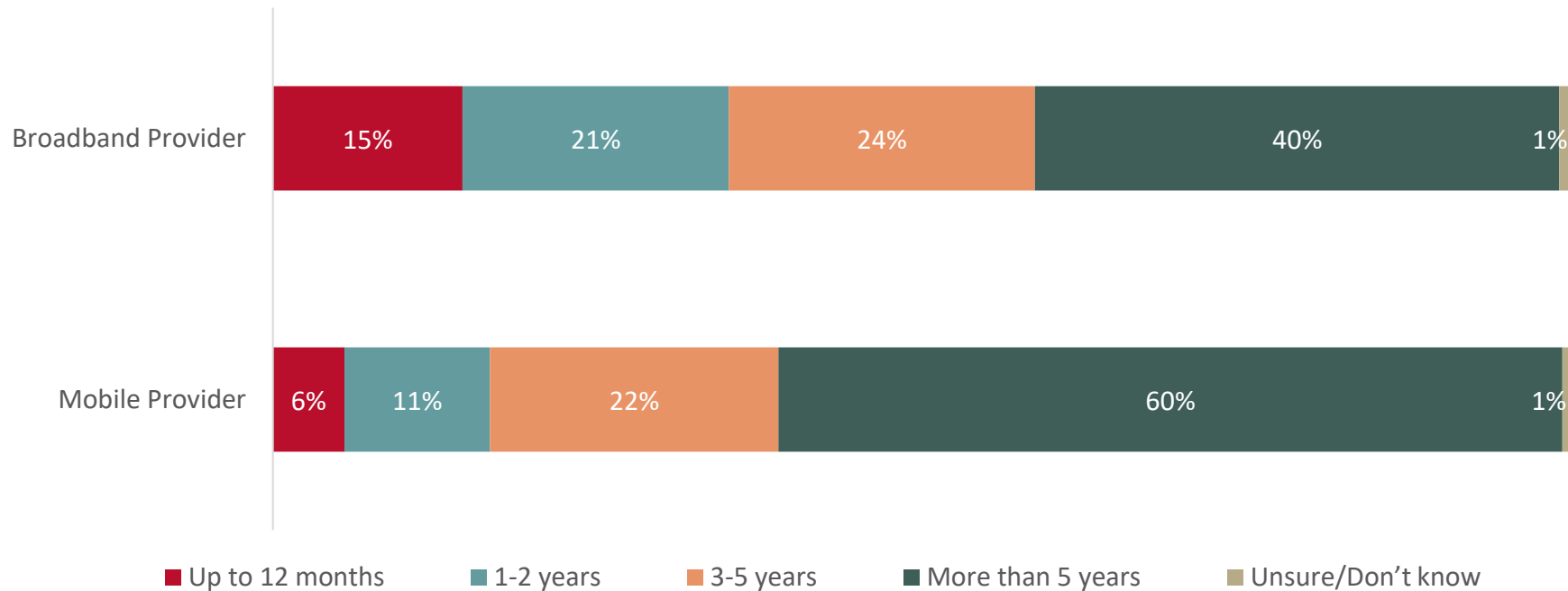


# Tenure

Mobile consumers have a longer tenure with their provider than broadband consumers, with 60% of mobile consumers having been with their current provider for more than 5 years, compared to 40% for broadband.

Mobile consumers have a longer tenure with their provider than broadband consumers.

While 83% of mobile consumers have been with their current provider for 3+ years, under two thirds of broadband consumers have been with the same provider for 3 years or more.



### Mobile

- 26% of consumers who are of Māori or Pasifika descent have been with their provider for less than two years.

### Broadband

- 79% of consumers aged 55+ have been with the same provider for 3+ years compared with 56% of consumers aged under 55 years.

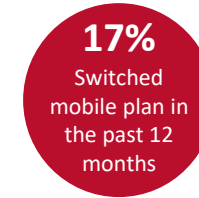
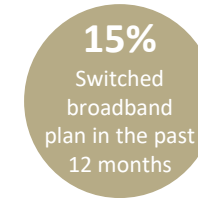


**Q** About how long have you been a customer of your provider for your broadband/ household internet/ mobile service?

# Switching plans with same provider

Switching mobile and broadband plans with the same provider is low.

Broadband and mobile consumers switch their plans at a relatively similar rate.



## Mobile

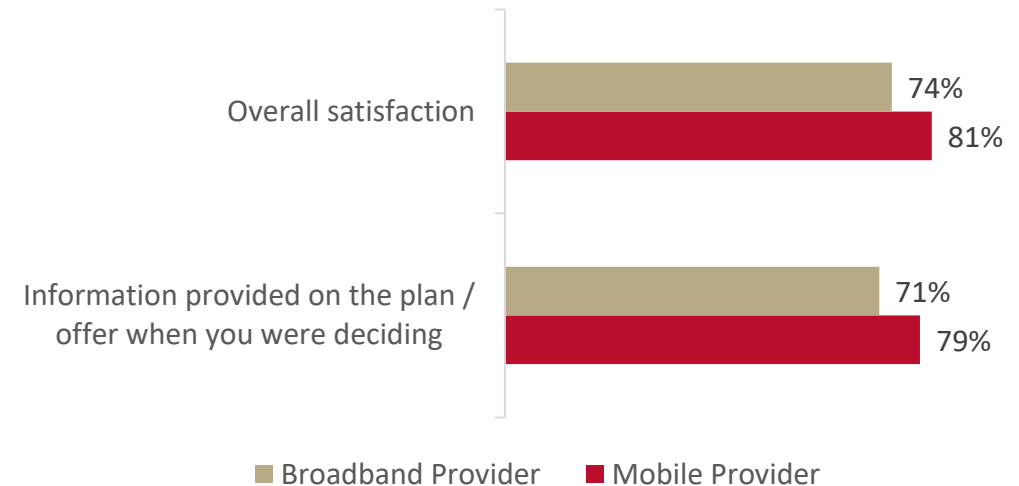
- More likely to switch plans with the same provider:
  - 25% Māori and Pasifika
  - 26% consumers in households earning over \$150K



## Broadband

- More likely to switch plans with the same provider:
  - 21% Māori and Pasifika
  - 21% consumers in households earning over \$150K

## Satisfaction (satisfied 7-10)

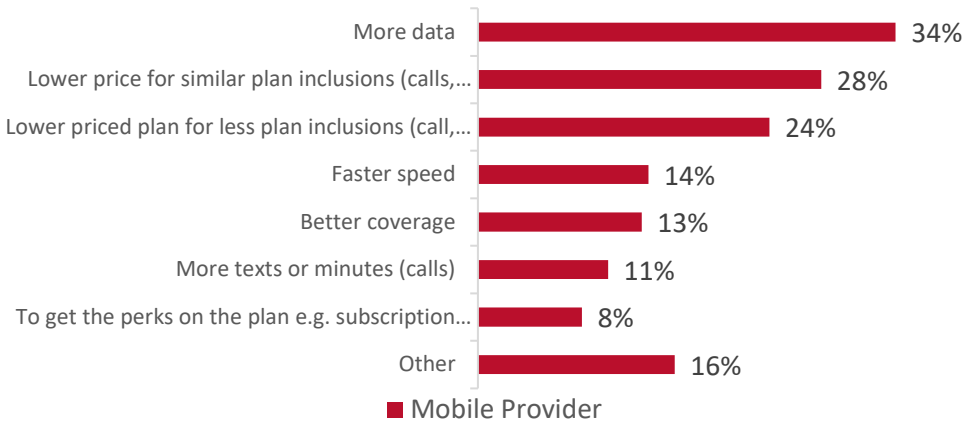


**Q** In the last 12 months, have you changed a plan relating to your mobile or broadband plans?

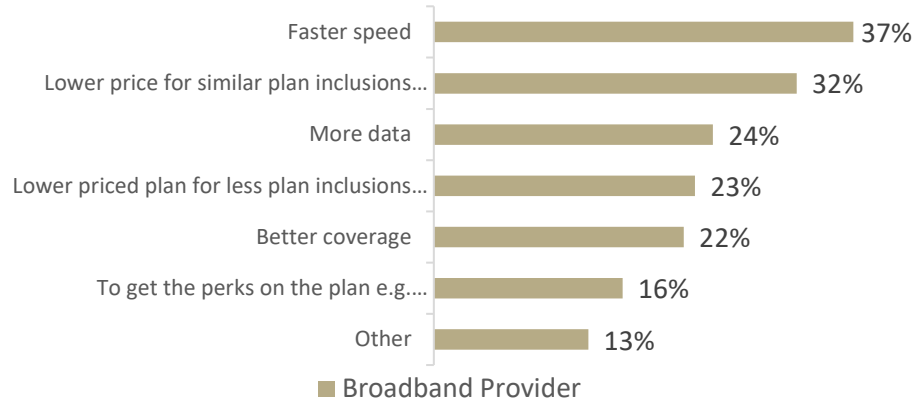
# Reasons for switching plans with same provider

The main reasons consumers are switching plans are for more data or lower prices for similar inclusions. Broadband consumers are also switching to get faster speed.

Reasons for Switching Plans



Reasons for Switching Plans



**Mobile consumers told us:**

- Slightly higher cost with increase in free minutes and data usage.
- Getting a new phone on a contract, they offered the best price.
- Company changed the plan due to older plan no longer being available.
- Moved to a higher priced plan with unlimited data to buy a phone on the plan.

**Broadband consumers told us:**

- Advice to switch to wireless over ADSL because of reduced maintenance of the copper wiring used in ADSL.
- Package deal with power and broadband.
- Community feedback that the service we had was available from [provider] cheaper but unlike others they don't tell you. I was going to change suppliers but they changed the plan with no charges although there is now a one month notice period I wasn't advised of and it's likely Netflix will terminate before the month expires.



**Mobile consumers:**

- Switched their plan for access to 'More data', 'Lower price for similar plan inclusions', and/or a Lower price plan for less plan inclusions'.
- Also mentioned were reasons including adding a new phone to the plan, changing from pre-pay to post-pay and adding or removing other members connected to the plan.

**Broadband consumers:**

- Chose to switch their plans for 'Faster speed', 'Lower price for similar plan inclusions', and 'More data'.
- Other reasons included moving houses, removing landline from the contract and changing to fibre.

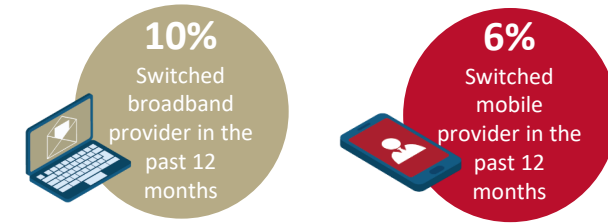
**Q** For which of the following reasons did you switch your broadband plan? (MR)

# Switching provider

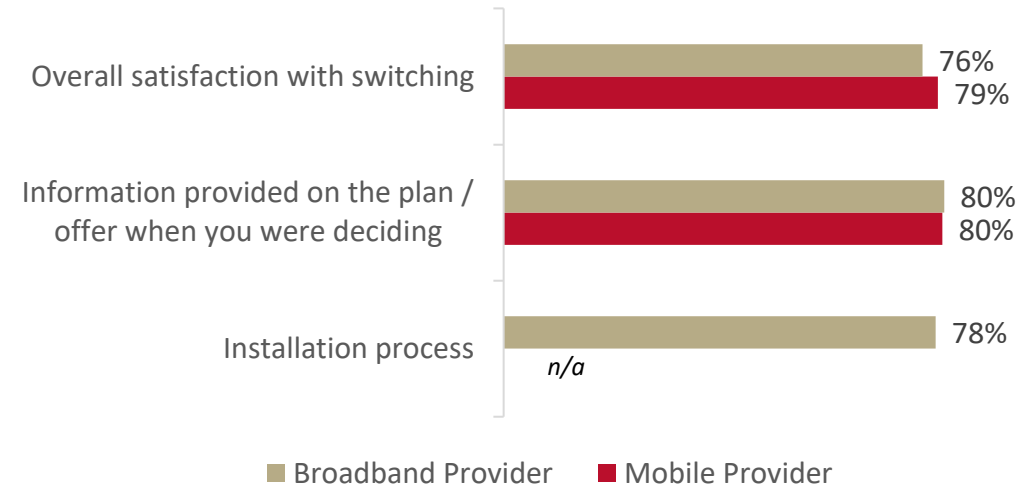
Switching provider is even less common than switching plan, with only 10% of consumers switching broadband provider and 6% switching mobile provider in the last 12 months.

Whilst switching is low, slightly more broadband consumers than mobile consumers have switched to a new provider.

Over three quarters of both mobile and broadband consumers are satisfied with the switching process.



## Satisfaction with services (satisfied 7-10)



### Mobile

- More likely to switch providers
  - 11% consumers aged 25-34
- Least likely to switch providers
  - 3% consumers aged 55+

### Broadband

- More likely to switch providers:
  - 15% consumers aged 25-34
  - 12% male consumers
  - 16% consumers in households earning over \$150K

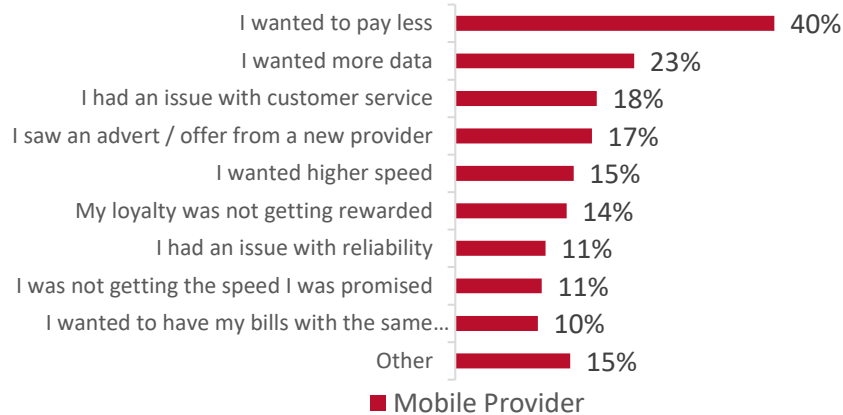


**Q** Overall, how satisfied or dissatisfied were you with the process of switching from [brand]? / Which broadband provider did you switch from? How satisfied or dissatisfied were you with the information provided on the plan / offer when you were deciding on your new provider? And how satisfied or dissatisfied were you with installation process from your new provider?

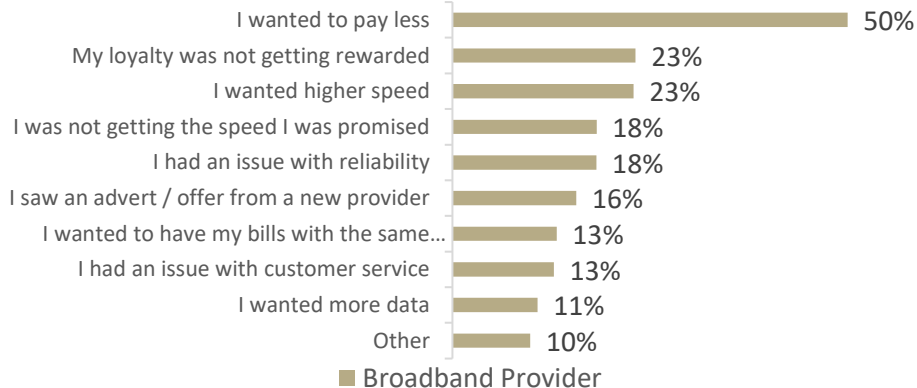
# Reasons for leaving provider

The main reason consumers leave their telco provider is because they want to pay less.

## Reasons for Leaving Provider



## Reasons for Leaving Provider



### Mobile consumers told us:

- *Wanted a new phone, [provider's] contract terms weren't agreeable for me.*
- *Better deal while purchasing a device.*
- *I brought a new phone and decided to switch my mobile plan as well. No serious issue I just wanted to see what another mobile plan would be like.*

### Broadband consumers told us:

- *They messed up our connection when we moved house and the problem was not resolved by them quickly enough.*
- *Kept getting billed for wrong amount, really hard to finally get a refund from them.*
- *Package deal with [provider] who were already my power provider.*
- *I was moving and they said they couldn't provide broadband at my new address.*



### Mobile consumers:

- 40% of consumers left their provider because they wanted to pay less.
- However, around a quarter of mobile consumers switched provider due to wanting more data.



### Broadband consumers:

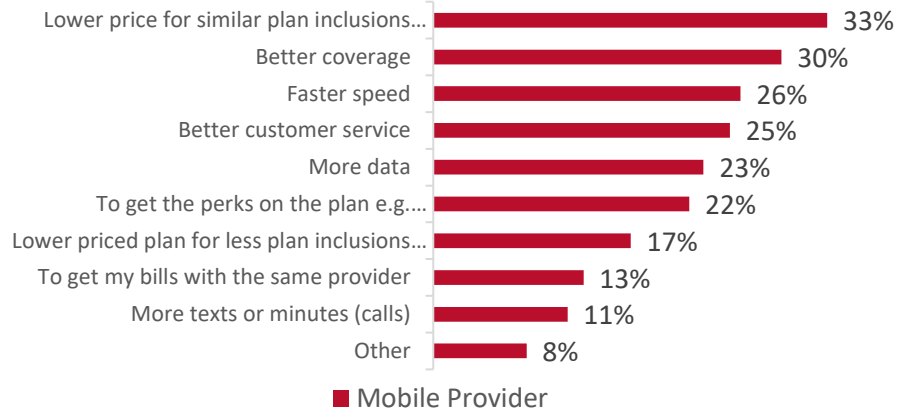
- 50% of consumers left their provider because they wanted to pay less.
- Around a quarter moved for higher speed.
- 23% feeling that their loyalty was not getting rewarded.

**Q** For which of the following reasons did you start looking to switch from [previous supplier]? (MR)

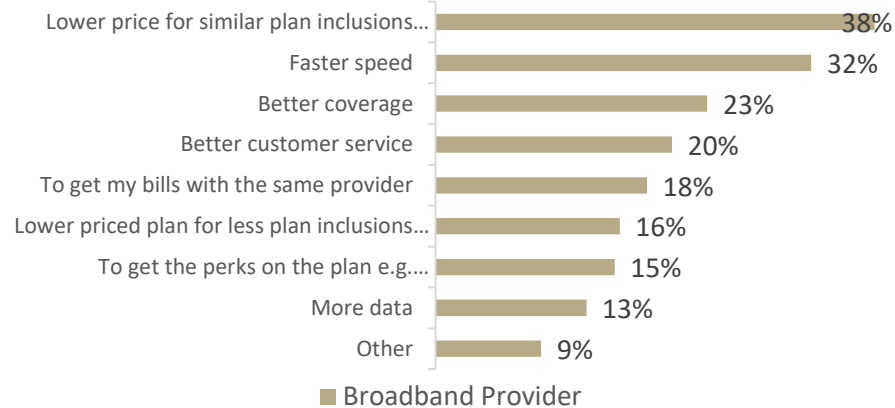
# Reasons for going to new provider

When choosing a new provider, consumers are influenced by lower prices for similar inclusions, faster speed and better coverage.

## Reasons for Going to new provider



## Reasons for Going to new provider



### Mobile consumers told us:

- *The person I spoke with in Nelson was brilliant, didn't treat me as an imbecile, was patient, knew her stuff, listened, and was extremely helpful; hence moving to [provider].*
- *To buy a new phone on a contract.*
- *The voicemail text app is awesome.*
- *Phone included in plan.*

### Broadband consumers told us:

- *Told them it was time for a discount seen as I had been with them for 20 years. They discounted my broadband by \$30 a month.*
- *Companies changed the plan due to older plans no longer being available.*
- *Netflix included and speed to set up.*
- *Contract ended and resigned up.*
- *I already had electricity with [provider] so it was easier to just add broadband with them. Plus they gave me \$300 free credit which was nice.*



### Mobile consumers:

- Top reasons for choosing current provider:
  - 33% lower priced plan with similar plan inclusions
  - 30% better coverage
  - 26% faster speed



### Broadband consumers:

- Top reasons for choosing current provider:
  - 38% lower priced plan with similar plan inclusions
  - 32% faster speed
  - 23% better coverage

Q And for which of the following reasons did you choose to switch to [brand]? (MR)



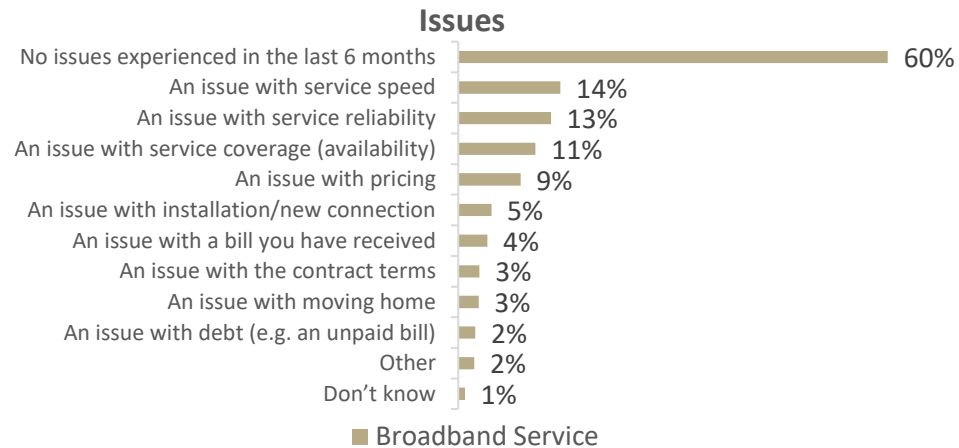
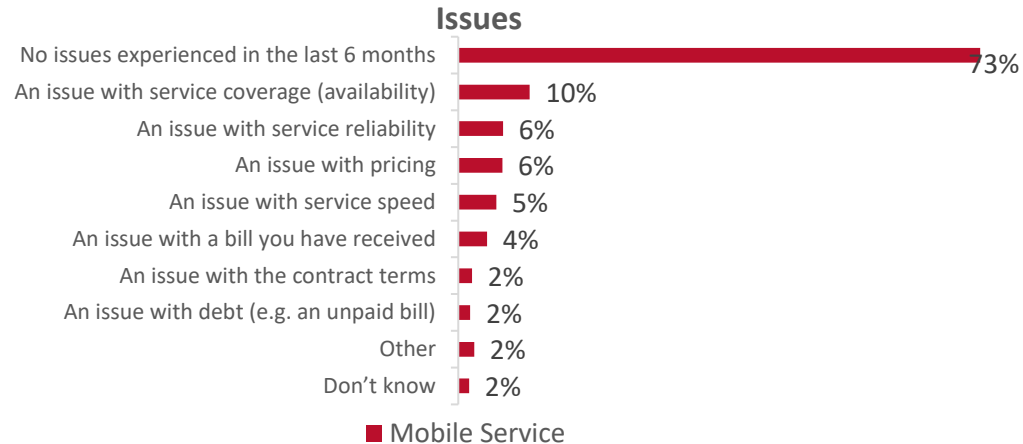
RESIDENTIAL INSIGHTS

Issues & Response



# Issues

Consumers are more likely to experience issues with broadband than with mobile services.



## Mobile consumers:

- 25% have had issues with their mobile services
- Main issues are:
  - 10% service coverage
  - 6% service reliability
  - 6% pricing

## Broadband consumers:

- 39% have had issues with their broadband services
- Main issues are:
  - 14% service speed
  - 13% service reliability



## Mobile consumers:

- Consumers aged 55+ are the least likely to experience issues.
- 18 to 34 year old mobile consumers are more likely to have issues with service coverage, reliability, speed, pricing and debt.



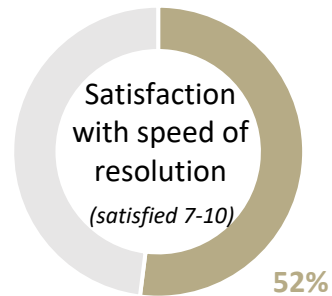
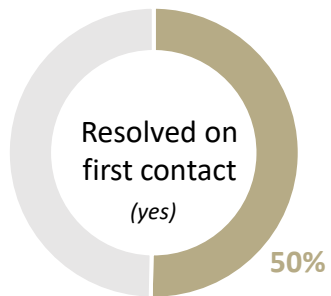
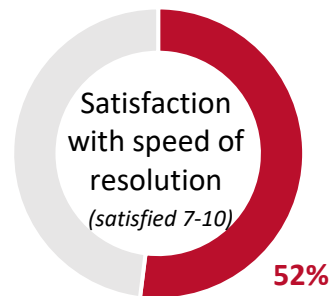
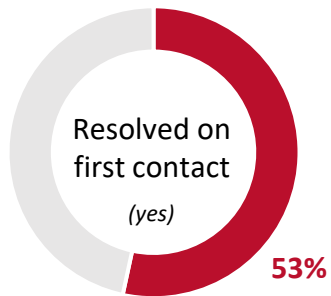
## Broadband consumers:

- Least likely to experience issues:
  - Consumers aged 55+
  - Consumers with fibre
- Consumers aged 18 to 34 are more likely to have experienced issues with service coverage, speed, installation or moving home.

**Q** In the last 6 months, have you experienced any of the following issues with your broadband internet/mobile service? (MR)

# Issue response

Half the issues are not solved on first contact for mobile and broadband consumers, with many consumers also feeling dissatisfied with the speed of resolution and helpfulness and knowledge of staff



## Mobile consumer issues:



- More likely to be solved on first contact:
  - 66% service speed
  - 60% contract terms
- Least likely to be solved on first contact.
  - 51% service coverage
  - 39% issues with pricing
- 51% of mobile consumers with unresolved issues are satisfied with their mobile service compared to 85% of those with no unresolved issues.

## Broadband consumer issues:



- More likely to be solved on first contact:
  - 81% debt
  - 70% contract terms
- Least likely to be solved on first contact:
  - 43% service speed
  - 39% service reliability
- 44% of broadband consumers with unresolved issues are satisfied compared to 81% of those with no unresolved issues.

**Q** How satisfied were you with how long it took to resolve the issue? How helpful and knowledgeable were their staff with the query/issue you had? / Was this issue resolved on the first contact?

# SME INSIGHTS

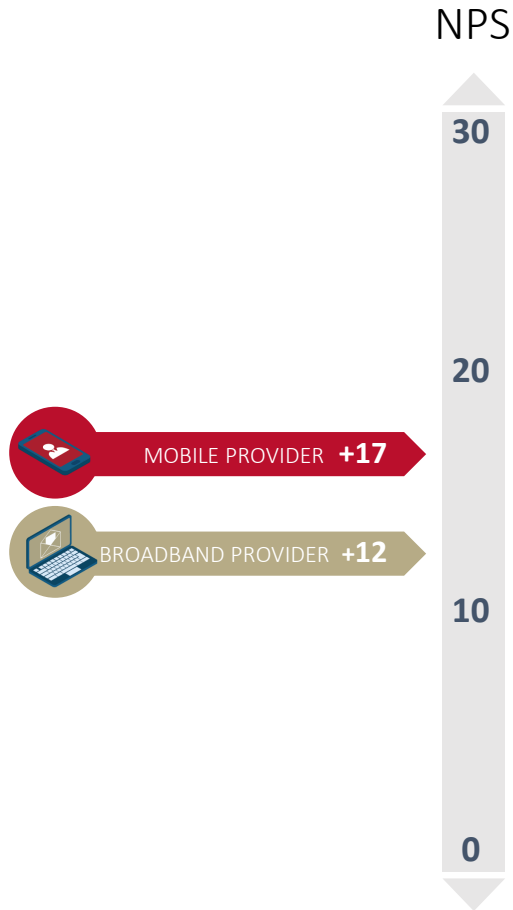


# NPS & Satisfaction



# NPS

Mobile and broadband providers post a positive NPS, however both are below the favourable threshold of 20.



NPS for both mobile and broadband is below the favourable threshold of +20.

Mobile providers rank above broadband providers in NPS among SME. A large portion of SME consumers are passives (scored 7-8) (42% broadband and 40% mobile) indicating that making small improvements could shift the needle in boosting NPS for both categories.

Mobile SMEs:	Broadband SMEs:
<ul style="list-style-type: none"> <li>Lower NPS:           <ul style="list-style-type: none"> <li>-2 Rental, Hiring &amp; Real Estate Services</li> <li>+5 Retail Trade</li> </ul> </li> <li>Higher NPS:           <ul style="list-style-type: none"> <li>+45 – SME in Arts and recreation</li> <li>+28 – SME with \$1m+ revenue</li> <li>+27 – SME in Education and Training</li> <li>+26 – SME in Manufacturing</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Lower NPS:           <ul style="list-style-type: none"> <li>-2 Retail Trade</li> <li>+2 Administrative &amp; Support Services</li> <li>+2 Information Media &amp; Telecommunications</li> </ul> </li> <li>Higher NPS:           <ul style="list-style-type: none"> <li>+33 – SME in Arts and recreation</li> <li>+32 – Wholesale Trade</li> <li>+23 – SME with \$1m+ revenue</li> </ul> </li> </ul>

NPS measures the loyalty of customers to a company, based on their ratings on a 0-10 scale, customers are classified into three categories: Promoters (9-10), Passives (7-8), Detractors (0-6). NPS is then calculated using the following formula:  $NPS = (\text{Percentage of Promoters} - \text{Percentage of Detractors})$ .

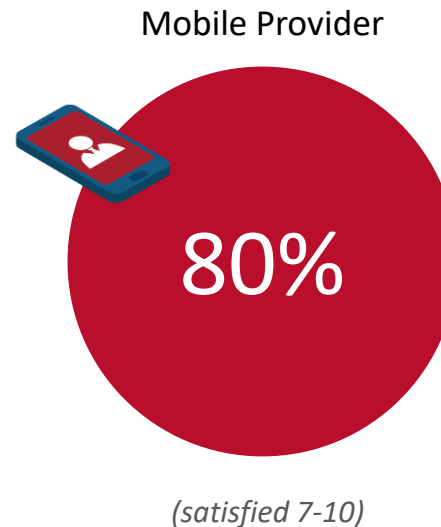
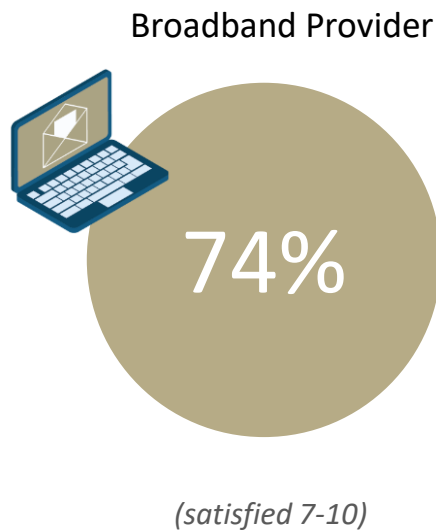
NPS scores range from -100 (all customers are detractors) to +100 (all customers are promoters). Bain & Co, the creators of the NPS metric, consider a score above 20 is favourable, above 50 is excellent, and above 80 is world class.

Q Considering your experience with your provider, how likely would you be to recommend them to a contact or colleague? (Scale 0-10)

# Overall satisfaction

Across broadband and mobile SME up to 80% of consumers are satisfied with their providers.

Overall satisfaction is high for SMEs across both broadband and mobile, with mobile SMEs being slightly more satisfied.



## Broadband SMEs:

- Higher levels of satisfaction for those in:
  - 85% Arts and Recreation
  - 82% Professional, Scientific and Technical Services
  - 80% Manufacturing

## Mobile SMEs:

- Highest level of satisfaction with their mobile provider.
  - 88% Professional, Scientific and Technical Services
  - 87% Electricity, Gas, Water & Waste Services
  - 86% Arts & Recreation
- SMEs earning over \$2m in revenue are more satisfied with the broadband and mobile provider (85% and 89% respectively).

**Q** Overall, how satisfied or dissatisfied are you with your provider for your broadband/mobile service for your business? Please take into account their products and services, as well as your experience of dealing with them. (Scale 0-10).

Base: Broadband customers n=977, mobile customers n=1,044

# Satisfaction with services

*SMEs are more satisfied with coverage and availability than pricing and customer service, however there is room for improvement across all service areas.*

Satisfaction follows a similar trend across both mobile and broadband, with both most satisfied with the coverage and availability offered by their provider.

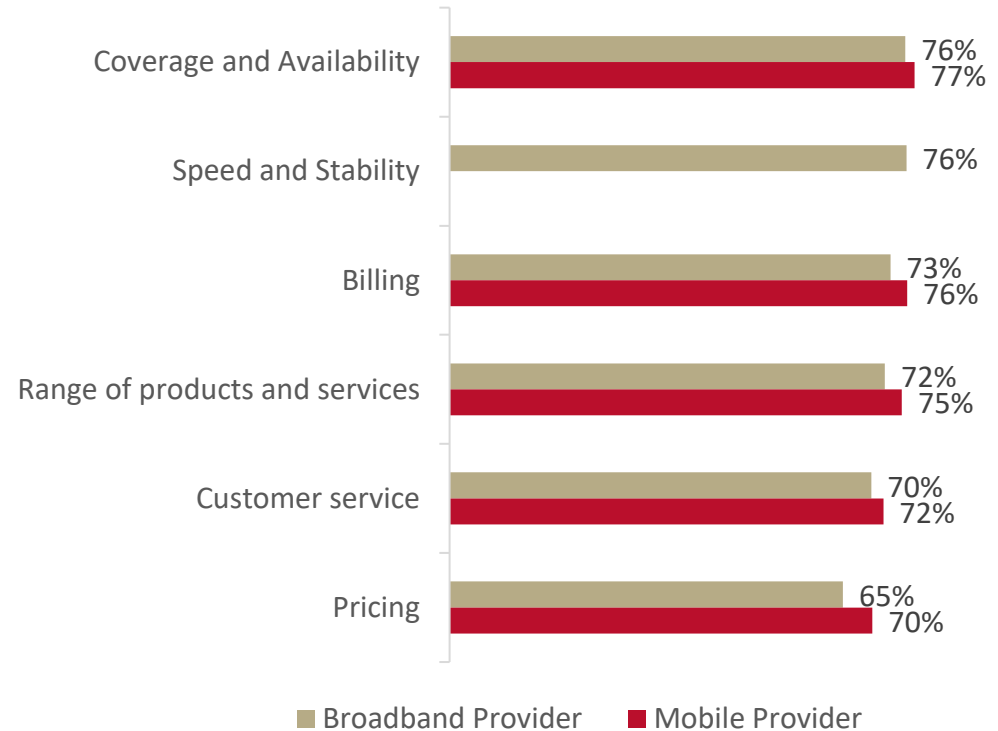
Pricing and customer service are the two least satisfied aspects among mobile and broadband SME consumers. This echoes what was seen in residential consumers satisfaction.

SMEs with a revenue of over \$1m were more satisfied in all areas compared to the average

- **Coverage and Availability:** broadband 87%, mobile 89%
- **Speed and Stability:** broadband 87%
- **Billing:** broadband 82%, mobile 84%
- **Range of products and services:** broadband 84%, mobile 86%
- **Customer service:** broadband 81%, mobile 79%
- **Pricing:** broadband 75%, mobile 77%



**Satisfaction (satisfied 7-10)**



**Q** How satisfied or dissatisfied you are with your provider for your broadband/mobile service for your business in relation to the following aspects? (MR)



# Tenure & Switching Behaviour

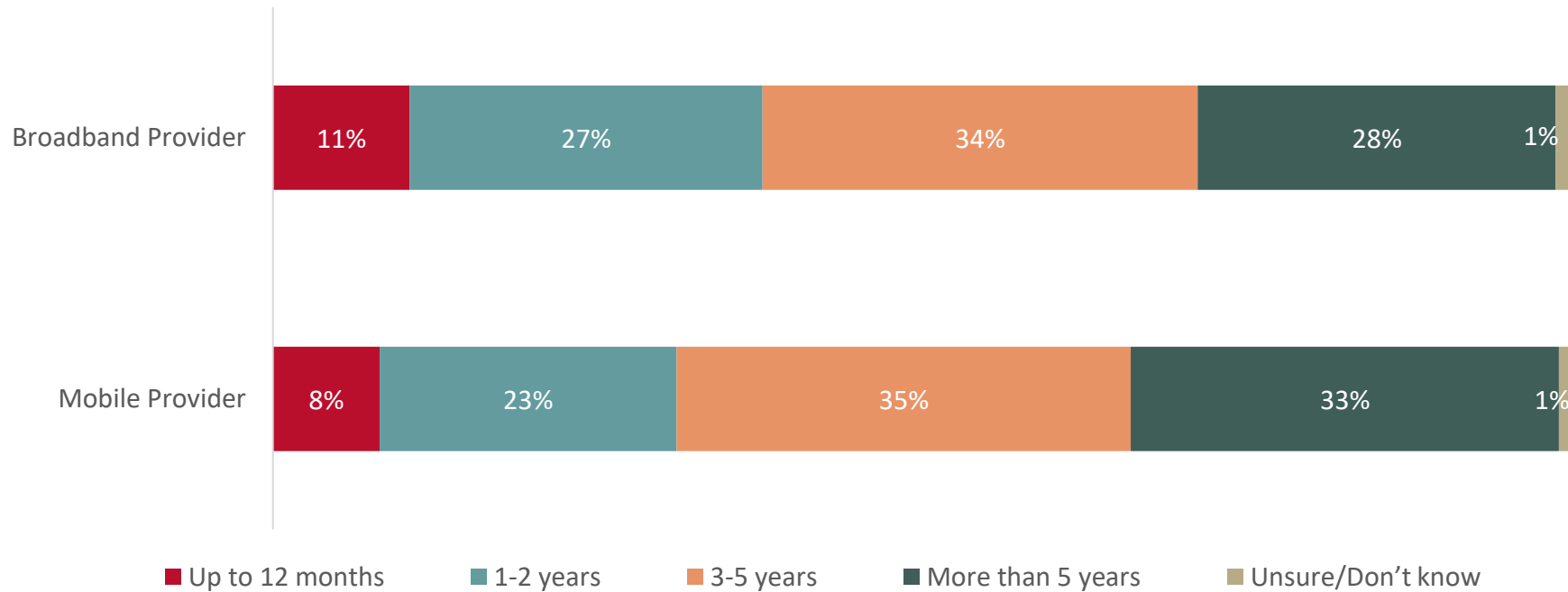


# Tenure

Over one third of SMEs have been with their current broadband and mobile provider(s) for 3-5 years.

SME consumers have been with their mobile provider for longer compared to how long they have been with their broadband provider.

- 38% of SMEs stayed with their broadband provider for less than 2 years.
- 31% of SMEs stayed with their mobile provider for less than 2 years.



- SME mobile consumers operating in retail trades have been with their provider for a shorter length of time than average, with under half having been with their current provider for less than 3 years.

- Higher revenue SMEs (over \$1m) stay longer with both their providers:
  - 85% mobile 3+ years
  - 76% broadband 3+ years



SME

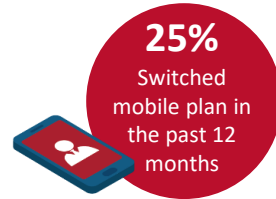
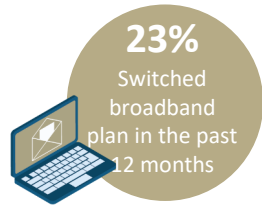
TENURE & SWITCHING

**Q** About how long has the business/company you work for been a customer of your broadband/mobile service provider?

Base: Broadband customers n=977, mobile customers n=1,044

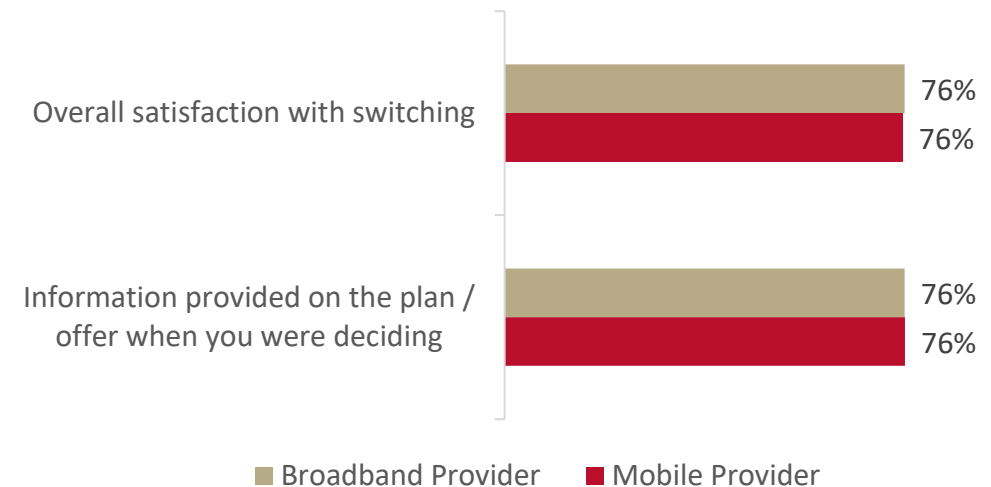
# Switching plans with same provider

*A quarter of SMEs have switched their broadband and/or mobile plan with their provider in the past 12 months.*



- SMEs are more likely to change either or both their broadband and mobile plan compared to residential consumers.
- Around a quarter of SMEs have changed plan relating to their broadband and/or mobile over the past 6 months.

## Satisfaction (satisfied 7-10)

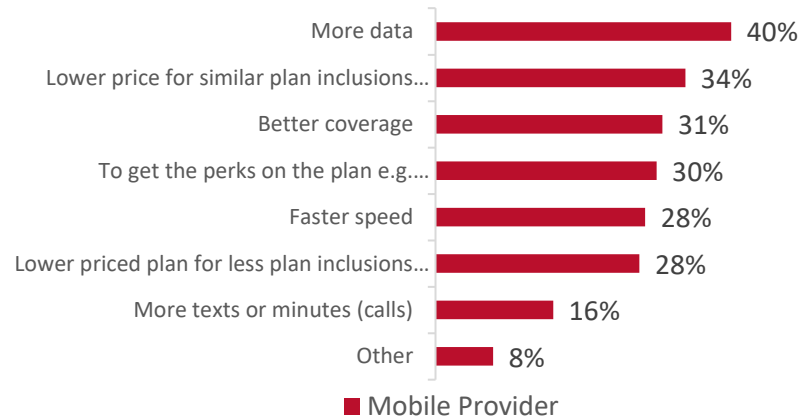


**Q** In the last 12 months, has the business/company you work for changed a plan relating to your mobile or broadband service ?

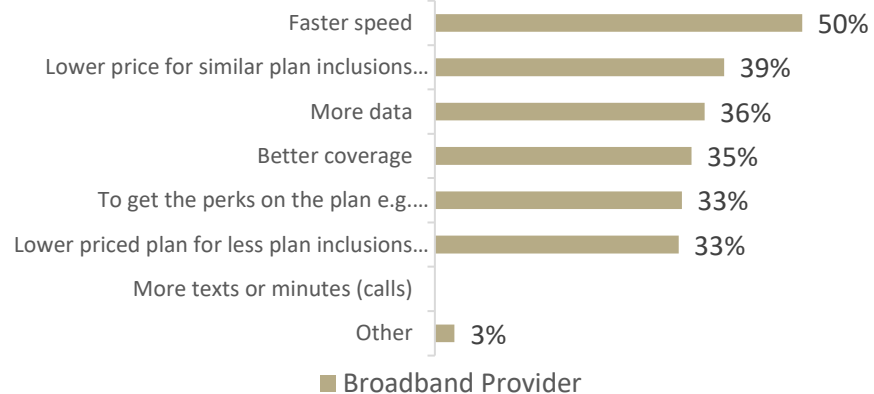
# Reasons for switching plan

The main reason for SMEs switching mobile plans is to get more data, and lower price for similar inclusions. For broadband SMEs it is faster speed.

## Reasons for Switching Plans



## Reasons for Switching Plans



### Mobile SME told us:



- Combining and updating all plans.
- Increased plan to receive another phone on contract.
- Dissatisfaction with previous provider's customer service.
- Advised by [provider] to change some of our phones to a different plan to lower the monthly charge without losing any benefits.
- They are changing the plan and its price. But that's okay with me.
- Adding another person to the current plan.

### Broadband SME told us:



- Roll over data.
- Upgrading the lines.
- Changed to fibre.
- ADSL becoming obsolete.



## Mobile SMEs:

- Attitudes towards switching mobile plans are similar when comparing residential to SMEs.
- Key reasons being:
  - 40% Gaining more data
  - 34% Lower pricing for similar plan inclusions
  - 31% Better coverage

## Broadband SMEs:

Reasons for switching broadband also remain consistent with what was seen in residential behaviour.

- Key reasons being:
  - 50% Faster speed
  - 39% Lower price for similar inclusions
  - 36% more data
  - 35% Better coverage

**Q** For which of the following reasons did the business/company you work for switch your broadband/mobile plan? (MR)

# Switching provider

Switching provider for SMEs is low, however broadband SMEs are slightly more likely to switch provider than mobile SMEs.

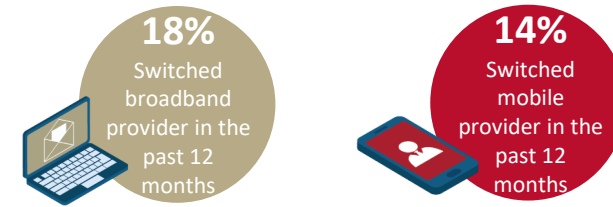
Switching providers is higher for SMEs than residential consumers.

## Mobile SMEs:

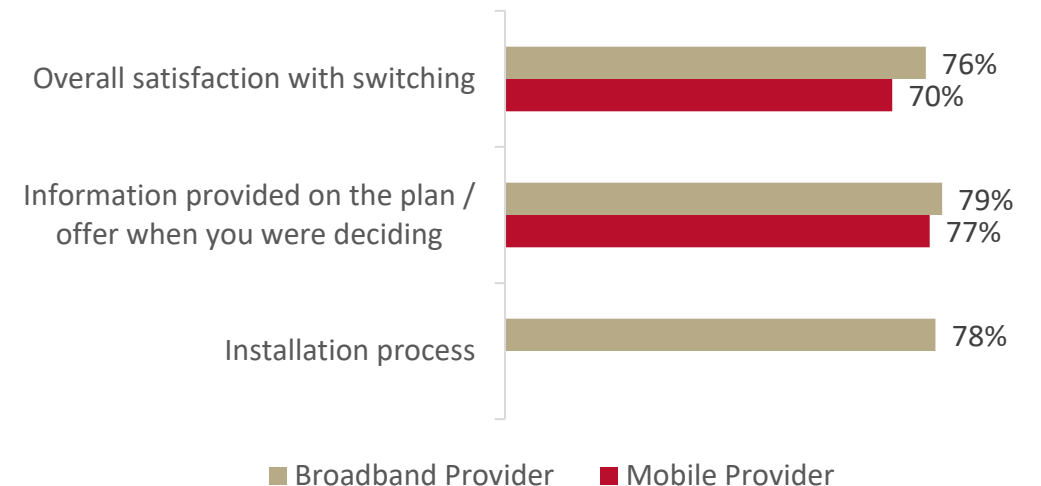
- More likely to switch providers:
  - 32% SME in Information Media & Telecommunications industry
  - 22% SME with 20-49 employees
- Less likely to switch providers:
  - 4% SME operating for 20+ years

## Broadband SMEs:

- More likely to switch providers:
  - 30% SME in Information Media & Telecommunications industry
  - 29% SME with 20-49 employees
- Less likely to switch providers:
  - 6% SME operating for 20+ years



## Satisfaction (satisfied 7-10)

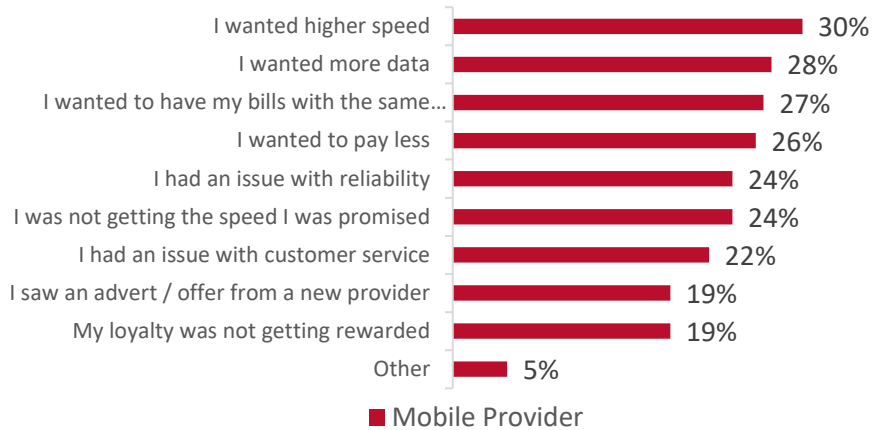


Q Overall, how satisfied or dissatisfied were you with the process of switching from [brand]? / Which broadband provider did you switch from? How satisfied or dissatisfied were you with the information provided on the plan / offer when you were deciding on your new provider? How satisfied or dissatisfied were you with installation process from your new provider?

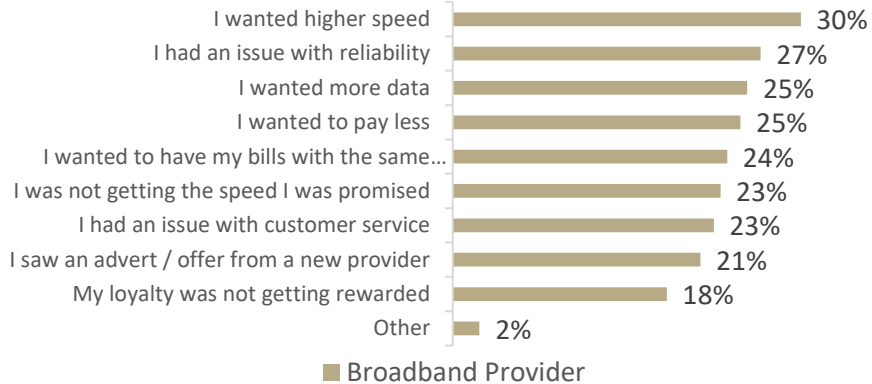
# Reasons for leaving provider

The main reason that mobile and broadband SME consumers leave their provider is for higher speed.

## Reasons for Leaving Provider



## Reasons for Leaving Provider



### Mobile SME told us:

- *Changed contracts.*
- *Lack of mobile reception in our area.*
- *They could not offer me the deal/Services I wanted.*
- *They didn't provide 3 way calling.*
- *Contract ended.*

### Broadband SME told us:

- *Just changed contracts to new partner.*
- *They did not offer the services I needed.*
- *Our IT person prefers to work with [provider].*



The reasons for SMEs wanting to switch provider are relatively consistent across both broadband and mobile.

### Mobile SMEs:



Looked to switch provider for:

- 30% Higher speed
- 28% More data
- 27% Getting their bills with the same provider

### Broadband SMEs:



Looked to switch provider for:

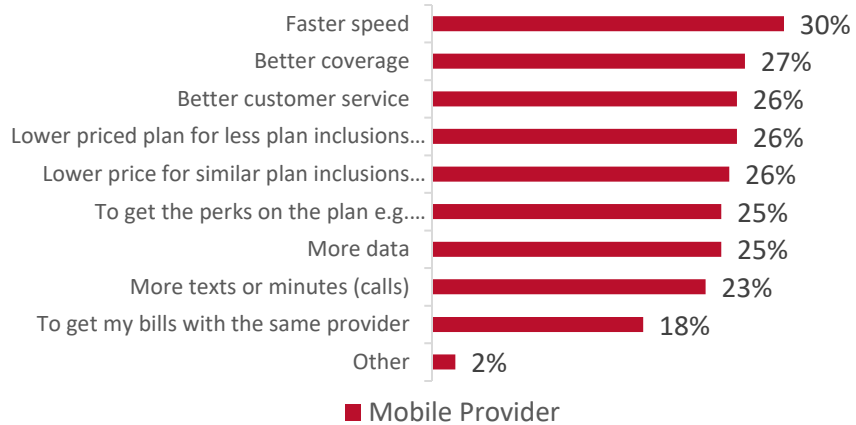
- 30% higher speed internet
- 27% Having issues with reliability
- 25% More data
- 25% Wanting to pay less

**Q** For which of the following reasons did you start looking to switch your business plan from [previous supplier]? (MR)

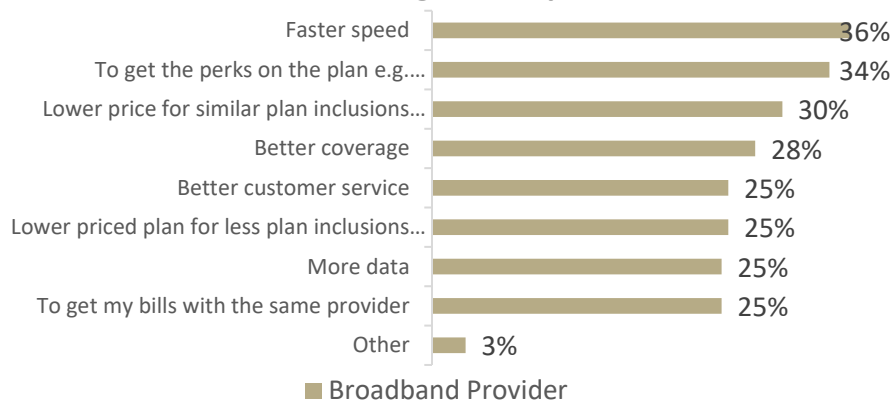
# Reasons for going to a new provider

The main reasons for choosing a new mobile provider are the offer of faster speed and better coverage. For broadband it is faster speed and the perks of the plan.

## Reasons for Going to new provider



## Reasons for Going to new provider



### Mobile SME told us:

- They could offer me the services I wanted.
- 3 way calling. Important when you work remote at times.
- I wanted a new iPhone & [provider] did not offer the one I wanted so I had to change to [provider] to buy it.



### Broadband SME told us:

- They offered the services I needed & a new phone.
- Our IT prefers to work with [provider].
- Had a promotion going on.



### Mobile SMEs:

- Main driver to leave their previous provider was due to lack of data, however this was not a top 3 reason for going to their new provider.
- The core reasons for choosing a new provider were:
  - 30% Faster speed
  - 27% Better coverage
  - 26% Better customer service
  - 26% Lower price

### Broadband SMEs:

- Show consistency in that the reason they left their previous provider is the reason they joined their current provider.
- Reasons for switching to a new provider:
  - 36% Faster internet speed
  - 30% Lower cost for a similar plan
  - 34% To get the perks on that plan that was offered



**Q** And for which of the following reasons did you choose to switch to [brand]? (MR)

# Issues & Response

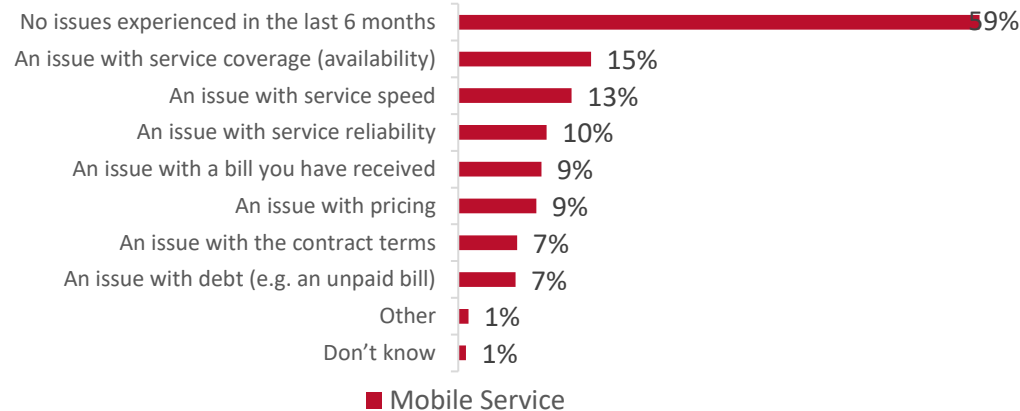




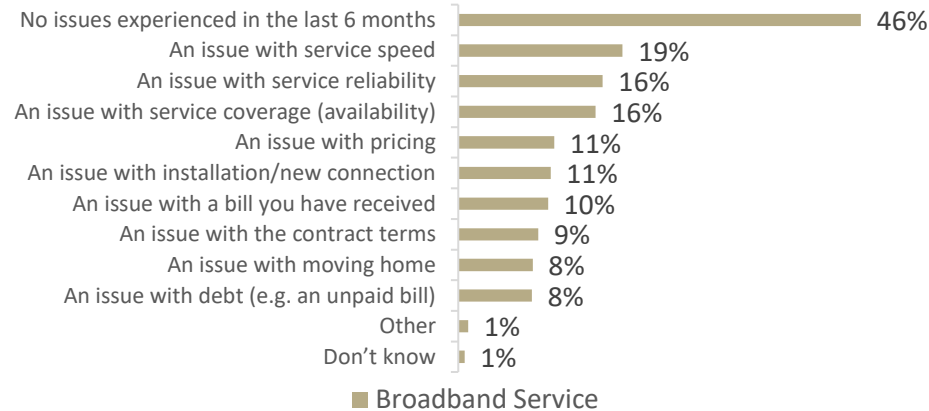
# Issues

*SMEs are more likely to experience issues with their broadband than with their mobile services.*

**Issues**



**Issues**



## Mobile SMEs:

- 40% of SME mobile consumers have experienced some performance issues.
- The main issues were:
  - 15% Service coverage
  - 13% Service speed

## Broadband SMEs:

- 53% of SME broadband consumers have had issues with their broadband services
- The main issues were:
  - 19% Service speed
  - 16% Service reliability
  - 16% Service coverage



- Larger SMEs with 20-49 employees are more likely to have experienced issues (49%).

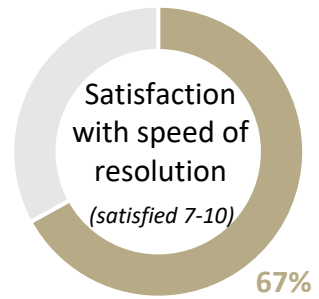
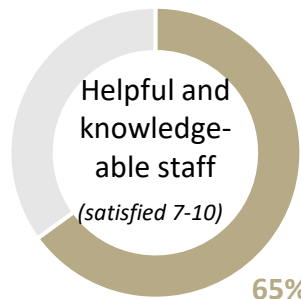
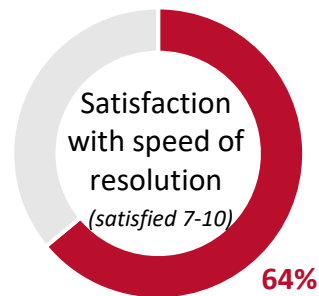
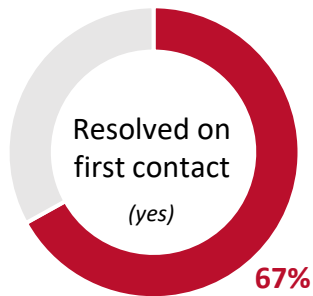


- Similar to mobile consumers, larger SMEs (20-49 employees) have experienced more issues with their broadband services (66%).
- SMEs with Fibre are less likely to have experienced any issues with their broadband services, with 53% claiming not to have had any issues.

**Q** In the last 6 months, has the business/company you work for experienced any of the following issues with your broadband internet/mobile service? (MR)

# Issue response

One third of SME are dissatisfied with staff knowledge and helpfulness, and the speed of resolution of their broadband and mobile issues.



## Mobile SMEs:

- More likely to be solved on first contact:
  - 80% Debt
  - 70% Contract terms
- Least likely to be solved on first contact:
  - 64% Pricing
  - 60% Service reliability
- Only 49% of SME mobile consumers with unresolved issues (n=35) are satisfied with their mobile service compared to 81% of those with no unresolved issues.

## Broadband SMEs:

- More commonly resolved on first contact:
  - 82% Moving locations
  - 80% Contract terms
- Least likely to be solved straight away:
  - 63% Service speed
  - 62% Service coverage
- Only 32% of SME broadband consumers who have unresolved issues (n=47) are satisfied compared to 76% of those with no unresolved issues.

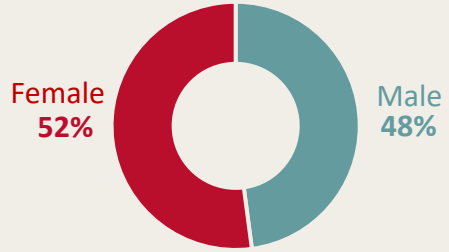
**Q** How satisfied were you with how long it took to resolve the issue? How helpful and knowledgeable were their staff with the query/issue you had? Was this issue resolved on the first contact?

# Demographics & Firmographics

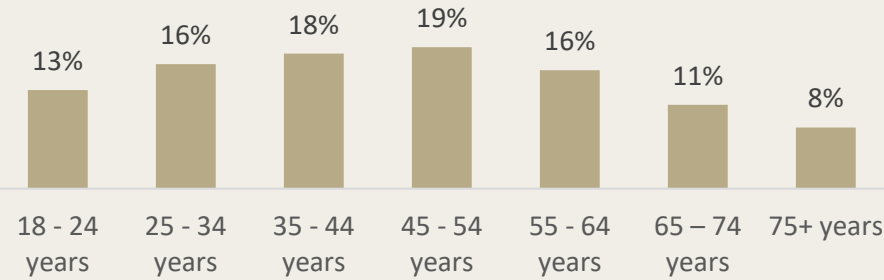


# Demographics – Residential

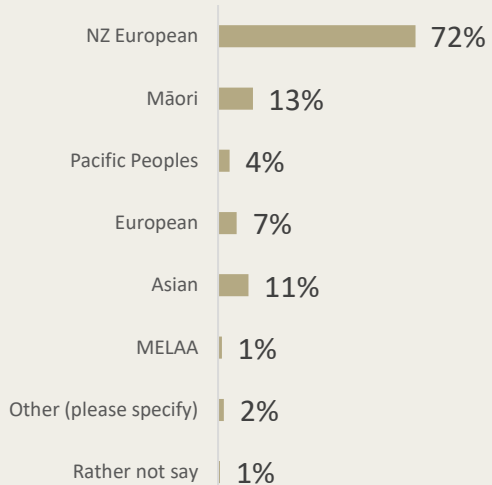
## Gender



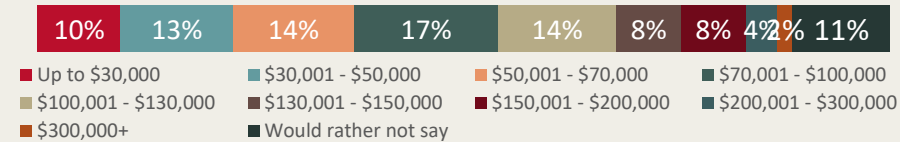
## Age



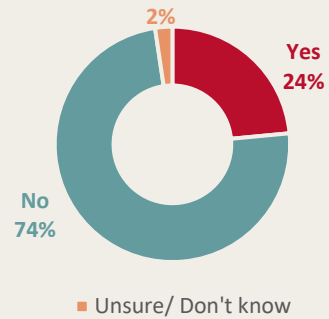
## Ethnicity



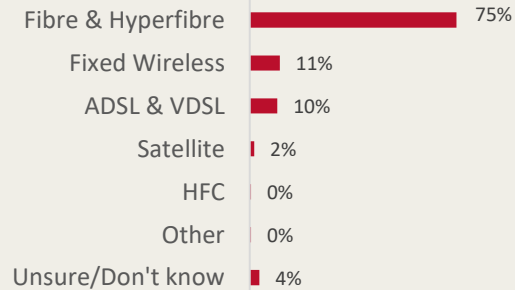
## Household Income



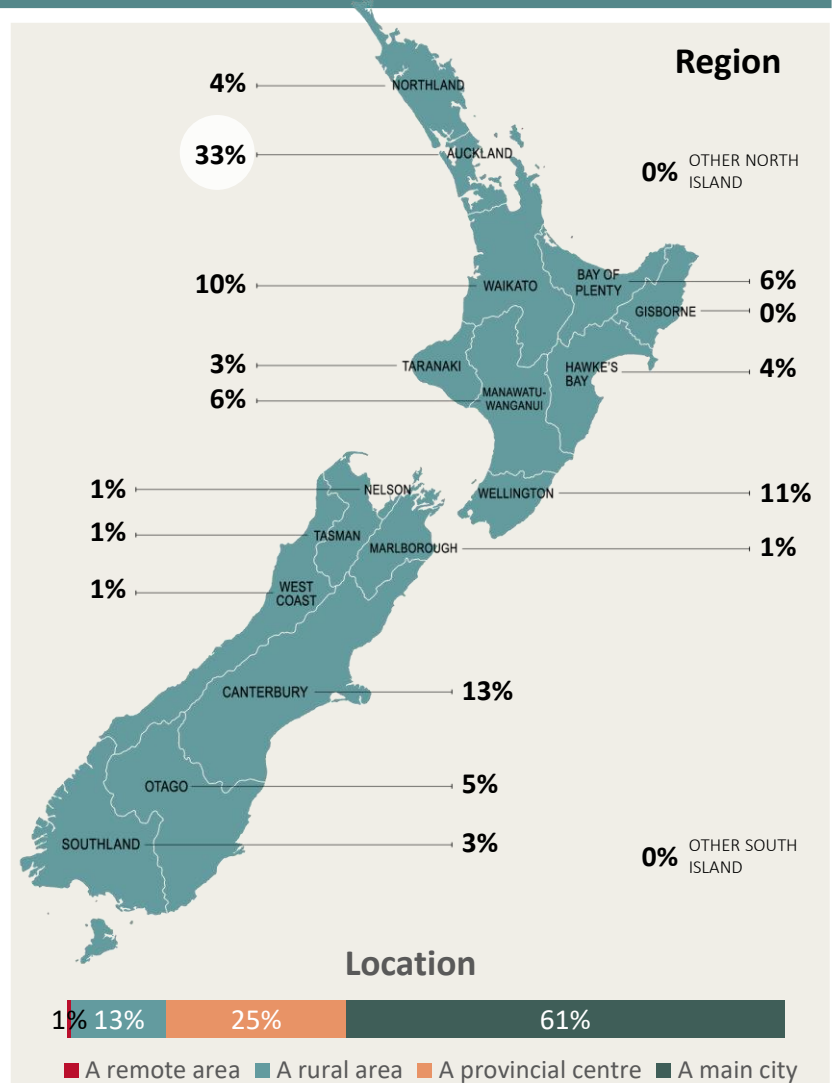
## Bundled electricity



## BB Technology Use

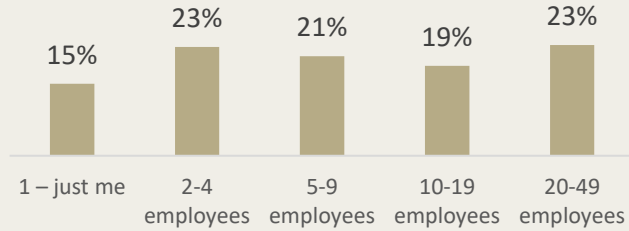


## Region

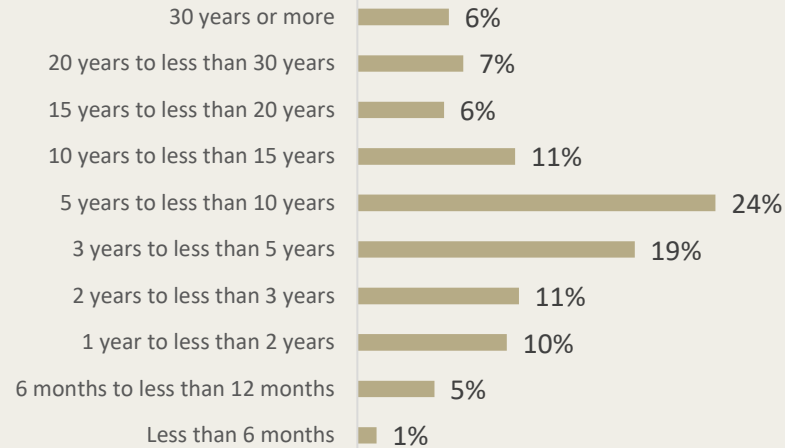


# Firmographics – SME

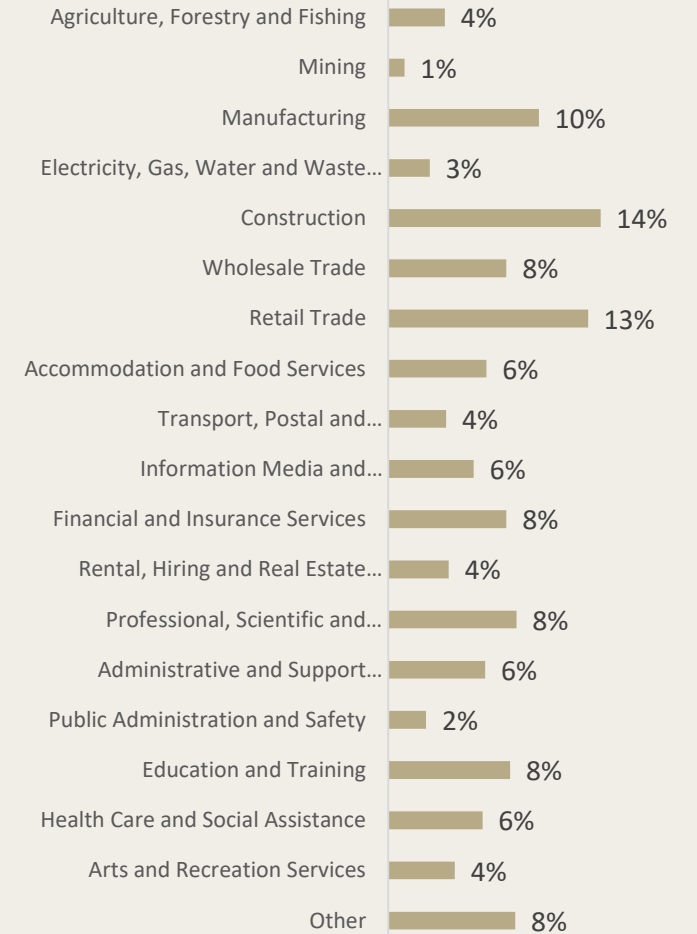
## Business Size



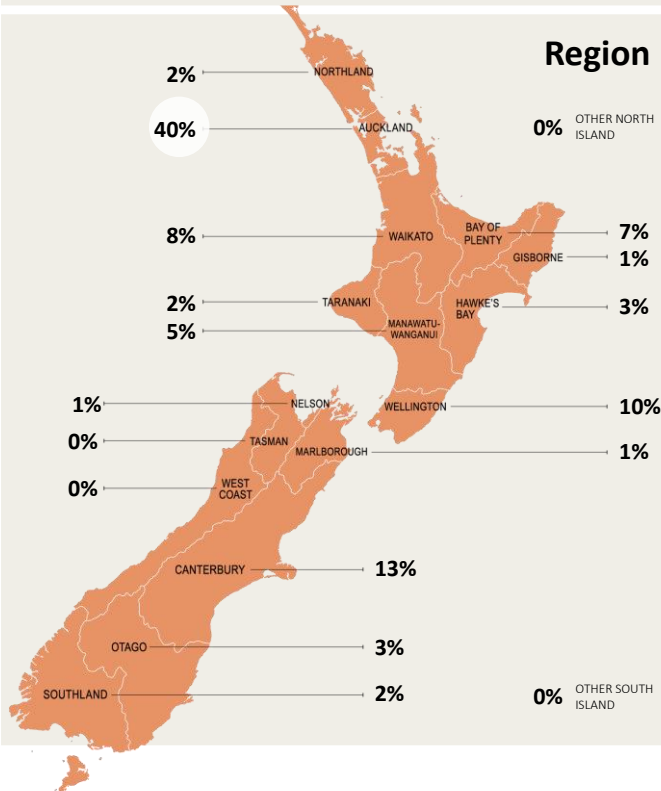
## Age of Company



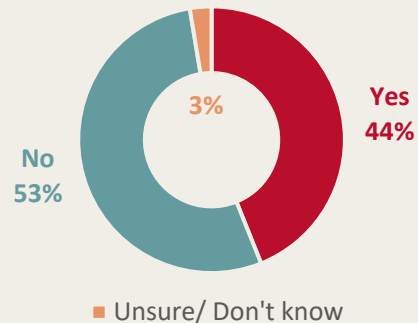
## Sector



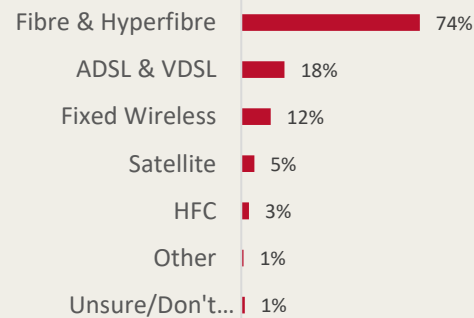
## Region



## Bundled Electricity



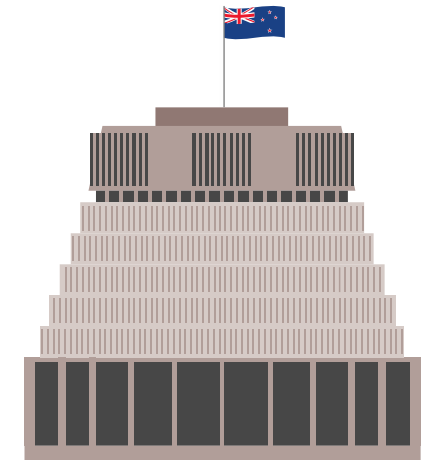
## BB Technology Use



# Methodology

## Weight used (Based on census 2018)

		18 - 24 years	25 - 34 years	35 - 44 years	45 - 54 years	55 - 64 years	65-74 years	75+ years
Regional	Male	2.5%	3.0%	3.4%	3.8%	3.5%	2.7%	1.7%
Regional	Female	2.5%	3.2%	3.8%	4.2%	3.7%	2.8%	2.2%
Auckland	Male	2.3%	2.9%	2.9%	2.9%	2.2%	1.4%	0.9%
Auckland	Female	2.3%	3.2%	3.3%	3.2%	2.4%	1.6%	1.2%
Wellington	Male	0.8%	0.9%	1.0%	1.0%	0.8%	0.5%	0.3%
Wellington	Female	0.8%	1.0%	1.1%	1.1%	0.8%	0.6%	0.5%
Canterbury	Male	0.9%	1.0%	1.1%	1.2%	1.0%	0.7%	0.5%
Canterbury	Female	0.8%	1.0%	1.2%	1.2%	1.1%	0.8%	0.7%



### Note

Any sample size below  $n=30$  is considered too low – however, by the nature of the data and the reporting structure, all data is shown. Please interpret with caution throughout the whole report.

Thank you

