NZ Telecommunications Customer Satisfaction Tracking

Quarterly Ad-hoc report

Messaging Apps

January – March 2025

Purpose of this research

Each month Insights HQ conducts research to monitor satisfaction with Retail Service Quality (RSQ) among consumers of Retail Service Providers (RSPs) across mobile and broadband.

As part of the RSQ Programme, the Commerce Commission works with Insights HQ to design and implement quarterly ad-hoc questions. These comprise additional questions added to the monthly satisfaction questionnaire and fielded to the same, nationally representative sample of mobile and broadband customers.

For this quarter, January – March 2025, questions have been added to:

- Understand the usage of messaging and calling apps on smartphones

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

Methodology

Respondents were invited to complete a 15-minute online survey about telecommunications.

RESIDENTIAL
Jan-Mar 2025

963 respondents

The residential sample was an adult sample (18+) nationally representative of the New Zealand population (age, gender, region).

Fieldwork was conducted in March 2025; respondents who completed the monthly tracker from January – March 2025 were invited to complete an ad-hoc survey.

Sample qualification criteria

- Main decision maker OR shared responsibility for making decisions about broadband internet service at home
- Main decision maker OR shared responsibility for making decisions about mobile phone plan / monthly payment / pre-pay
- Currently have broadband internet at home OR mobile provider and telecommunications provider is known

SME
Jan-Mar 2025

185 respondents

The SME sample talked to businesses with up to 50 full time employees and was nationally representative of the New Zealand SME population (business size, region).

Fieldwork was conducted in March 2025; respondents who completed the monthly tracker from January – March 2025 were invited to complete an ad-hoc survey.

Sample qualification criteria

- Main decision maker OR shared responsibility for making decisions about Internet at the business/company you work for or own
- Business has its own business plan with broadband and current broadband provider is known
- Main decision maker OR shared responsibility for making decisions about mobile phone plan / monthly payment / pre-pay for the business
- Business has its own business plan with mobile and current mobile provider is known

Note: Totals in report may not sum to 100% due to rounding. Figures are rounded to the closest whole number.

Weighting methodology

RESIDENTIAL
Weighted to ensure nationally representative sample by age, gender and region

		Auckland	Canterbury	Wellington	Rest of North Island	Rest of South Island
Male	18-24	3.0%	1.0%	0.7%	2.5%	0.7%
	25-34	3.5%	1.2%	1.0%	2.5%	0.7%
	35-44	2.7%	1.0%	1.0%	2.2%	0.7%
	45-54	2.7%	1.2%	1.0%	2.5%	1.0%
	55-64	2.2%	1.0%	0.7%	2.5%	1.0%
	65+	2.2%	1.2%	1.0%	3.5%	1.0%
Female	18-24	2.7%	1.0%	0.7%	2.2%	0.7%
	25-34	3.5%	1.0%	1.0%	2.5%	0.7%
	35-44	2.7%	1.0%	1.0%	2.5%	0.7%
	45-54	2.7%	1.2%	1.0%	2.7%	1.0%
	55-64	2.2%	1.0%	0.7%	2.7%	1.0%
	65+	2.5%	1.5%	1.0%	3.5%	1.2%

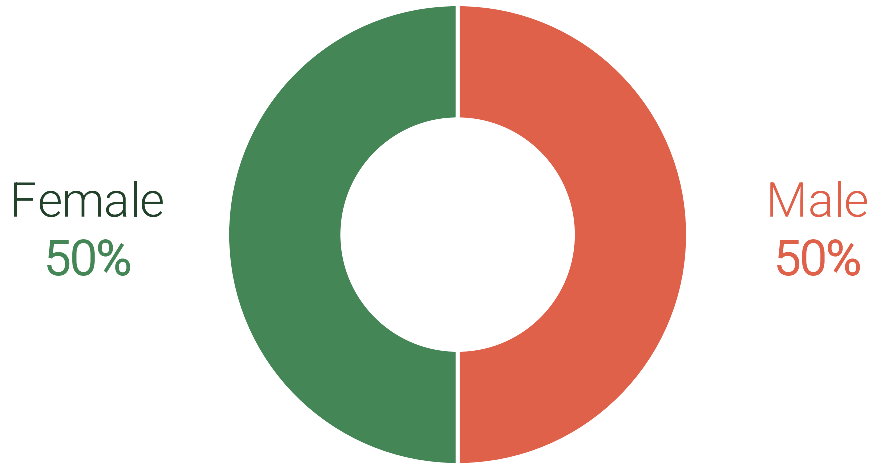
SME
Weighted to ensure nationally representative sample by region and FTE

REGION	FTE	%
Auckland	1	22.0%
Auckland	2-5	8.5%
Auckland	6-49	4.5%
RONI	1	24.0%
RONI	2-5	11.0%
RONI	6-49	6.0%
South Island	1	14.0%
South Island	2-5	6.5%
South Island	6-49	3.5%

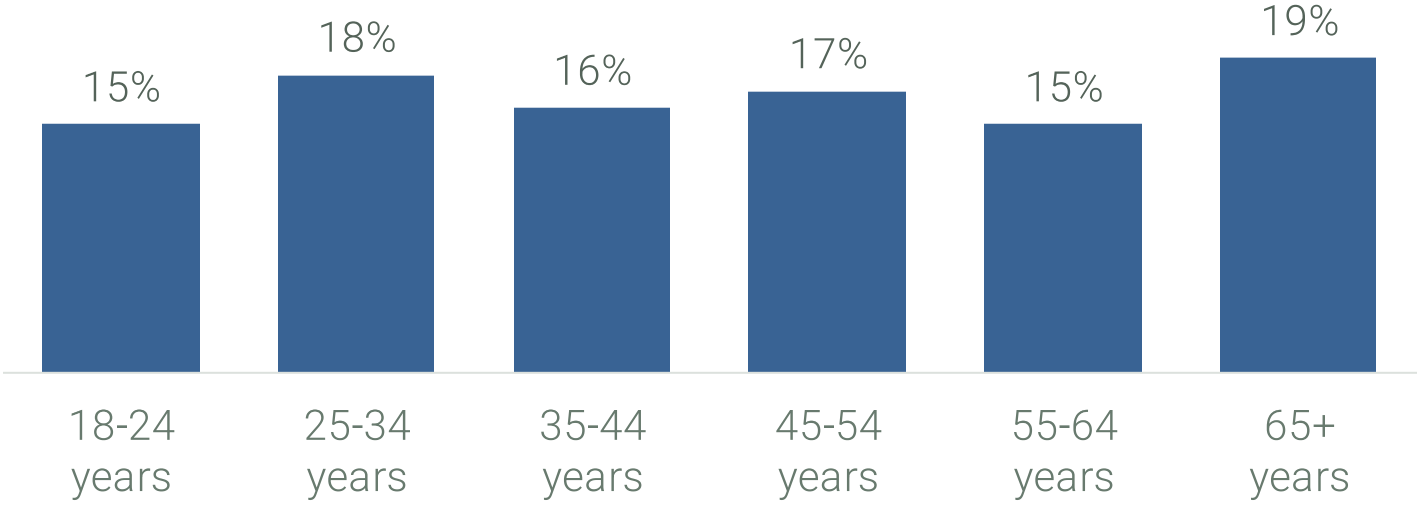
An interlocking quota cell methodology was employed, whereby representative quotas are set for each cell, e.g., 18-24 year-old males in Northland. Weighting is then used to ‘balance’ any cells that are slightly under or over quota to ensure the final sample and all reported data is nationally representative.

Demographics - Residential

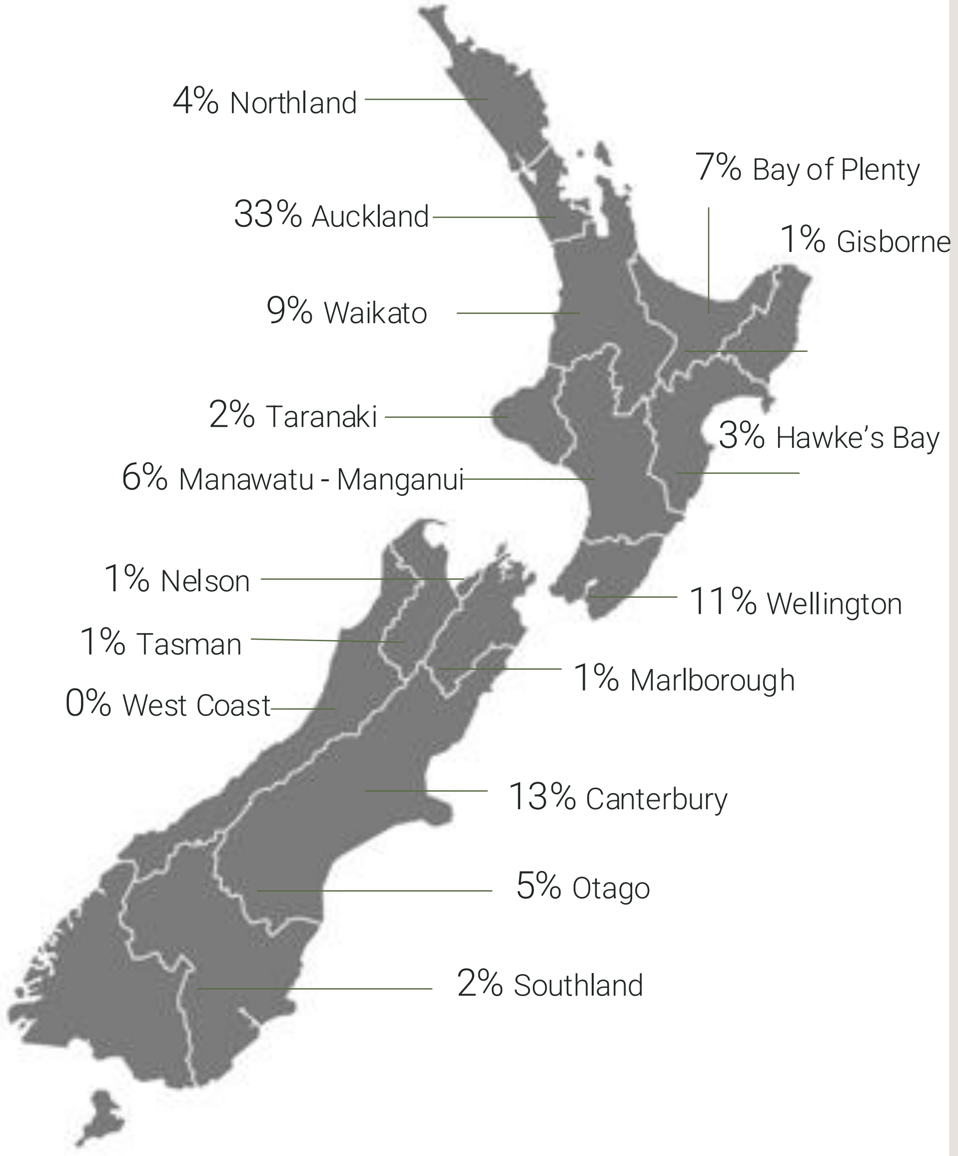
Gender



Age

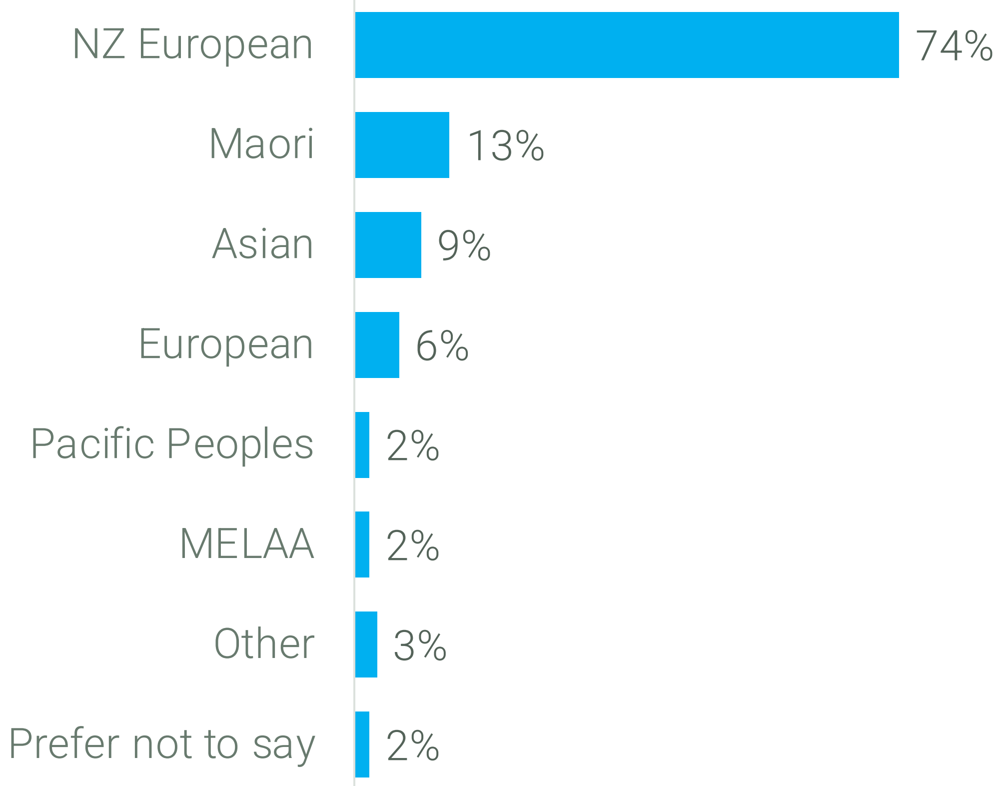


Region



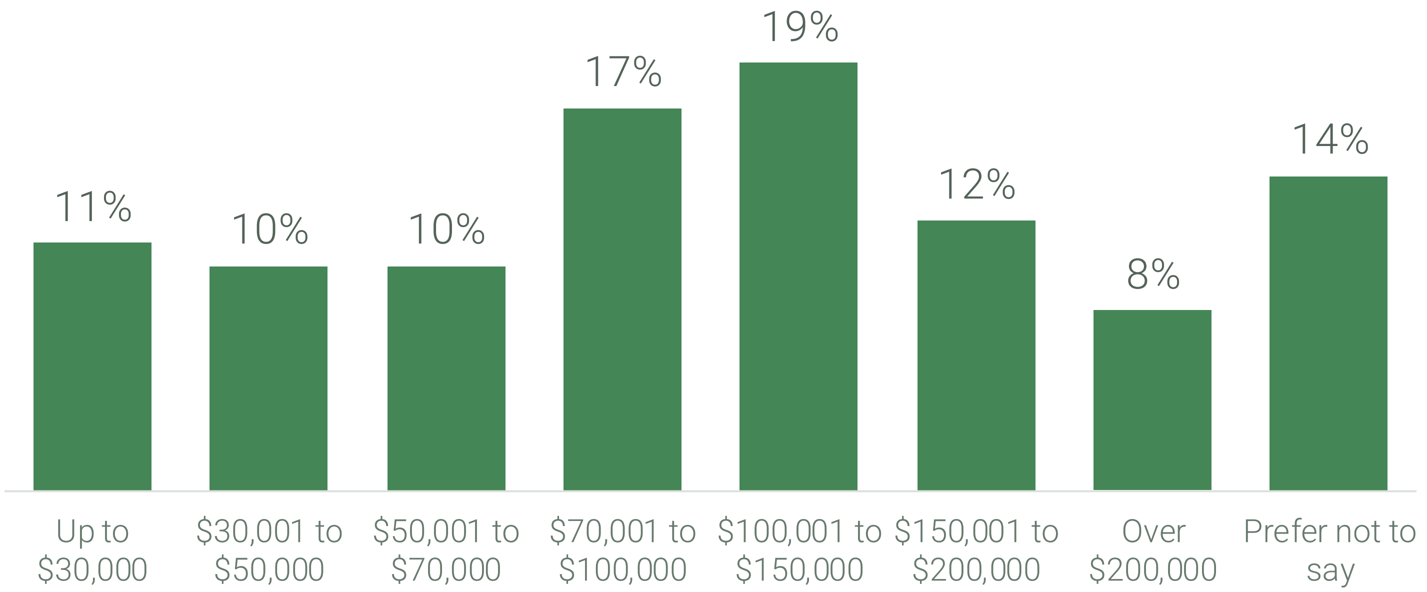
11% rural
89% urban

Ethnicity



Note: Multiple Response question

Household Income

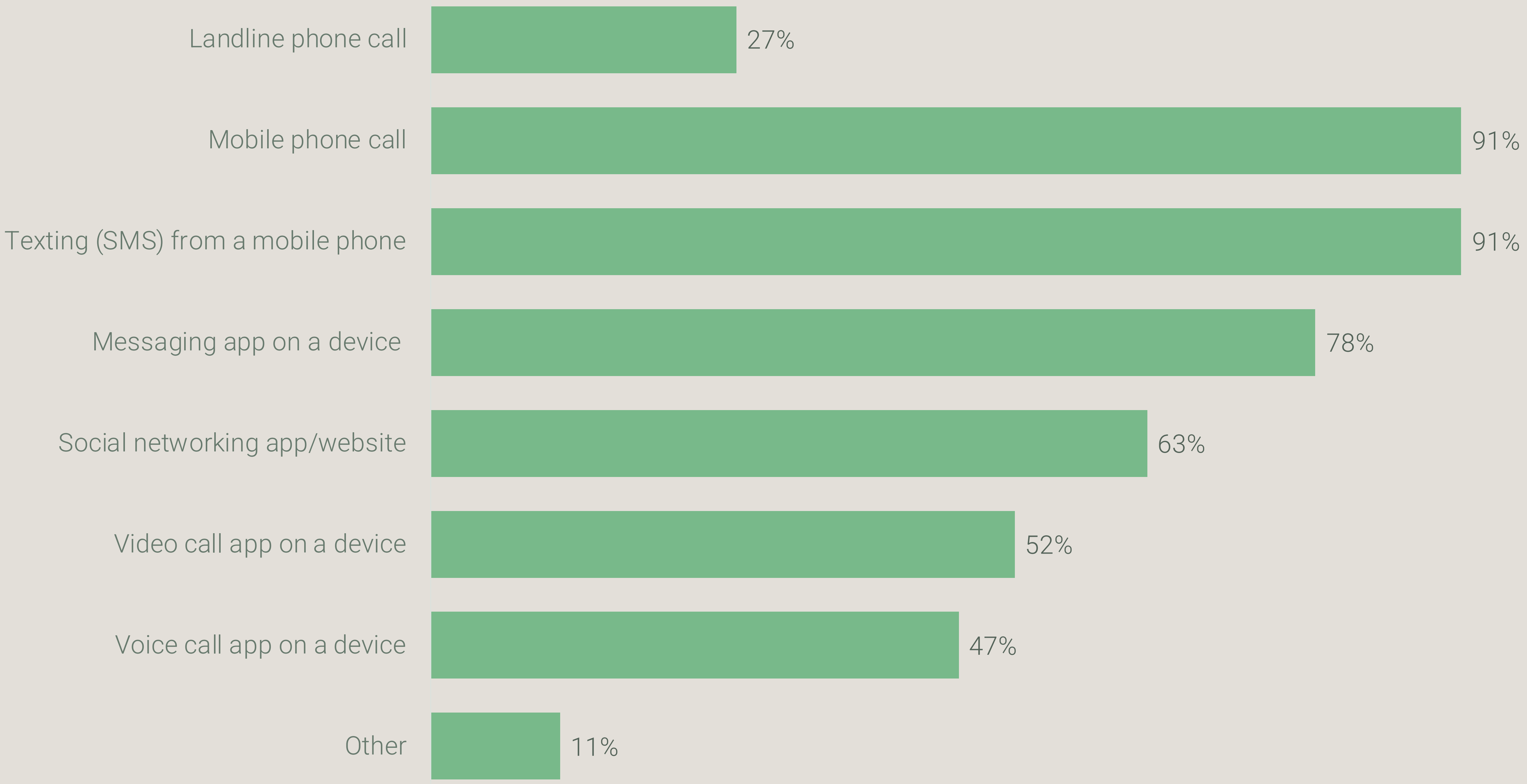


INSIGHTS HQ

RESIDENTIAL INSIGHTS

Communication types used in the last month

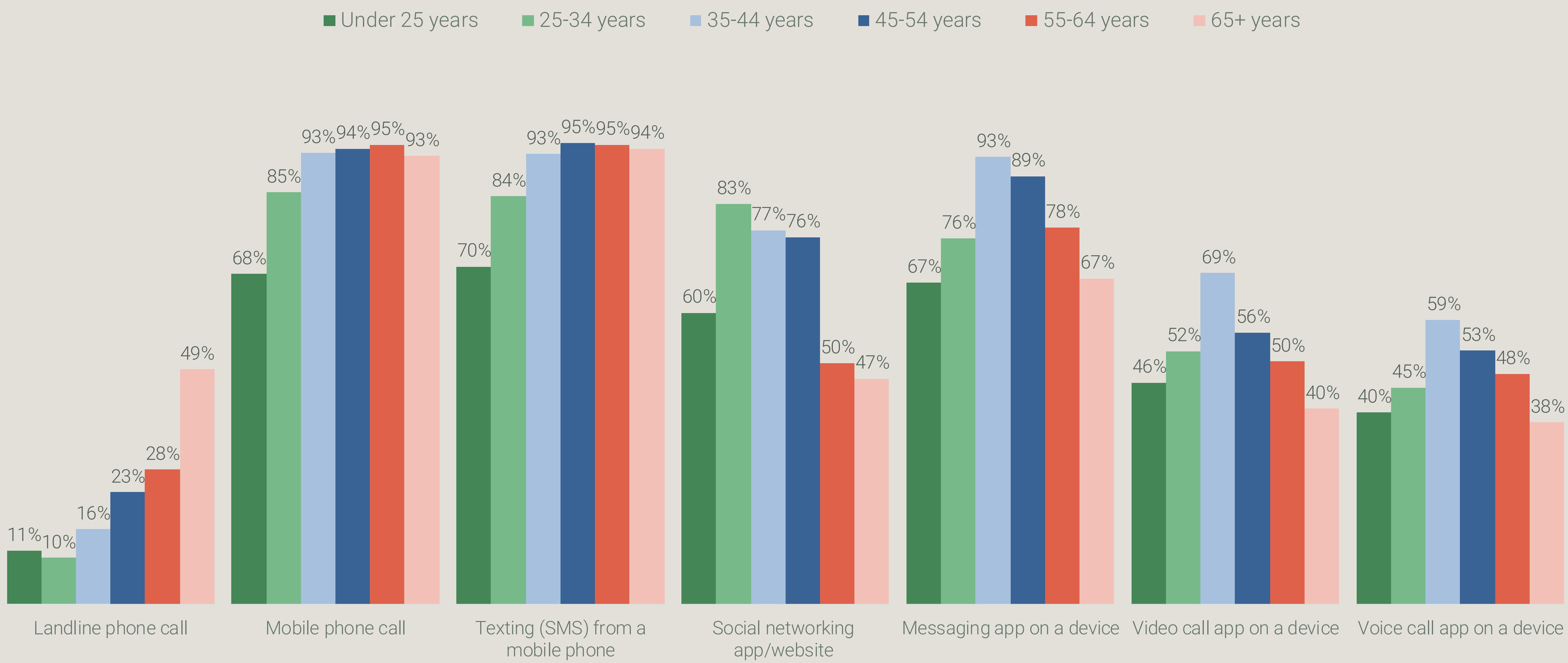
Mobile phone remains the most popular method of communication. 91% have made a mobile phone call or sent a text message from their mobile phone in the last month.
Over three quarters have used a messaging app via a device in the last month.



In the last month, which of the following have you used for your communication?
Base: Jan-Mar n=963

Communication types used in last month

Under 25 year-olds are less likely to have made a mobile phone call or sent a mobile text message in the last month. Messaging apps have higher usage among 35-54 year-olds.

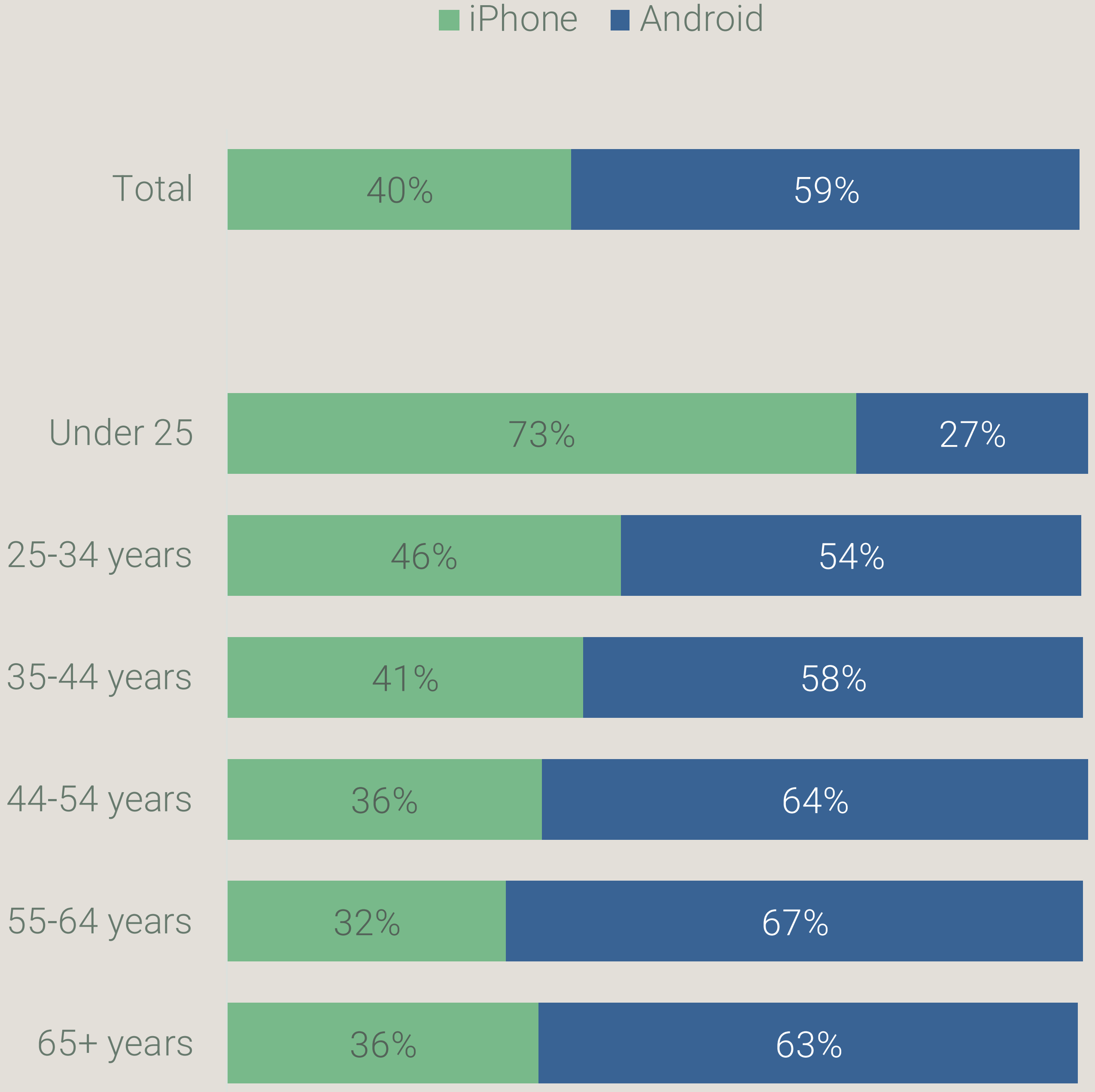


In the last month, which of the following have you used for your communication?
Base: Jan-Mar n=963

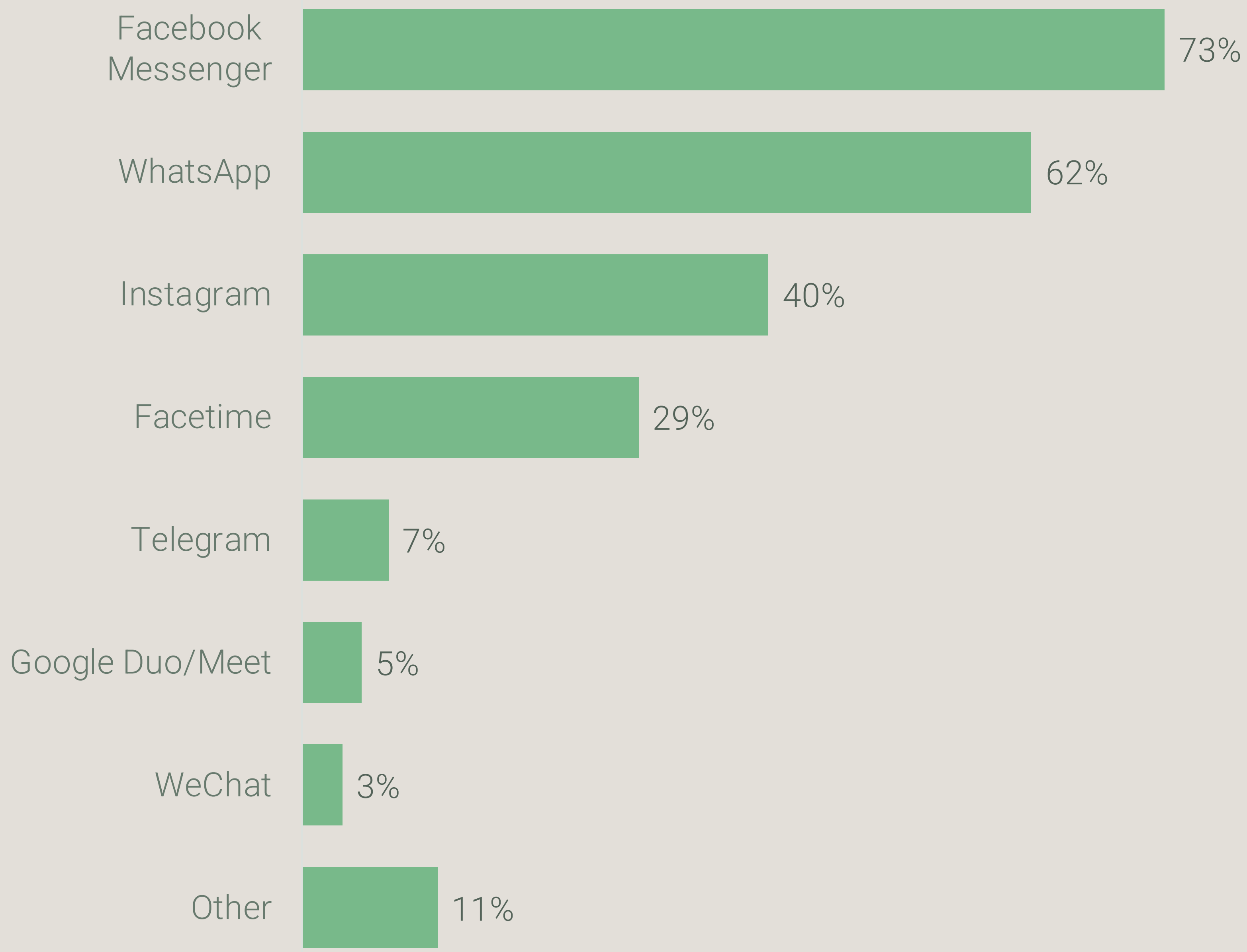
Handset type and messaging apps

The most popular messaging apps are Facebook Messenger followed by WhatsApp.

Handset Type



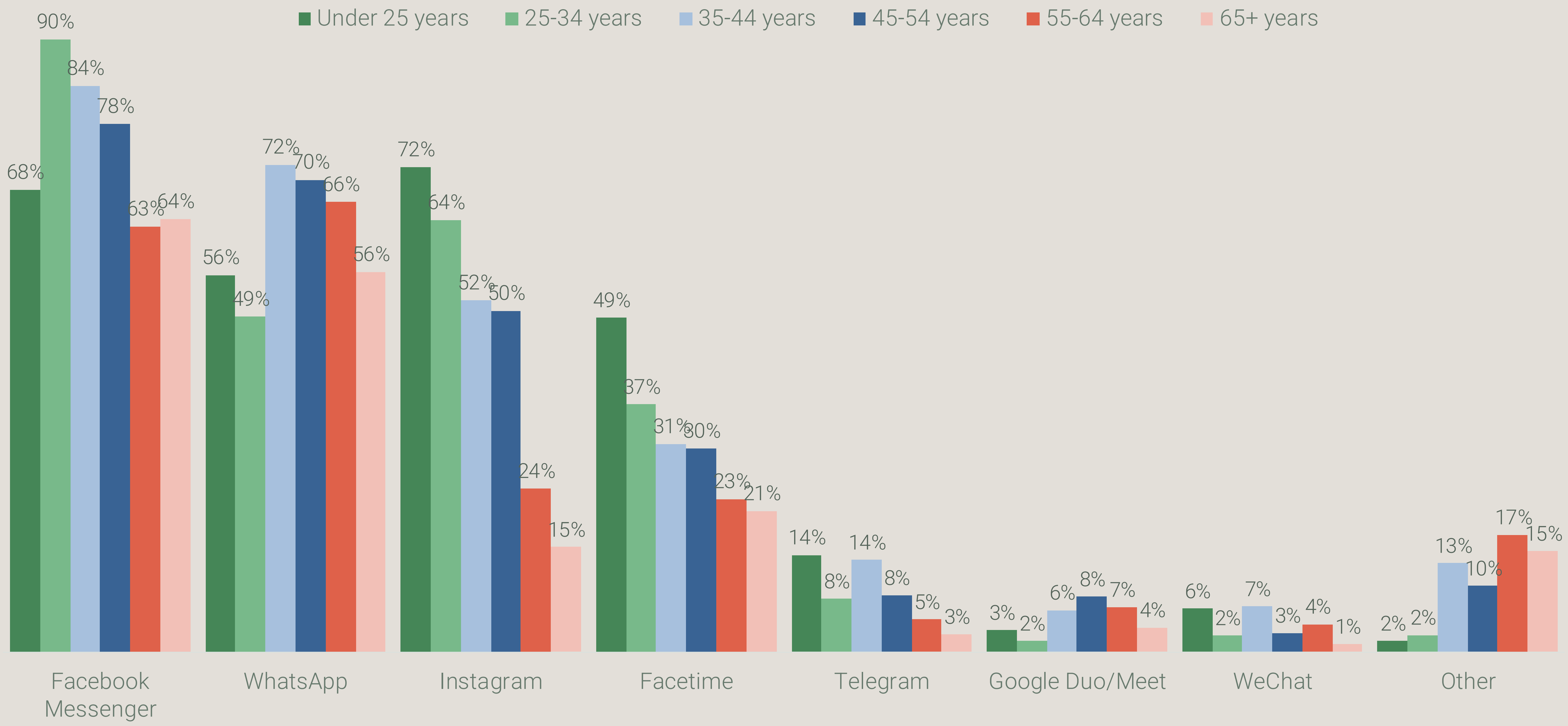
Messaging Apps on phone



What type of phone do you currently have?
Which messaging/calling apps do you currently have on your smartphone?
Base: Jan-Mar n=963

Messaging apps by age

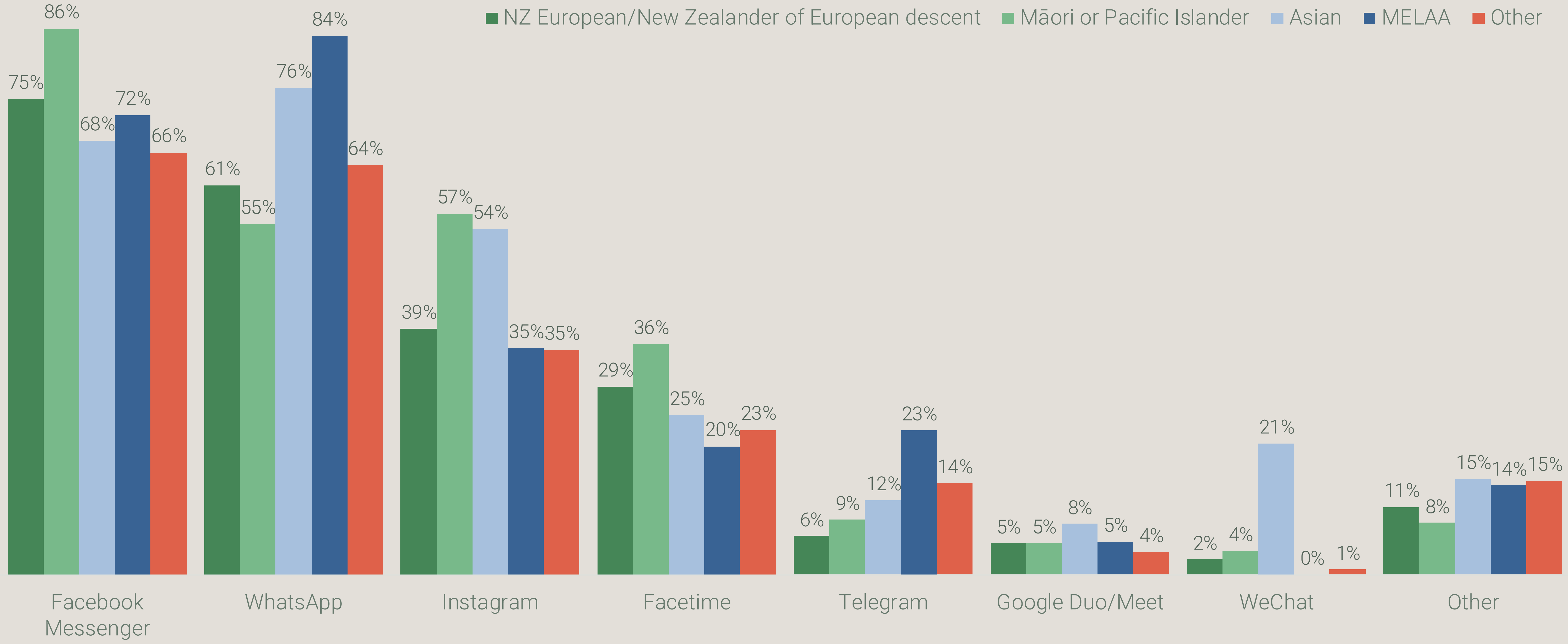
Looking at which apps respondents have downloaded by age, Facebook Messenger is more popular among all groups apart from Under 25s (Instagram most popular), and 55–64-year-olds (WhatsApp more popular). Both Facetime and Instagram are more popular among younger demographics.



Which messaging/calling apps do you currently have on your smartphone?
Base: Jan-Mar n=963

Messaging apps by ethnicity

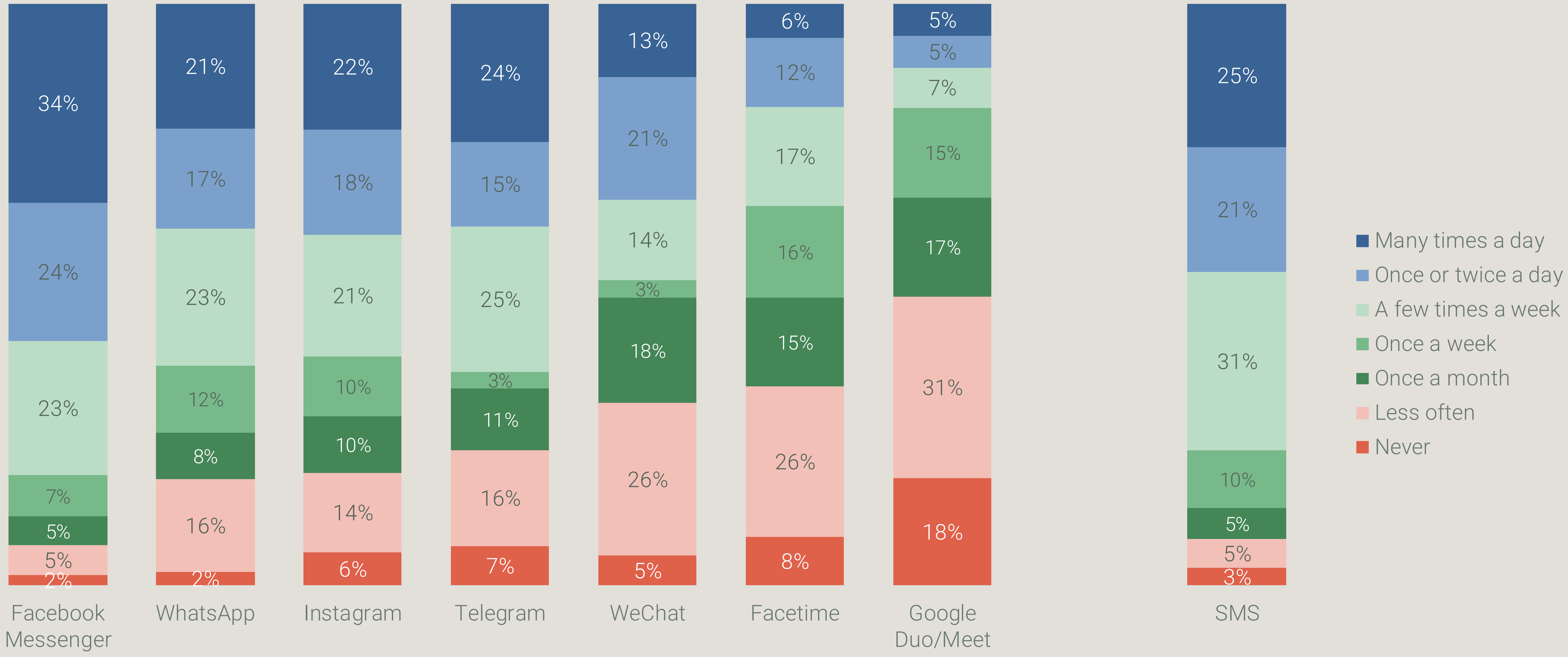
There are some skews in the popularity of messaging apps by ethnicity; WhatsApp is more popular among Asian and MELAA (Middle Eastern, Latin American, African) consumers. Instagram is more popular among Māori or Pacific Islander and Asian consumers. WeChat is downloaded predominantly by Asian consumers.



Which messaging/calling apps do you currently have on your smartphone?
Base: Jan-Mar n=963

Message frequency

Currently Facebook Messenger appears to be the strongest competition to SMS messages. It is the most popular and usage frequency is higher than sending SMS messages. WhatsApp and Instagram also have high usage frequency although lower than sending SMS messages.

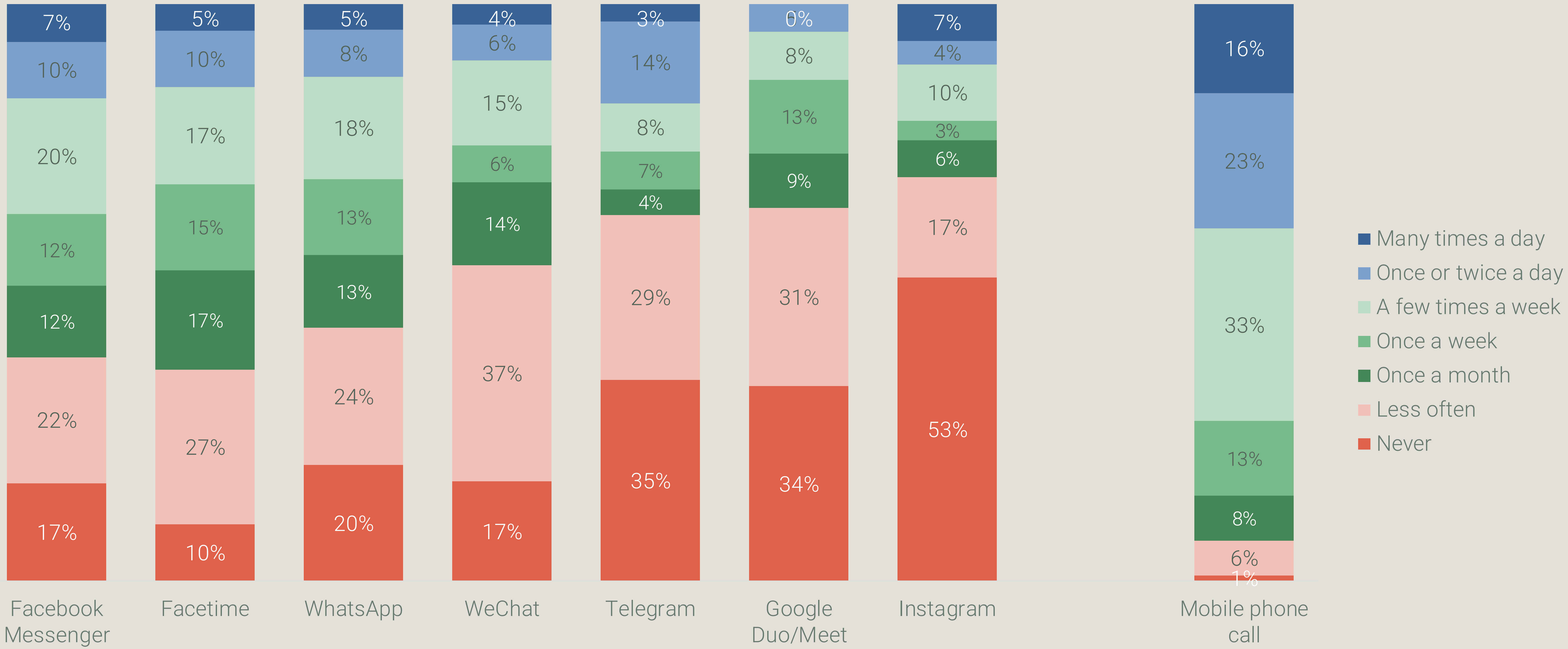


% downloaded onto smartphone	73%	62%	40%	7%	3%	29%	5%	100%

How often do you use the following for sending messages from your mobile phone (including texts, images, videos)?
Base: Jan-Mar n=963

Calling frequency

Mobile phones are the most popular channel to make voice calls. However, the majority of consumers with a messaging app on their smartphone have used that app to make calls. Almost half of those with Facebook Messenger (49%), FaceTime (47%), or WhatsApp (44%), have used that app to make a call at least once a week.



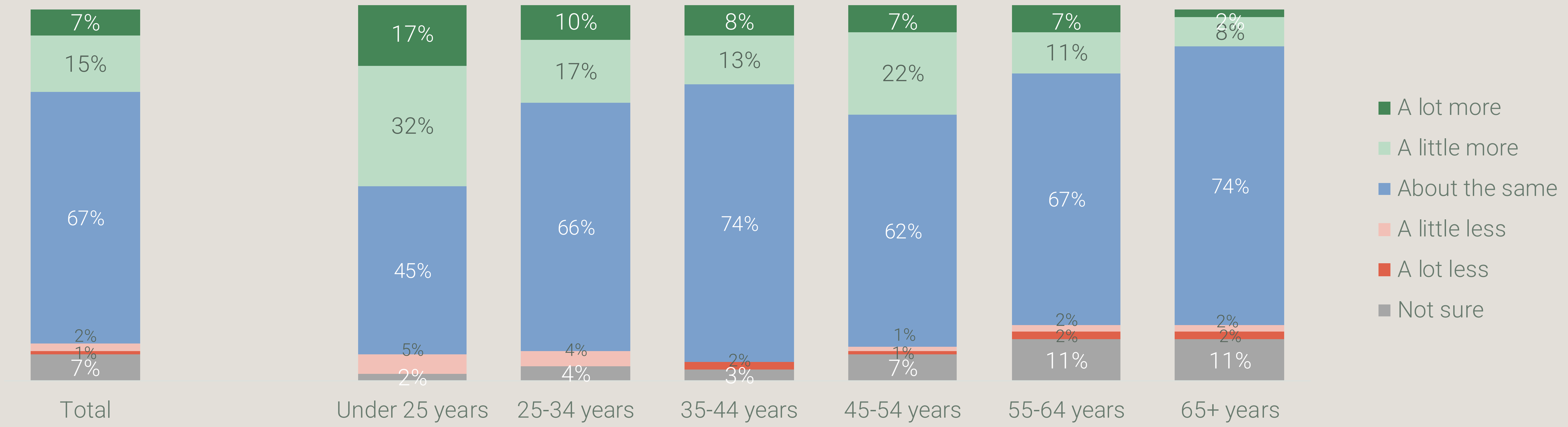
% downloaded onto smartphone	Facebook Messenger	Facetime	WhatsApp	WeChat	Telegram	Google Duo/Meet	Instagram	Mobile phone call
	73%	29%	62%	3%	7%	5%	40%	100%

How often do you use the following for making calls from your mobile phone (either voice calls or video calls)?
Base: Jan-Mar n=963

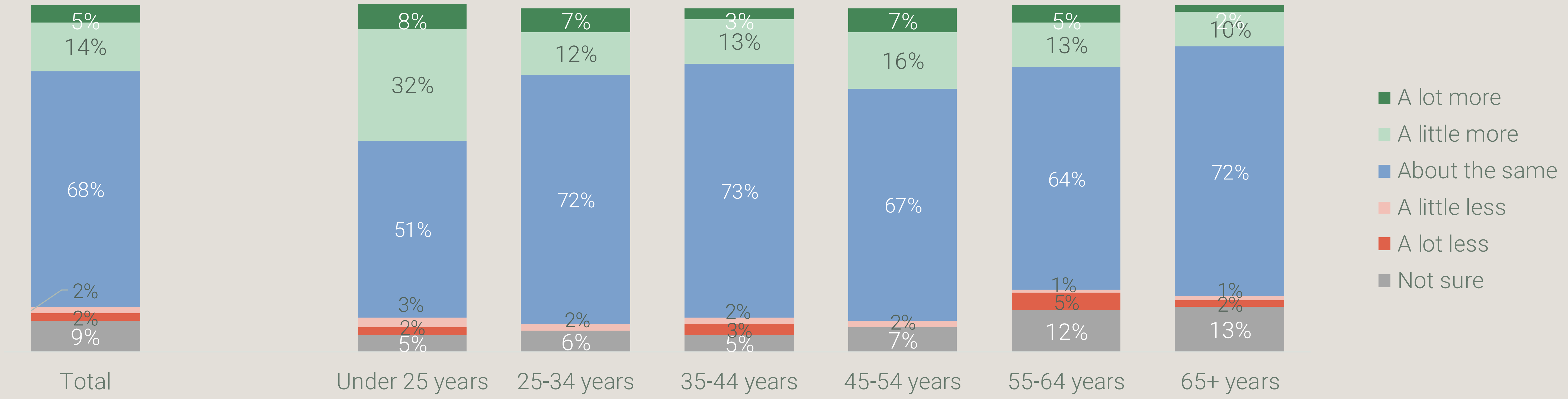
Future behaviour

The increase in messaging app usage is more likely to come from the younger demographic. Almost half (49%) of under 25s expect to send more messages and 40% expect to make more calls in the future.

Expect to send **more messages** via messaging apps



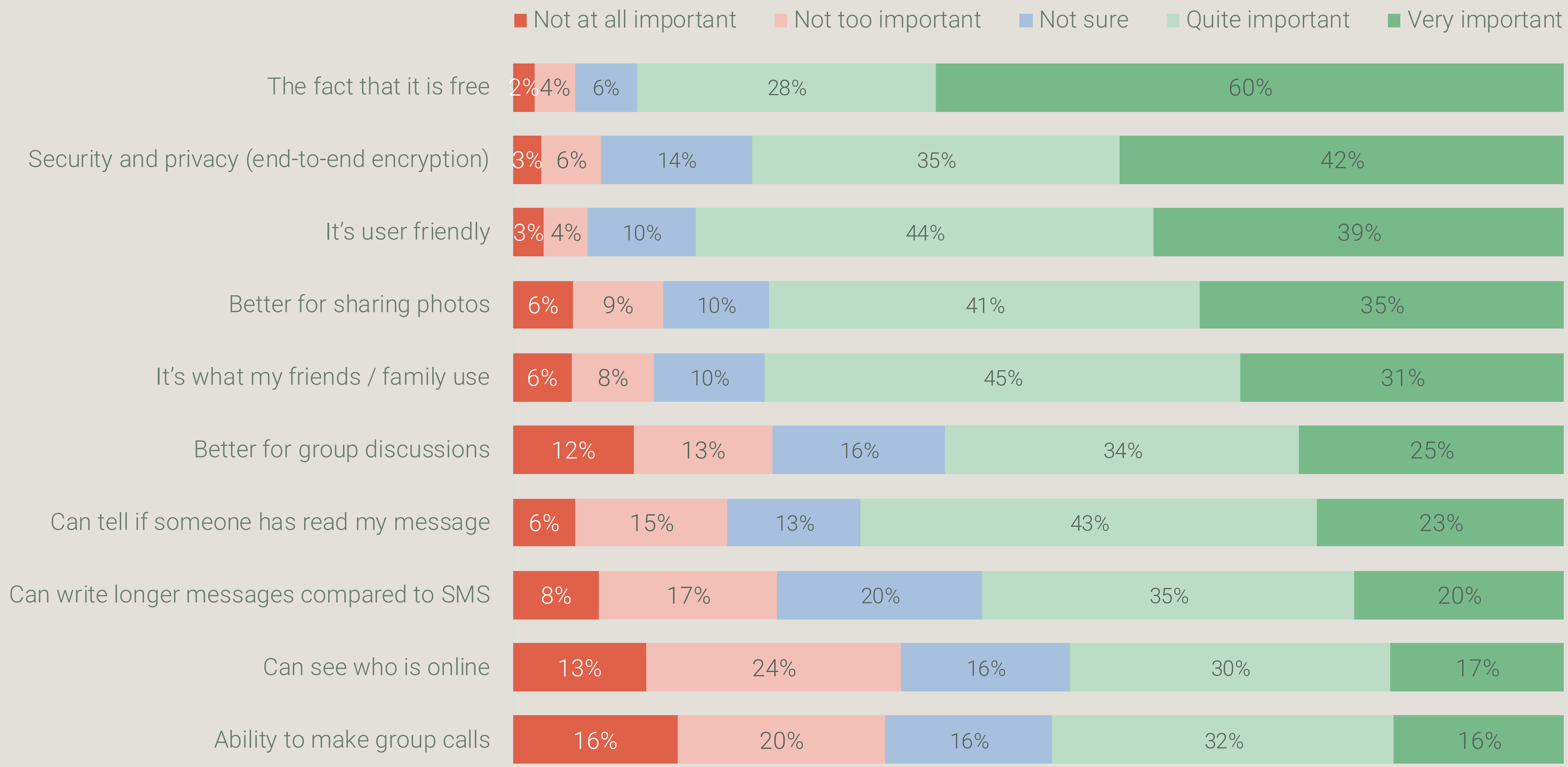
Expect to **make more calls** via messaging/calling apps



Do you expect to be sending messages via messaging apps (e.g WhatsApp, Messenger, WeChat) more or less in the future?
Do you expect to be making calls via messaging/calling apps (e.g WhatsApp, Messenger, WeChat) more or less in the future?
Base: Jan-Mar n=963

Importance of factors

The fact it is free is the key driver of usage and popularity; 60% say this is very important. Security and privacy is also important to the majority of consumers.

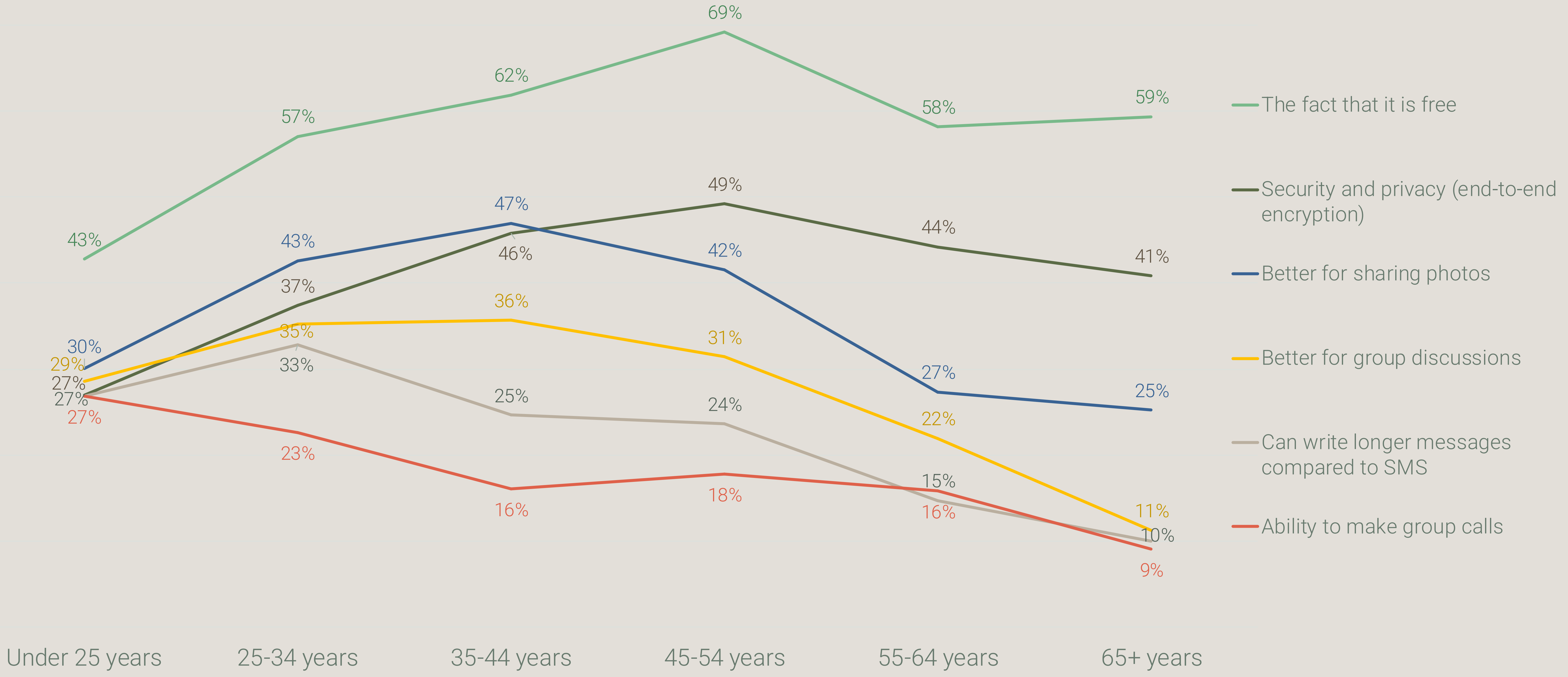


Thinking about messaging/calling apps, how important would you say the following are:
(including texts, images, videos, calls)?
Base: Jan-Mar n=963

Importance of factors

(% 'very important')

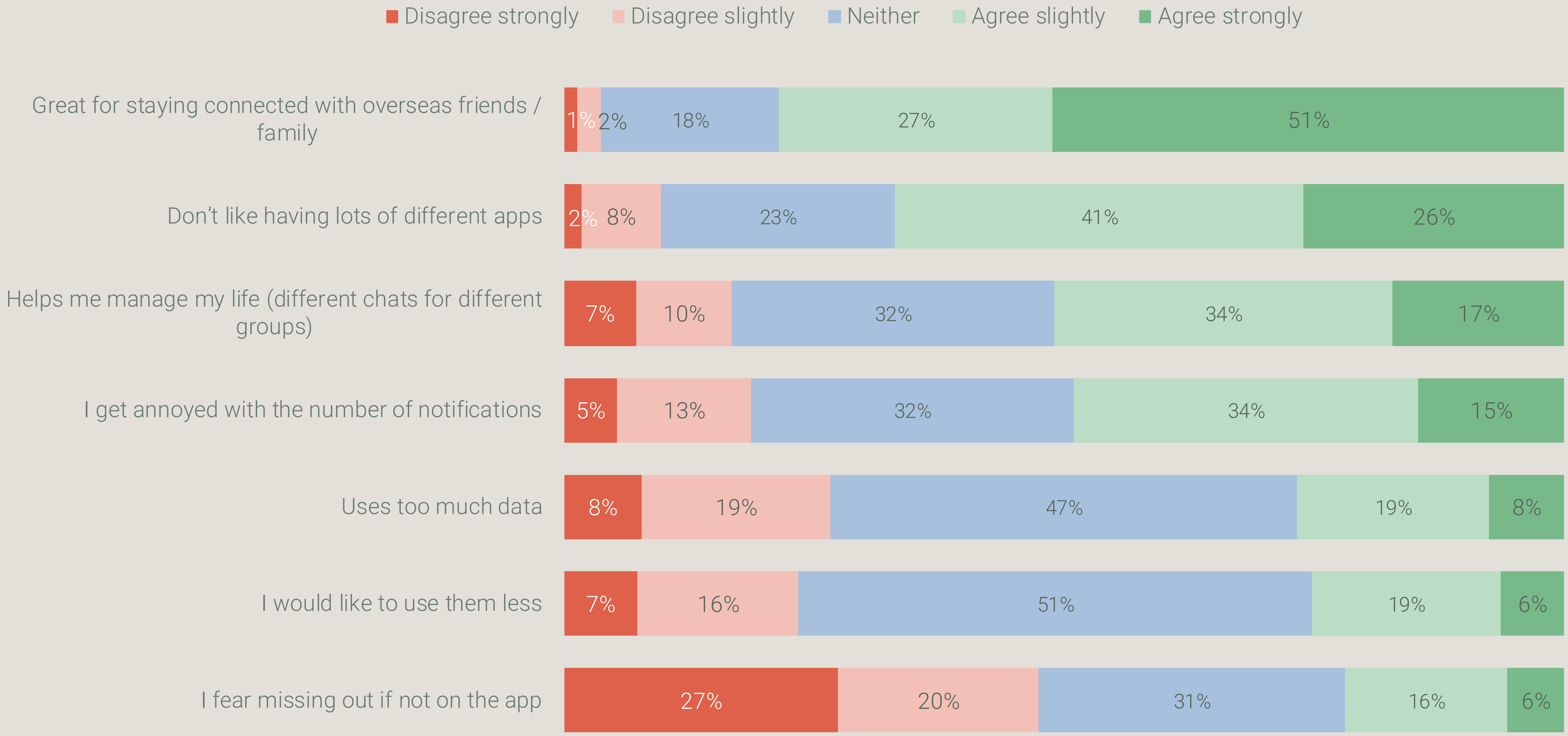
The fact it is free, and security are important across all age groups. However, 35-44 years olds place more importance on sharing photos compared to other ages, security and privacy is more important among 45–54-year-olds. Group functionality and the ability to write longer messages are more important among younger consumers.



Thinking about messaging/calling apps, how important would you say the following are?
Base: Jan-Mar n=963

Agreement statements

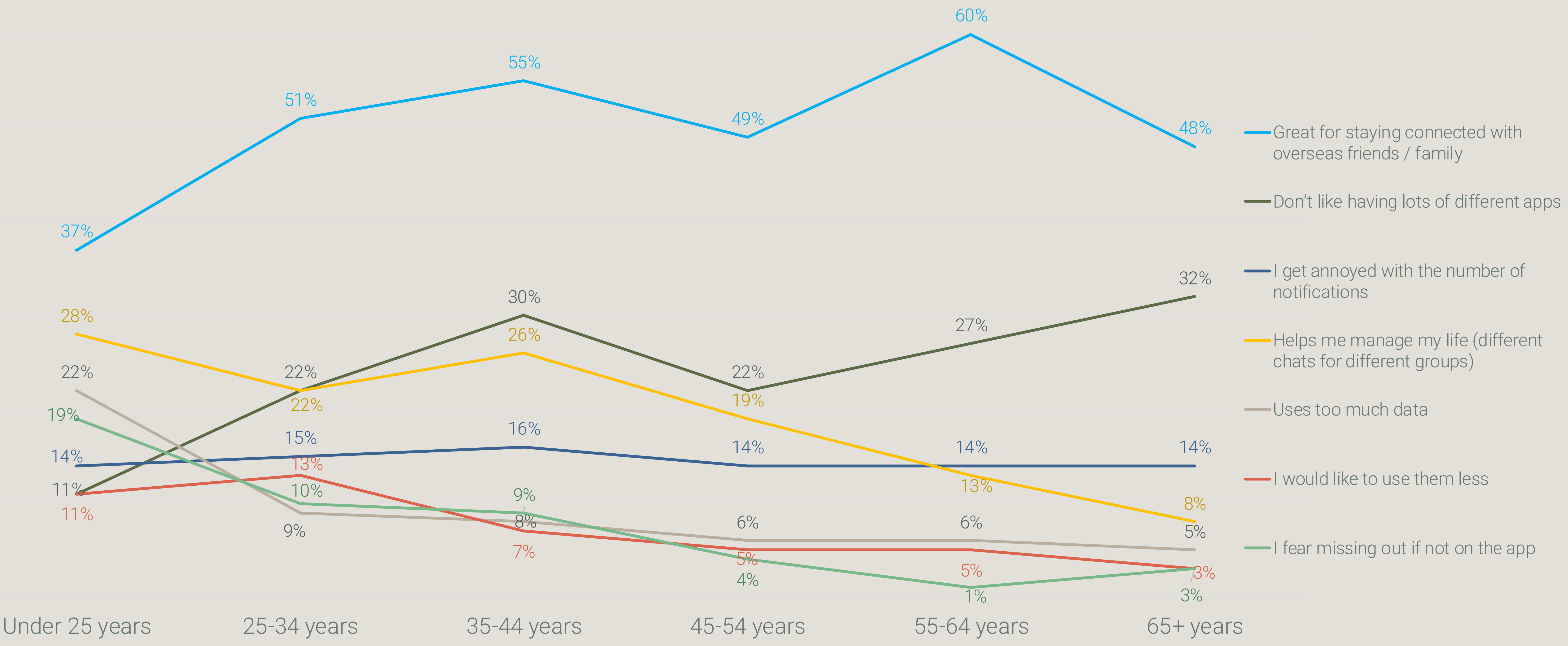
Overseas connection is also a key driver, 78% agree that apps are great for staying connected with overseas friends. However, many don't like having too many apps (67% agree), and 49% get annoyed with the number of notifications.



To what extent do you agree with the following statements about messaging/calling apps?
Base: Jan-Mar n=963

Agreement statements

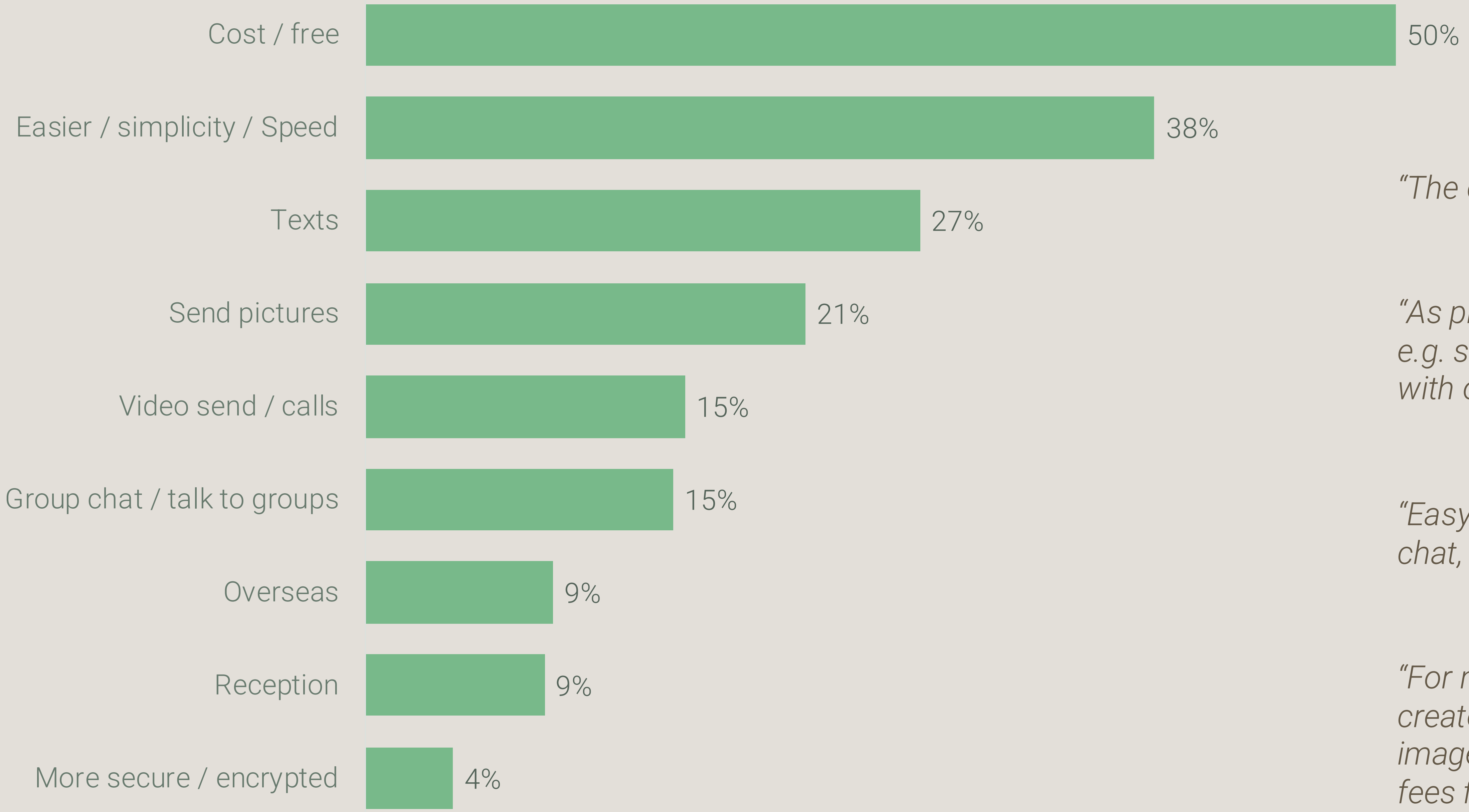
Overseas connection is a key driver across all age groups. However, younger consumers are more likely to agree that apps help them manage their life, while older consumers are more likely to dislike having lots of different apps. Under 25s are more likely to fear missing out if not on the app.



To what extent do you agree with the following statements about messaging/calling apps?
Base: Jan-Mar n=963

Verbatim preference for messaging apps

The majority believe that no cost (free) followed by ease / simplicity / speed are the key reasons why people prefer messaging apps. A key aspect of the cost theme is that it is free to send images, videos and free to message people overseas.



"The cost you get stung with for accidently sending a MMS"

"As previously highlighted they are great for group chats e.g. sports teams; they're free; easy way to keep in touch with overseas friends / family."

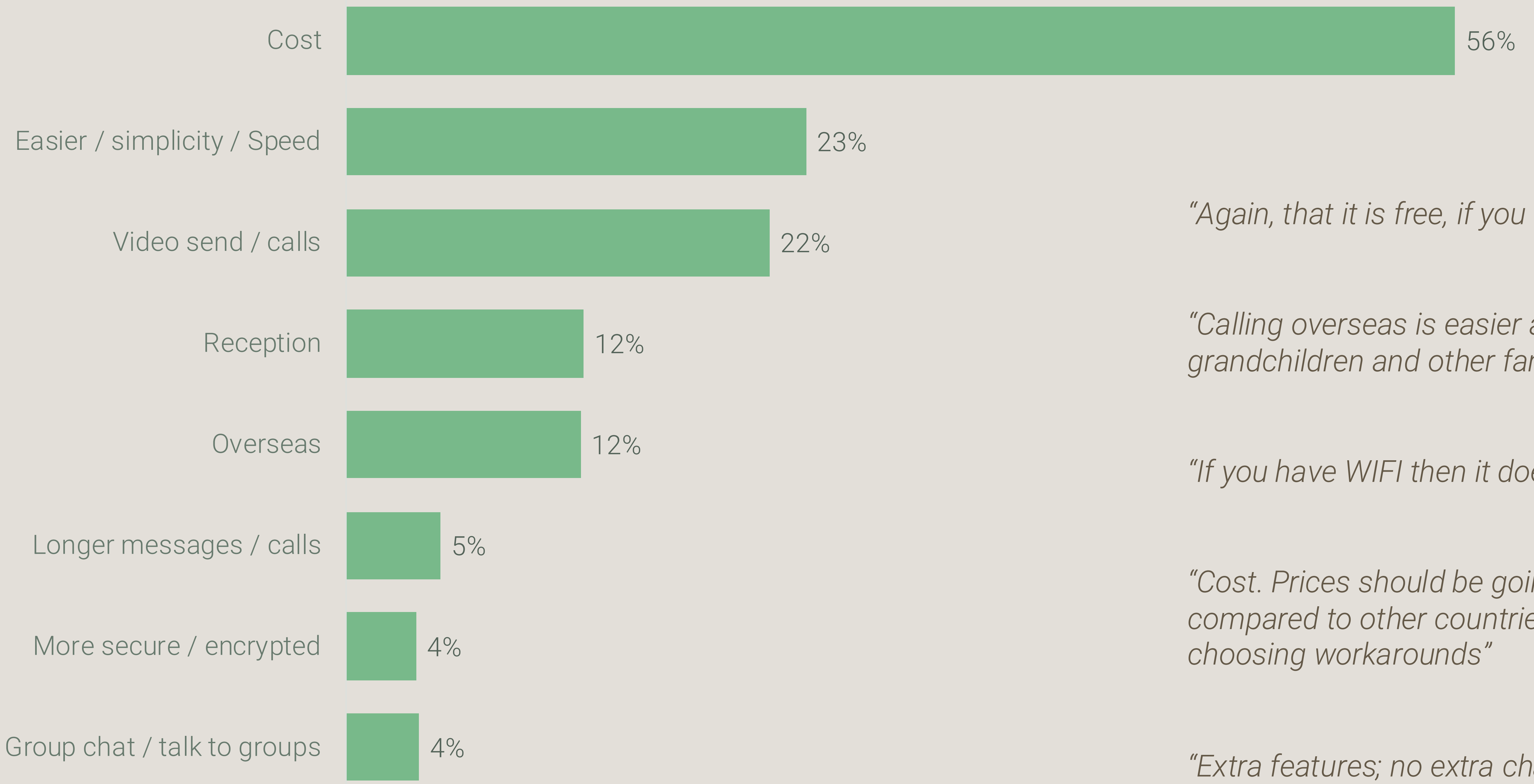
"Easy to use and can swap easily between message chat, call and video call."

"For me it's easier to communicate with people overseas and create group chats. Added bonus of being able to send images and videos using only data so no worries about added fees from sending media that used to exist."

We want to understand why some New Zealanders may prefer to use messaging apps rather than sending text messages / SMS. Why do you think people may prefer messaging apps?
Base: Jan-Mar, all who gave a response n=707

Verbatim preference for calling apps

Similar to messaging apps, the majority believe the key reasons for their preference for calling apps is the cost (free) and the fact it is easier and simpler compared to mobile / landline calls.



"Again, that it is free, if you are on Wi-Fi. The quality is just as good."

"Calling overseas is easier and costs less. I use video calling a lot to talk to grandchildren and other family members throughout NZ and Australia."

"If you have WIFI then it doesn't affect your prepaid minutes."

"Cost. Prices should be going down significantly in New Zealand when compared to other countries but they haven't. So consumers are choosing workarounds"

"Extra features; no extra charge for calling overseas; group chat calls"

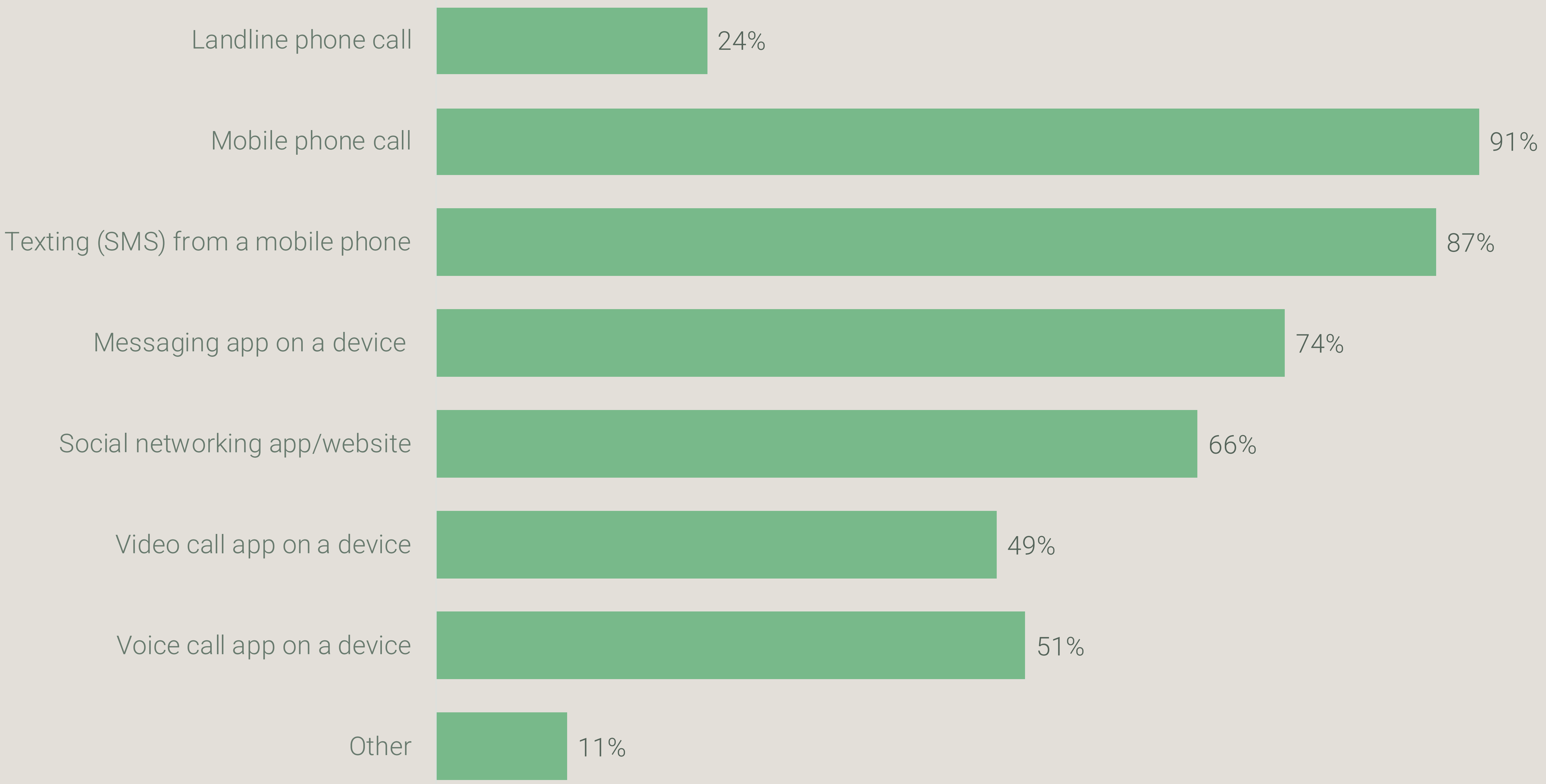
We want to understand why some New Zealanders may prefer to use calling apps rather than a regular mobile phone call. Why do you think people may prefer calling apps?
Base: Jan-Mar all who gave a response n=646

INSIGHTS HQ

SME Insights

Communication types used in last month

Similar to consumers, mobile phone is the most popular methods of communication, 91% have made a mobile phone call and 87% sent a text message from their mobile phone in the last month.
Three quarters (74%) have used a messaging app via a device in the last month.

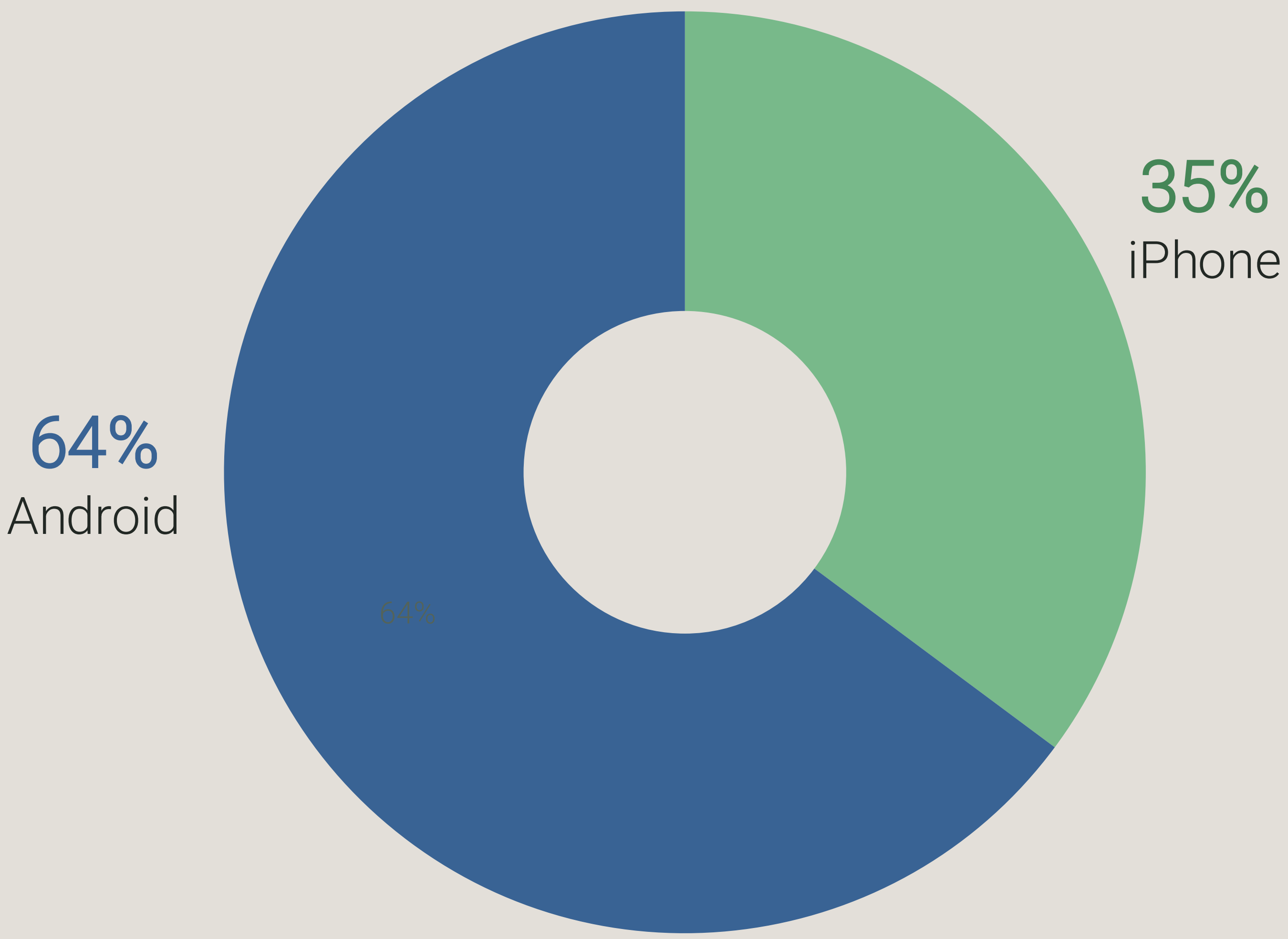


In the last month, which of the following have you used for your communication?
Base: Jan-Mar n=185

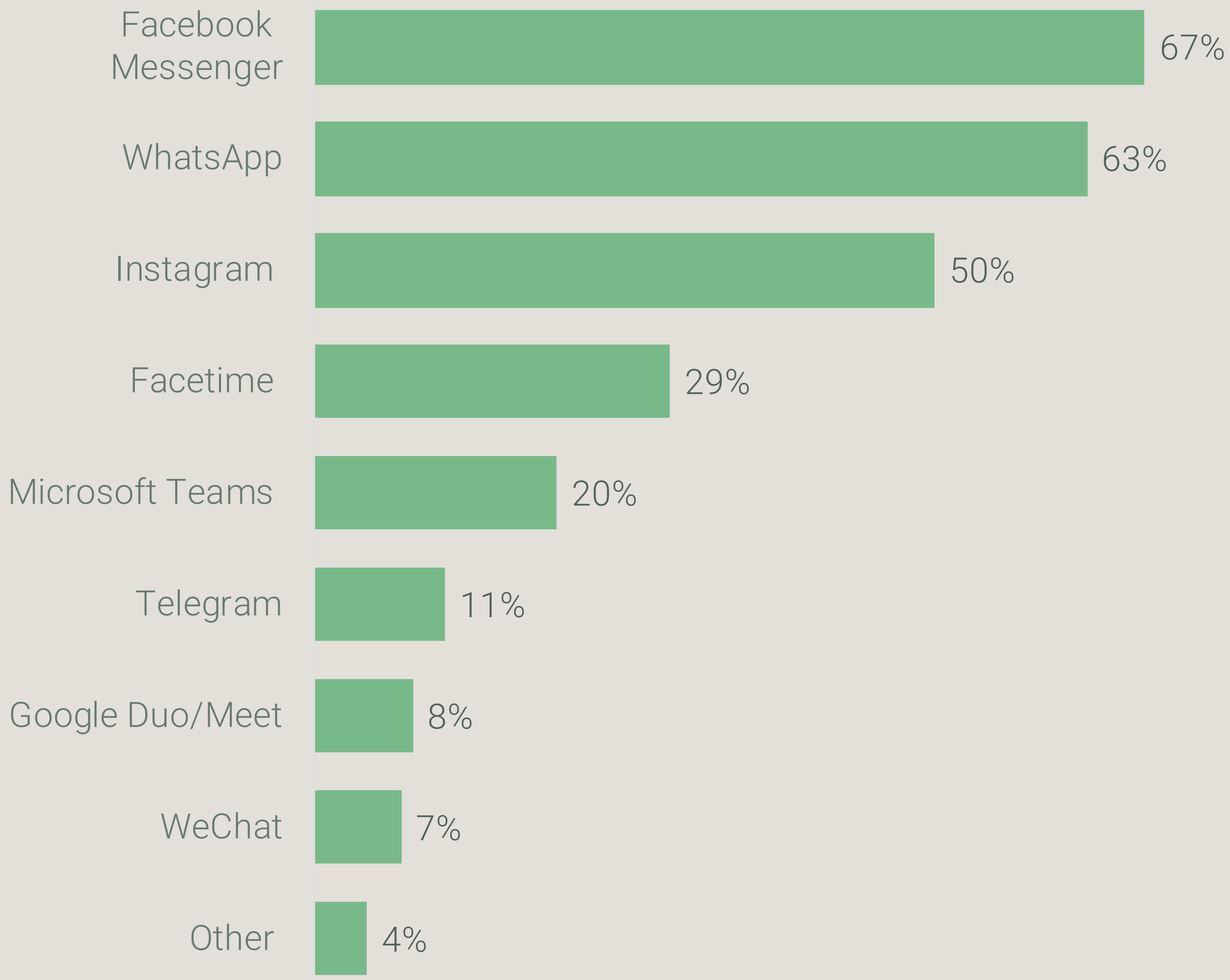
Handset type and messaging apps

As with residential consumers, the most popular messaging apps for SMEs are Facebook Messenger followed by WhatsApp. A fifth of SMEs have also downloaded Microsoft Teams.

Handset Type



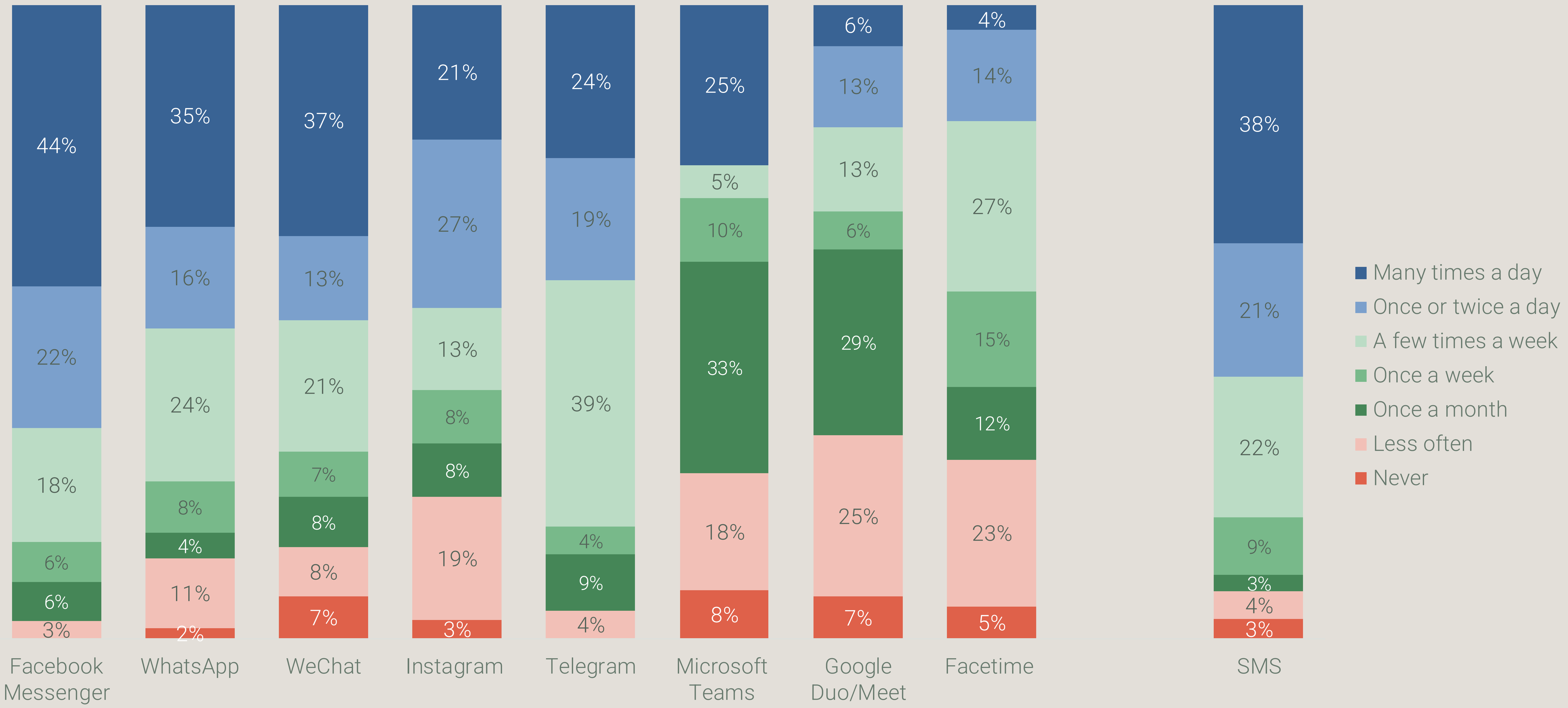
Messaging Apps on phone



What type of phone do you currently have?
Which messaging/calling apps do you currently have on your smartphone?
Base: Jan-Mar n=185

Message frequency

Currently Facebook Messenger appears to be the strongest competition to SMS messages. It is the most popular and usage frequency is higher than sending SMS messages. WhatsApp also has both high usage frequency and popularity.

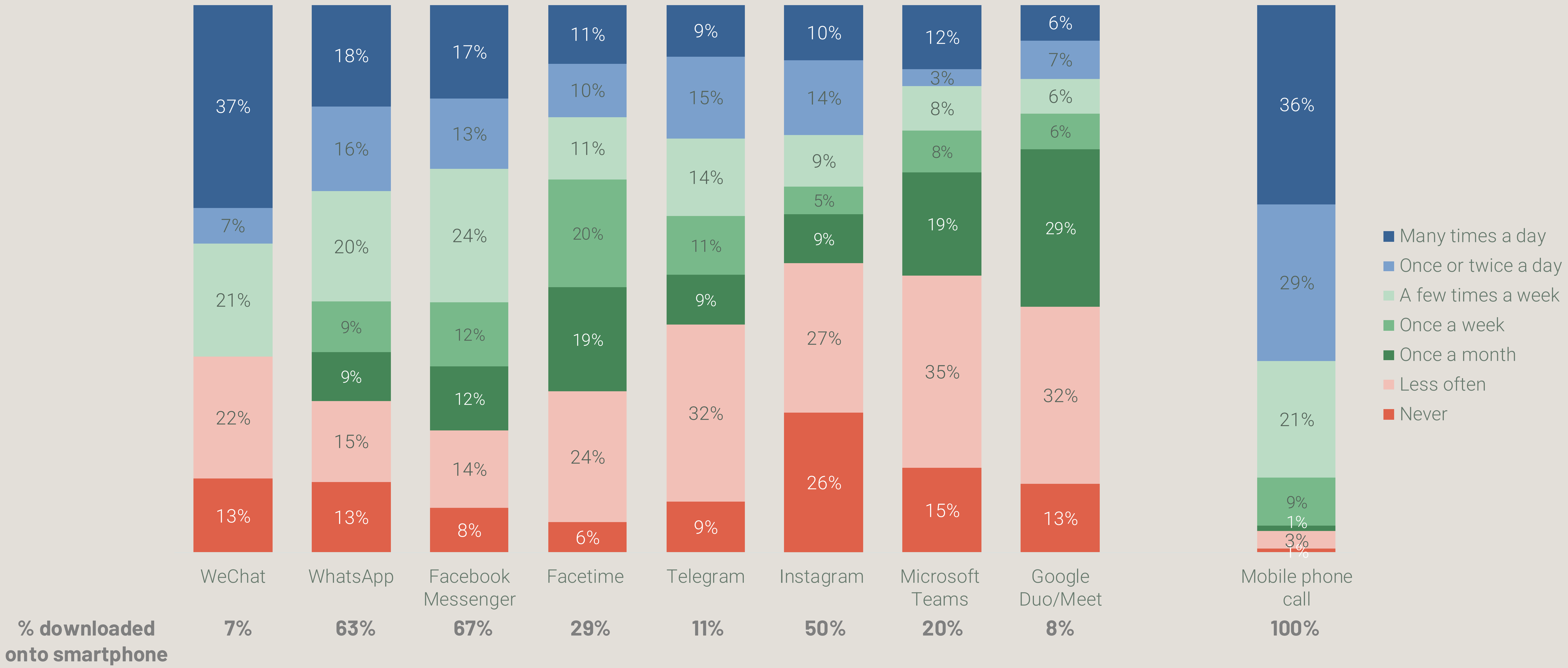


	Facebook Messenger	WhatsApp	WeChat	Instagram	Telegram	Microsoft Teams	Google Duo/Meet	Facetime	SMS
% downloaded onto smartphone	**67%**	**63%**	**7%**	**50%**	**11%**	**20%**	**8%**	**29%**	**100%**

How often do you use the following for sending messages from your mobile phone (including texts, images, videos)?
Base: Jan-Mar n=185

Calling frequency

Mobile phones are the most popular channel to make voice calls, however the majority of SMEs with a messaging app on their smartphone have used that app to make calls. Almost two thirds of those with Facebook Messenger (66%), WeChat (65%), WhatsApp (63%), have used that app to make a call at least once a week.

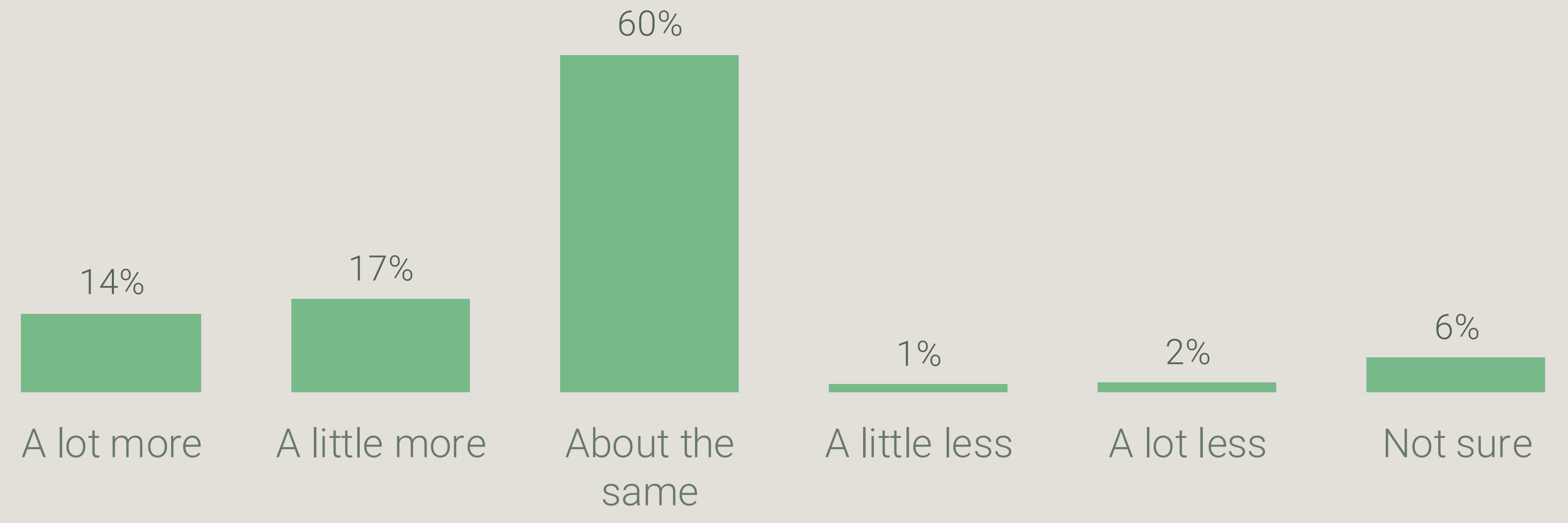


How often do you use the following for making calls from your mobile phone (either voice calls or video calls)?
Base: Jan-Mar n=185

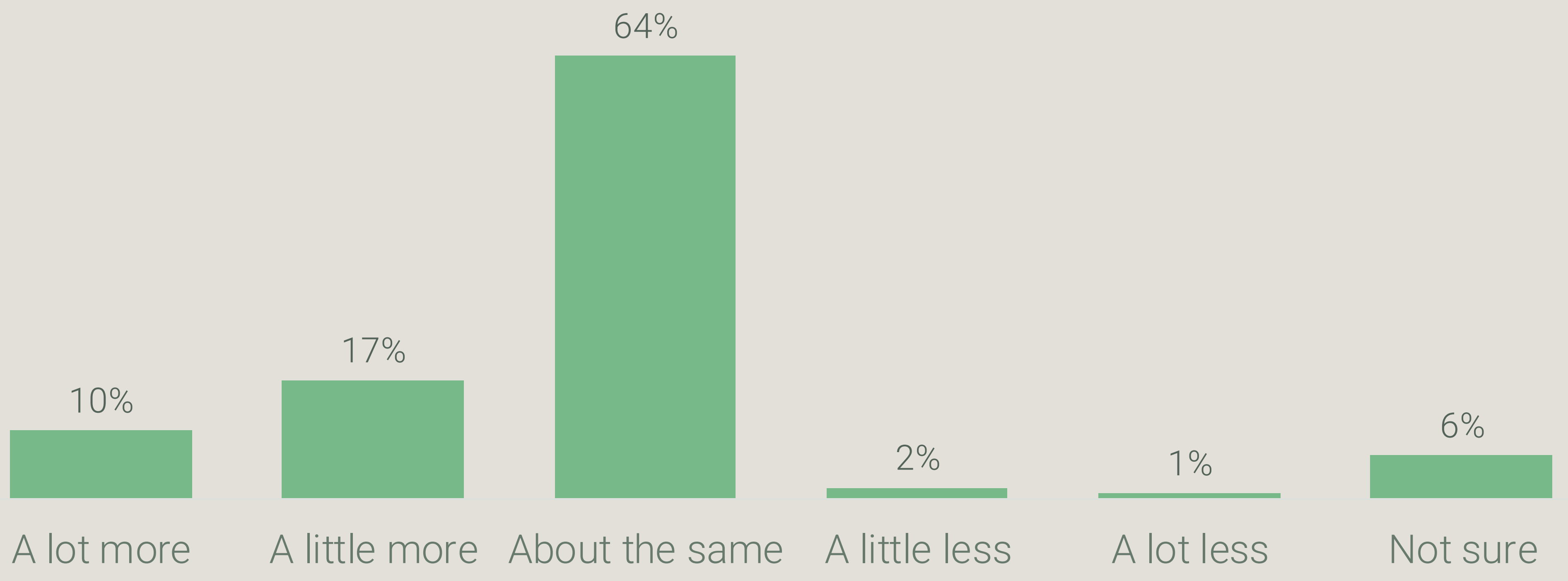
Future behaviour

We can expect app usage to grow; a third (31%) of SMEs expect to send more messages and over a quarter (27%) expect to make more calls via messaging / calling apps in the future.

Expect to send **more messages** via messaging apps



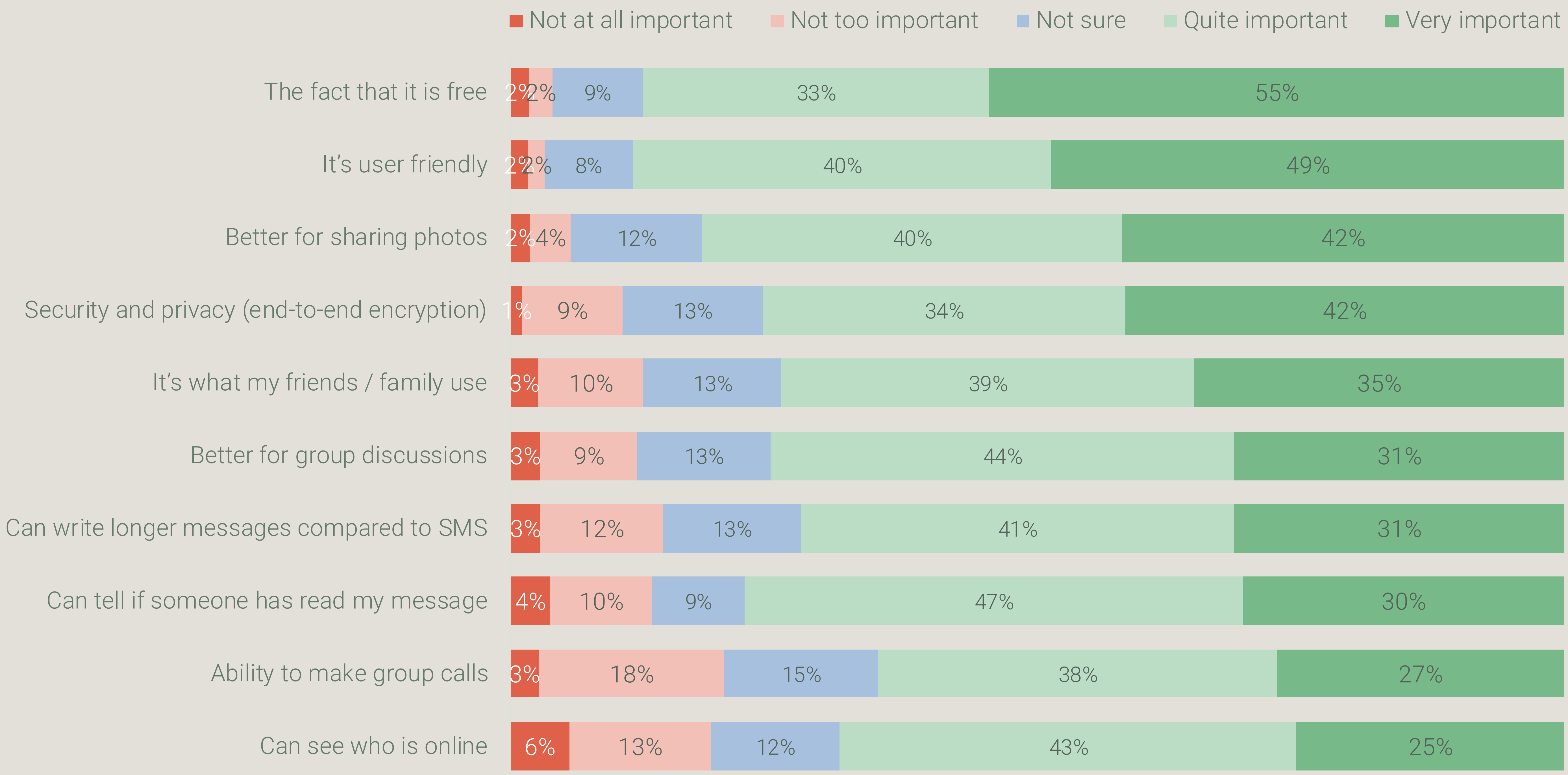
Expect to **make more calls** via messaging/calling apps



Do you expect to be sending messages via messaging apps (e.g WhatsApp, Messenger, WeChat) more or less in the future?
Do you expect to be making calls via messaging/calling apps (e.g WhatsApp, Messenger, WeChat) more or less in the future?
Base: Jan-Mar n=185

Importance of factors

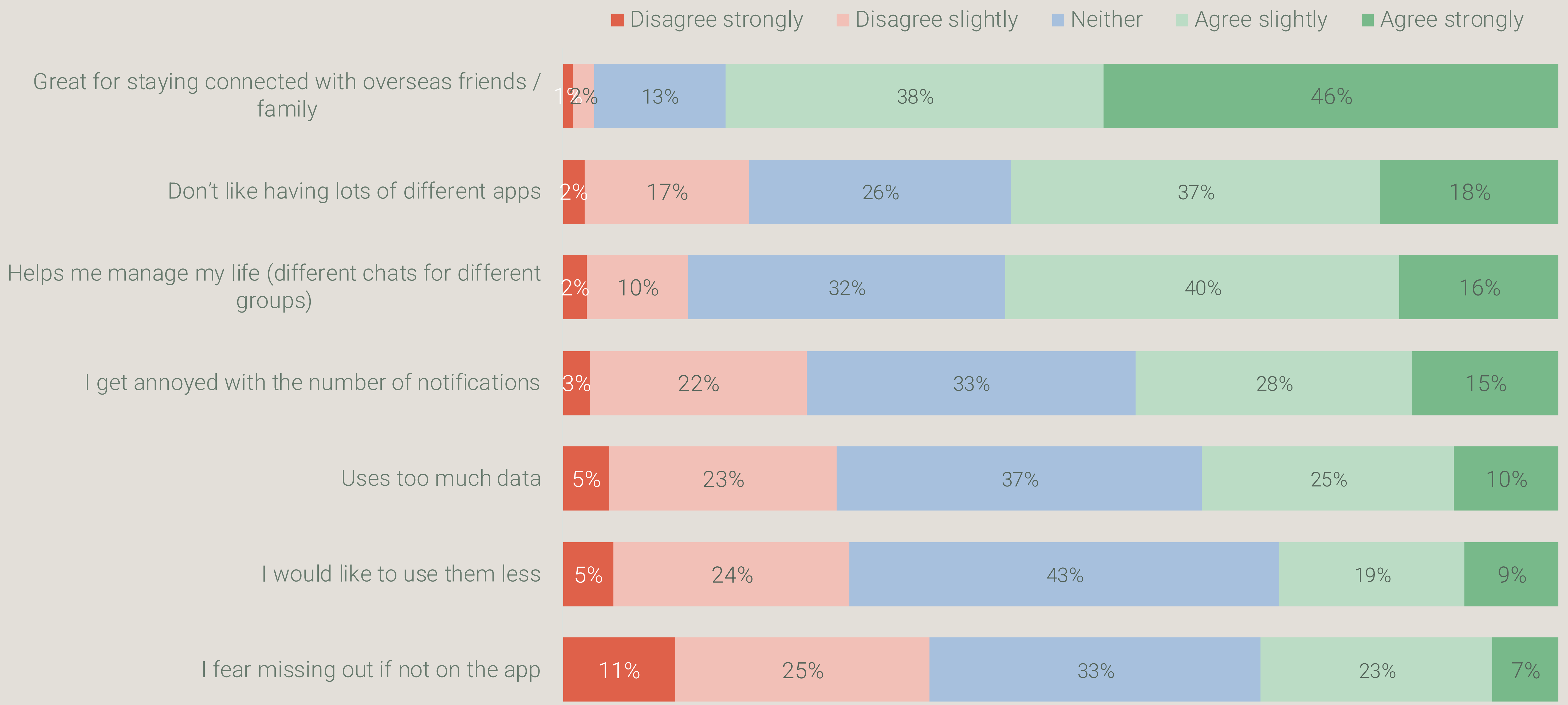
As with residential consumers, the fact it is free is the key driver of usage and popularity; 88% say this is important. Being user friendly is also important to the majority of SMEs (89%),



Thinking about messaging/calling apps, how important would you say the following are: (including texts, images, videos, calls)?
Base: Jan-Mar n=185

Agreement statements

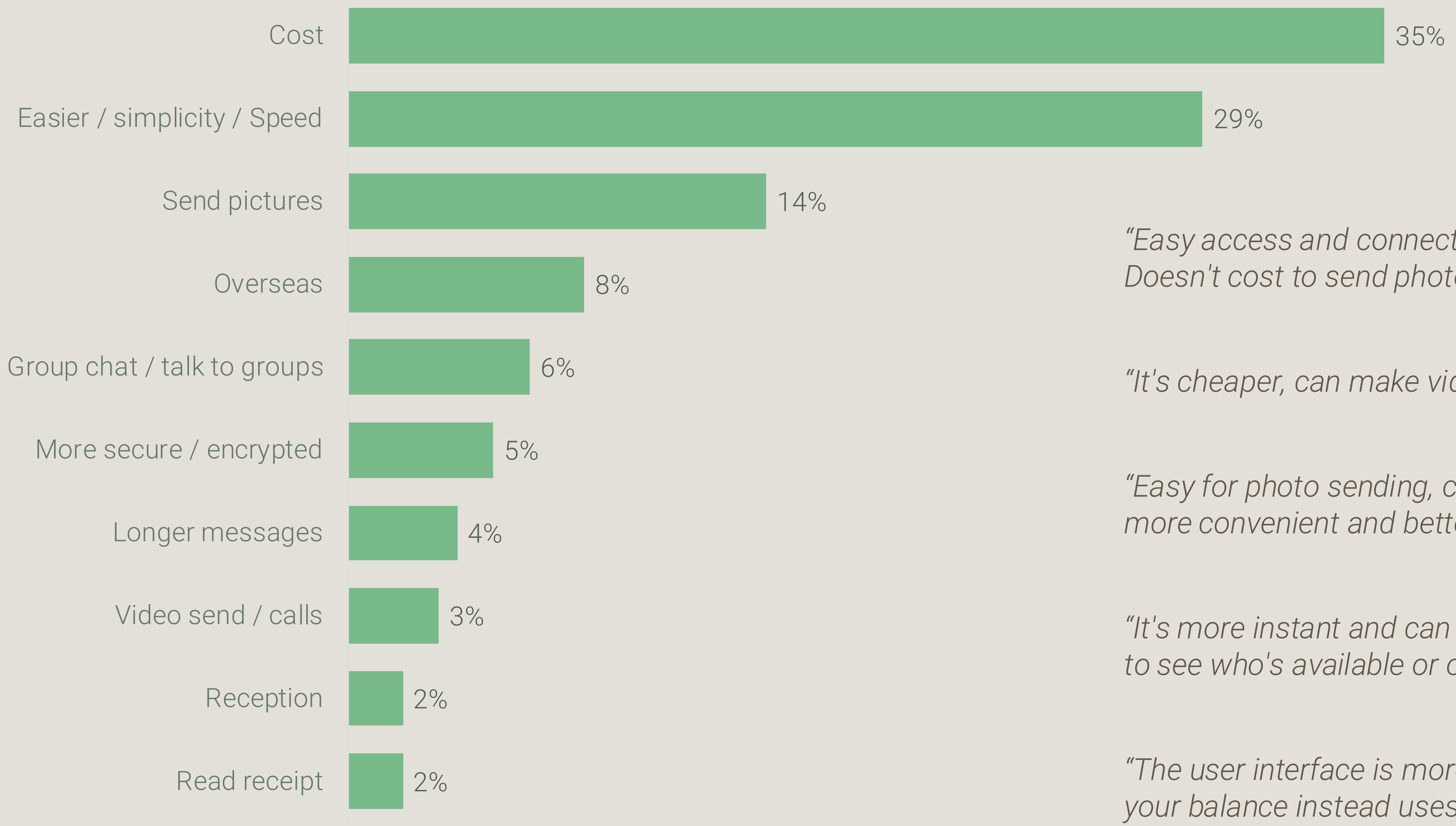
Overseas connection is also a key driver among SMEs, 84% agree that apps are great for staying connected with overseas friends. However, many don't like having too many apps (55% agree), and 43% get annoyed with the number of notifications.



To what extent do you agree with the following statements about messaging/calling apps?
Base: Jan-Mar n=185

Verbatim preference for messaging apps

As with residential consumers, SME also think that cost and ease / simplicity / speed are the main drivers behind the preference for messaging apps.



"Easy access and connection with people. Doesn't cost to send photos or videos."

"It's cheaper, can make video calls, and family have the same apps."

"Easy for photo sending, can make family and friend group chats, just a lot more convenient and better to look at."

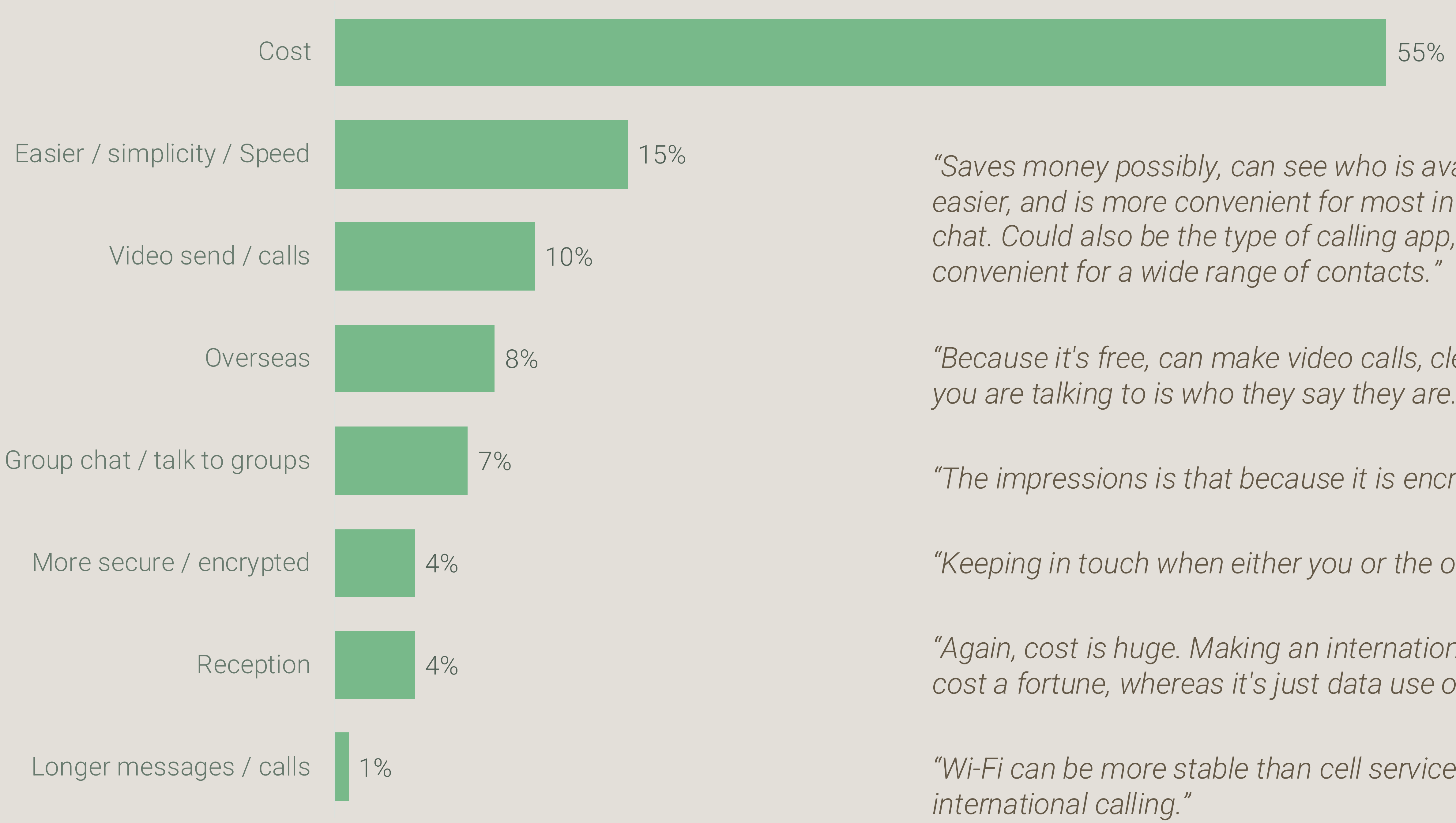
"It's more instant and can be more useful when setting up group chats, easier to see who's available or online, and might just be a personal preference."

"The user interface is more friendly and adding photos/videos does not impact your balance instead uses data."

We want to understand why some New Zealanders may prefer to use messaging apps rather than sending text messages / SMS. Why do you think people may prefer messaging apps?
Base: Jan-Mar, all who gave a response n=162

Verbatim preference for calling apps

Similar to residential consumer, the majority believe the key reasons for their preference of calling apps is the cost (free), followed by the perception that it is easier and simpler compared to mobile / landline calls.



"Saves money possibly, can see who is available or online, can setup group chats easier, and is more convenient for most in regards to when one chats or group chat. Could also be the type of calling app, which might be more popular and convenient for a wide range of contacts."

"Because it's free, can make video calls, clear, and in real time, and proof if person you are talking to is who they say they are."

"The impressions is that because it is encrypted it is safer."

"Keeping in touch when either you or the other person is travelling."

"Again, cost is huge. Making an international call to my family in Holland would still cost a fortune, whereas it's just data use on the apps."

"Wi-Fi can be more stable than cell service. Doesn't cost anything. Allows international calling."

We want to understand why some New Zealanders may prefer to use calling apps rather than a regular mobile phone call. Why do you think people may prefer calling apps?
Base: Jan-Mar, all who gave a response n=143

Thank you

Insights HQ