

NZ Telecommunications Customer Satisfaction Tracking

6 monthly report

January – June 2025



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 Insights HQ 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 customer acquisition and retention rates of poorly performing RSPs.

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 January – June 2025		SME January – June 2025	
2,447 broadband customers	2,129 mobile customers	657 broadband customers	736 mobile customers
<p>The residential sample was an adult sample (18+) nationally representative of the New Zealand population (age, gender, region).</p> <p>Fieldwork was conducted monthly with this deck focusing on the 6 months from January – June 2025.</p>		<p>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).</p> <p>Fieldwork was conducted monthly with this deck focusing on the 6 months from January – June 2025.</p>	
<p>Sample qualification criteria</p> <ul style="list-style-type: none">• 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		<p>Sample qualification criteria</p> <ul style="list-style-type: none">• 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%
	18-24	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%
Auckland	2-5	9%
Auckland	6-49	5%
RONI	1	24%
RONI	2-5	11%
RONI	6-49	6%
South Island	1	14%
South Island	2-5	7%
South Island	6-49	4%

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.

Note: prior to May 2024 no quota or weighting was applied to SME data.

What is a 'favourable' score

The data and report includes NPS and Satisfaction scores, with commentary highlighting what is and is not a 'favourable' score.

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.

Satisfaction is measured using a five point scale, and we measure the satisfaction score using the % of respondents who returned a rating within the top 2 boxes (4-5 on the 5 point scale).

After a review of literature and comparable scores across industries in New Zealand, the Commerce Commission consider a **favourable satisfaction score to be 80% or above**.

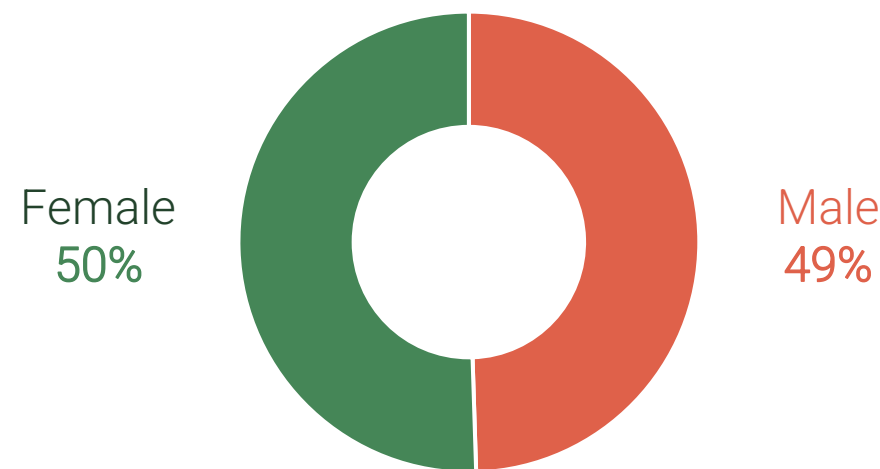


RESIDENTIAL INSIGHTS

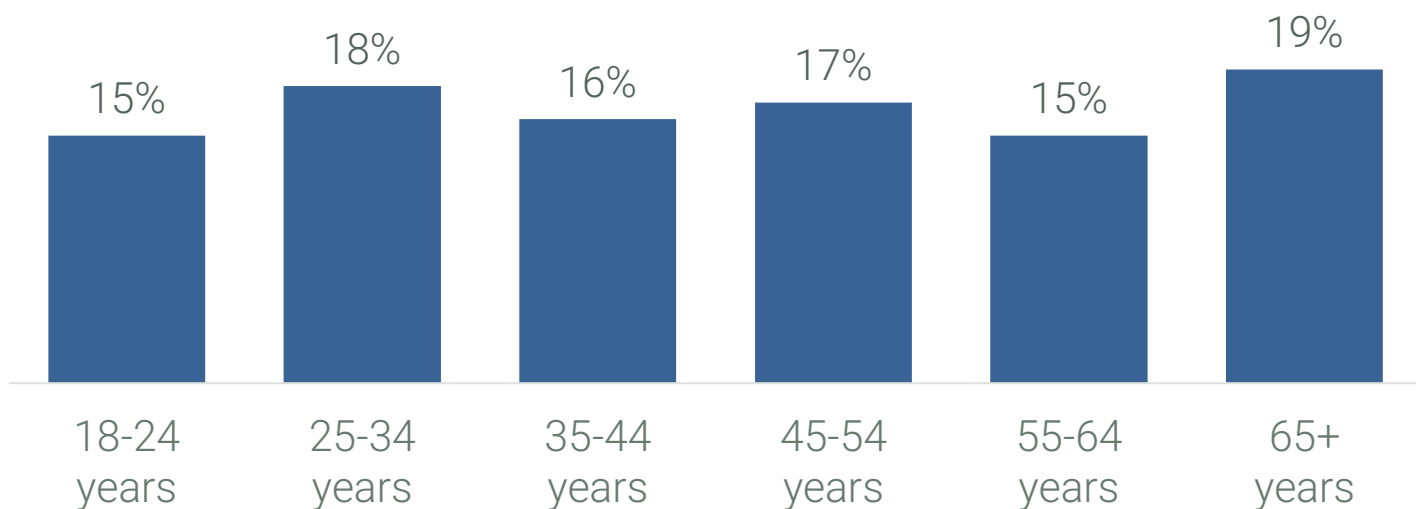
NPS and Satisfaction

Demographics - Residential

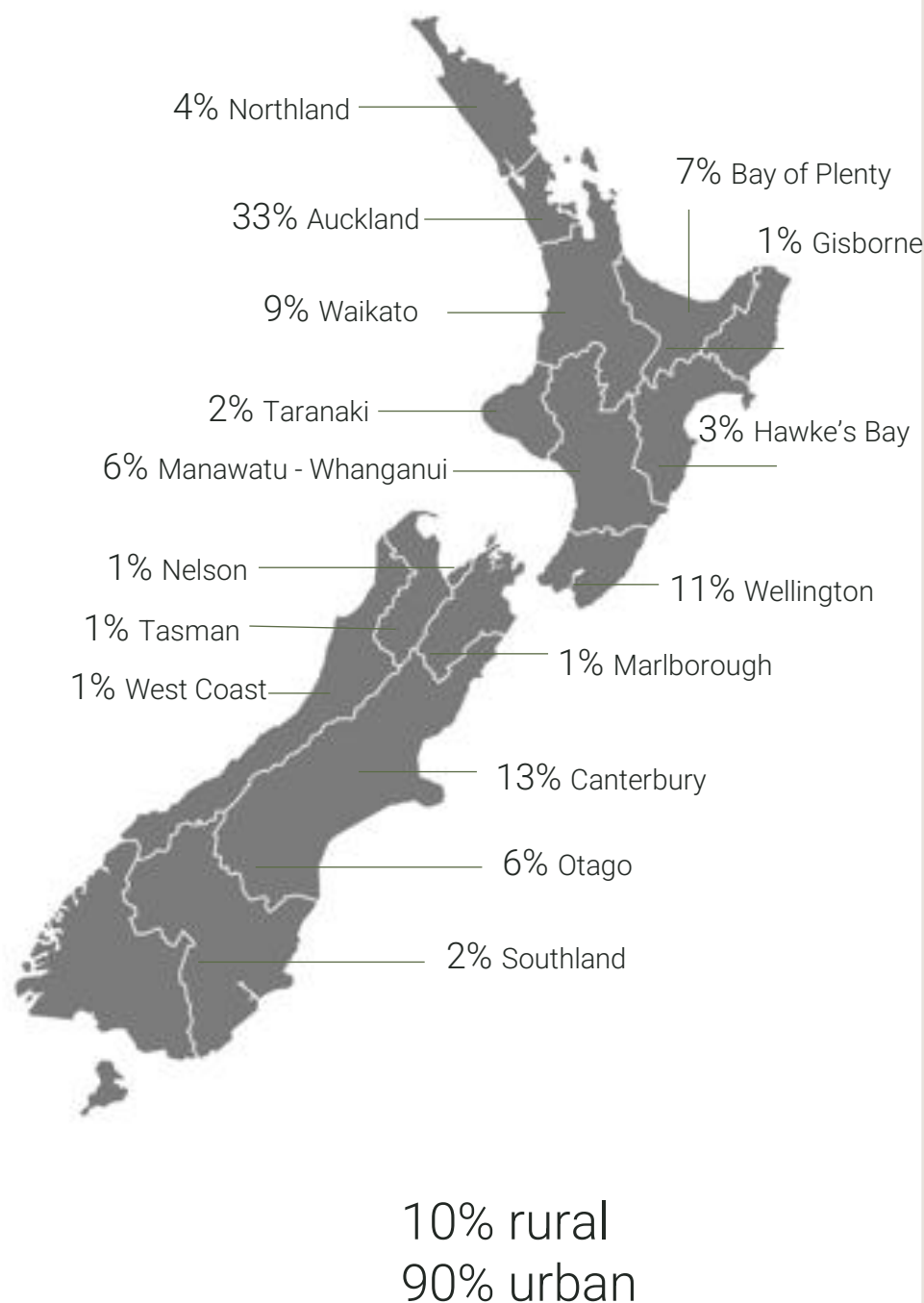
Gender



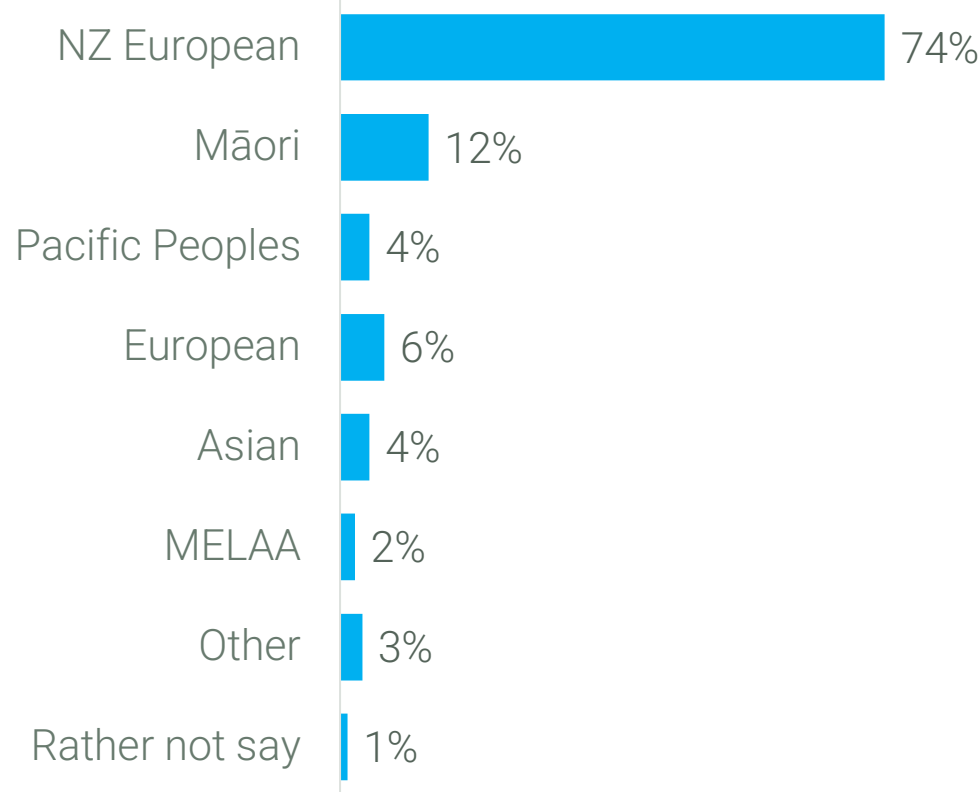
Age



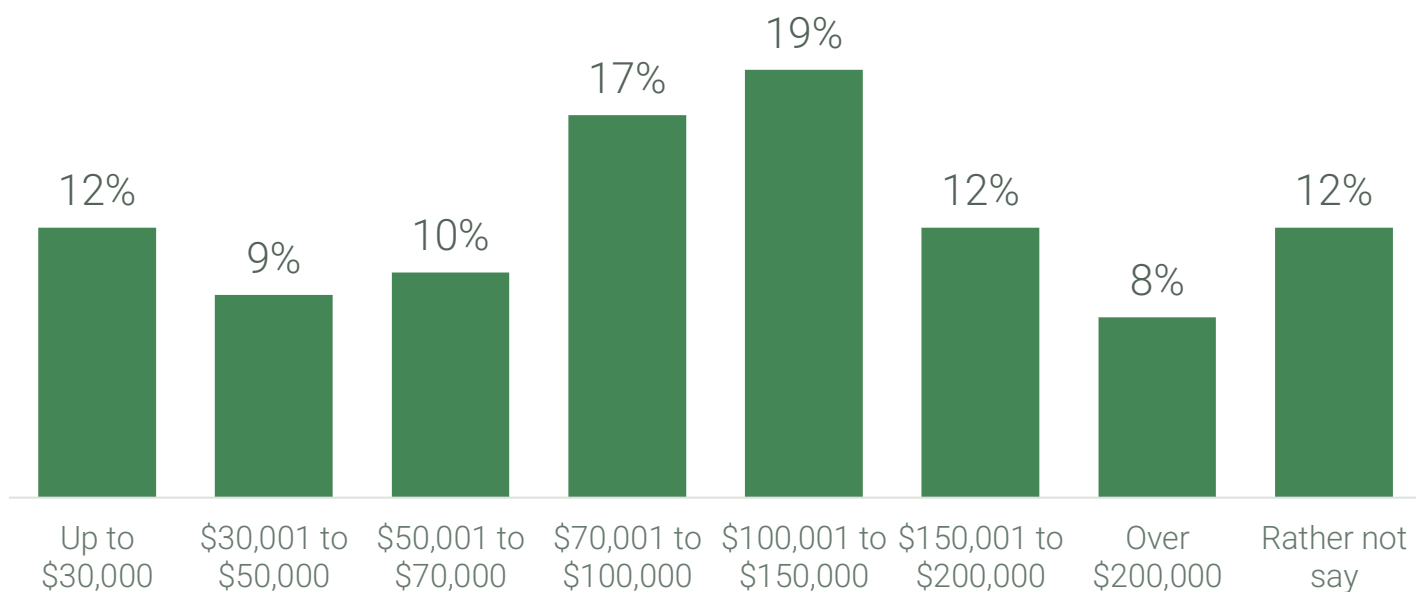
Region



Ethnicity

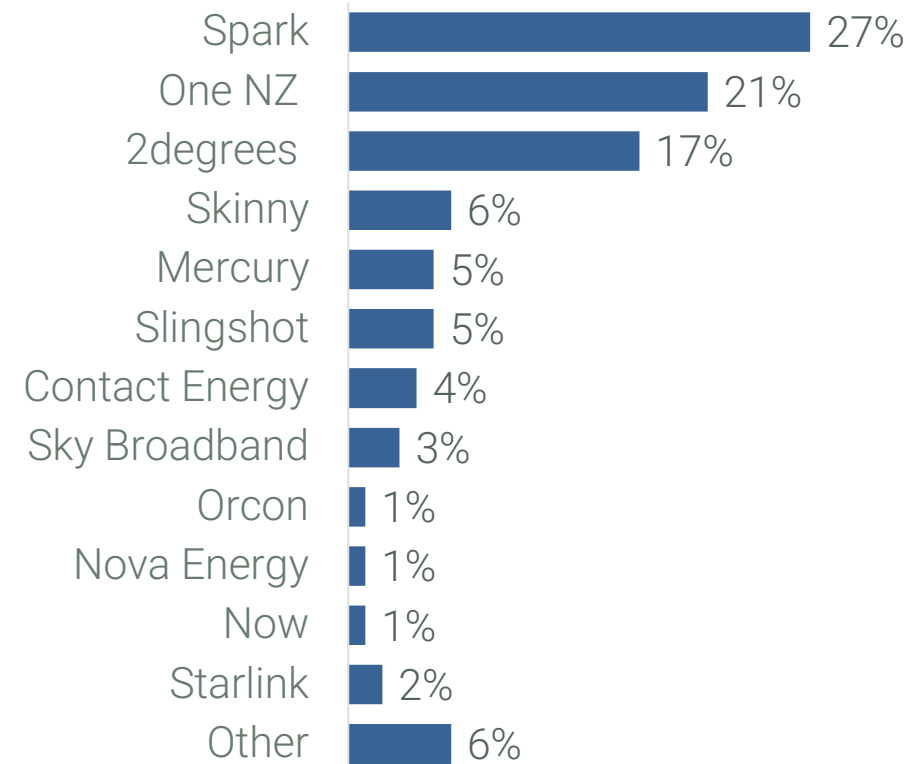


Household Income

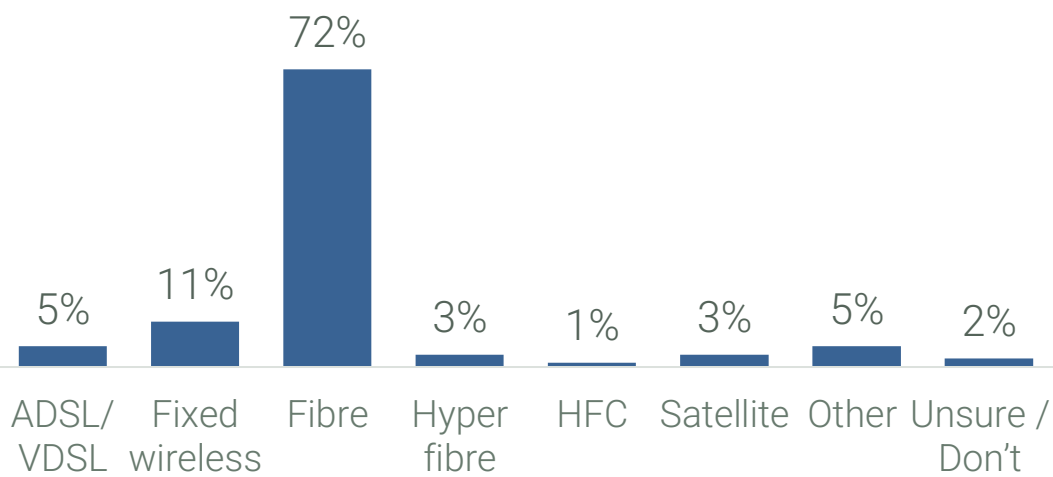


Products and Providers - Residential

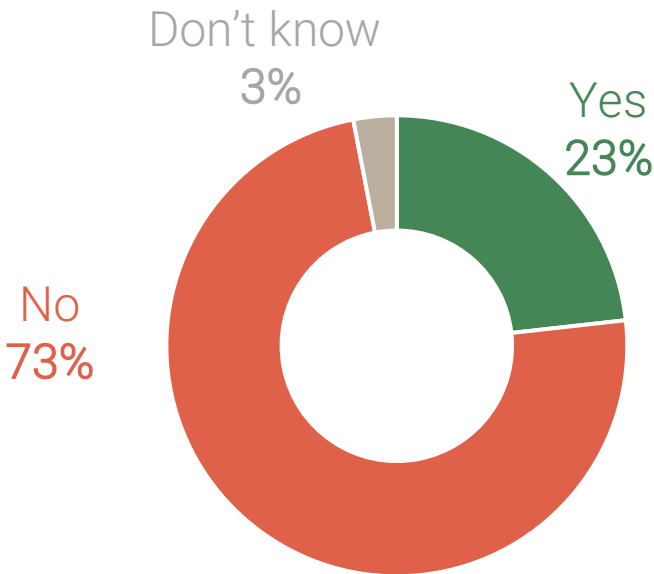
Broadband Provider



Broadband Technology

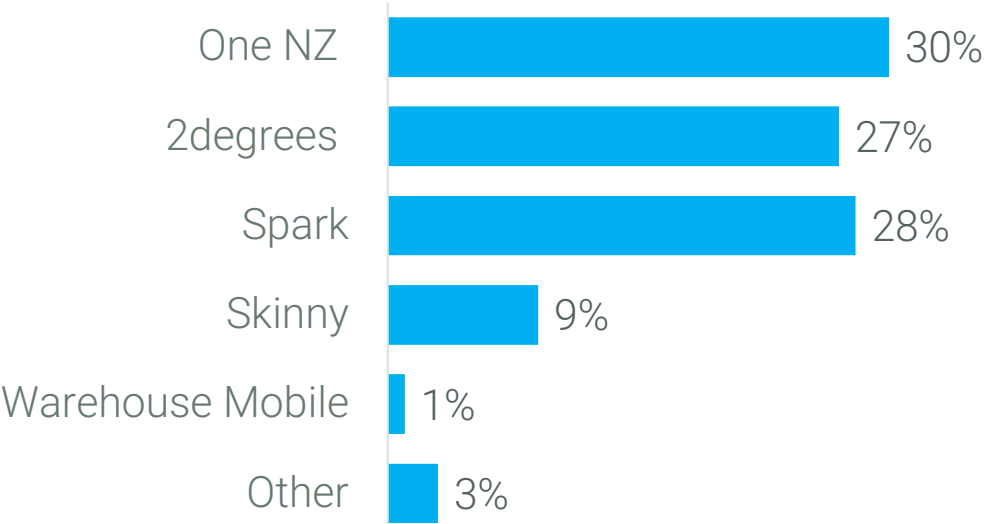


Electricity Bundle

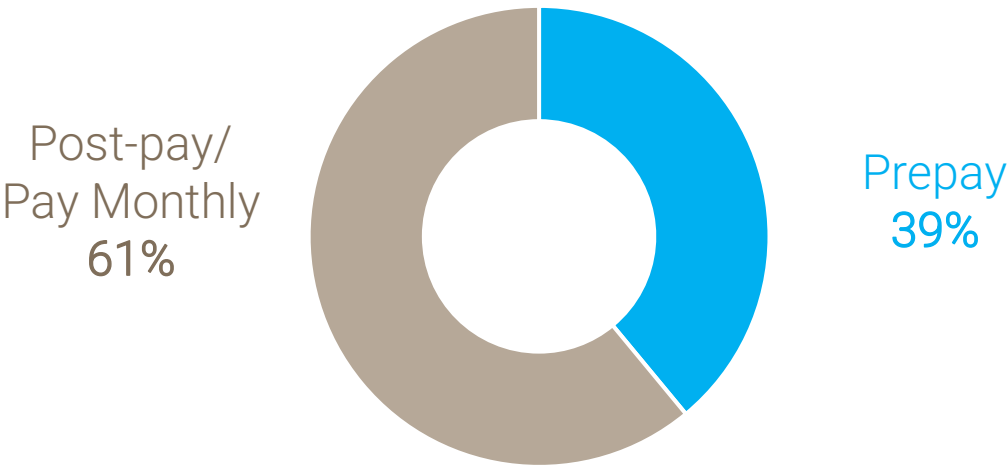


Is your electricity from the same provider as your broadband or mobile provider?

Mobile Provider



Mobile Plan



RESIDENTIAL SUMMARY January – June 2025

Neither mobile nor broadband hit the favourable threshold of +20 for NPS. Broadband posts a negative NPS of -12 while Mobile has an NPS of -5. Neither mobile nor broadband meet the favourable threshold of 80% for overall satisfaction.

After significant decreases in NPS and Satisfaction from Jan-June 23 to Jul-Dec 24 for both Mobile and Broadband we see a flattening as industry scores remain low.

Satisfaction has improved slightly across many aspects after the decline seen in the previous waves, however, still sits below the 80% favourable threshold.

Switching providers is not common, with only 12% of consumers switching broadband provider and 7% switching mobile provider in the last 12 months. Satisfaction with switching has changed little and remains below the 80% threshold for all aspects of switching.

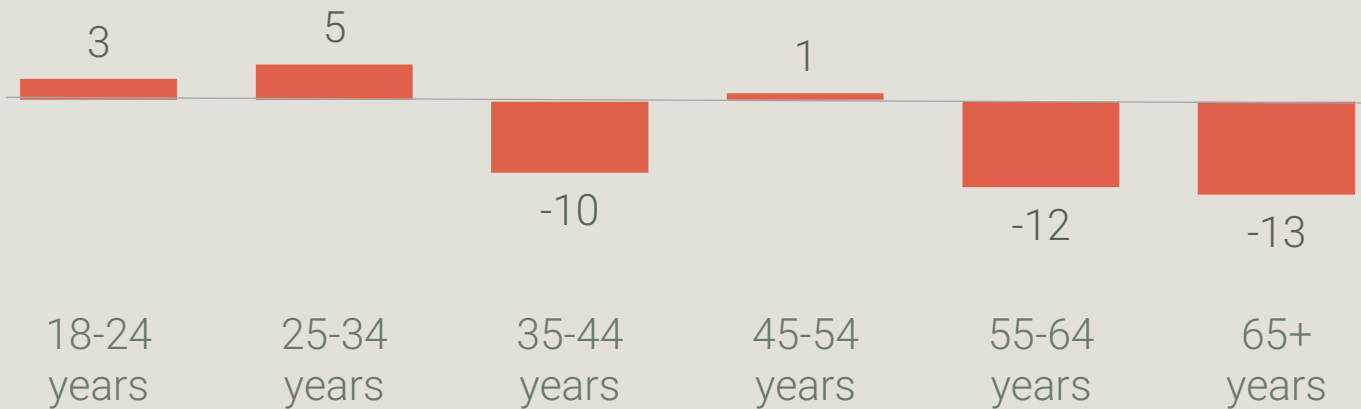
36% of mobile customers have experienced an issue with their mobile service, and 51% of broadband customers have experienced an issue with their broadband internet service in the past 6 months.

Net Promoter Score

Neither mobile nor broadband hit the favourable threshold of +20 and both have negative NPS. NPS is lower among older customers.



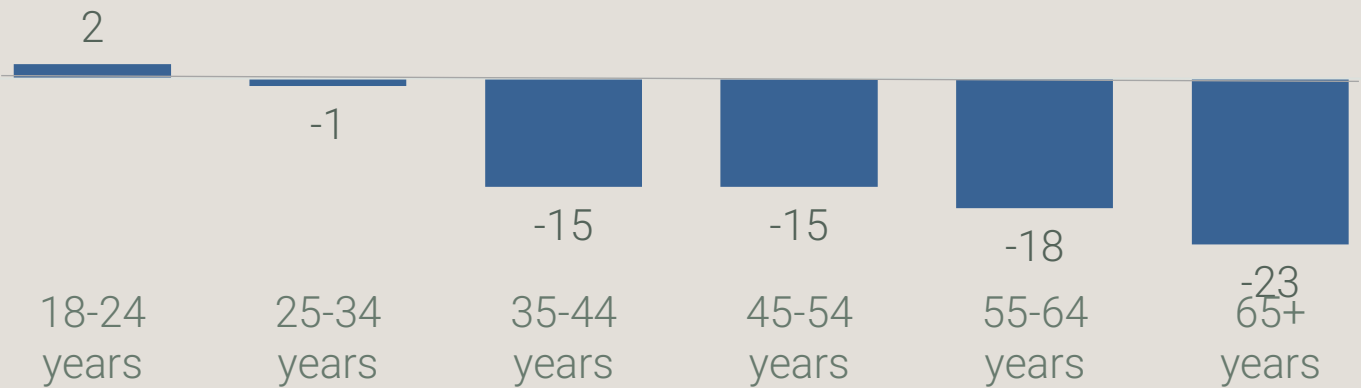
Mobile NPS
-5



Mobile NPS lower among households with 2 children (-20)



Broadband NPS
-12



Broadband NPS higher among Satellite broadband customers (+24)

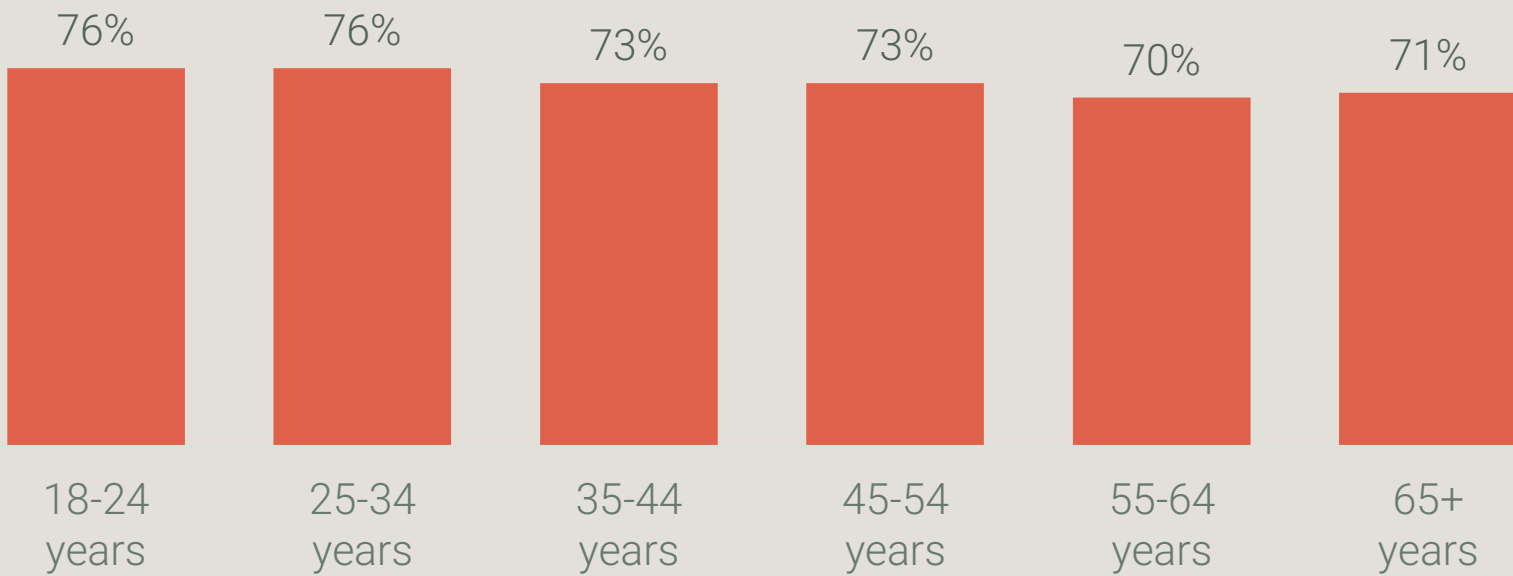
NPS measures the loyalty of customers to a company, based on their ratings on a 0-10 scale, customers are classified into three categories: Promoters (9-10), Passives (7-8), Detractors (0-6). NPS is then calculated using the following formula: $NPS = (\text{Percentage of Promoters} - \text{Percentage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

Overall satisfaction

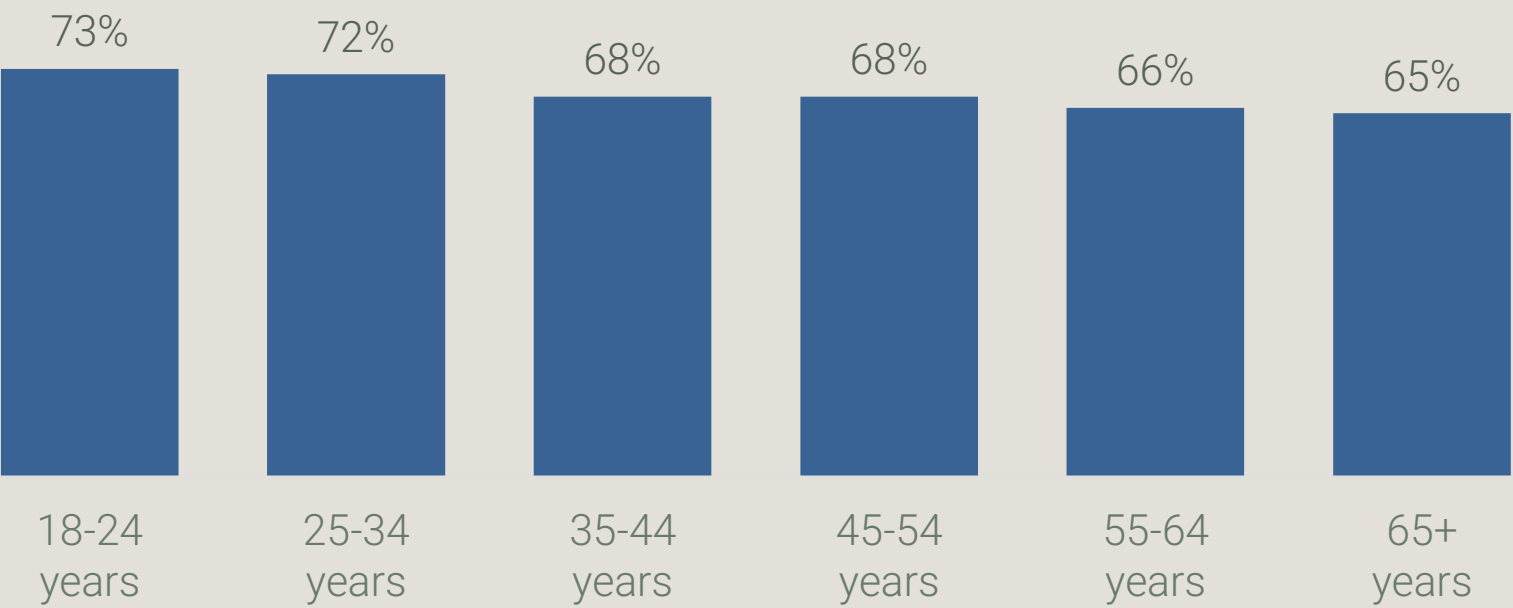
Neither mobile nor broadband meet the favourable threshold of 80% satisfaction.



Mobile
Satisfaction
73%



Broadband
Satisfaction
69%

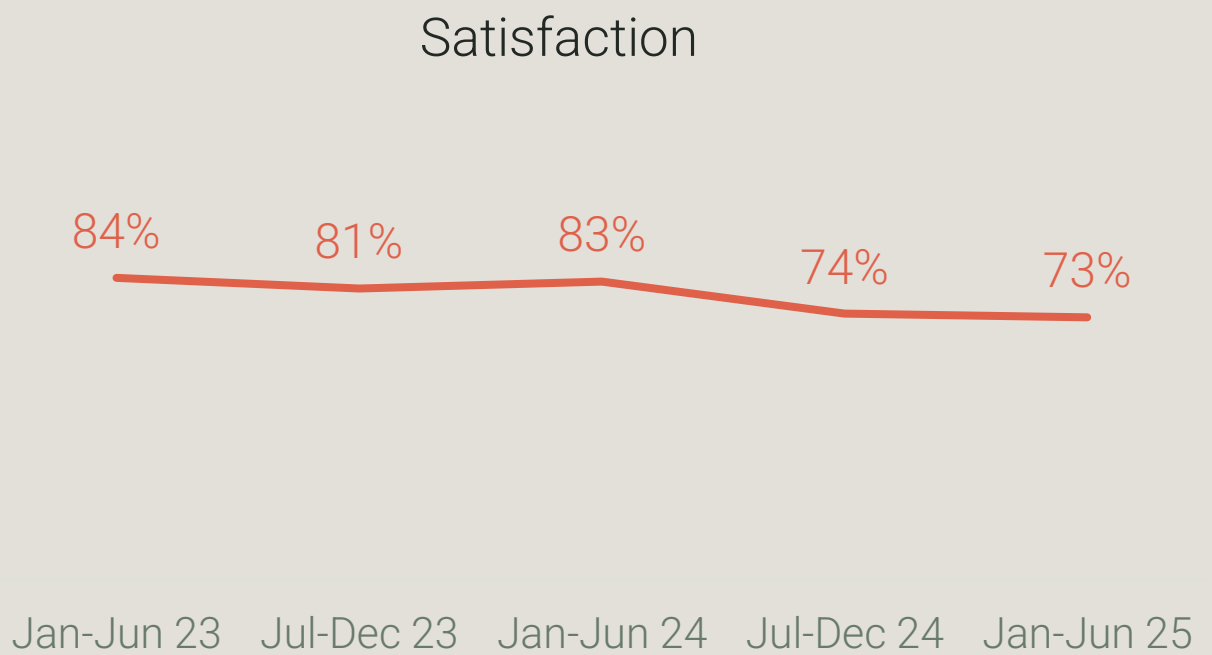
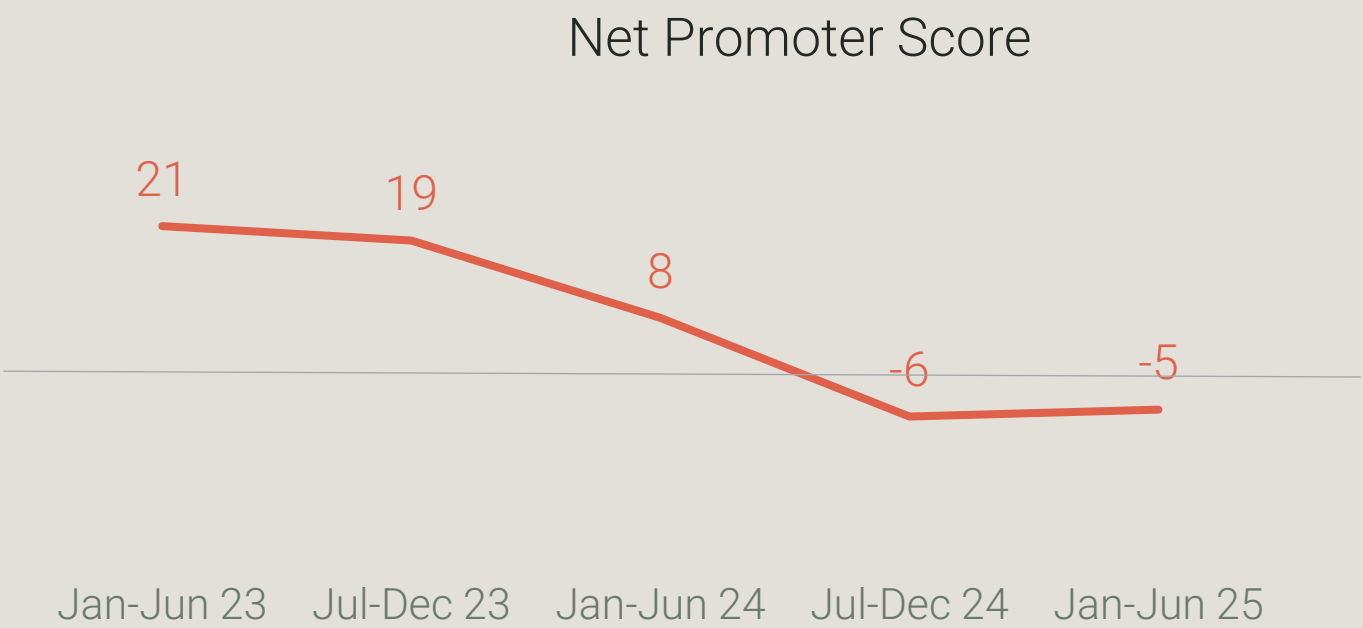


NPS and satisfaction trended

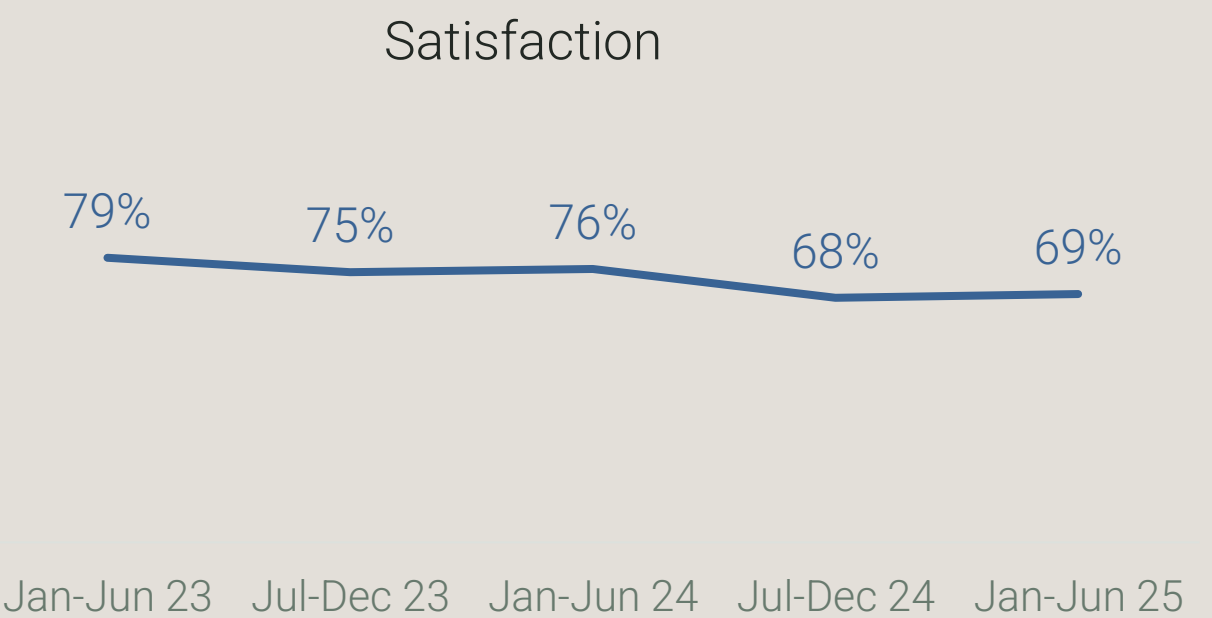
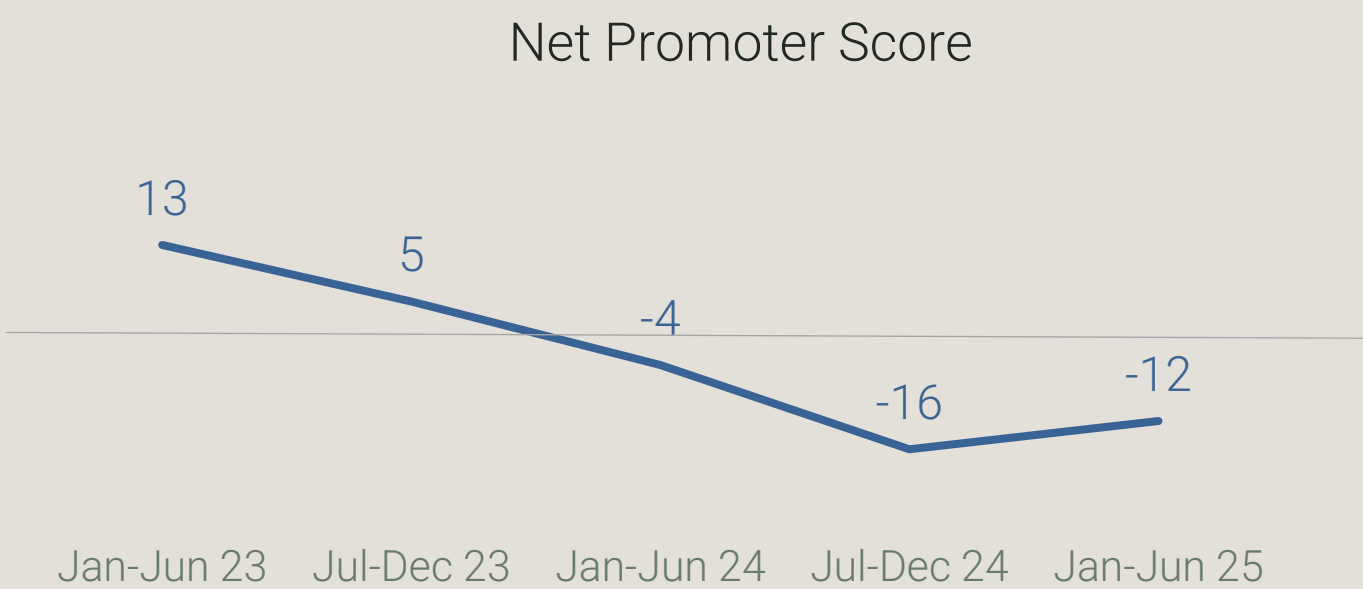
NPS and Satisfaction appear to be levelling out, after the decline.



Mobile



Broadband



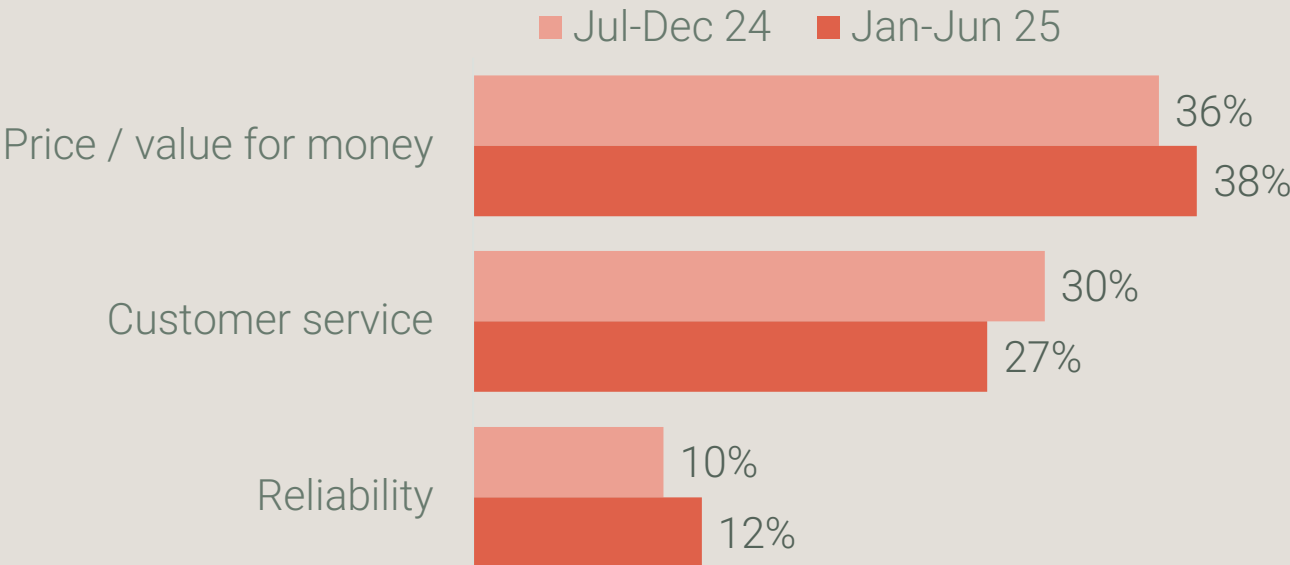
Considering your experience with your provider, how likely would you be to recommend them to a friend or family member? (Scale 0-10)
Overall, how satisfied or dissatisfied are you with your provider for your broadband / household internet service / mobile service? Please take into account their products and services, as well as your experience of dealing with them. (Scale 1-5)
Base: Jan – Jun 25 Broadband provider Population=2447 Mobile provider Population=2129.

NPS – negative reasons

Price, followed by customer service is the key top of mind reason detractors (those giving a 0-6 NPS score) give to explain their low NPS score.



Mobile



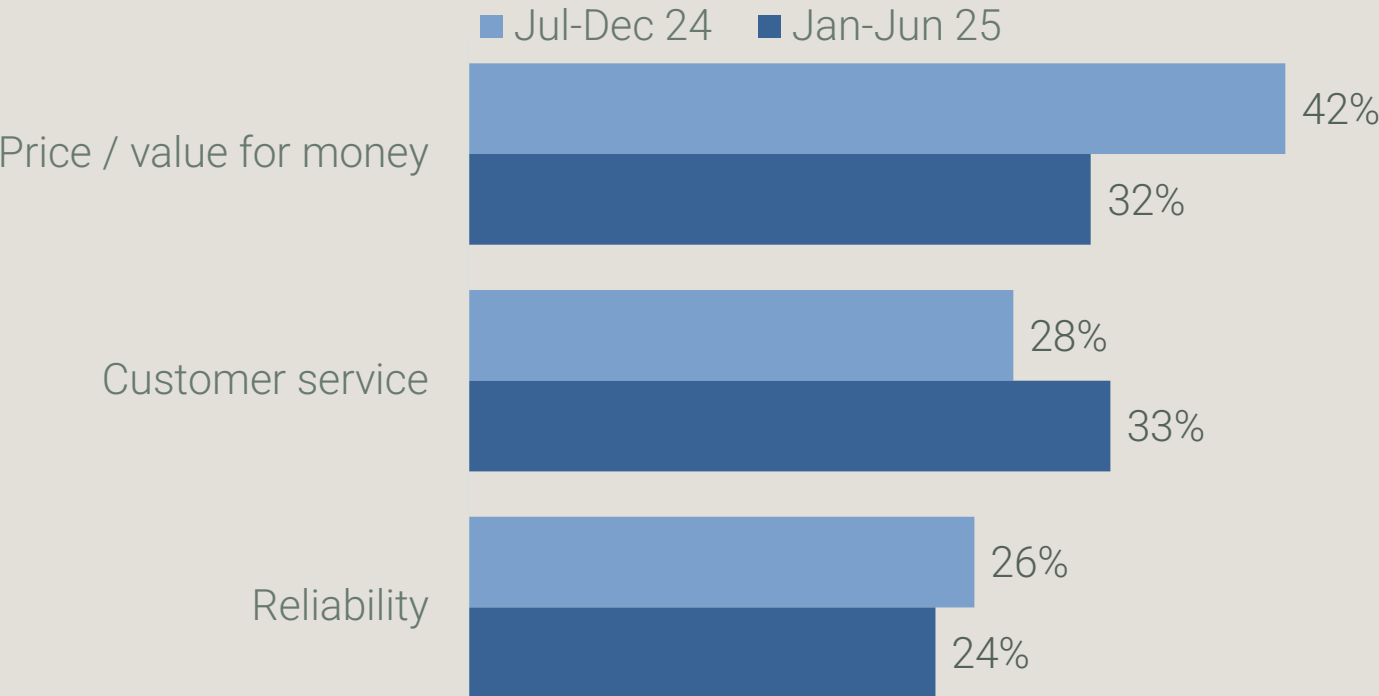
“Ever increasing prices and don’t try to retain long term customers. New customers get good deals that don’t get passed on to existing customers.”

“Plans too complicated to enable me to know what is best for me. The lack of personal service to discuss needs and best product for me to use.”

“Base price for pay monthly has risen again in 12 months and is too high for someone who doesn’t use the calling/text a lot.”



Broadband



“Because all they seem to do is put the prices up and make extremely large profits for themselves but how is that looking out for the consumers who they say they are looking out for to help”

“Yet another price increase.”

“Getting expensive and sometimes seems slow.”

“Price is too high. Always cutting out . Already looking at other options.”

“Customer service is disappointing, and app no longer works as it should.”

“Extremely unreliable company and poor customer service.”

Considering your experience with your provider, how likely would you be to recommend them to a friend or family member? (Scale 0-10)
Why_did_you_give_“Mbl-Provider”_a_score_of_“PIPE_IN_Provider-NPS”_?
Why_did_you_give_“BB-Provider”_a_score_of_“PIPE_IN_Provider-NPS”_?
Base: Jan – Jun 25 Broadband detractors =927, Mobile detractors =716.

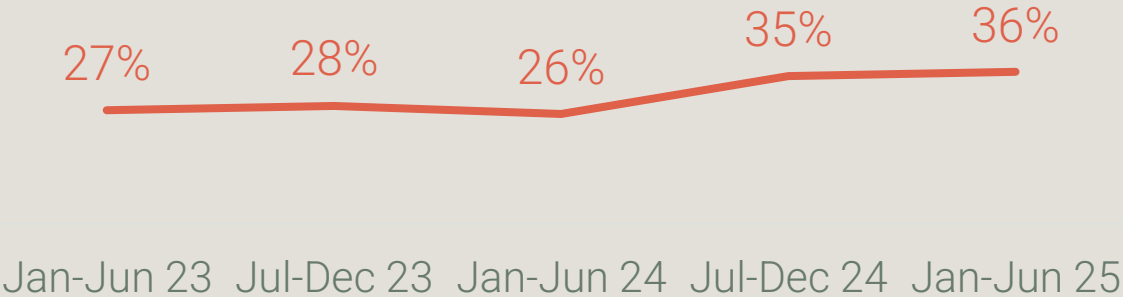
NPS and issues experienced

NPS correlates with Issue Incidence, as those customers who have experienced an issue give their provider a significantly lower NPS score compared to customers with no issues.

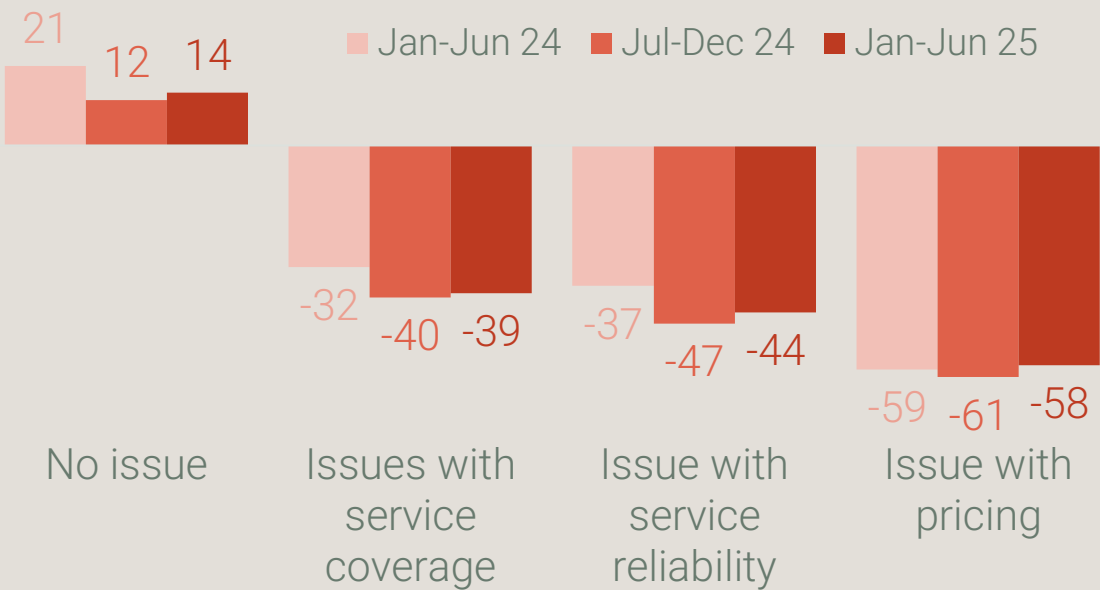


Mobile

Experienced an issue

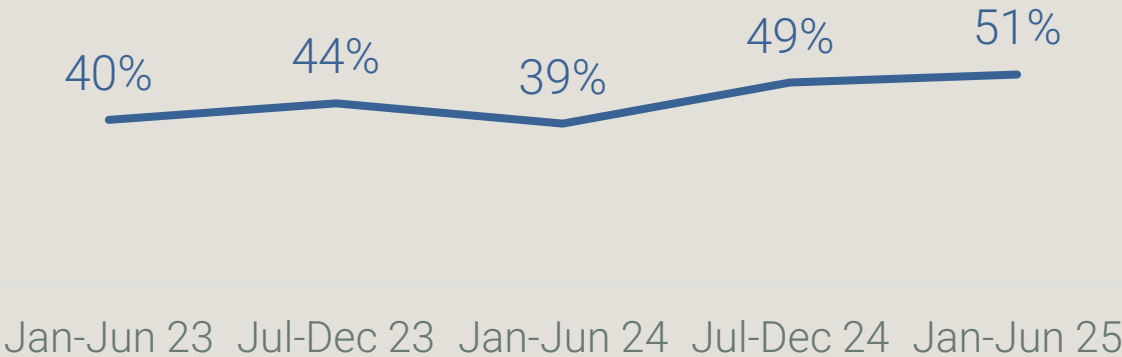


NPS by issues experienced

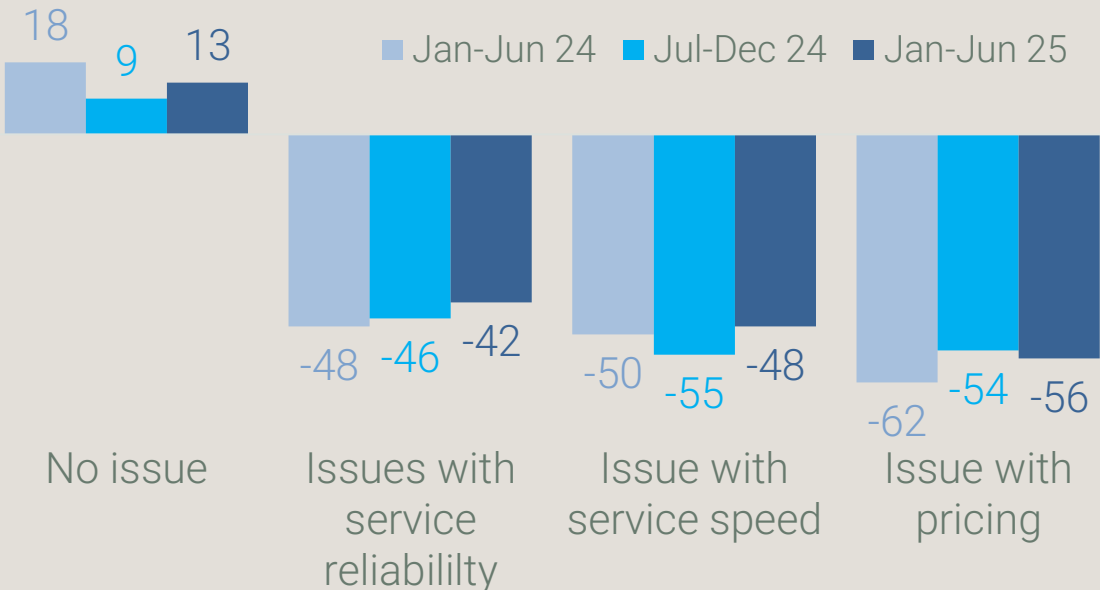


Broadband

Experienced an issue



NPS by issues experienced



Considering your experience with your provider, how likely would you be to recommend them to a friend or family member? (Scale 0-10)
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 1-5)
Base: Jan – Jun 25 Broadband provider Population=2447 Mobile provider Population=2129.

NPS and satisfaction by provider

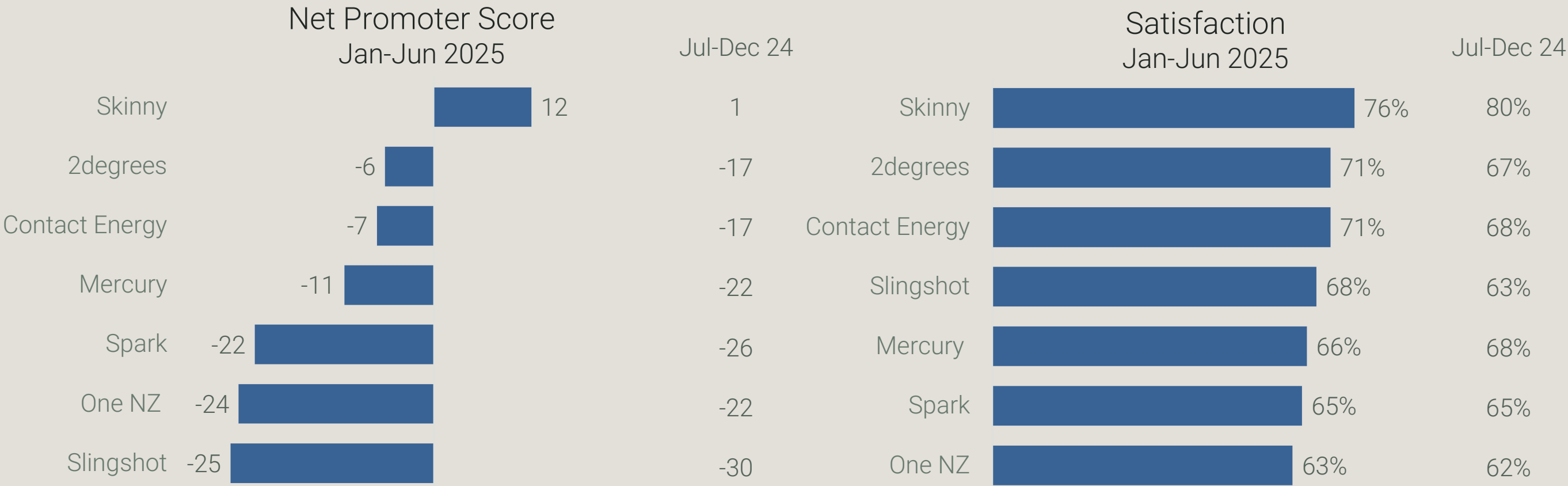
Only Skinny Mobile meets the favourable threshold of 80% for satisfaction and +20 for NPS.



Mobile



Broadband



Considering your experience with your provider, how likely would you be to recommend them to a friend or family member? (Scale 0-10)
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 1-5)
Base: Jan – Jun 25 Spark mobile customers n=593, One NZ mobile customers n=648, 2degrees mobile customers n=571, Skinny mobile customers n=199
Spark broadband customers n=655, One NZ broadband customers n=521, 2degrees broadband customers n=400, Skinny broadband customers n=148, Slingshot broadband customers n=19, Mercury broadband customers n=133, Contact Energy broadband customers n=99.

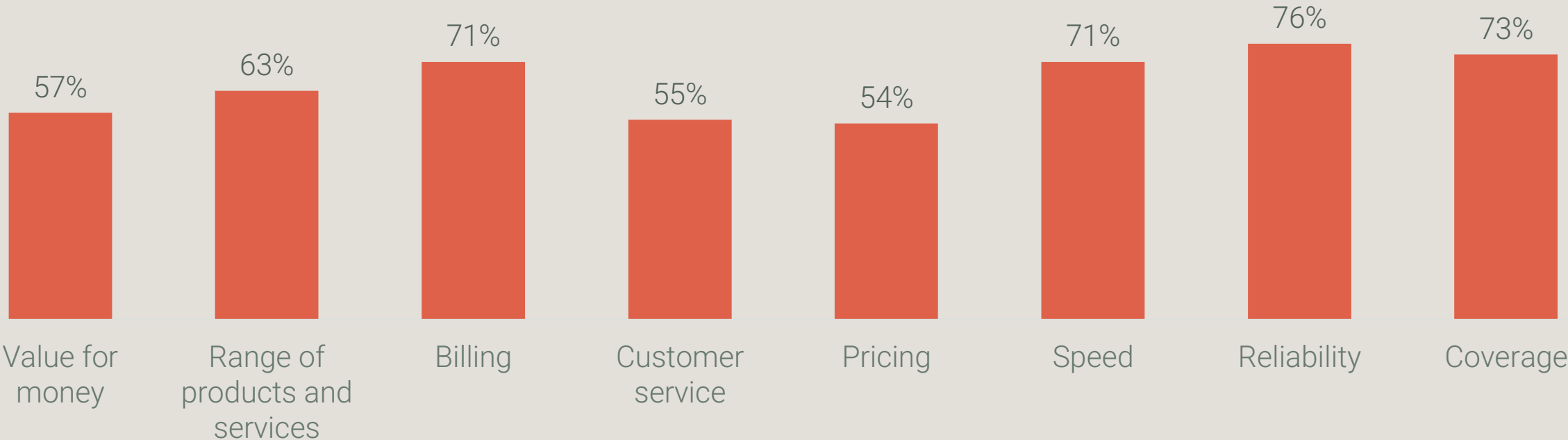
Satisfaction

(rating 4-5 on 5 point scale)

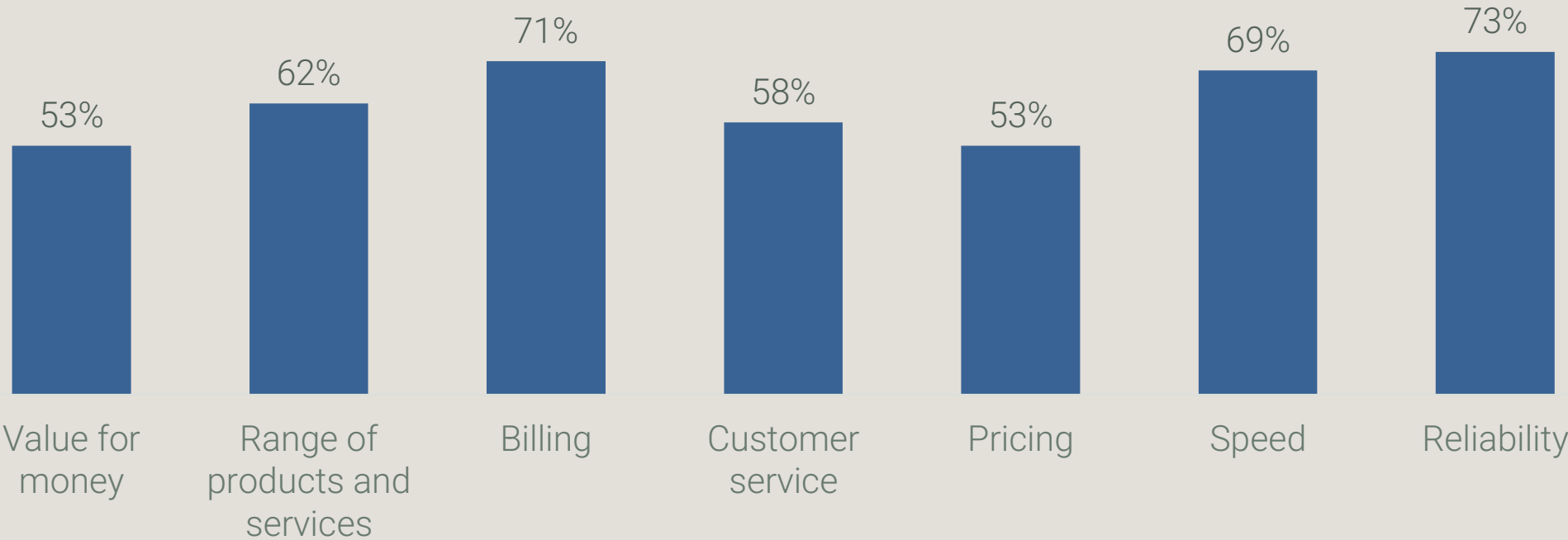
No areas are meeting the favourable threshold of 80%, with relatively low scores for pricing, value for money and customer service.



Mobile
Satisfaction
73%



Broadband
Satisfaction
69%



Satisfaction across all aspects of Broadband and Mobile is significantly lower among older customers.

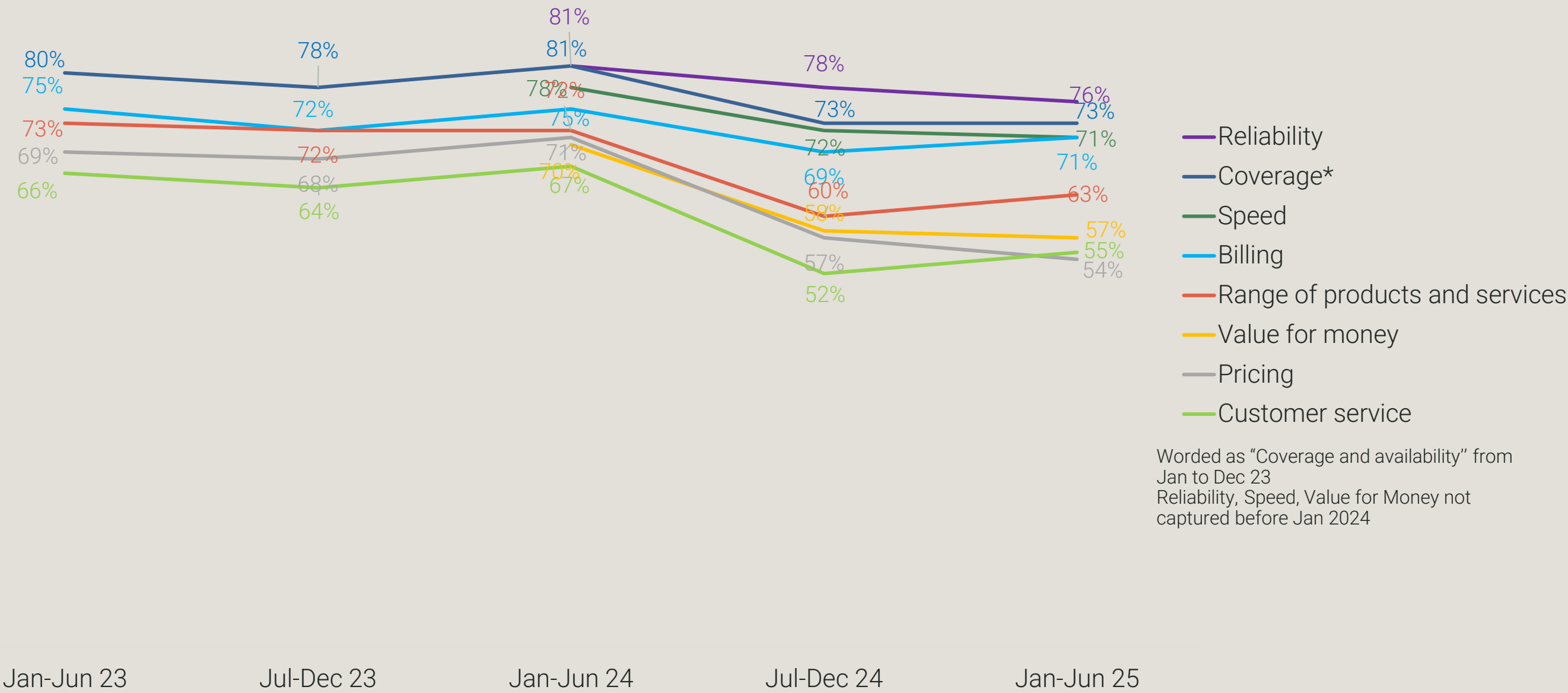
Mobile Satisfaction Trended

All areas remain below the 80% favourable threshold, and many have declined since early 2024.



Mobile

Satisfaction
(rating 4-5 on 5 point scale)

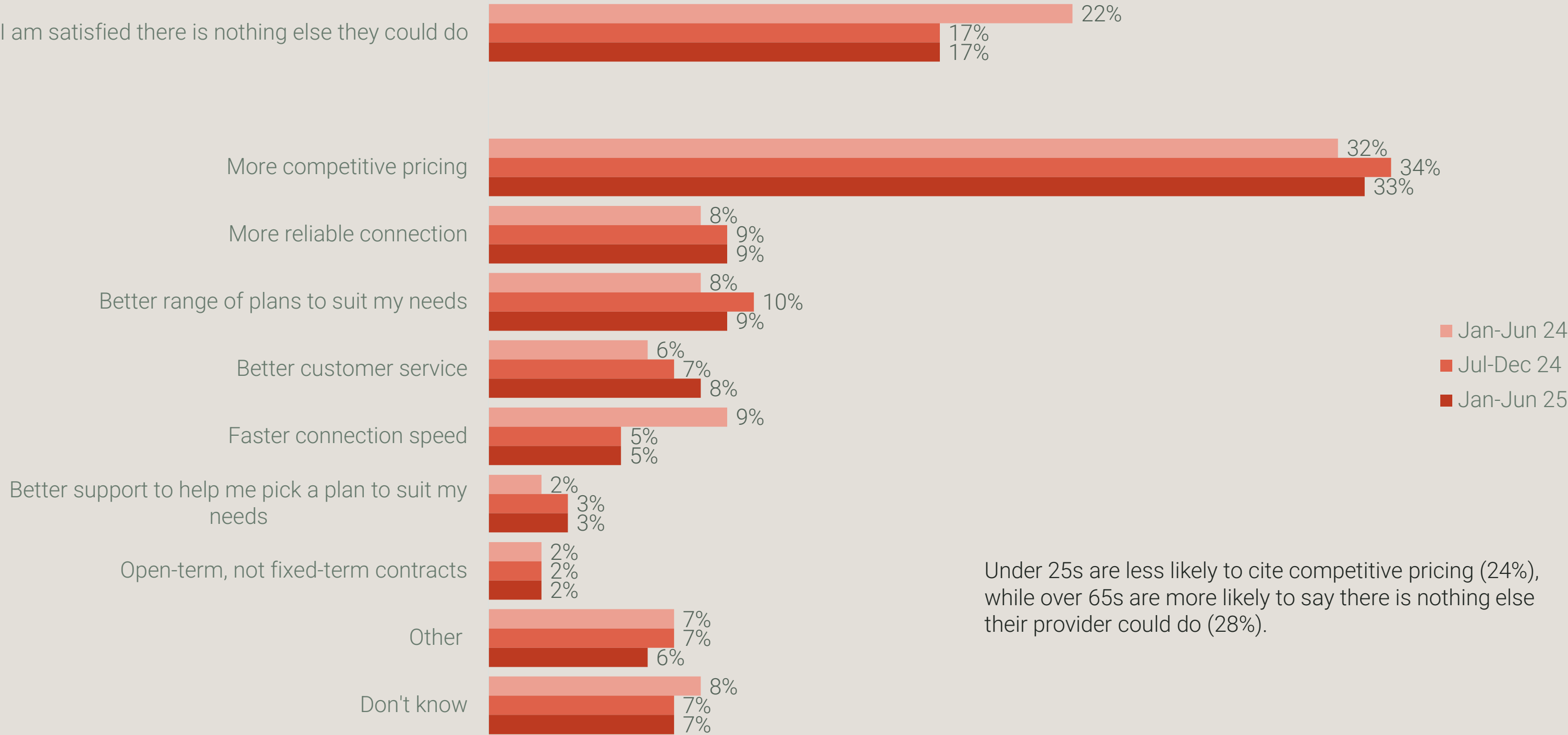


Worded as "Coverage and availability" from Jan to Dec 23
Reliability, Speed, Value for Money not captured before Jan 2024

Note: Satisfaction scale changed for both broadband and mobile in Jan 2024 to a 5-point scale (T2B showing) from a 10-point scale (T4B showing)

How to improve mobile satisfaction

When prompted, a third of mobile customers cite more competitive pricing as the one thing their provider could do to improve service. Almost a fifth (17%) state there is nothing else their provider could do.



Under 25s are less likely to cite competitive pricing (24%), while over 65s are more likely to say there is nothing else their provider could do (28%).

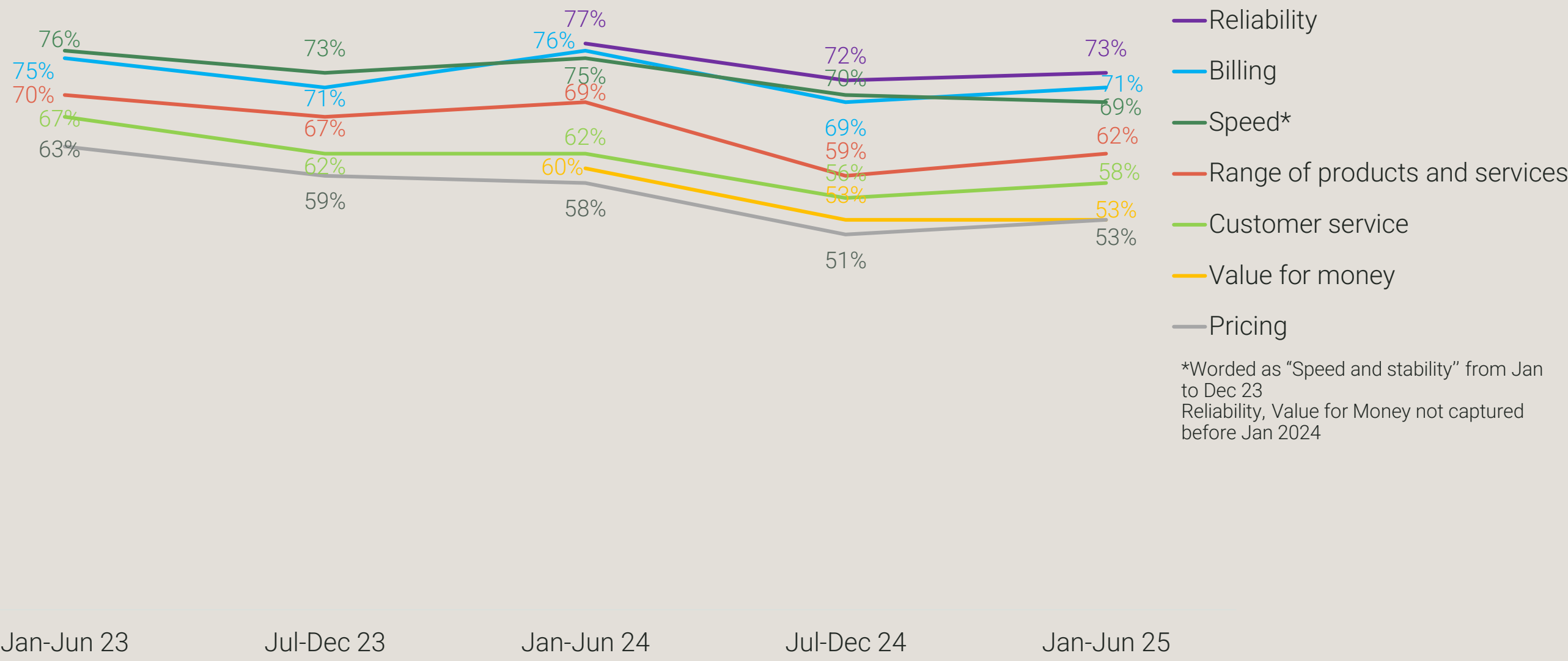
Broadband Satisfaction Trended

Many areas have improved slightly but are still below the levels seen in early 2024.



Broadband

Satisfaction
(rating 4-5 on 5 point scale)

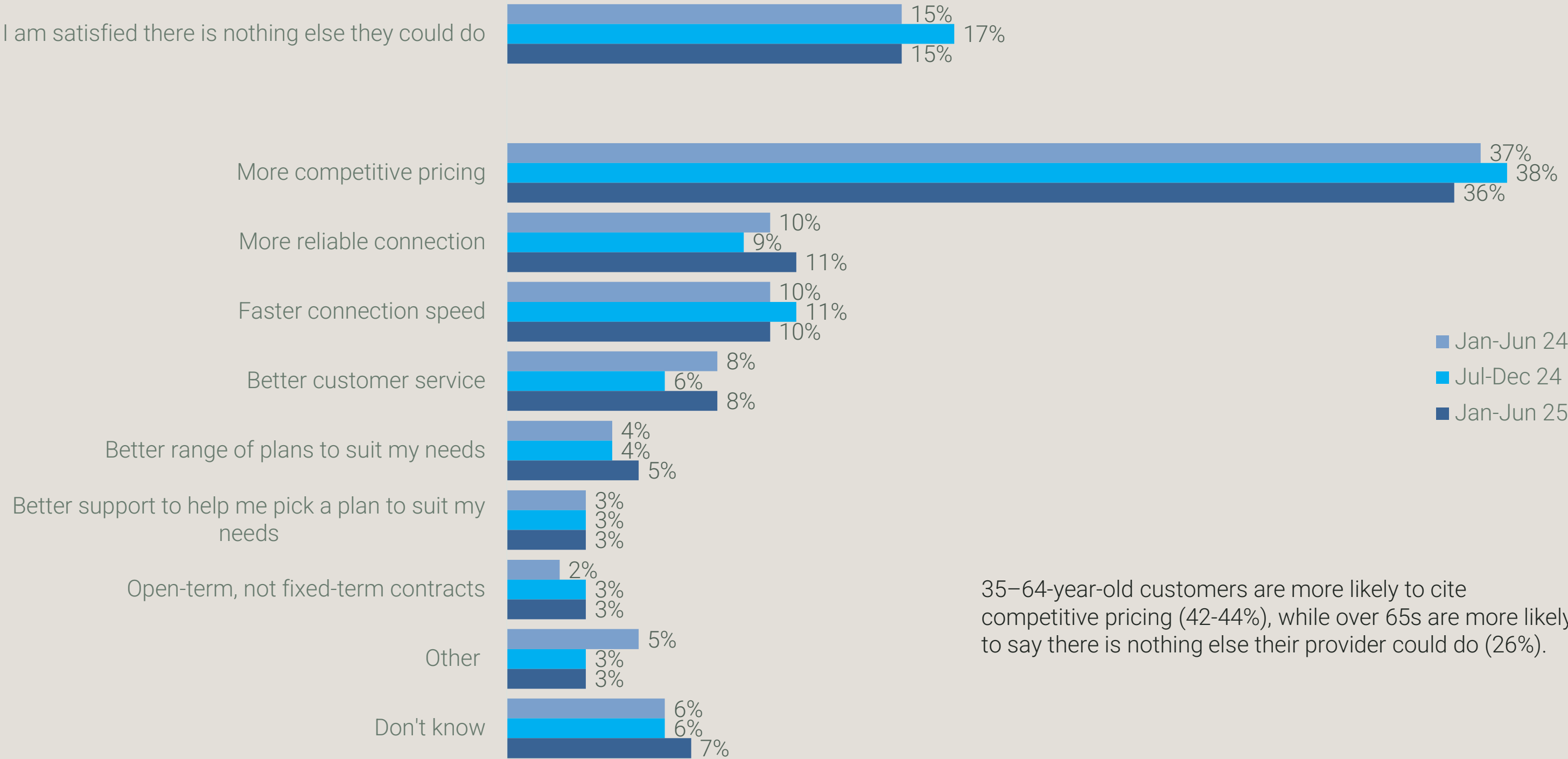


*Worded as "Speed and stability" from Jan to Dec 23
Reliability, Value for Money not captured before Jan 2024

Note: Satisfaction scale changed for both broadband and mobile in Jan 2024 to a 5-point scale (T2B showing) from a 10-point scale (T4B showing)

How to improve broadband satisfaction

When prompted 36% of broadband customers cite more competitive pricing as the one thing their provider could do to improve service.



35–64-year-old customers are more likely to cite competitive pricing (42-44%), while over 65s are more likely to say there is nothing else their provider could do (26%).



RESIDENTIAL INSIGHTS

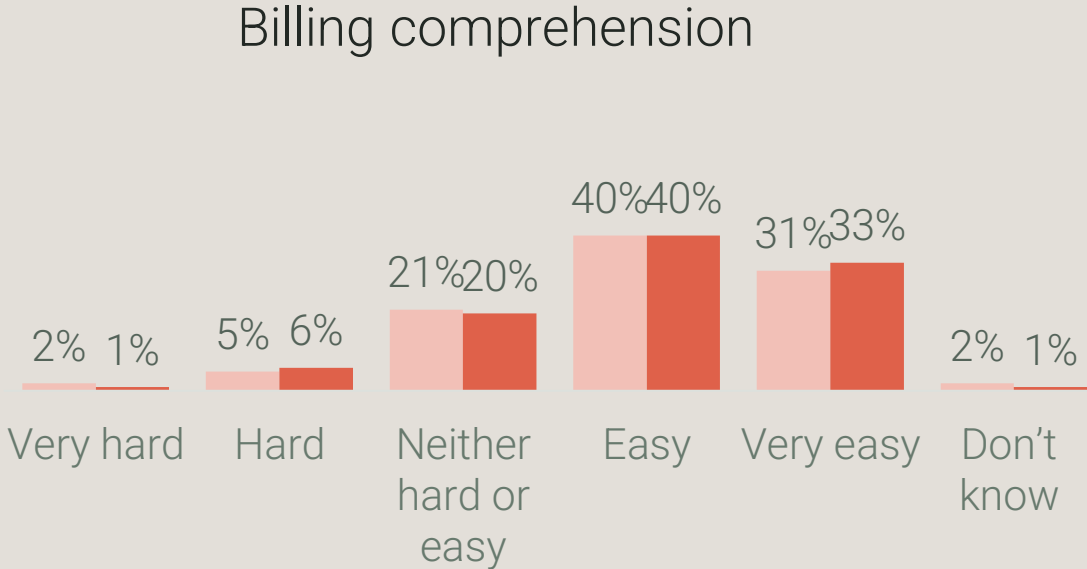
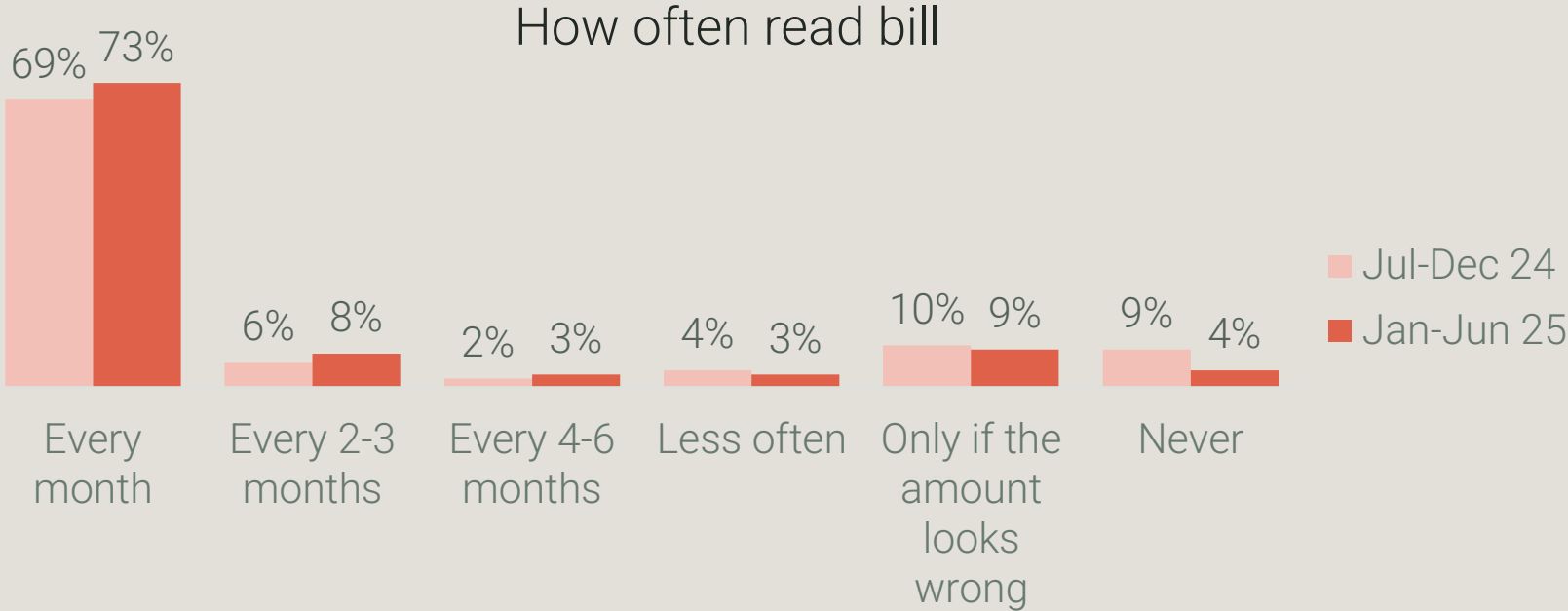
Billing

Billing comprehension

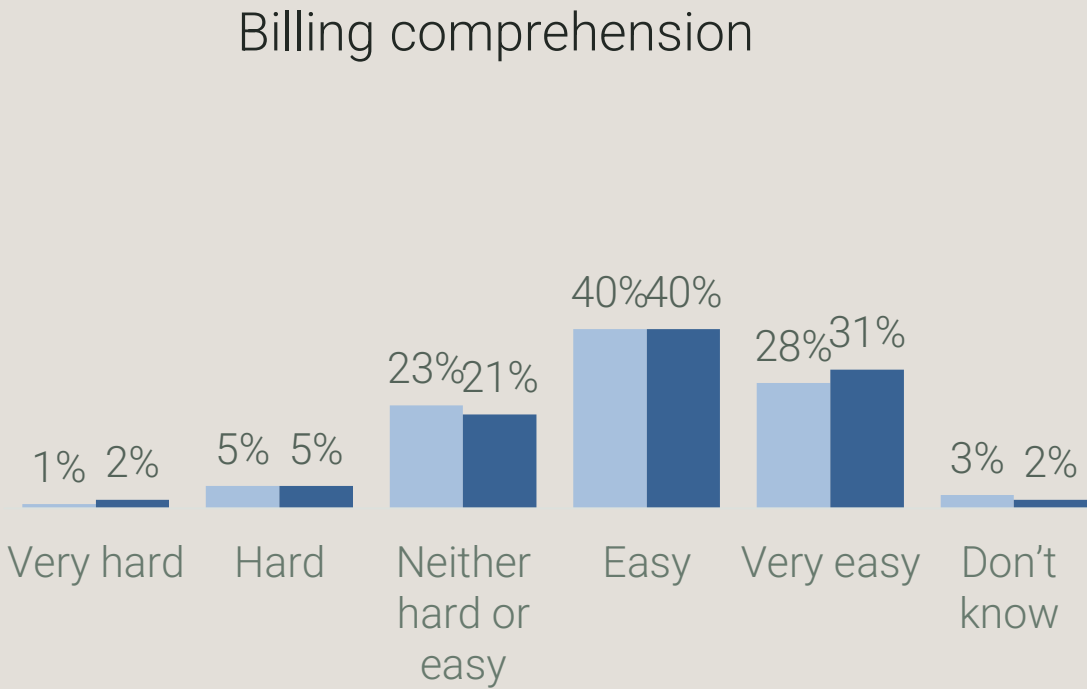
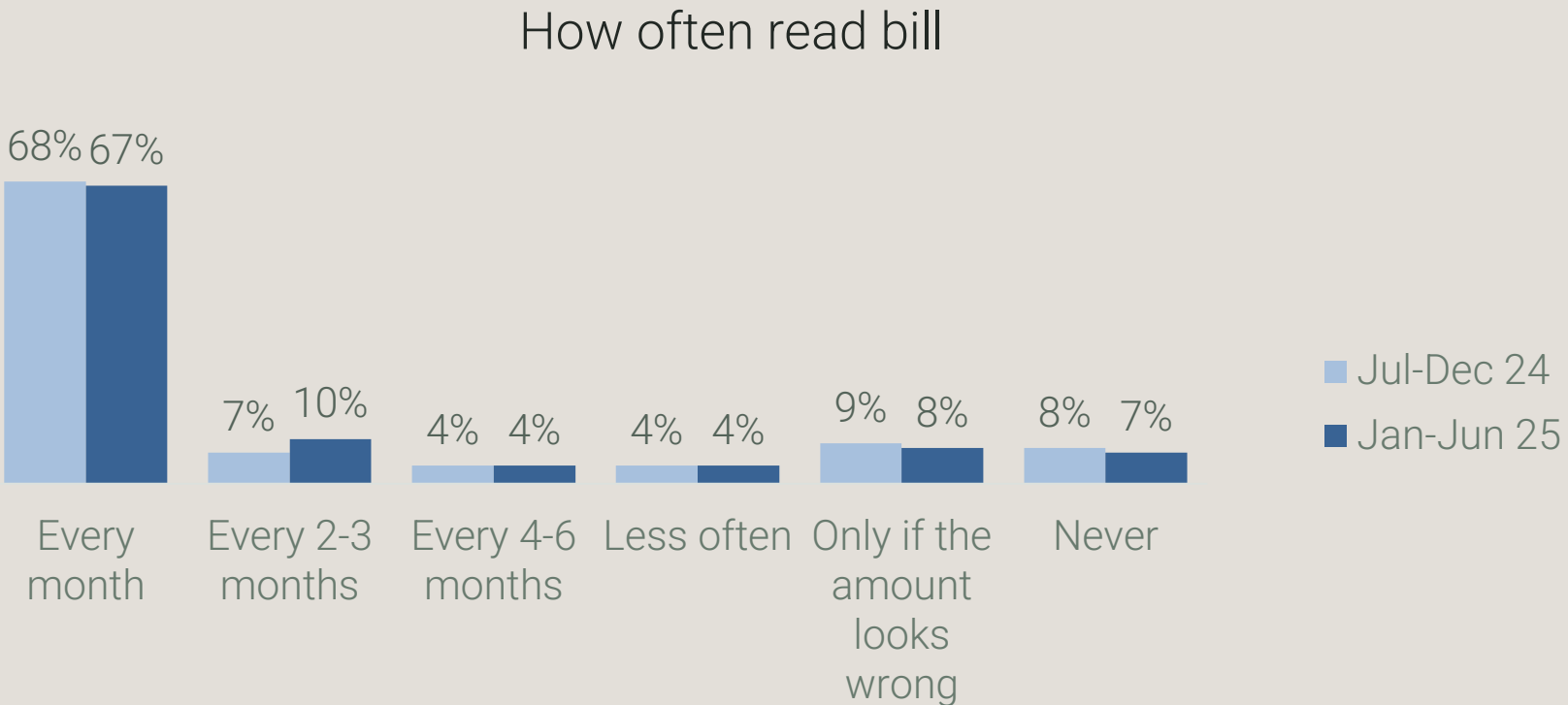
Of those who read their bill, the majority (71% - 73%) find the bill easy to understand.



Mobile



Broadband



How often do you read your bills from...
How easy it is to understand your bills from...
Base: Jan – Jun 25 Broadband provider Population=2447, Pay monthly mobile provider Population=1219, Broadband customers who read bill n=2279, Mobile customers who read bill n=1168



RESIDENTIAL INSIGHTS

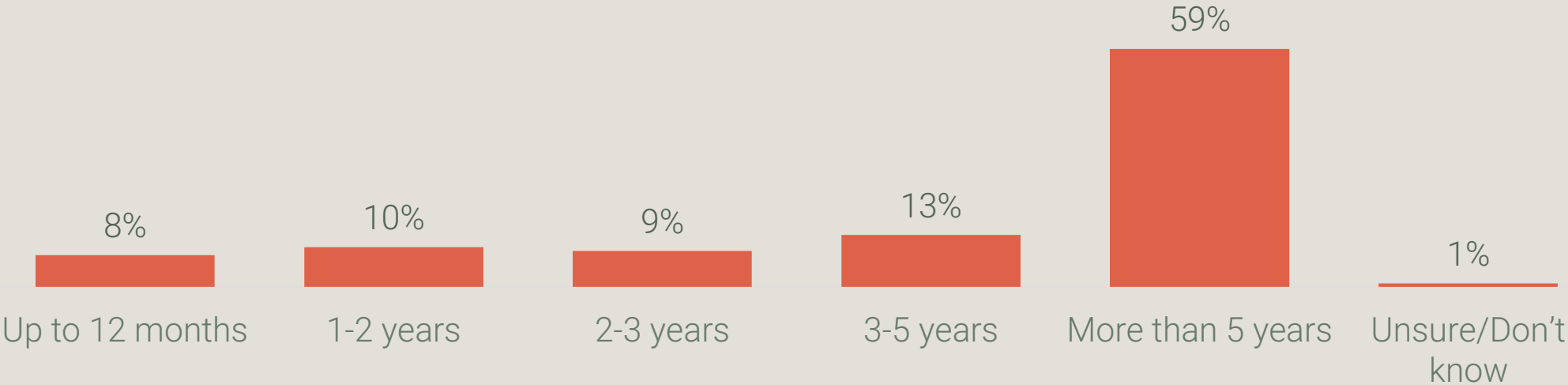
Tenure and Switching Behaviour

Tenure

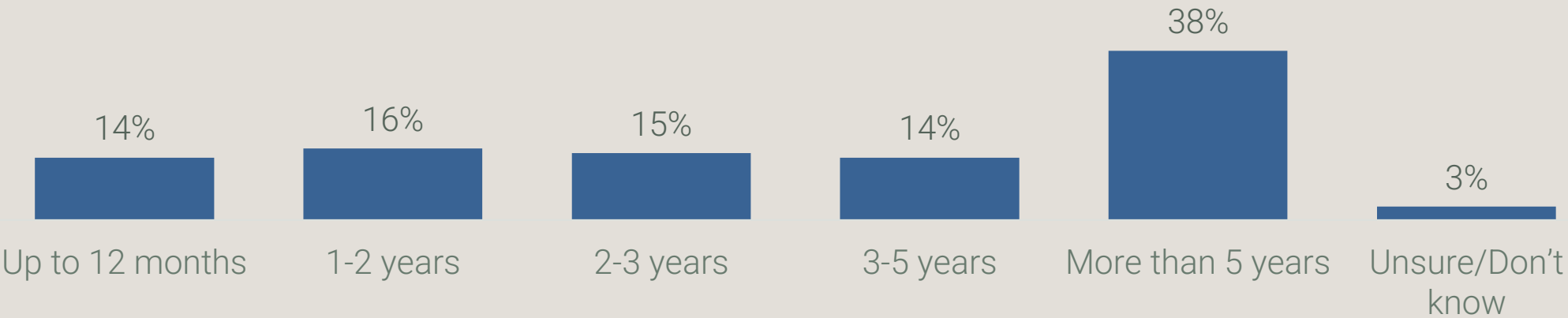
Mobile consumers have a longer tenure with their provider than broadband consumers. 59% of mobile consumers have been with their current provider for more than 5 years, compared to 38% for broadband. This is likely due to the entry of new Broadband providers and thereby increased market switching.



Mobile



Broadband

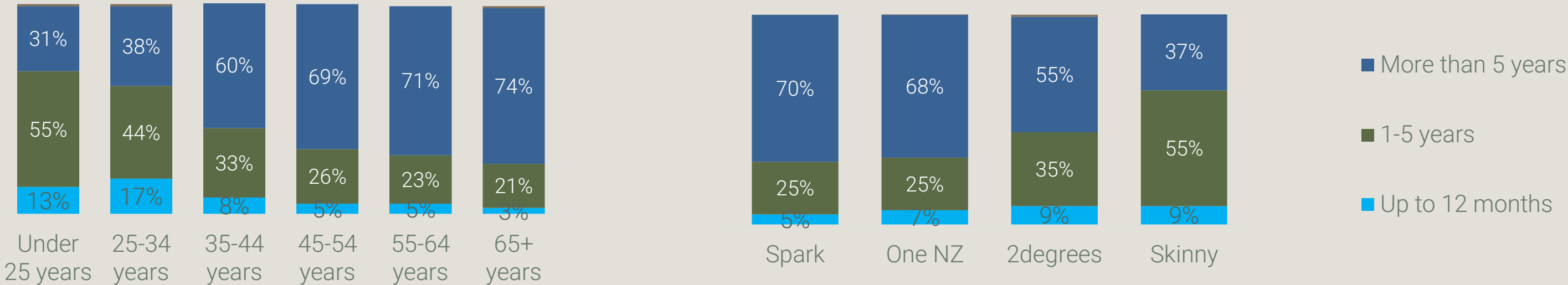


Tenure

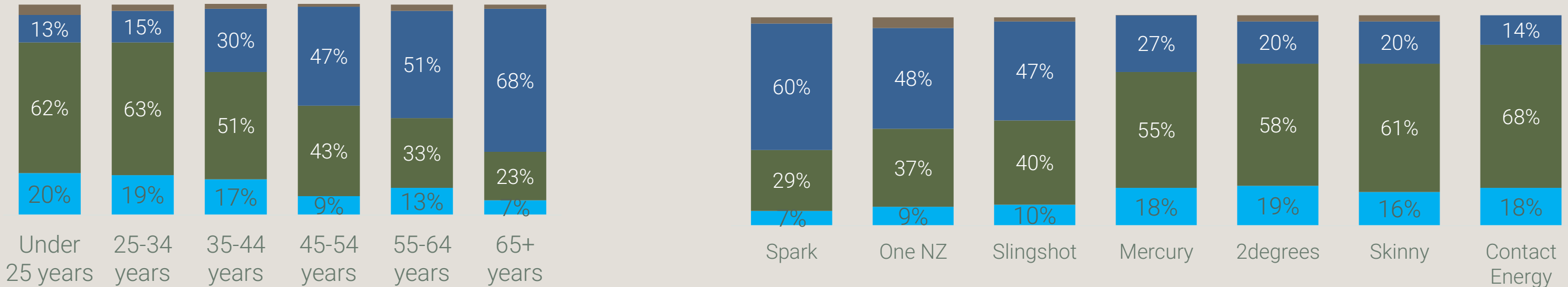
Mobile and broadband provider tenure correlates strongly with age; the majority of over 65 customers have been with their provider for more than 5 years. Spark and One NZ, followed by 2degrees (in mobile) have the longest tenure customers.



Mobile



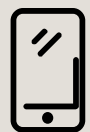
Broadband



About how long have you been a customer of...
Base: Jan – Jun 25 Spark mobile customers n=593, One NZ mobile customers n=648, 2degrees mobile customers n=571, Skinny mobile customers n=199
Spark broadband customers n=655, One NZ broadband customers n=521, 2degrees broadband customers n=400, Skinny broadband customers n=148, Slingshot broadband customers n=19,
Mercury broadband customers n=133, Contact Energy broadband customers n=99.
Note: Figures in chart may not appear to add to 100 as 'don't know' responses have not been charted

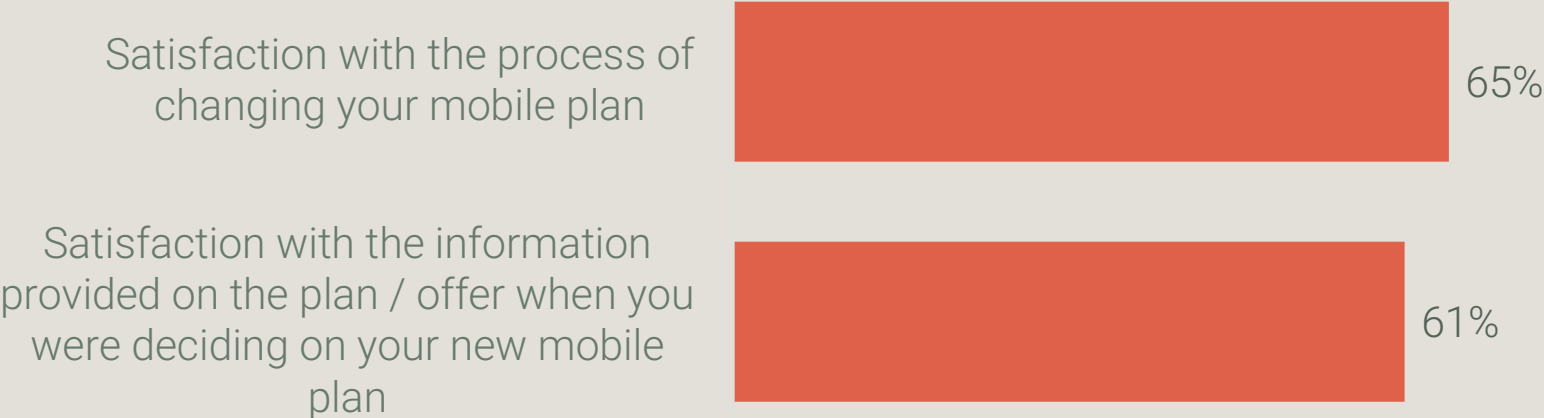
Changing plans with same provider

Changing mobile and broadband plans with the same provider is low. Neither mobile nor broadband hit the 80% overall satisfaction with changing plans benchmark.



16%
changed mobile plans in the last 12 months

(12% changed plans Jul-Dec 24 and 10% Jan-Jun 24)



15%
changed broadband plans in the last 12 months

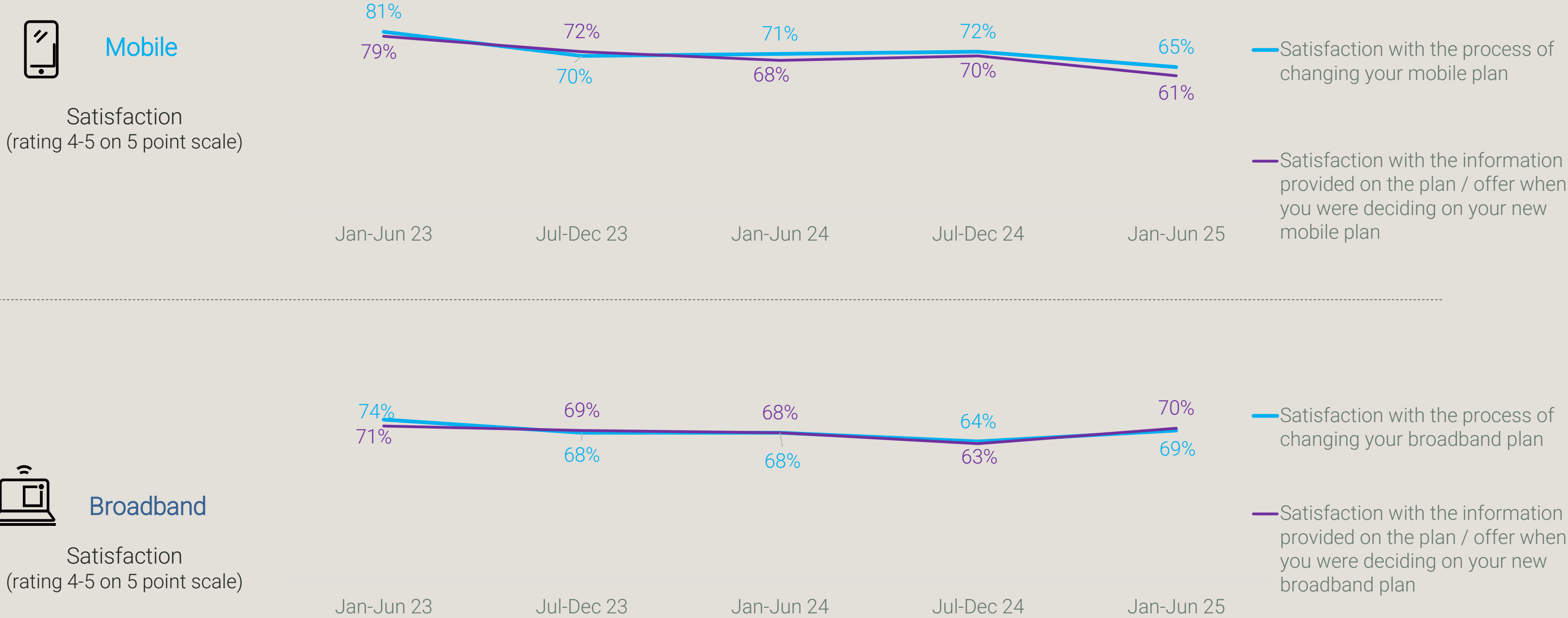
(12% changed plans Jul-Dec 24 and 11% Jan-Jun 24)



In the last 12 months, have you changed a plan relating to your....
Overall, how satisfied were you with...
Base: Jan – Jun 25 Broadband provider Population=2447 Mobile provider Population=2129.
Base: Jan – Jun 25 Changed broadband plans with same provider =361, Changed mobile plans with same provider =333.

Changing plans with same provider – trended satisfaction

Satisfaction with the process of changing mobile plans and the information provided has declined.
Satisfaction with the information provided when changing broadband plans has increased.



In the last 12 months, have you changed a plan relating to your....
Overall, how satisfied were you with...
Base: Jan – Jun 25 Changed broadband plans with same provider =361, Changed mobile plans with same provider =333.

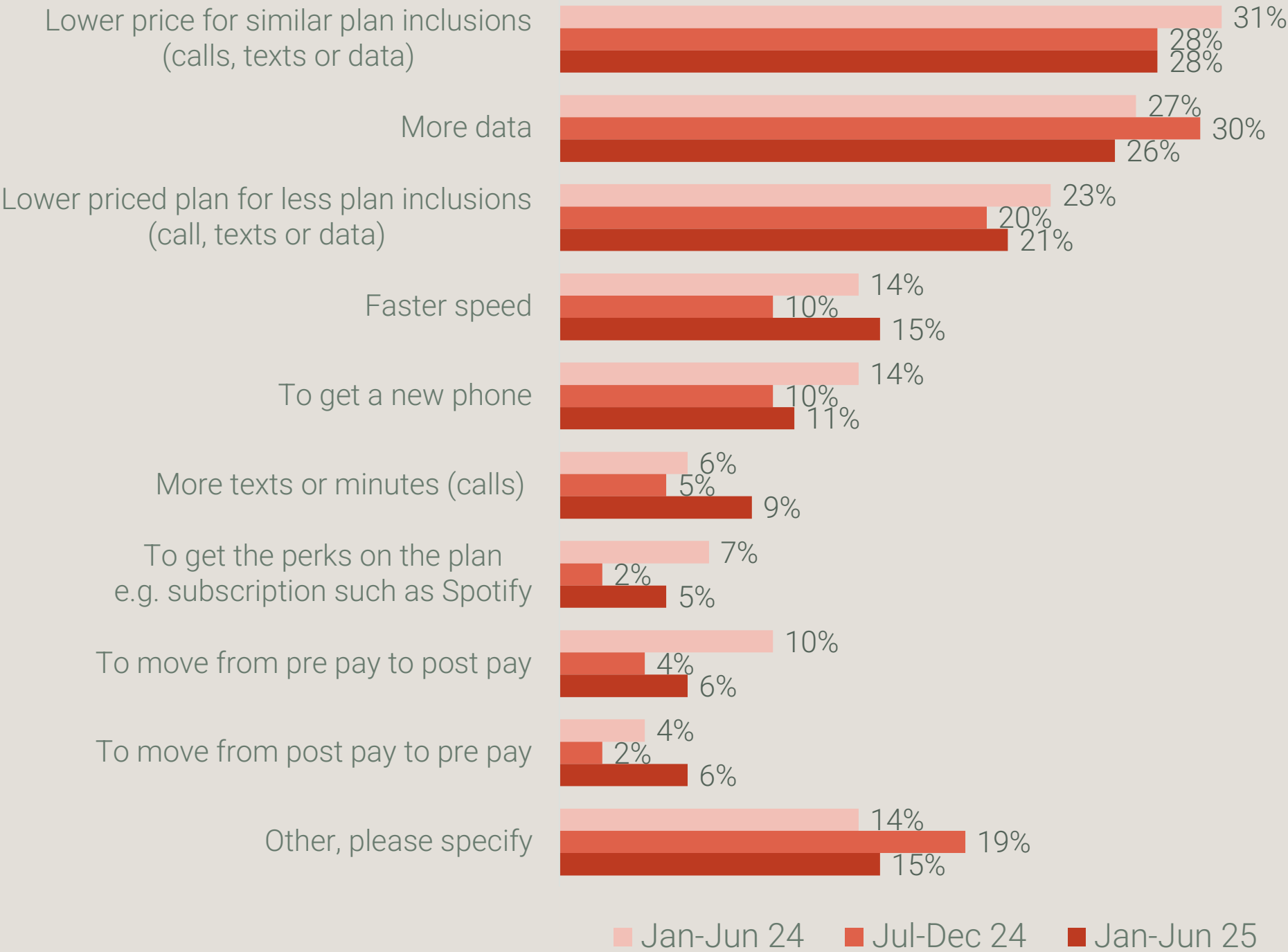
Reasons for changing mobile plans with the same provider

More data and lower pricing are the key reasons for changing mobile plans.



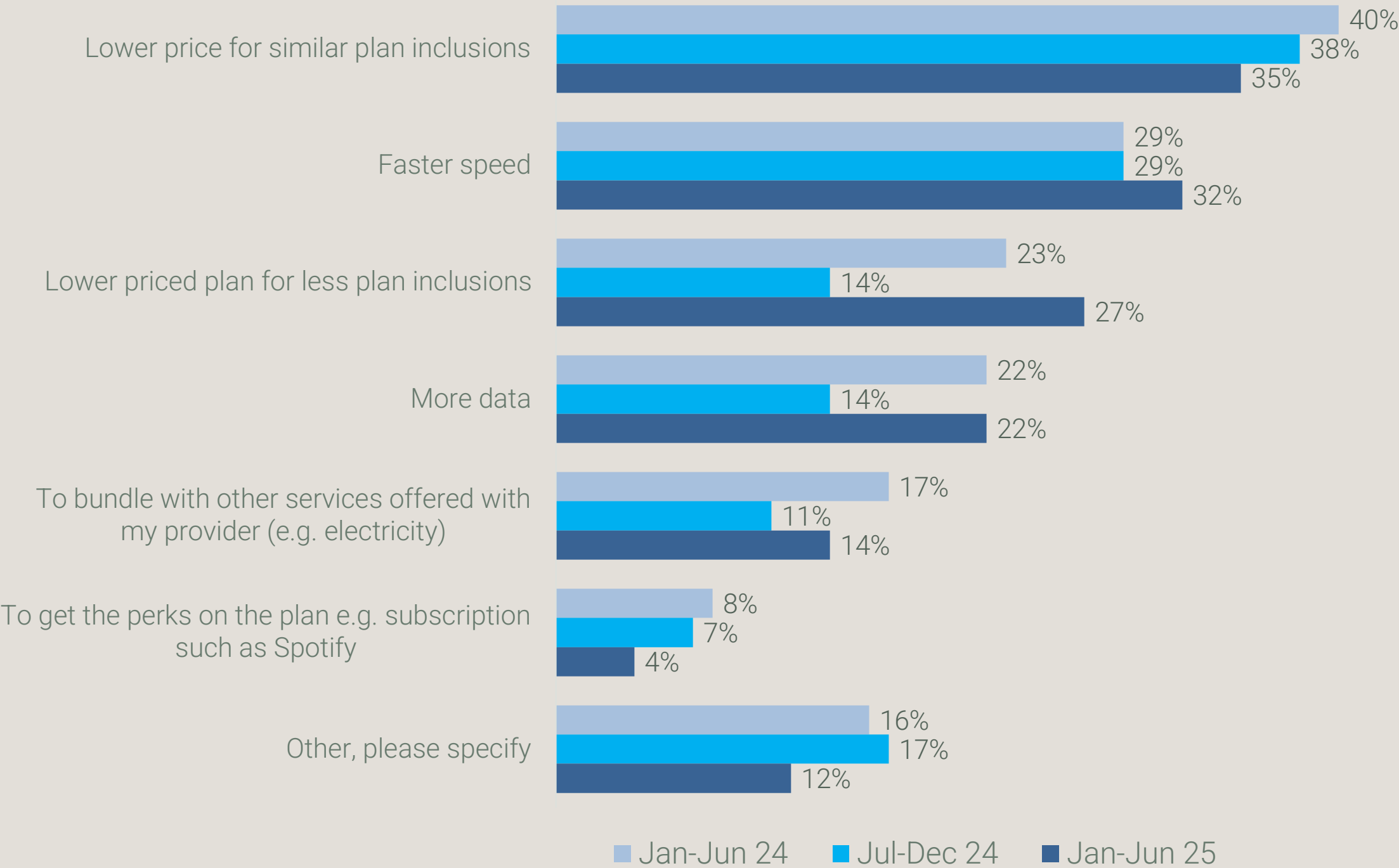
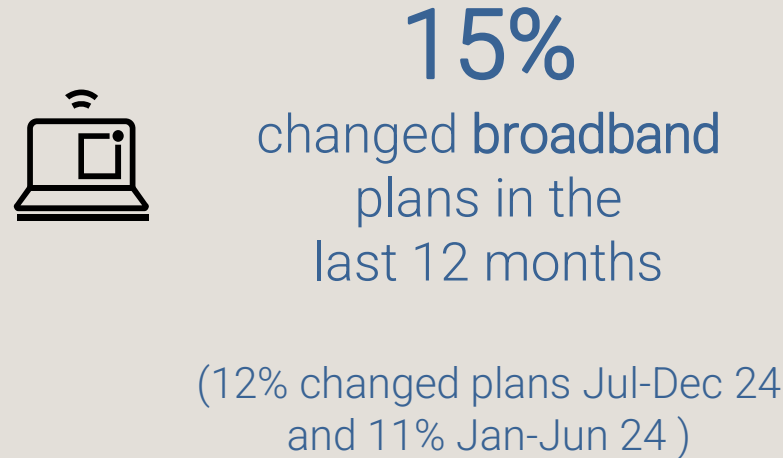
16%
changed mobile plans in the last 12 months

(12% changed plans Jul-Dec 24 and 10% Jan-Jun 24)



Reasons for changing broadband plans the with same provider

Lower price for similar plan inclusions and faster speed are key reasons for changing broadband plans. We see an increase in people switching for lower priced plans with less plan inclusions and for more data.



Switching provider

Switching provider is less common than changing plan, with only 12% of consumers switching broadband provider and 7% switching mobile provider in the last 12 months. Overall satisfaction with switching fails to meet the 80% satisfaction benchmark for both mobile and broadband.



7%
switched mobile
provider in the
last 12 months

(6% switched provider in Jul-Dec 24
and 5% Jan-Jun 2024)

Switching provider is more
common among under 35s;
11% of under 25s and 12% of
25-34 years old's have
switched mobile provider

Overall satisfaction with switching
provider



Satisfaction with the information
provided on the plan / offer when
you were deciding on your new
mobile plan



12%
switched broadband
provider in the
last 12 months

(10% switched provider in Jul-Dec 24
and 11% Jan-Jun 2024)

Switching provider is more
common among under 35s;
20% of under 25s and 19% of
25-34 years old's have
switched broadband provider

Overall satisfaction with switching
provider



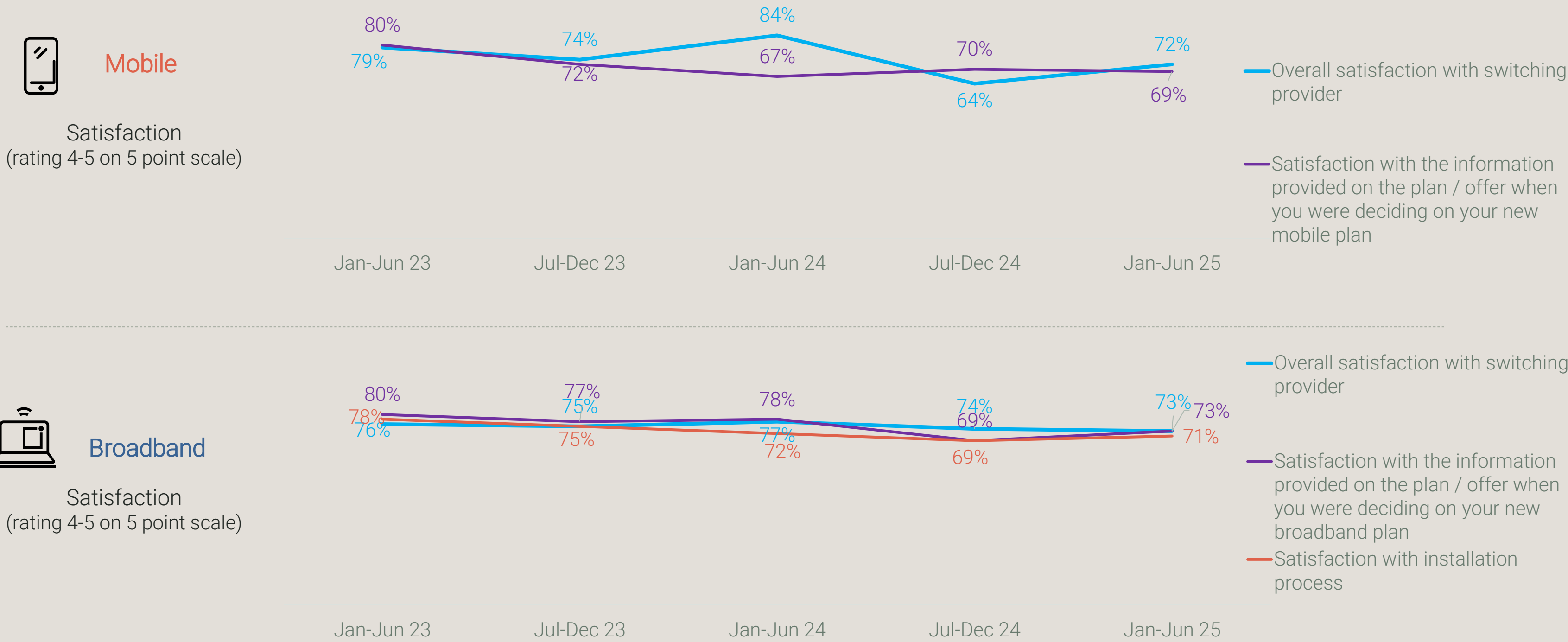
Satisfaction with the information
provided on the plan / offer when you
were deciding on your new broadband
plan



In the last 12 months, have you switched / changed telecommunication providers relating to your
Base: Jan – Jun 25 Broadband provider Population=2447 Mobile provider Population=2129.
Base: Jan – Jun 25 Switched broadband provider =299. Switched mobile provider =138.

Switching provider – trended satisfaction

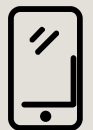
Satisfaction with broadband provider switching is relatively consistent. However, overall satisfaction with switching mobile provider has increased slightly.



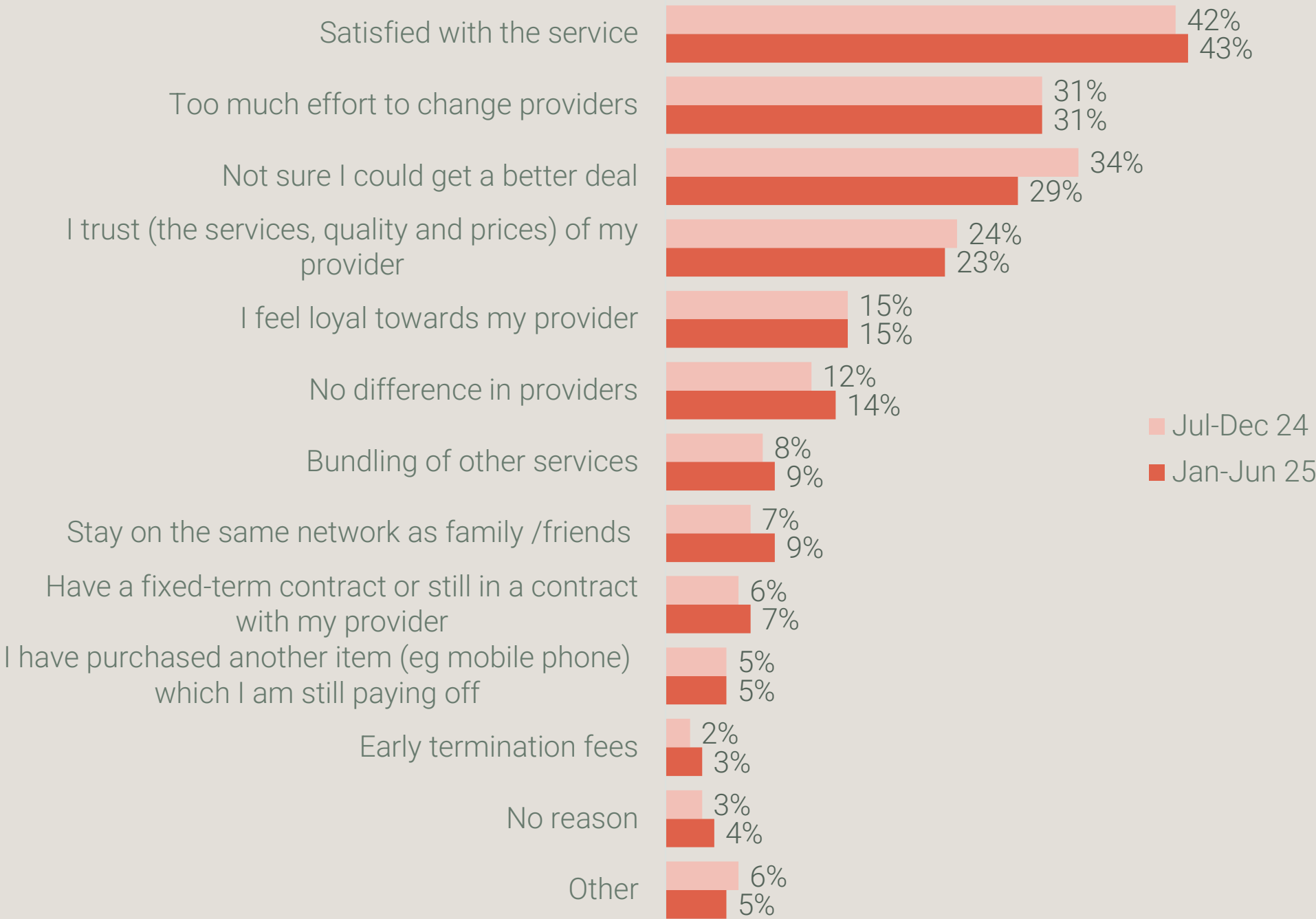
In the last 12 months, have you switched / changed telecommunication providers relating to your
Overall, how satisfied were you with...
Base: Jan – Jun 25 Switched broadband provider =299. Switched mobile provider =138.

Reasons for staying with current provider

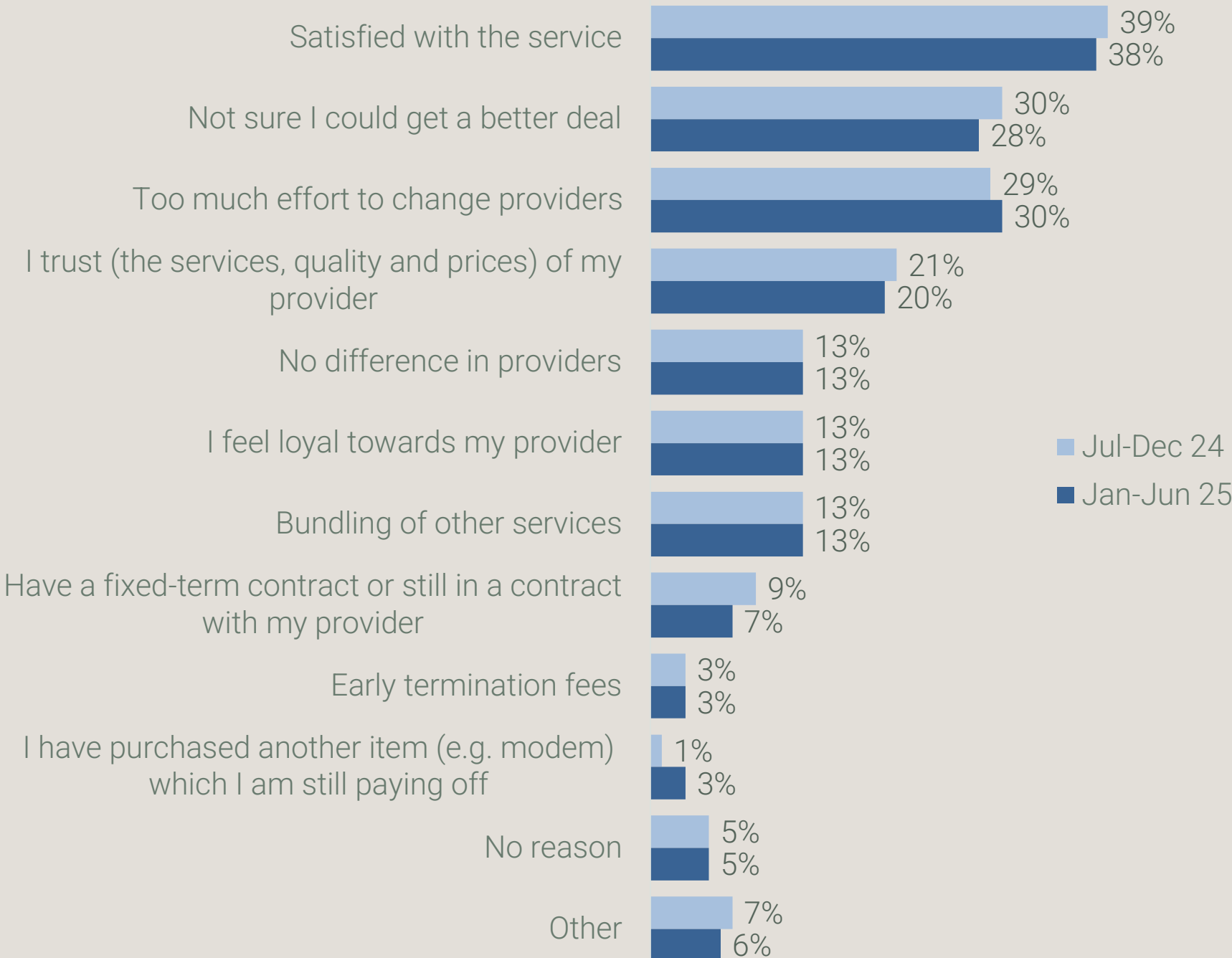
The main reasons consumers are staying with their current provider is because they are satisfied with the service, the perceived effort of switching and not being sure they could get a better deal.



Mobile



Broadband



Reasons for leaving provider

Paying less is the main driver of consumers starting to look to leave their mobile and/or broadband provider.



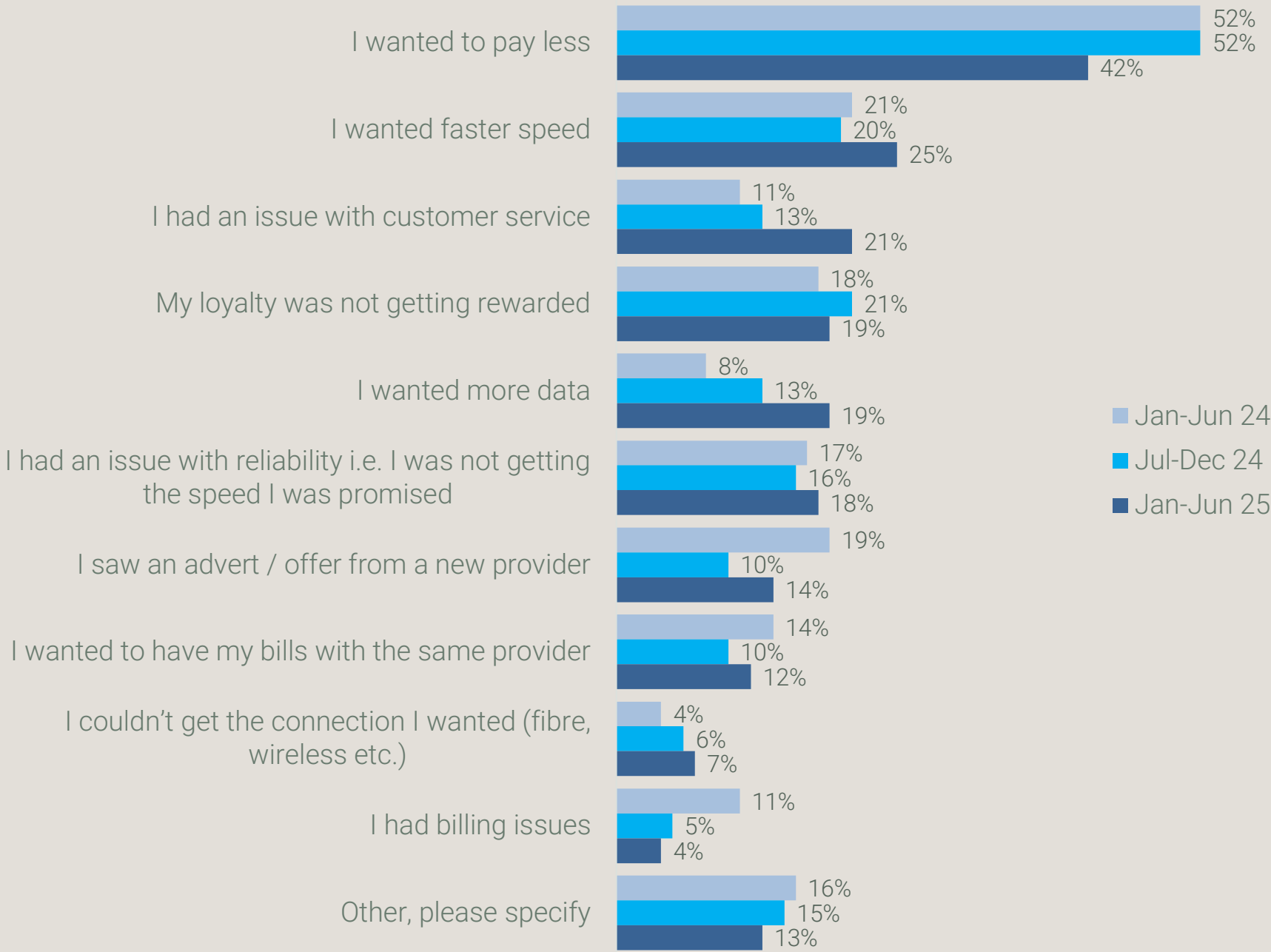
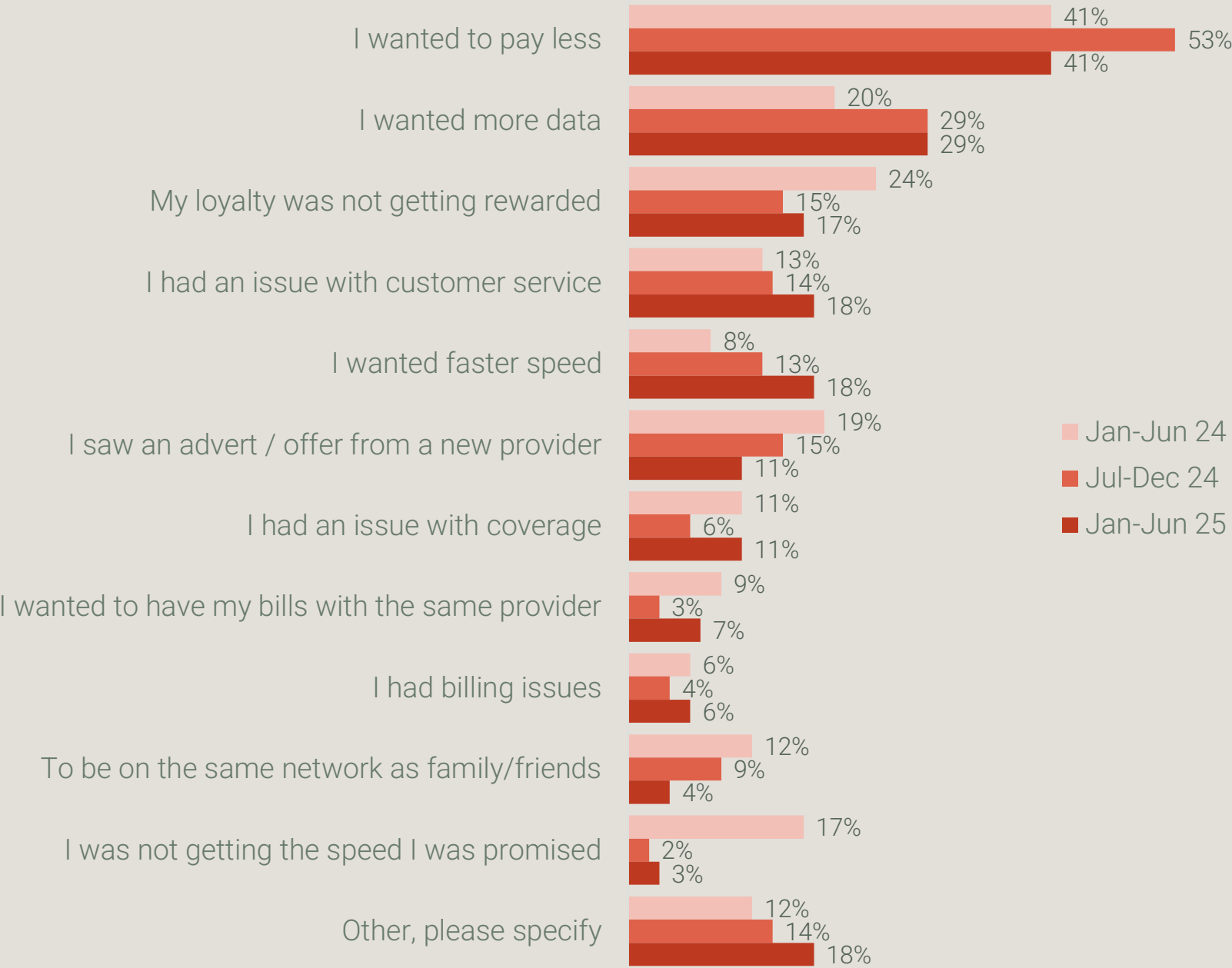
7%

switched **mobile** provider in the last 12 months
(6% switched provider in Jul-Dec 24 and 5% Jan-Jun 2024)



12%

switched **broadband** provider in the last 12 months
(10% switched provider in Jul-Dec 24 and 11% Jan-Jun 2024)



For which of the following reasons did you start looking to switch from ...? (Multiple response question)
Base: Jan – Jun 25 Switched broadband provider =299. Switched mobile provider =138.

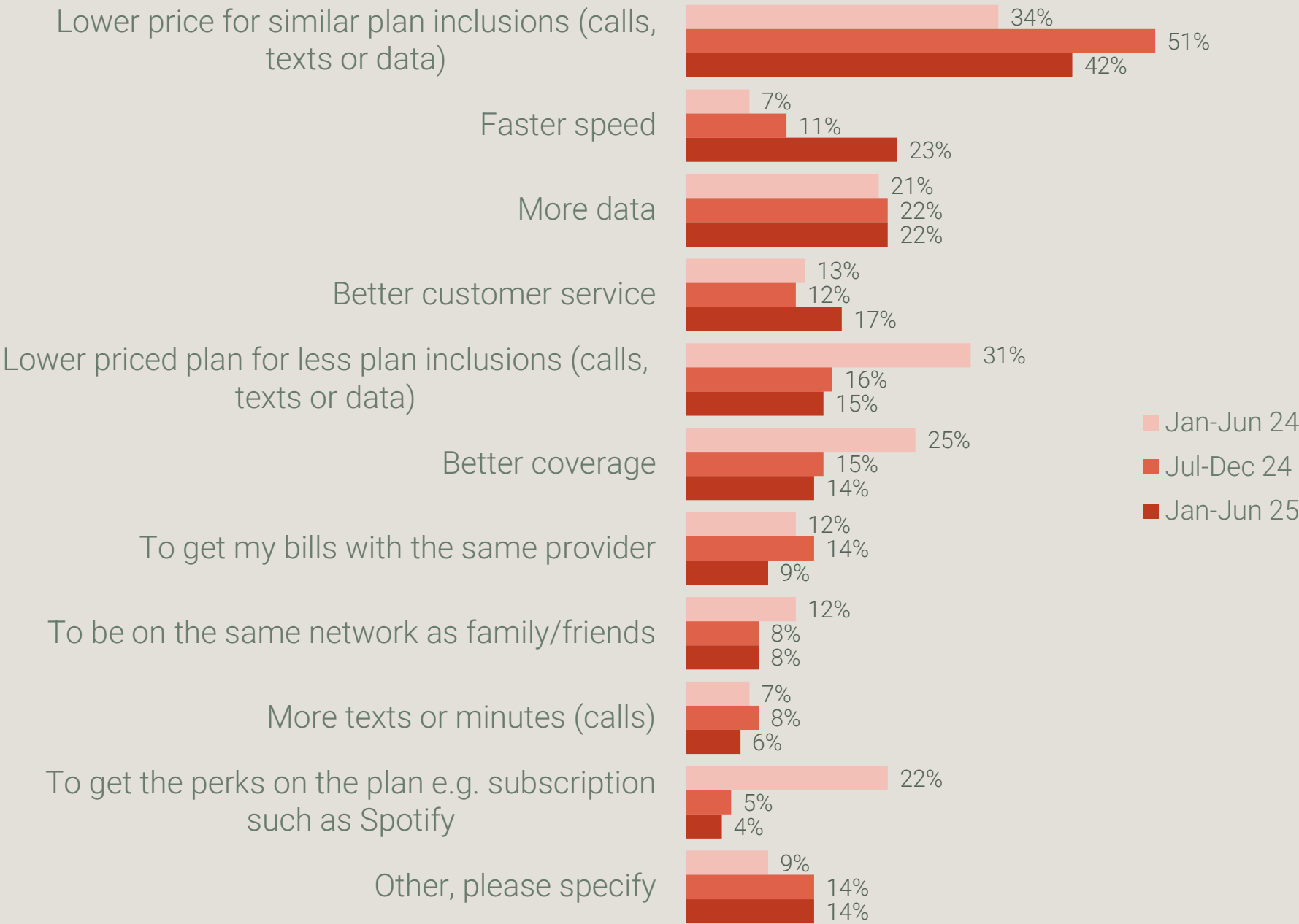
Reasons for choosing their new provider

When choosing a new mobile provider, consumers were mainly influenced by lower prices for less inclusions, faster speeds and more data. Many consumers who switch broadband plans are motivated by lower prices.



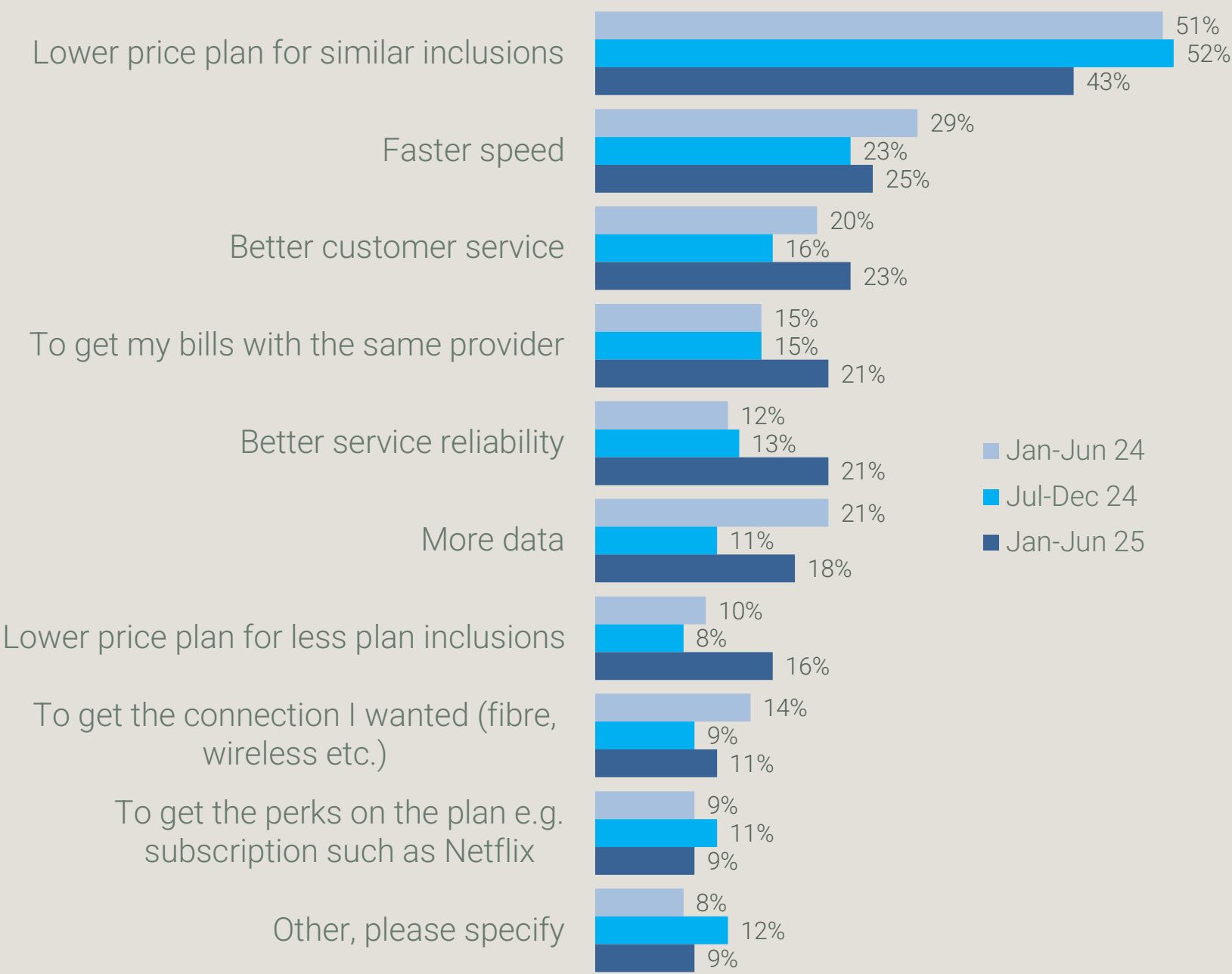
7%

switched **mobile** provider in the last 12 months
(6% switched provider in Jul-Dec 24 and 5% Jan-Jun 2024)



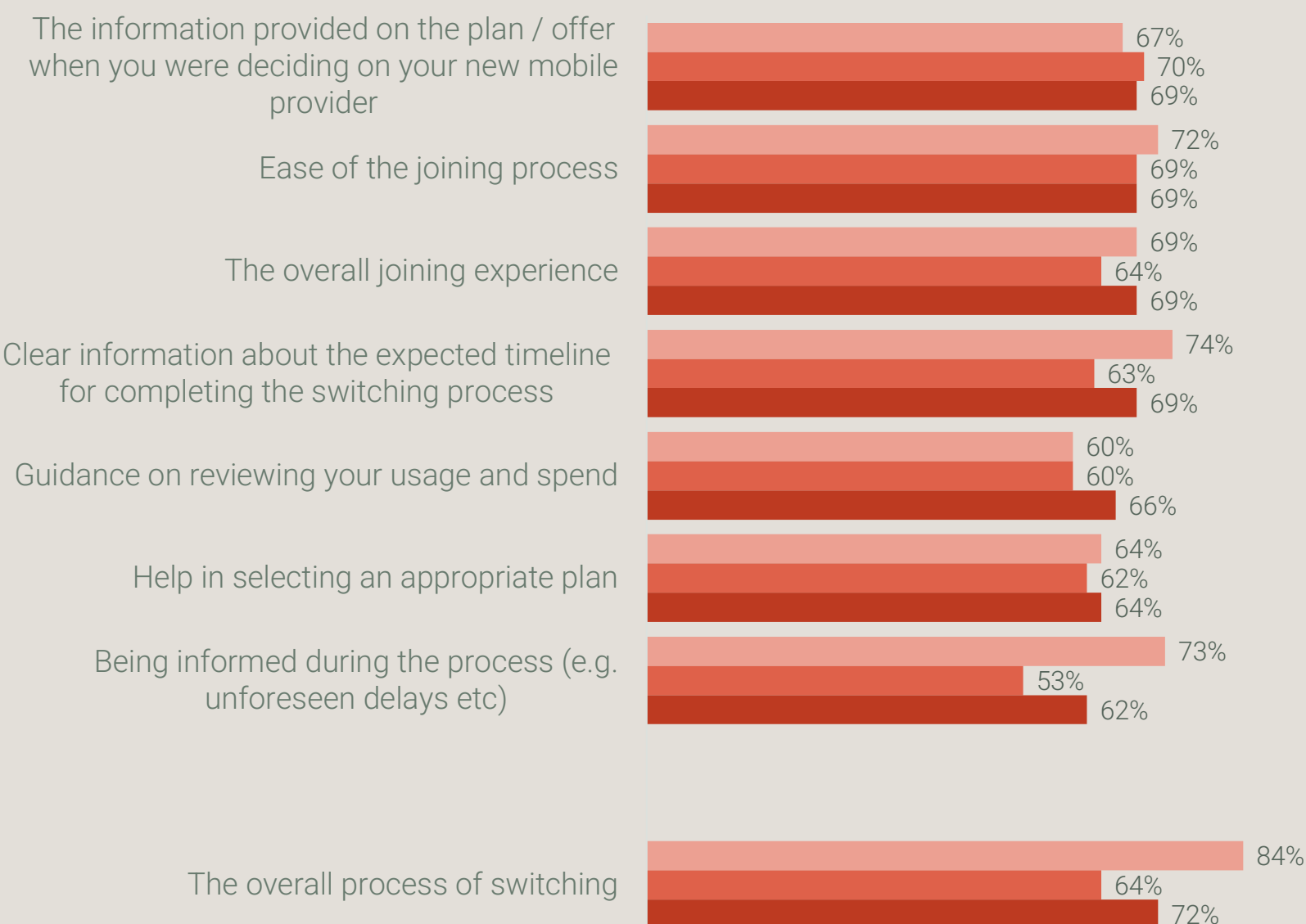
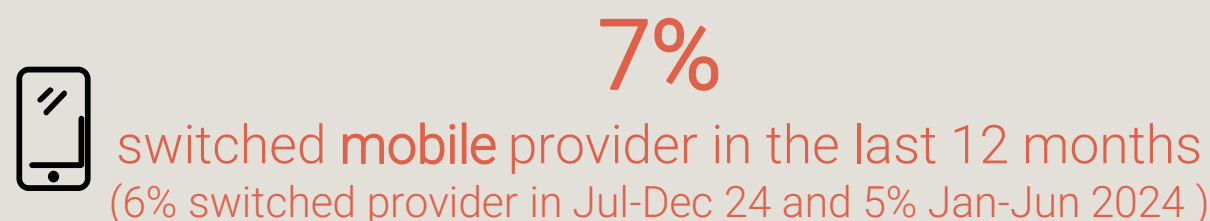
12%

switched **broadband** provider in the last 12 months
(10% switched provider in Jul-Dec 24 and 11% Jan-Jun 2024)

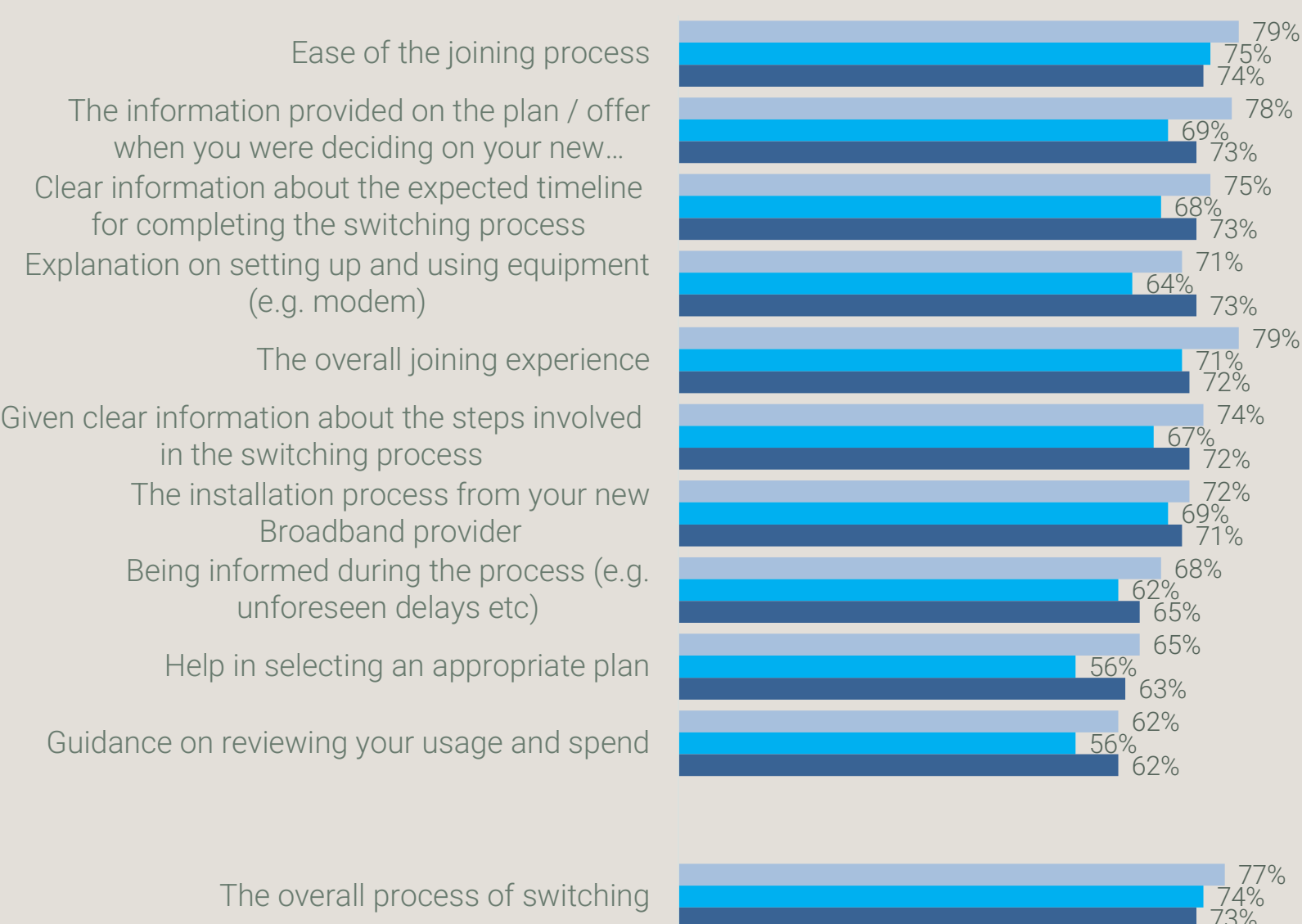


Satisfaction when joining their new provider

Satisfaction with all aspects of mobile and broadband fall below the favourable threshold of 80%.



Jan-Jun 24 Jul-Dec 24 Jan-Jun 25



Jan-Jun 24 Jul-Dec 24 Jan-Jun 25



RESIDENTIAL INSIGHTS

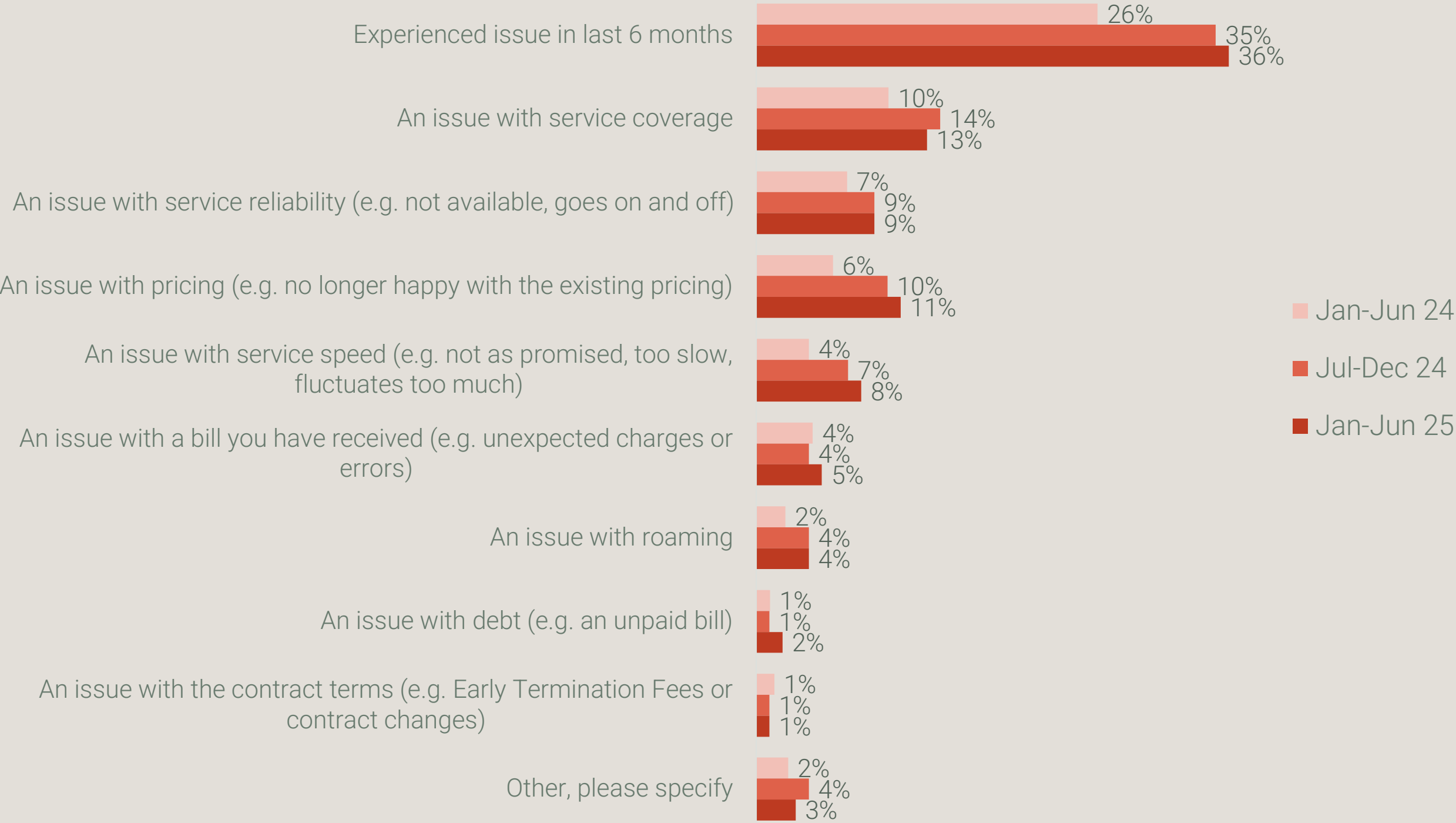
Issues and Response

Mobile Issues

Over a third (36%) of customers have experienced an issue with their mobile provider; the most common issues experienced with mobile service are issues to do with mobile coverage.



36%
of Mobile customers have
experienced an issue with
their mobile service in the
past 6 months

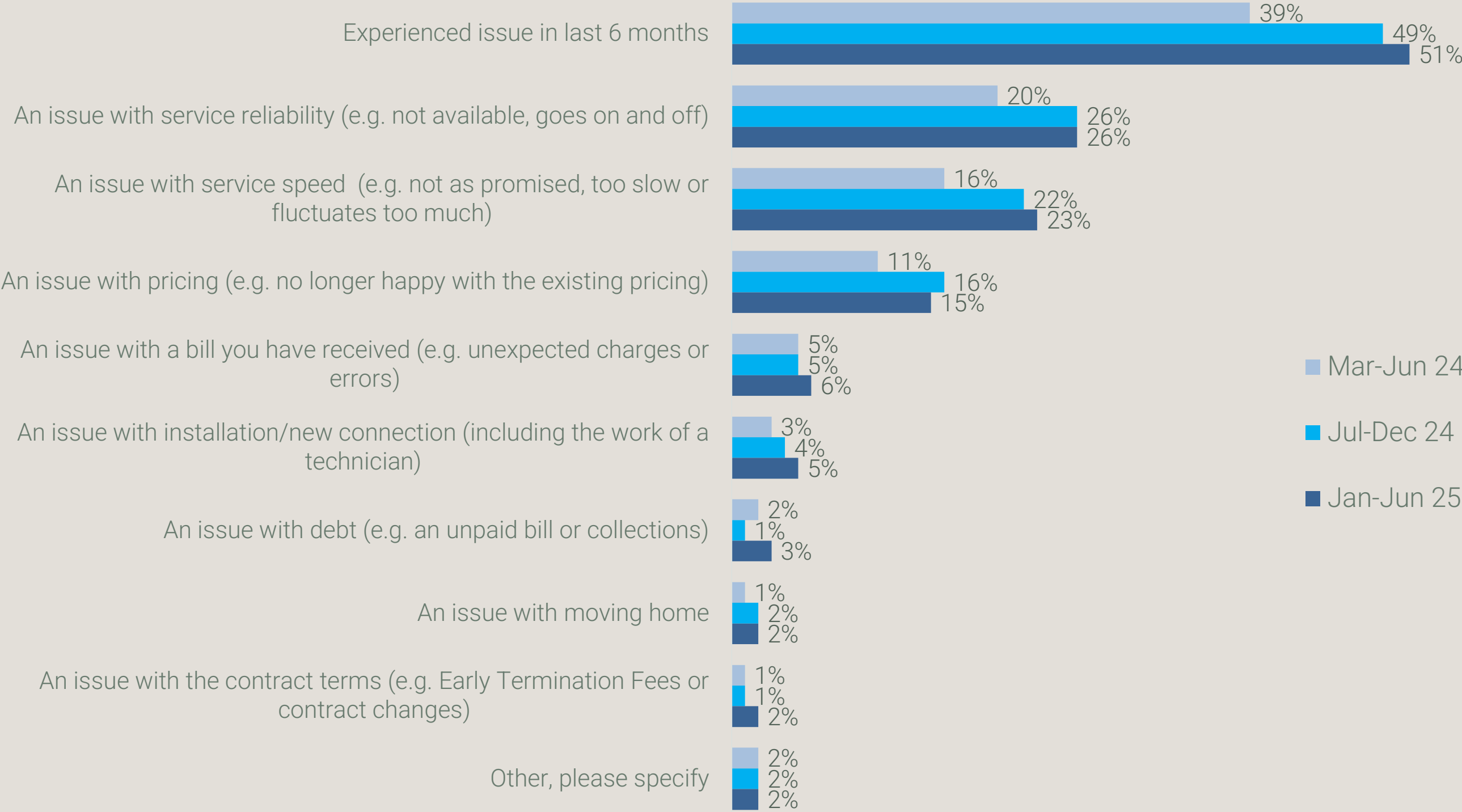


Broadband Issues

Half (51%) of customers experienced an issue with their broadband provider, particularly with service reliability and service speed.



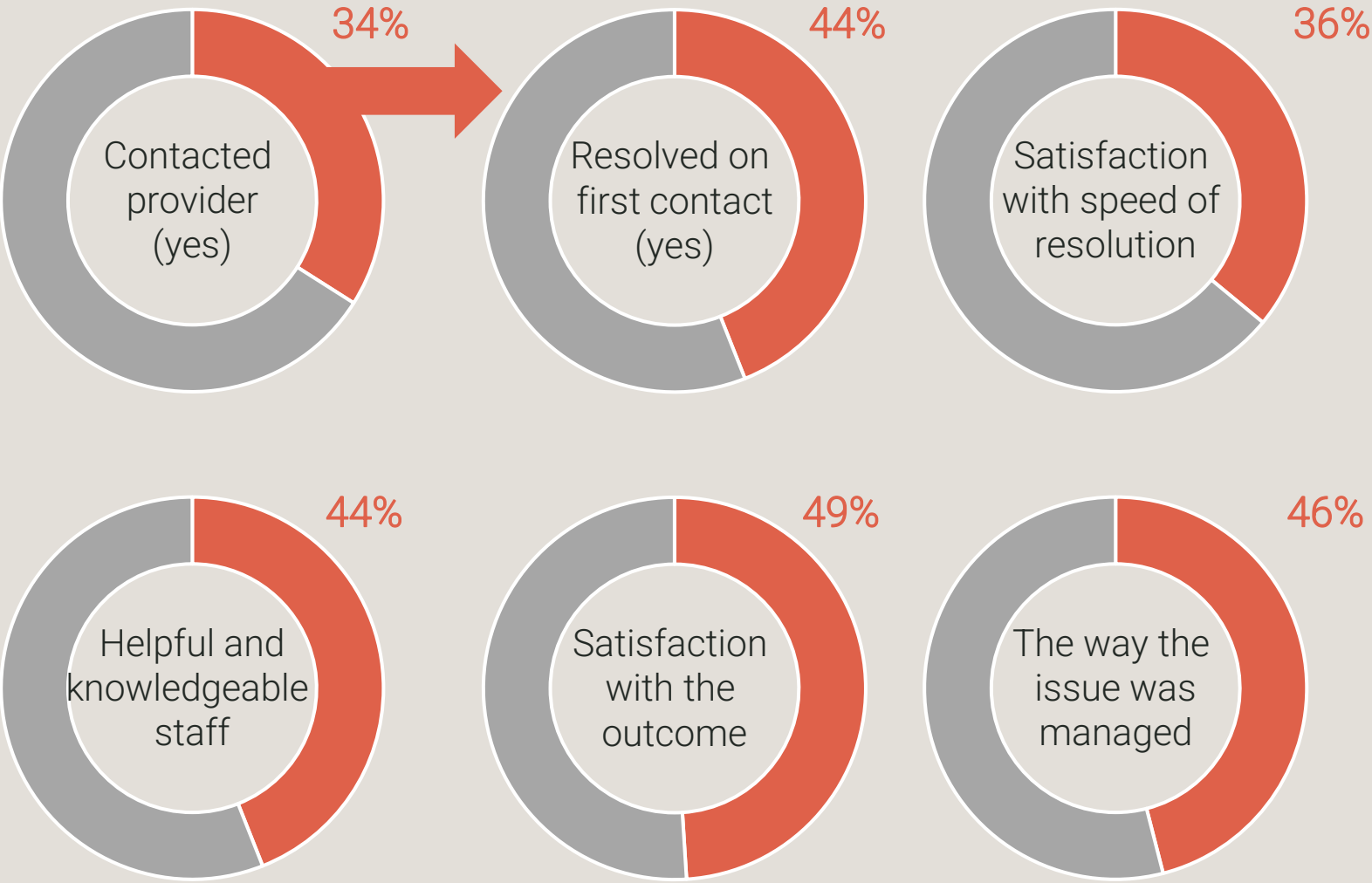
51%
of broadband customers
have experienced an issue
with their broadband
internet service in the
past 6 months



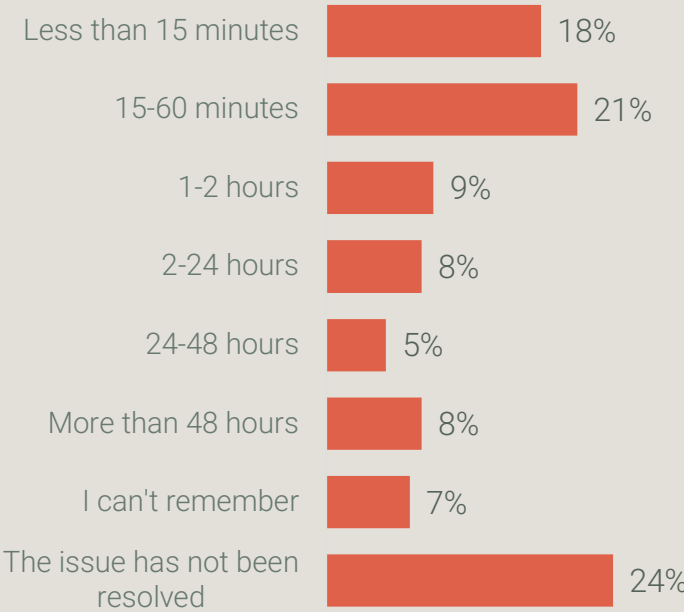
Mobile Issue deep dive

Service coverage

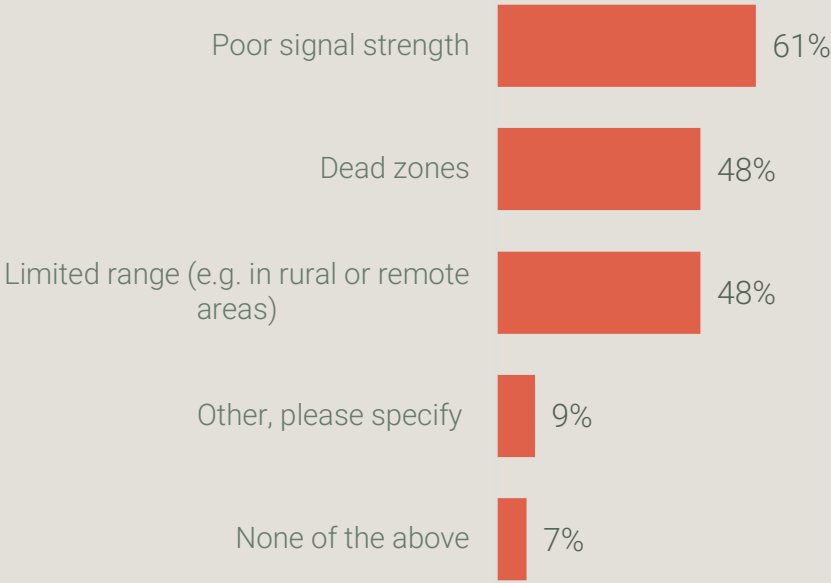
13% of consumers had an issue with their mobile service coverage. Of the 34% who contacted their provider, almost half (44%) were resolved on the first contact. The most common issue was related to poor signal strength.



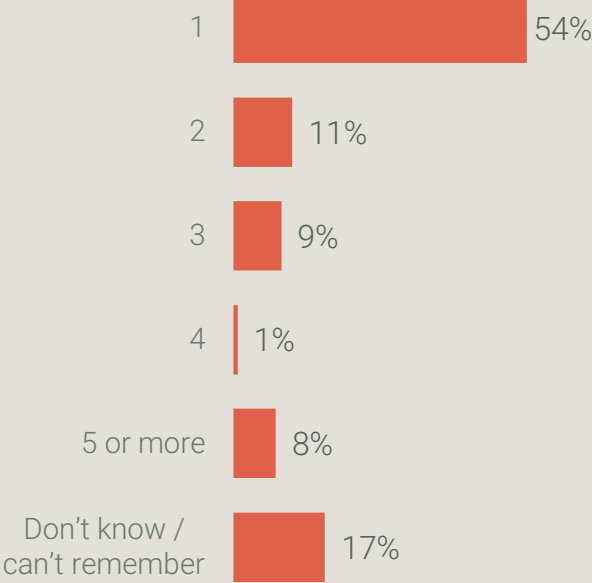
Length of time to resolve



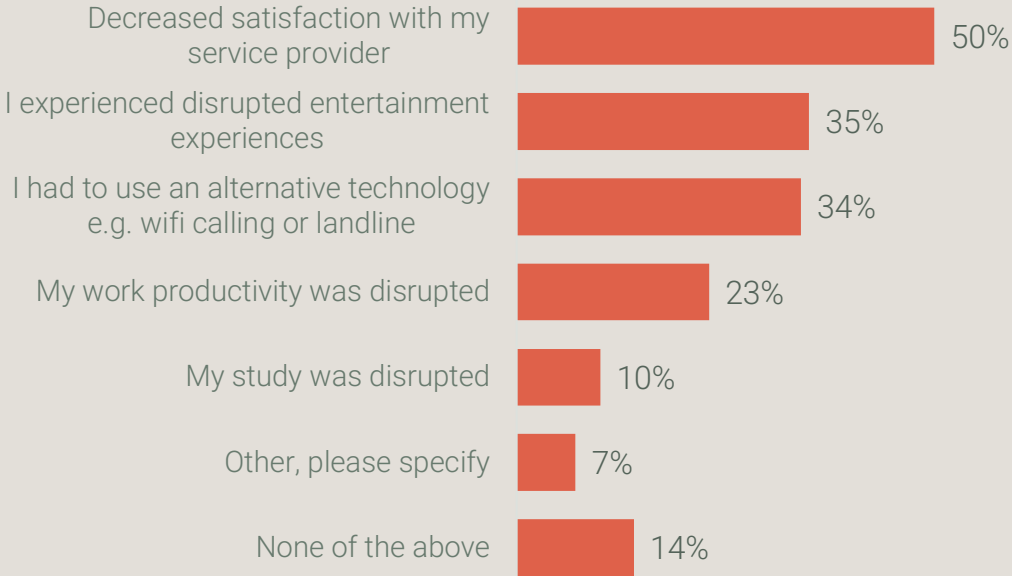
Issue related to



Number of times contacted provider



Impact



Did you contact your provider about this issue? Was this issue resolved on the first contact? How long did it take to resolve your issue successfully and completely, including any time spent waiting e.g. on the phone or in store? How satisfied were you with how long it took to resolve the issue? How satisfied or dissatisfied were you with how helpful and knowledgeable their staff were with the issue you had? How many times did you have to contact your provider to resolve this issue? And overall, how satisfied or dissatisfied were you with the outcome? And overall, how satisfied or dissatisfied were you with the way your provider managed the issue? Can you provide more details on the issue you had with your [issue], was it related to any of the below issues? Below is a list of different things you may have experienced as a result of having an issue with [issue].
Base: Mobile customers who experienced mobile service coverage issue (n=293) and contact provider about issue (n=95)

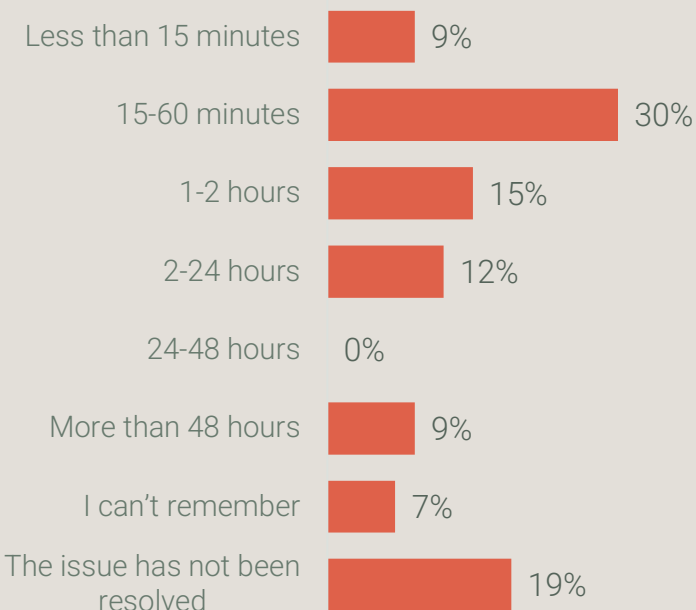
Mobile Issue deep dive

Service reliability

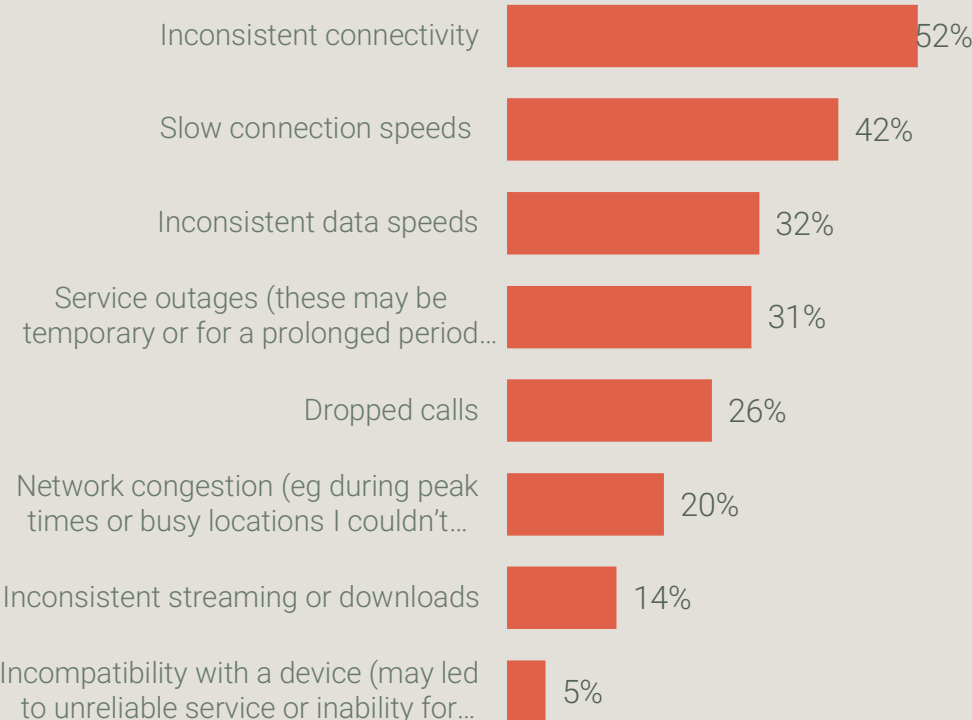
9% of consumers had an issue with their mobile service reliability. Of those, 56% contacted their provider, and of those, 30% contacted their provider more than once. The most common issue was related to inconstant connectivity.



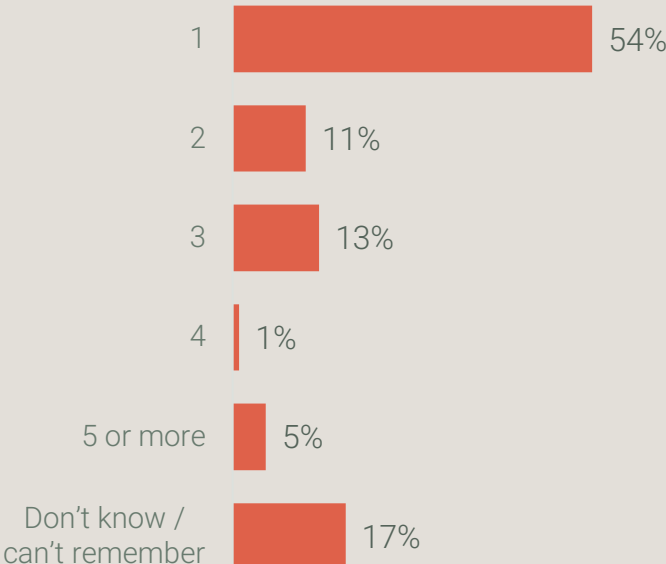
Length of time to resolve



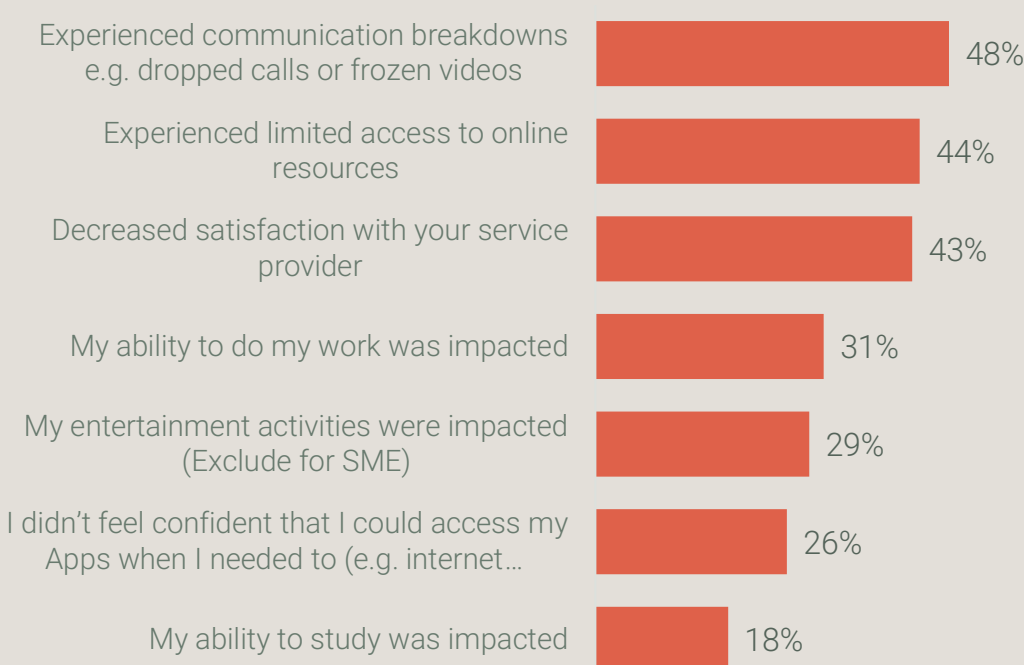
Issue related to



Number of times contacted provider



Impact

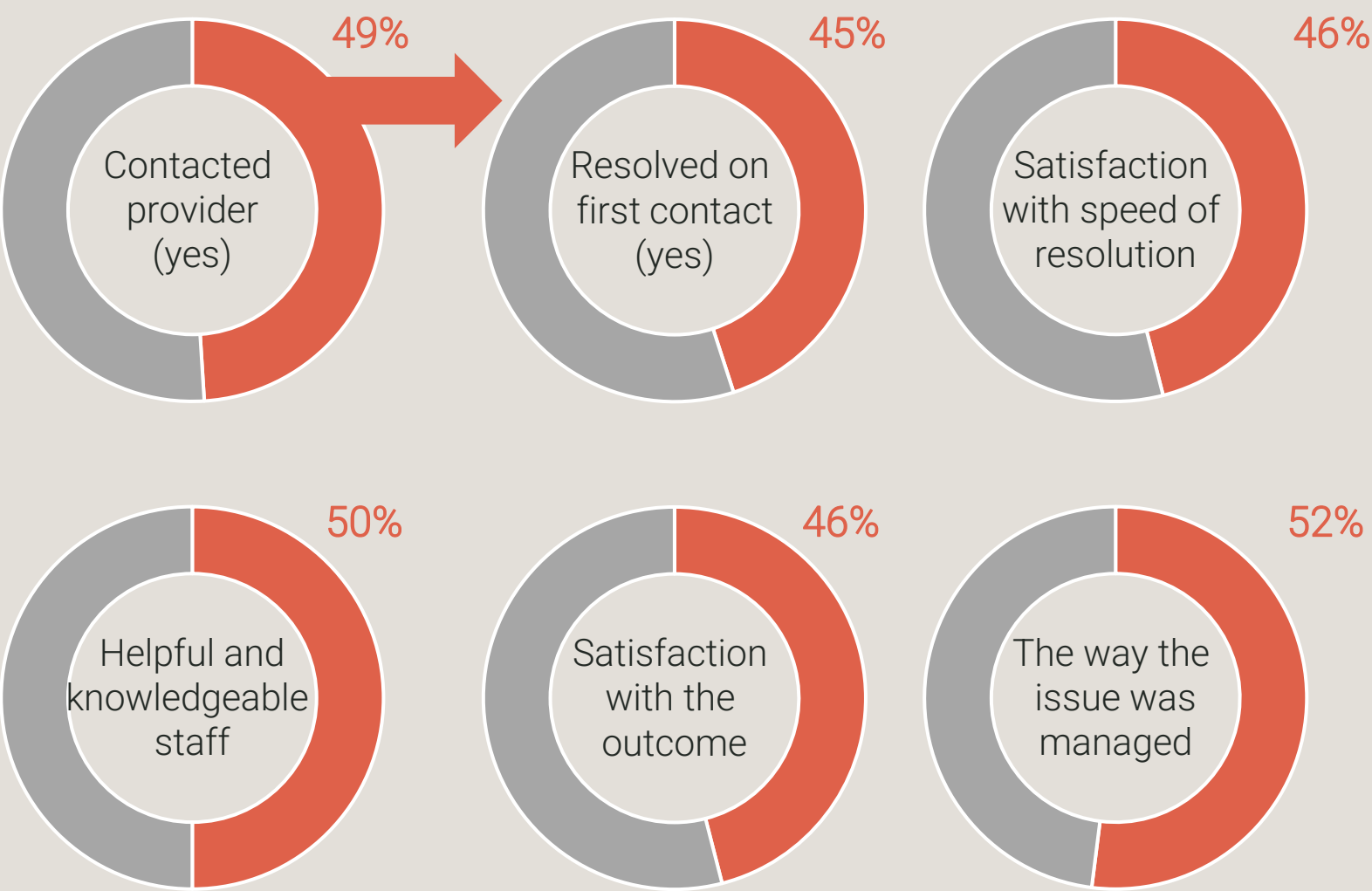


Did you contact your provider about this issue? Was this issue resolved on the first contact? How long did it take to resolve your issue successfully and completely, including any time spent waiting e.g. on the phone or in store? How satisfied were you with how long it took to resolve the issue? How satisfied or dissatisfied were you with how helpful and knowledgeable their staff were with the issue you had? How many times did you have to contact your provider to resolve this issue? And overall, how satisfied or dissatisfied were you with the outcome? And overall, how satisfied or dissatisfied were you with the way your provider managed the issue? Can you provide more details on the issue you had with your [issue], was it related to any of the below issues? Below is a list of different things you may have experienced as a result of having an issue with [issue].
Base: Mobile customers who experienced service reliability issue (n=200) and contact provider about issue (n=111)

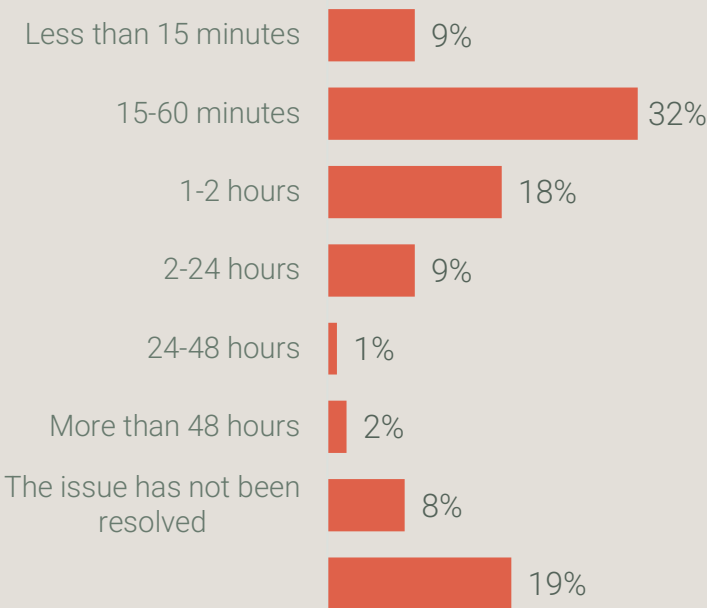
Mobile Issue deep dive

Service speed

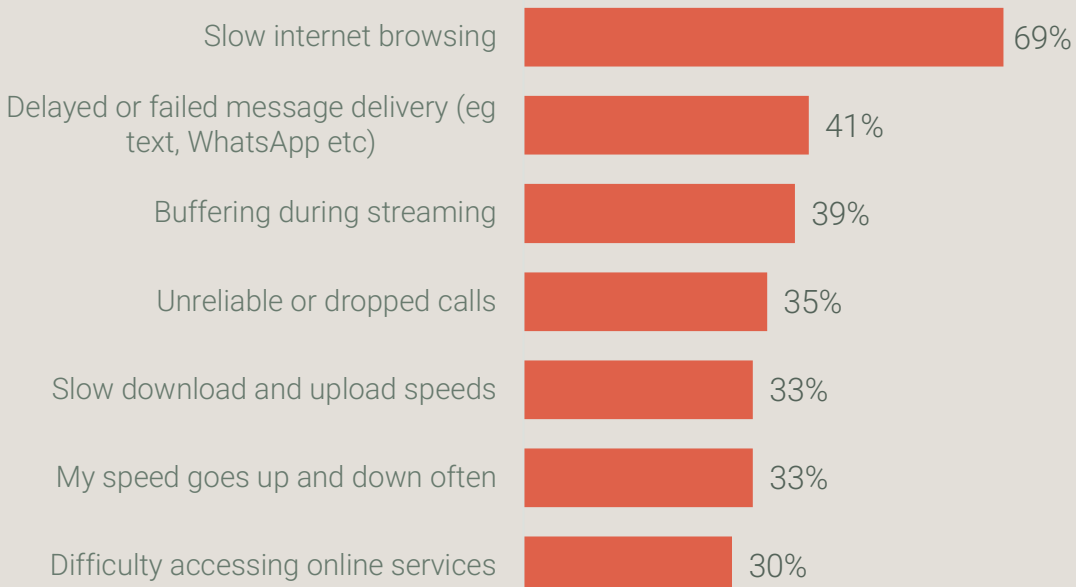
8% of consumers had an issue with their mobile service speed. Of those, 49% contacted their provider. The most common issue was related to slow internet browsing.



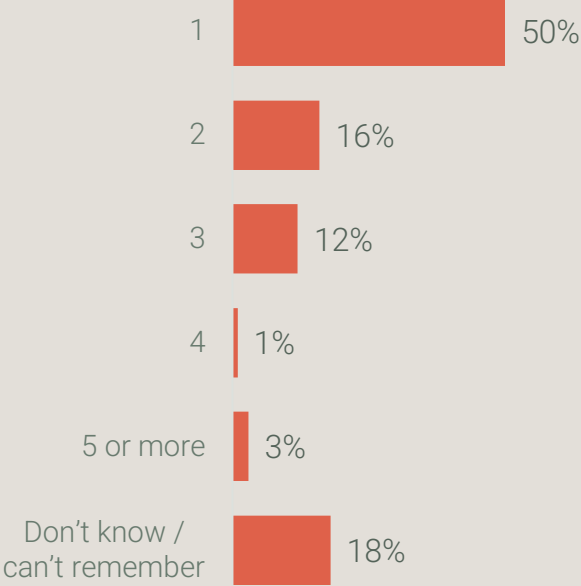
Length of time to resolve



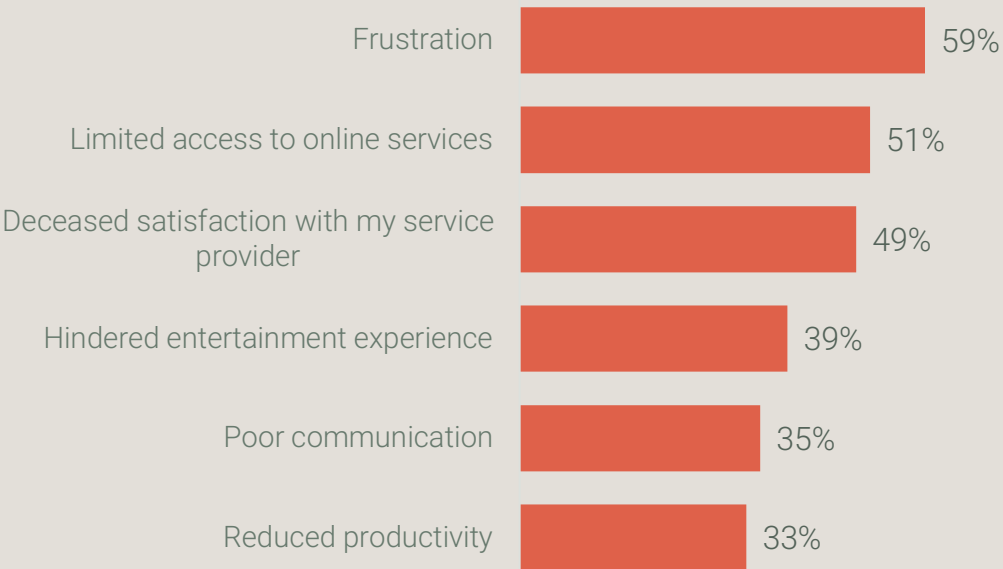
Issue related to



Number of times contacted provider



Impact



Did you contact your provider about this issue? Was this issue resolved on the first contact? How long did it take to resolve your issue successfully and completely, including any time spent waiting e.g. on the phone or in store? How satisfied were you with how long it took to resolve the issue? How satisfied or dissatisfied were you with how helpful and knowledgeable their staff were with the issue you had? How many times did you have to contact your provider to resolve this issue? And overall, how satisfied or dissatisfied were you with the outcome? And overall, how satisfied or dissatisfied were you with the way your provider managed the issue? Can you provide more details on the issue you had with your [issue], was it related to any of the below issues? Below is a list of different things you may have experienced as a result of having an issue with [issue].
Base: Mobile customers who experienced service speed issue (n=159) and contact provider about issue (n=78)

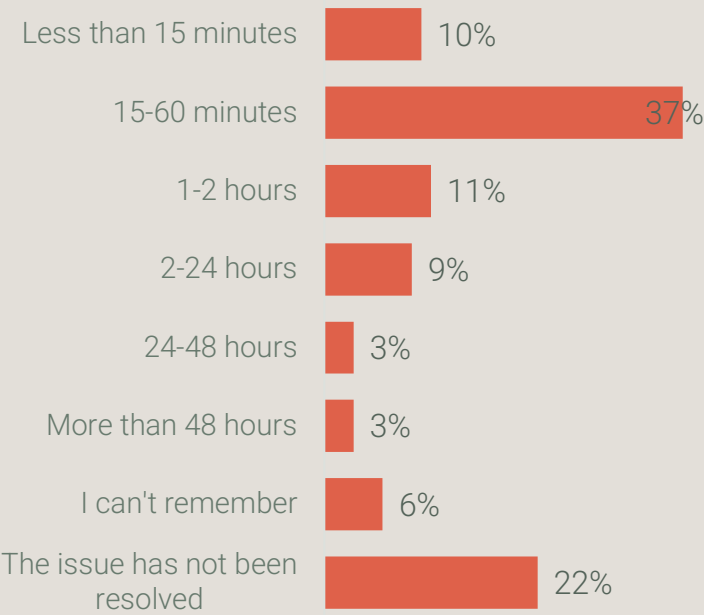
Mobile Issue deep dive

Pricing

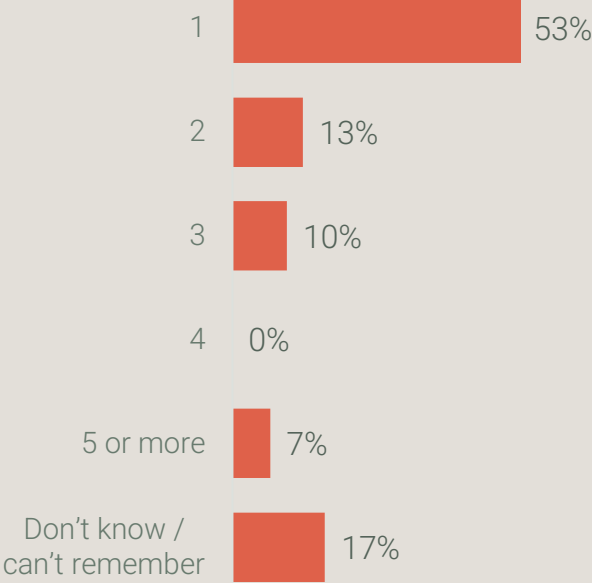
11% of consumers had an issue with their mobile pricing. Of those, 40% contacted their provider.



Length of time to resolve



Number of times contacted provider

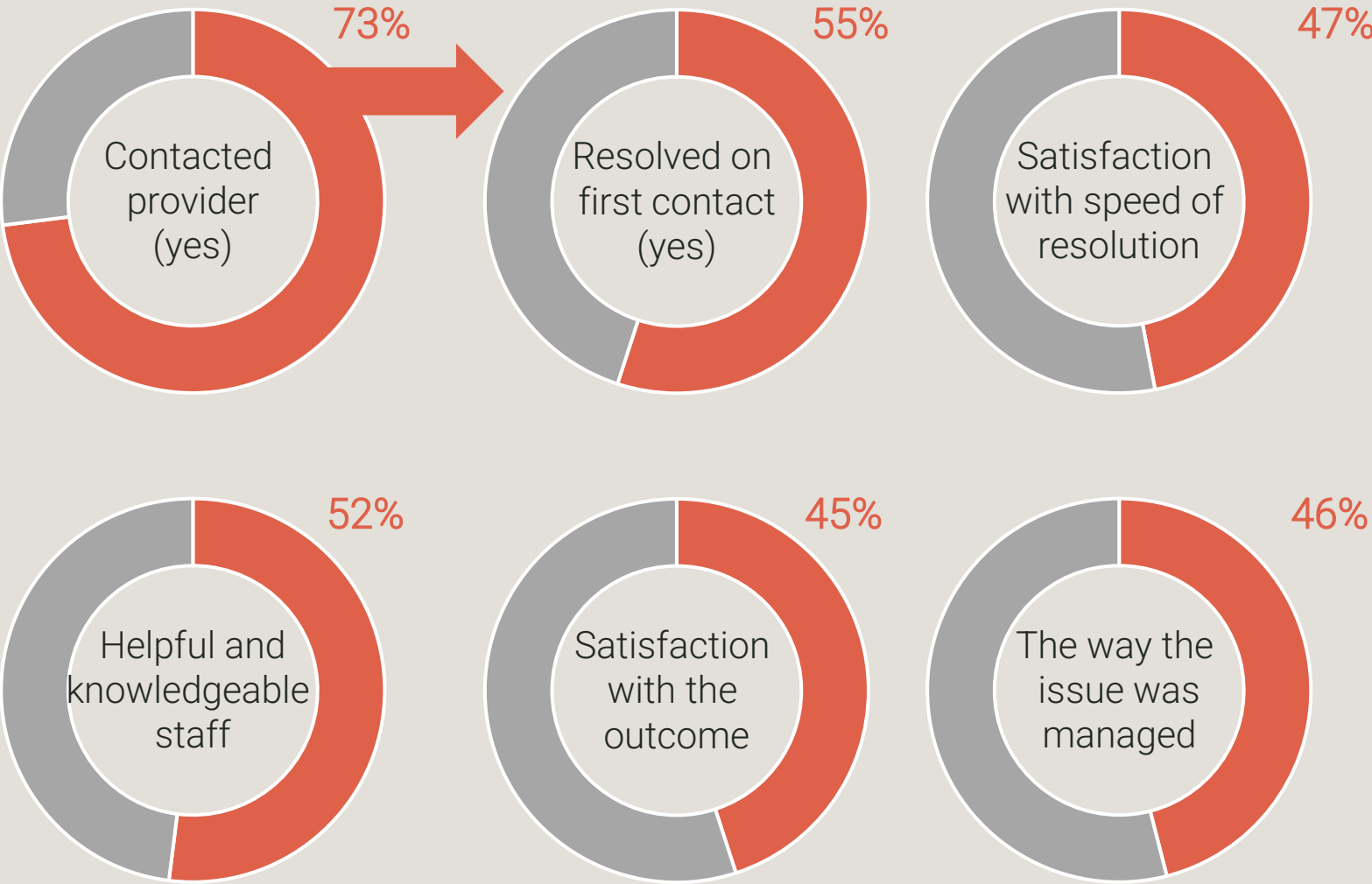


Did you contact your provider about this issue? Was this issue resolved on the first contact? How long did it take to resolve your issue successfully and completely, including any time spent waiting e.g. on the phone or in store? How satisfied were you with how long it took to resolve the issue? How satisfied or dissatisfied were you with how helpful and knowledgeable their staff were with the issue you had? How many times did you have to contact your provider to resolve this issue? And overall, how satisfied or dissatisfied were you with the outcome? And overall, how satisfied or dissatisfied were you with the way your provider managed the issue? Can you provide more details on the issue you had with your [issue], was it related to any of the below issues? Below is a list of different things you may have experienced as a result of having an issue with [issue].
Base: Mobile customers who experienced pricing issue (n=228) and contact provider about issue (n=110)

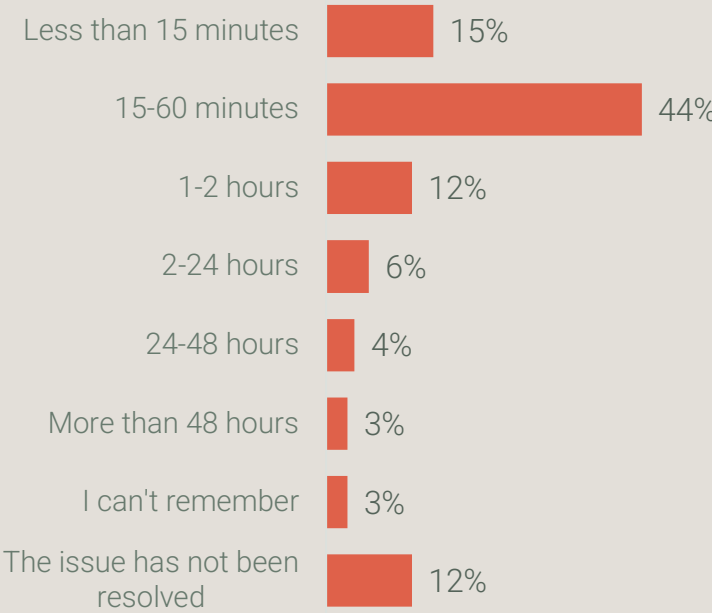
Mobile Issue deep dive

Billing

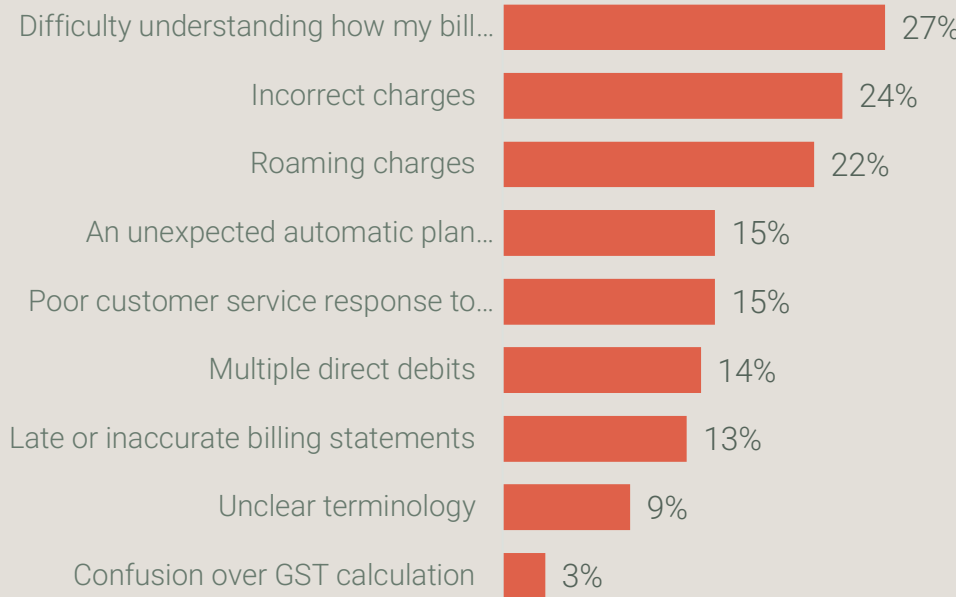
5% of consumers had an issue with their mobile billing. Of those, 73% contacted their provider. The most common issue was difficulty understanding bill.



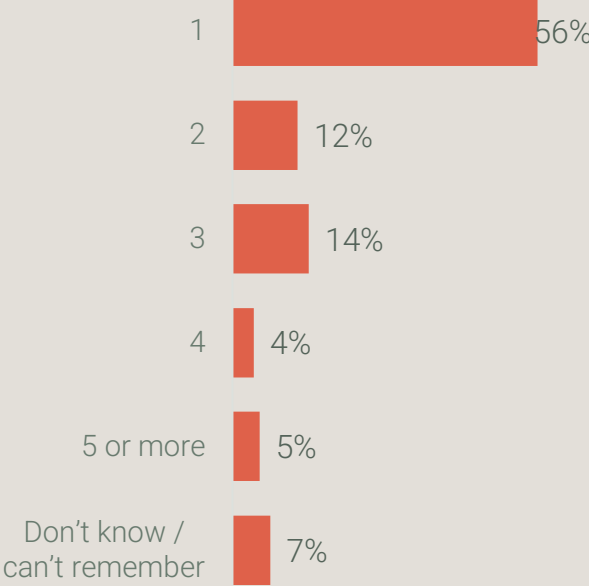
Length of time to resolve



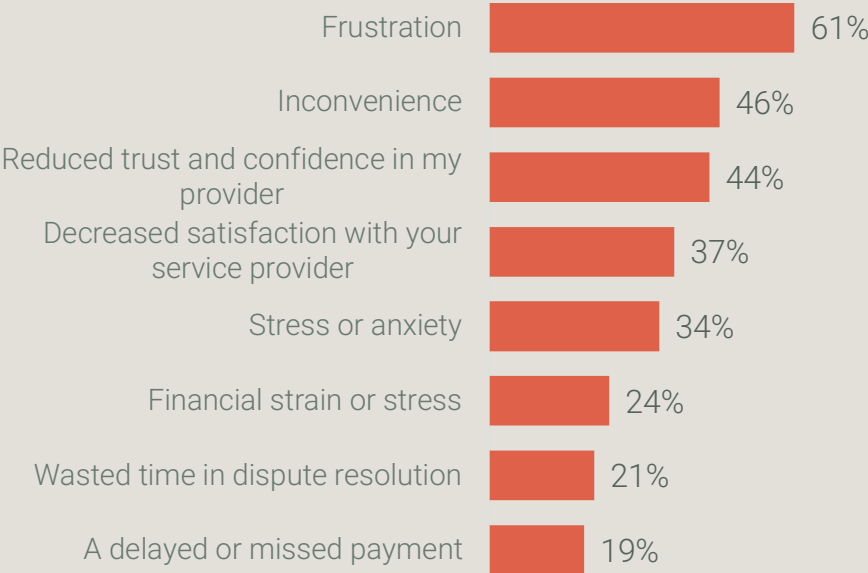
Issue related to



Number of times contacted provider



Impact



Did you contact your provider about this issue? Was this issue resolved on the first contact? How long did it take to resolve your issue successfully and completely, including any time spent waiting e.g. on the phone or in store? How satisfied were you with how long it took to resolve the issue? How satisfied or dissatisfied were you with how helpful and knowledgeable their staff were with the issue you had? How many times did you have to contact your provider to resolve this issue? And overall, how satisfied or dissatisfied were you with the outcome? And overall, how satisfied or dissatisfied were you with the way your provider managed the issue? Can you provide more details on the issue you had with your [issue], was it related to any of the below issues? Below is a list of different things you may have experienced as a result of having an issue with [issue].
Base: Mobile customers who experienced billing issue (n=100) and contact provider about issue (n=73)

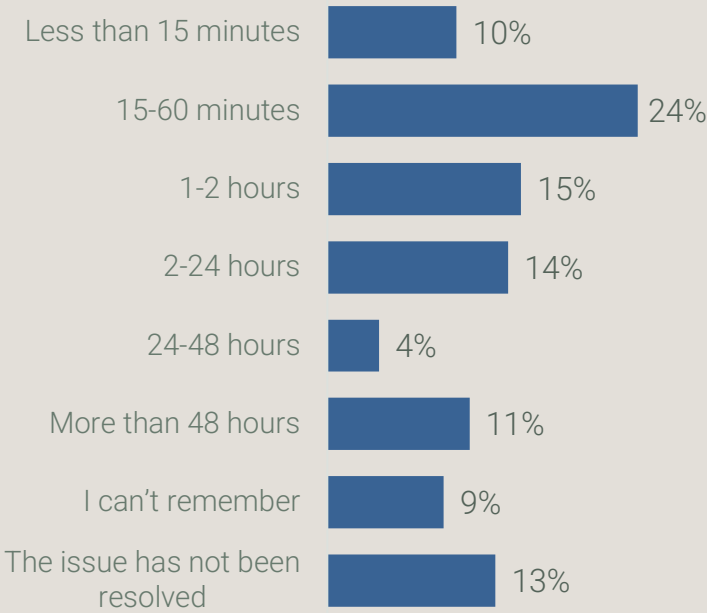
Broadband Issue deep dive

Service reliability

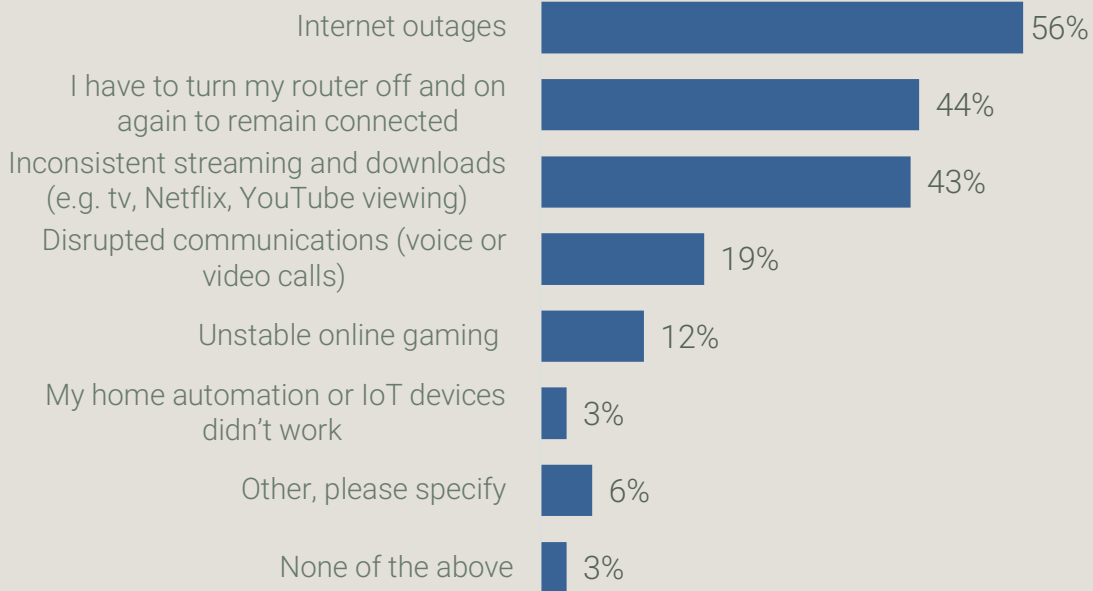
26% of consumers had an issue with their broadband service reliability, of those, 55% contacted their provider. Internet outages was the main issue.



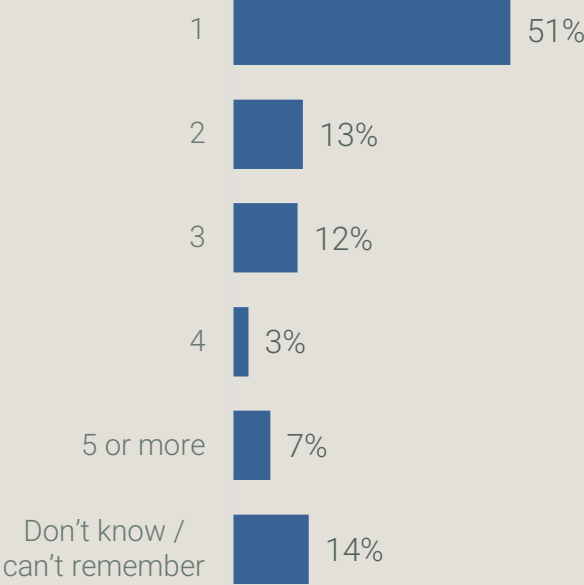
Length of time to resolve



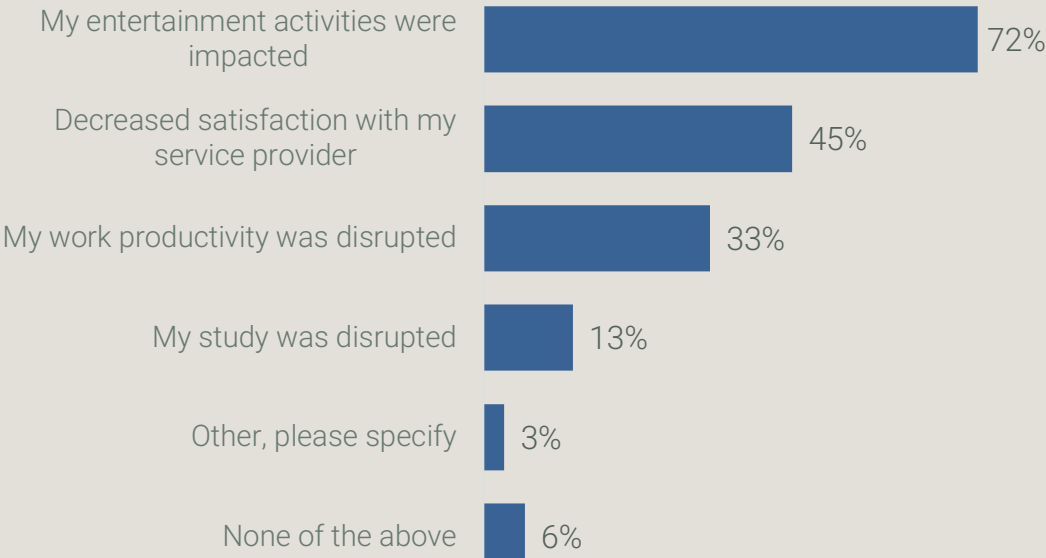
Issue related to



Number of times contacted provider



Impact

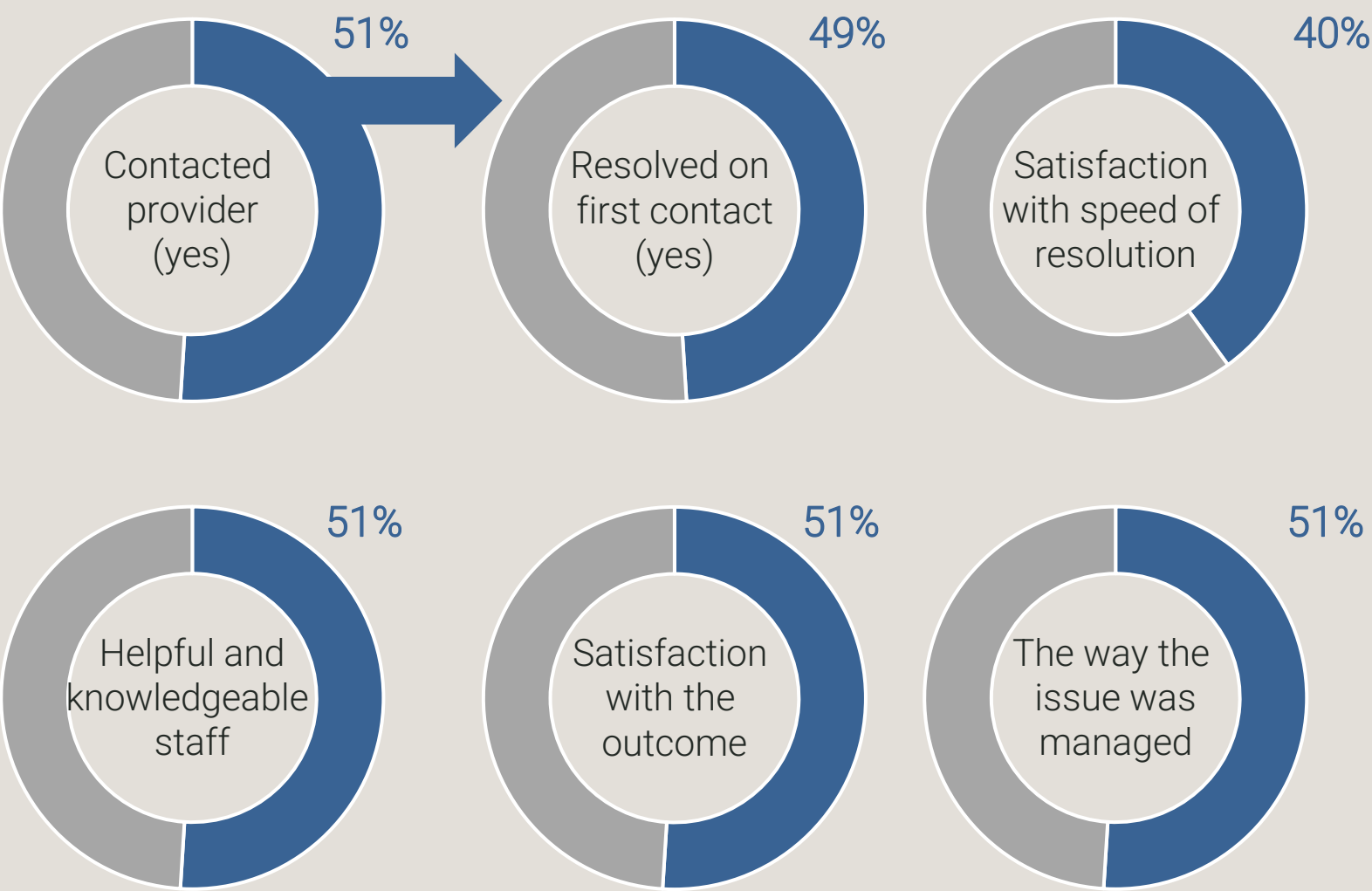


Did you contact your provider about this issue? Was this issue resolved on the first contact? How long did it take to resolve your issue successfully and completely, including any time spent waiting e.g. on the phone or in store? How satisfied were you with how long it took to resolve the issue? How satisfied or dissatisfied were you with how helpful and knowledgeable their staff were with the issue you had? How many times did you have to contact your provider to resolve this issue? And overall, how satisfied or dissatisfied were you with the outcome? And overall, how satisfied or dissatisfied were you with the way your provider managed the issue? Can you provide more details on the issue you had with your [issue], was it related to any of the below issues? Below is a list of different things you may have experienced as a result of having an issue with [issue].
Base: Broadband customers who experienced service reliability issue (n=625) and contact provider about issue (n=346)

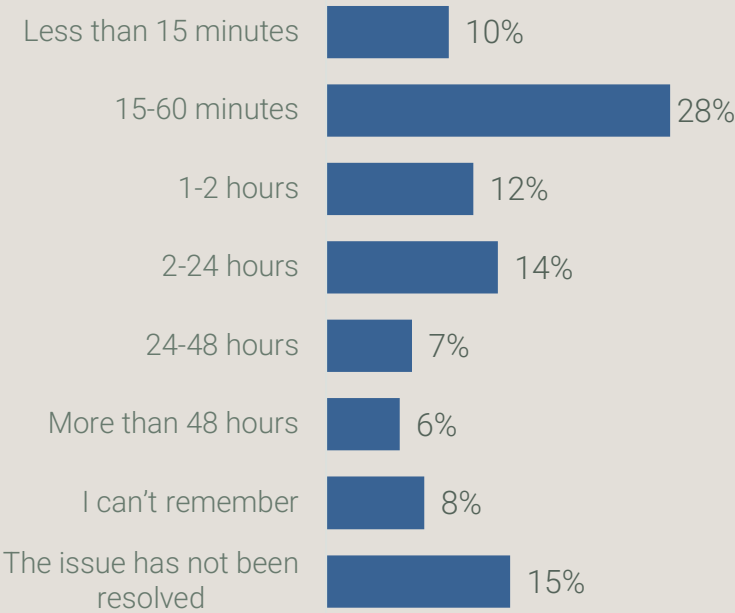
Broadband Issue deep dive

Service speed

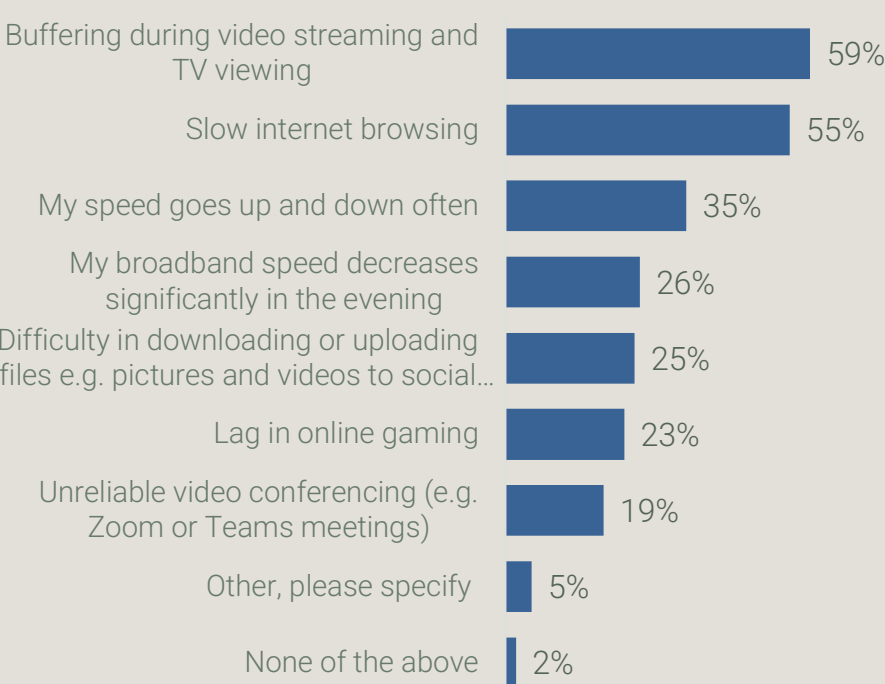
23% of consumers had an issue with their broadband service speed, of those, 51% contacted their provider. Buffering during video streaming and slow internet browsing were the main issues.



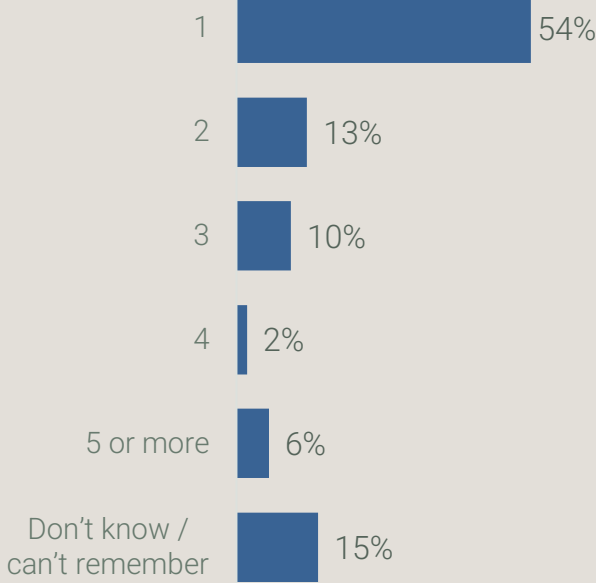
Length of time to resolve



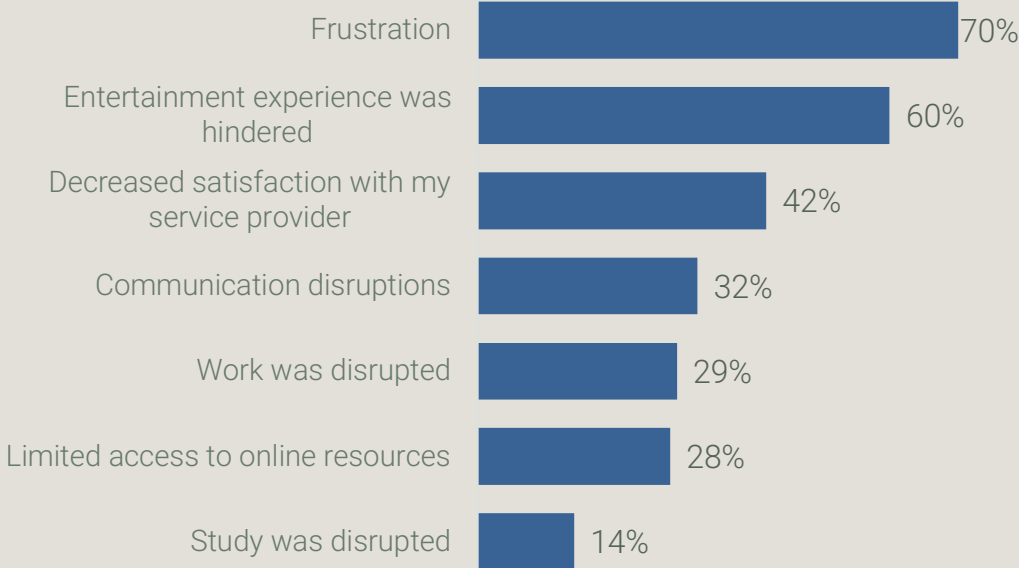
Issue related to



Number of times contacted provider



Impact

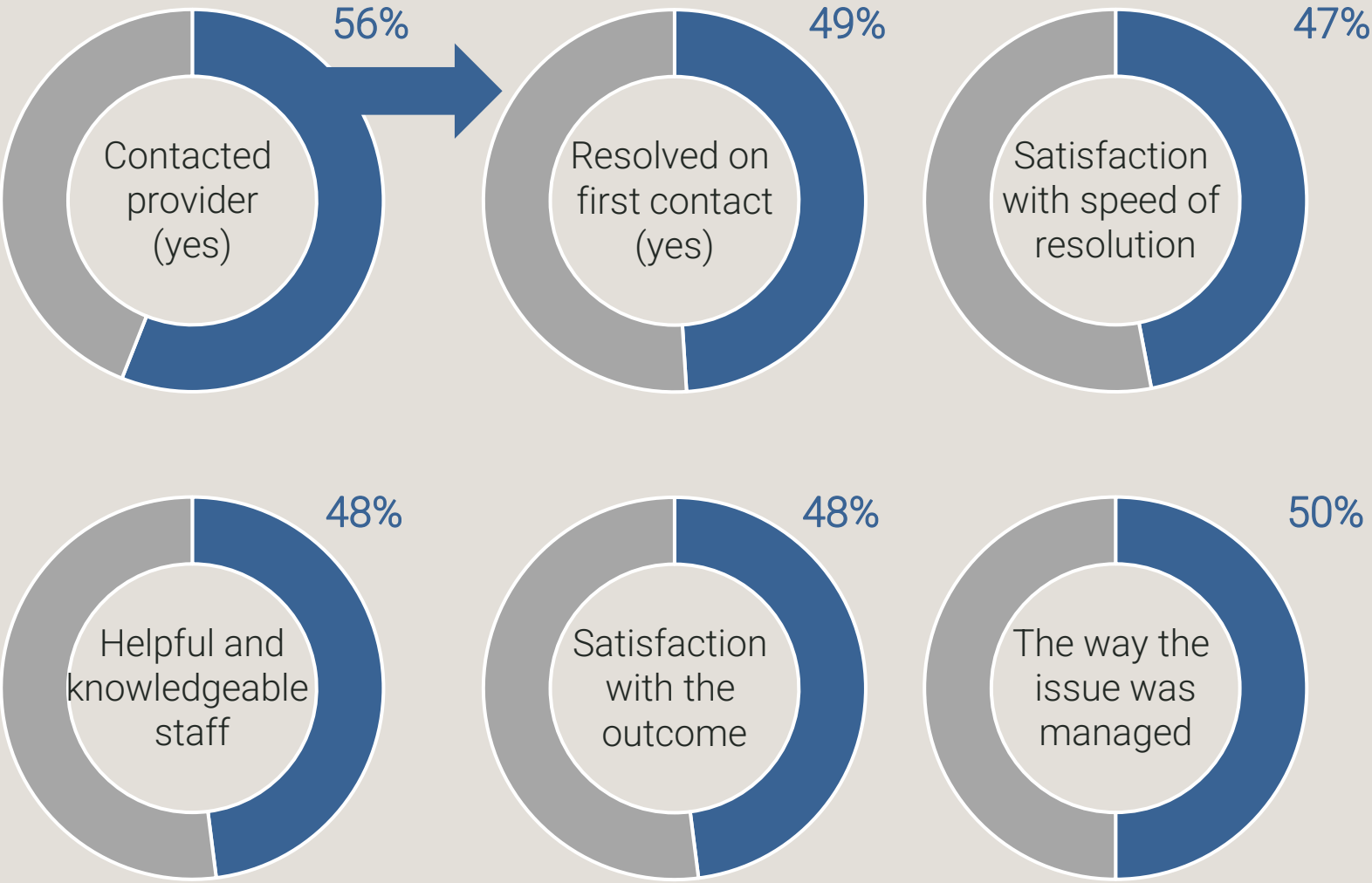


Did you contact your provider about this issue? Was this issue resolved on the first contact? How long did it take to resolve your issue successfully and completely, including any time spent waiting e.g. on the phone or in store? How satisfied were you with how long it took to resolve the issue? How satisfied or dissatisfied were you with how helpful and knowledgeable their staff were with the issue you had? How many times did you have to contact your provider to resolve this issue? And overall, how satisfied or dissatisfied were you with the outcome? And overall, how satisfied or dissatisfied were you with the way your provider managed the issue? Can you provide more details on the issue you had with your [issue], was it related to any of the below issues? Below is a list of different things you may have experienced as a result of having an issue with [issue].
Base: Broadband customers who experienced service speed issue (n=563 and contact provider about issue (n=285)

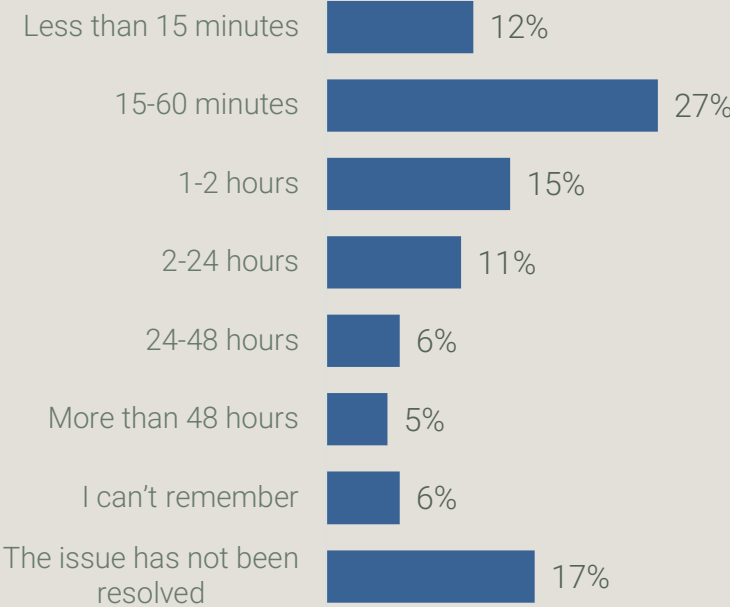
Broadband Issue deep dive

Pricing

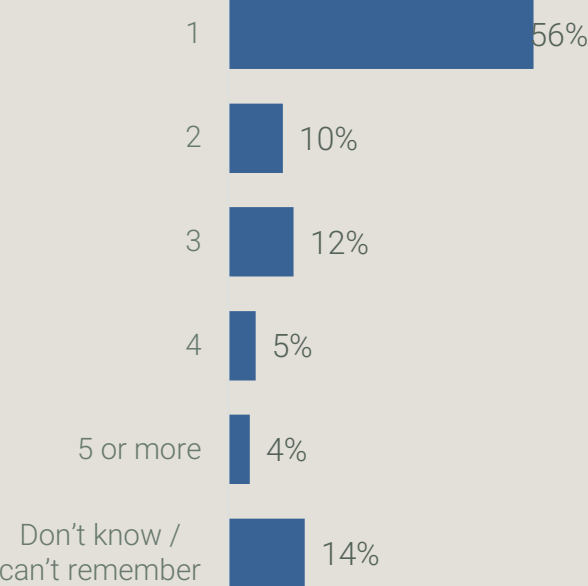
15% of consumers had an issue with their broadband pricing, of those, 56% contacted their provider.



Length of time to resolve



Number of times contacted provider

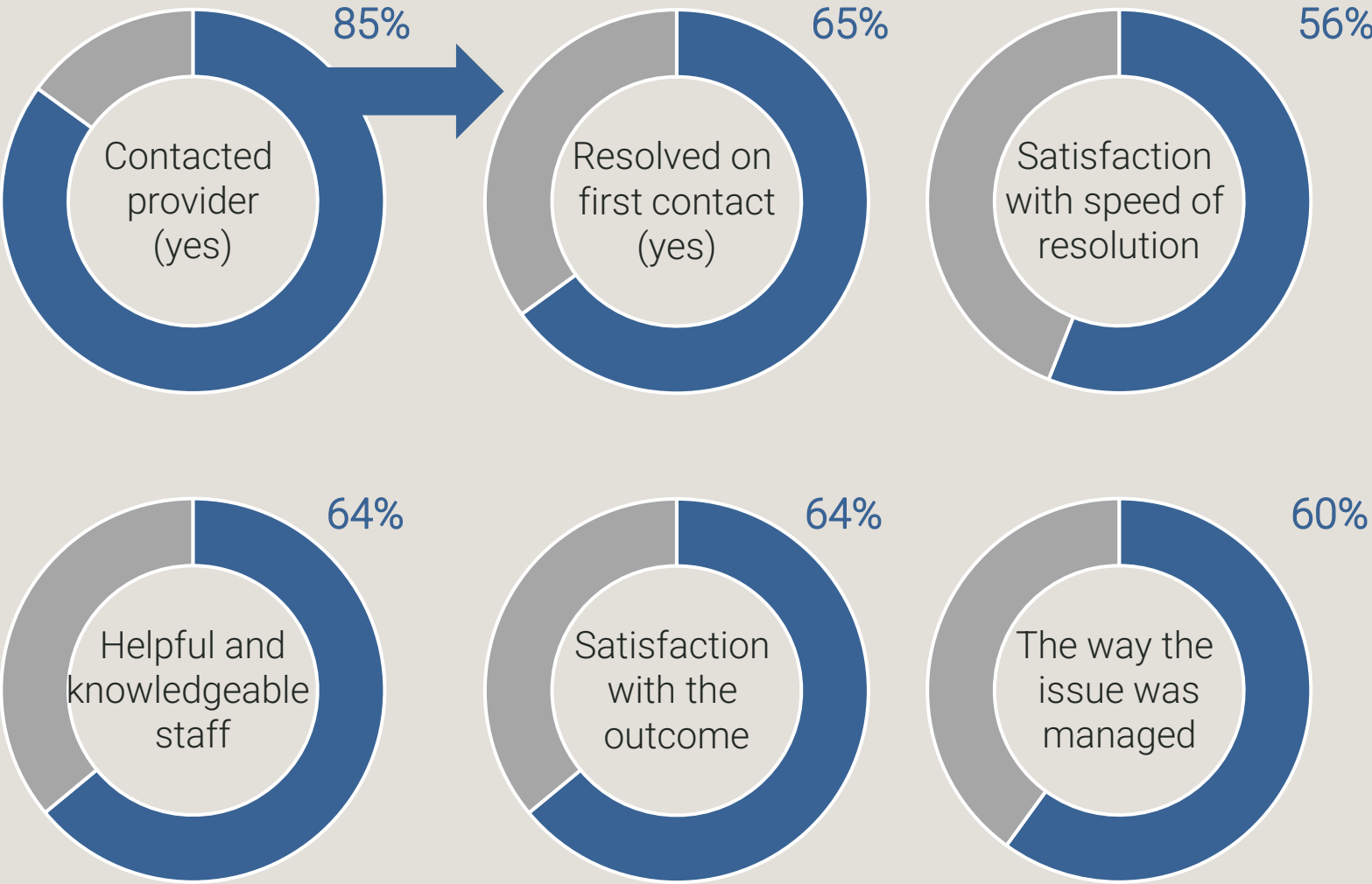


Did you contact your provider about this issue? Was this issue resolved on the first contact? How long did it take to resolve your issue successfully and completely, including any time spent waiting e.g. on the phone or in store? How satisfied were you with how long it took to resolve the issue? How satisfied or dissatisfied were you with how helpful and knowledgeable their staff were with the issue you had? How many times did you have to contact your provider to resolve this issue? And overall, how satisfied or dissatisfied were you with the outcome? And overall, how satisfied or dissatisfied were you with the way your provider managed the issue?
Base: Broadband customers who experienced pricing issue (n=374) and contact provider about issue (n=210)

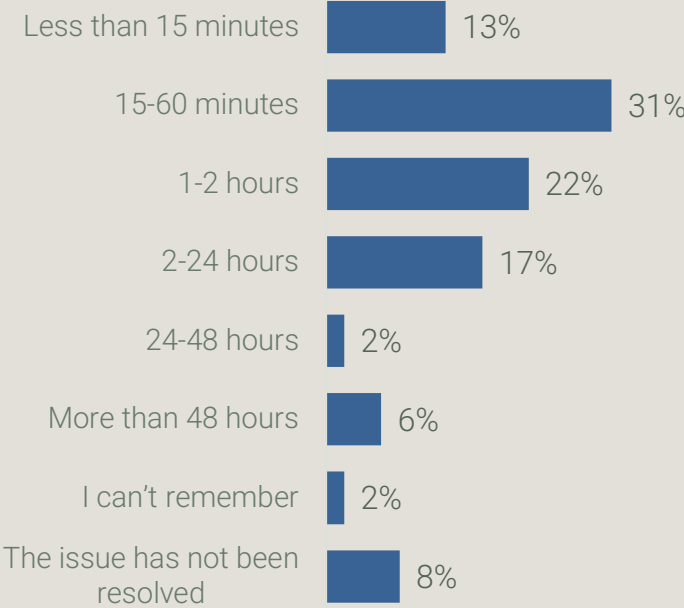
Broadband Issue deep dive

Billing

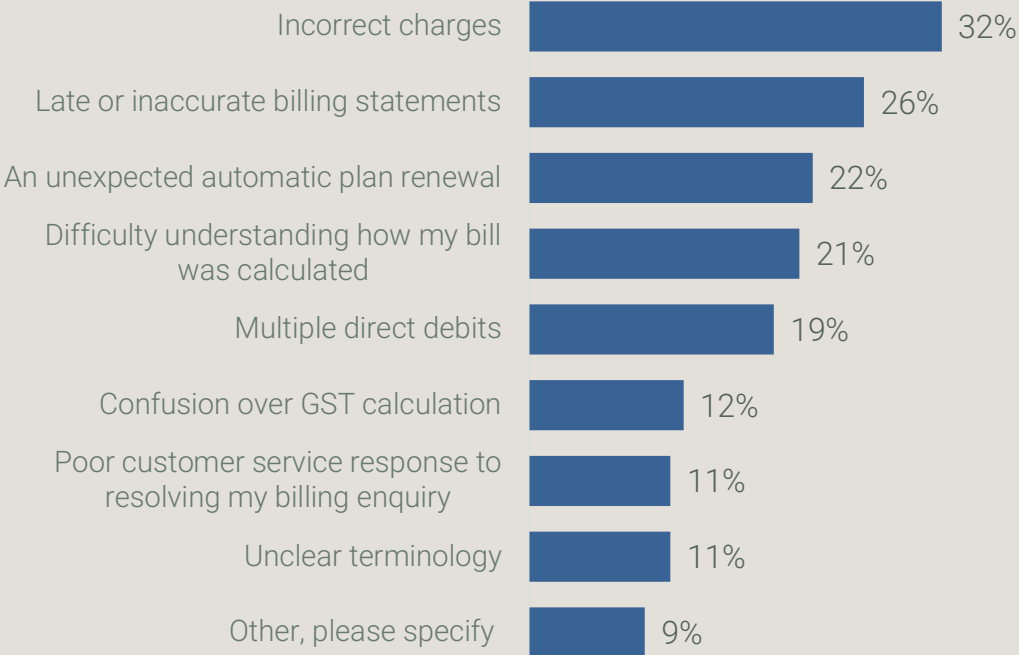
6% of consumers had an issue with their broadband billing, of those, 85% contacted their provider. Incorrect charges and late/inaccurate billing were the main issues.



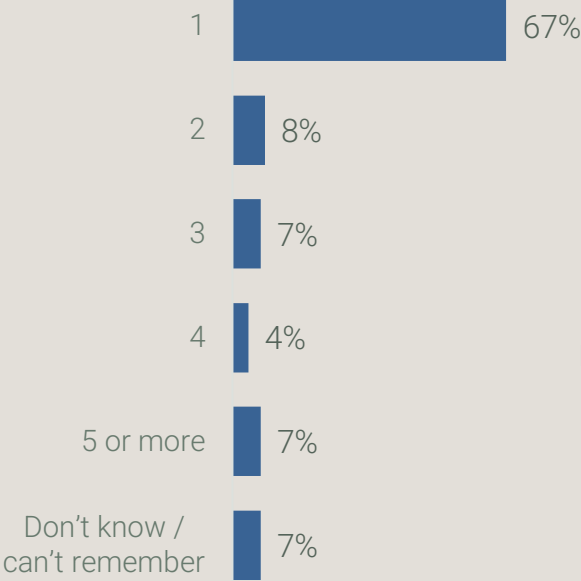
Length of time to resolve



Issue related to



Number of times contacted provider



Impact

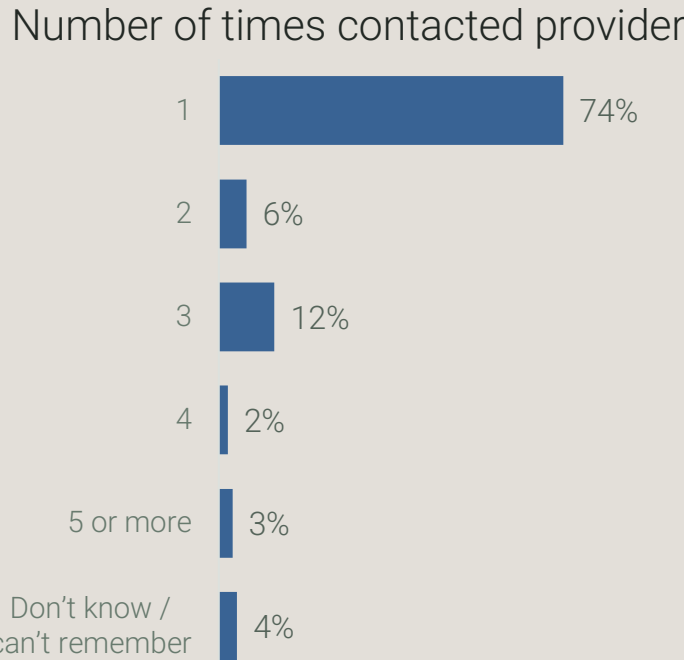
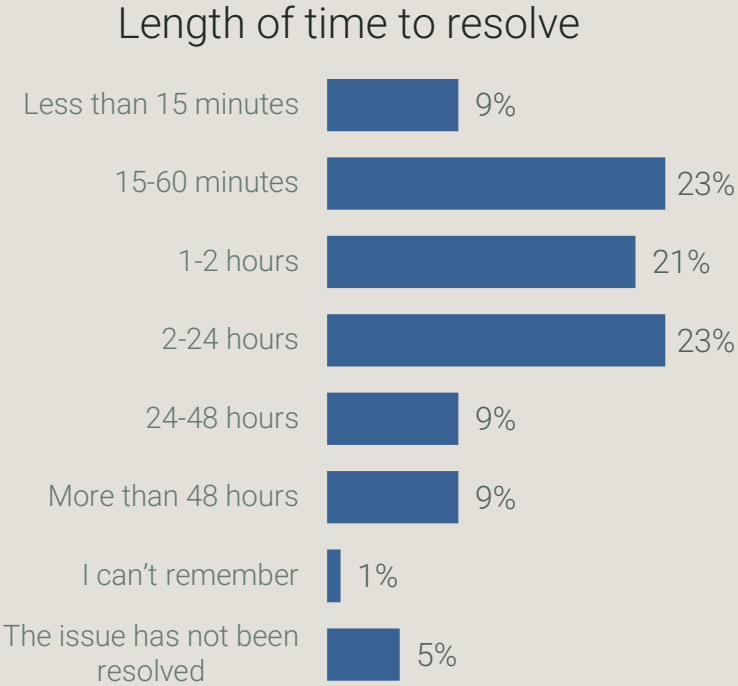
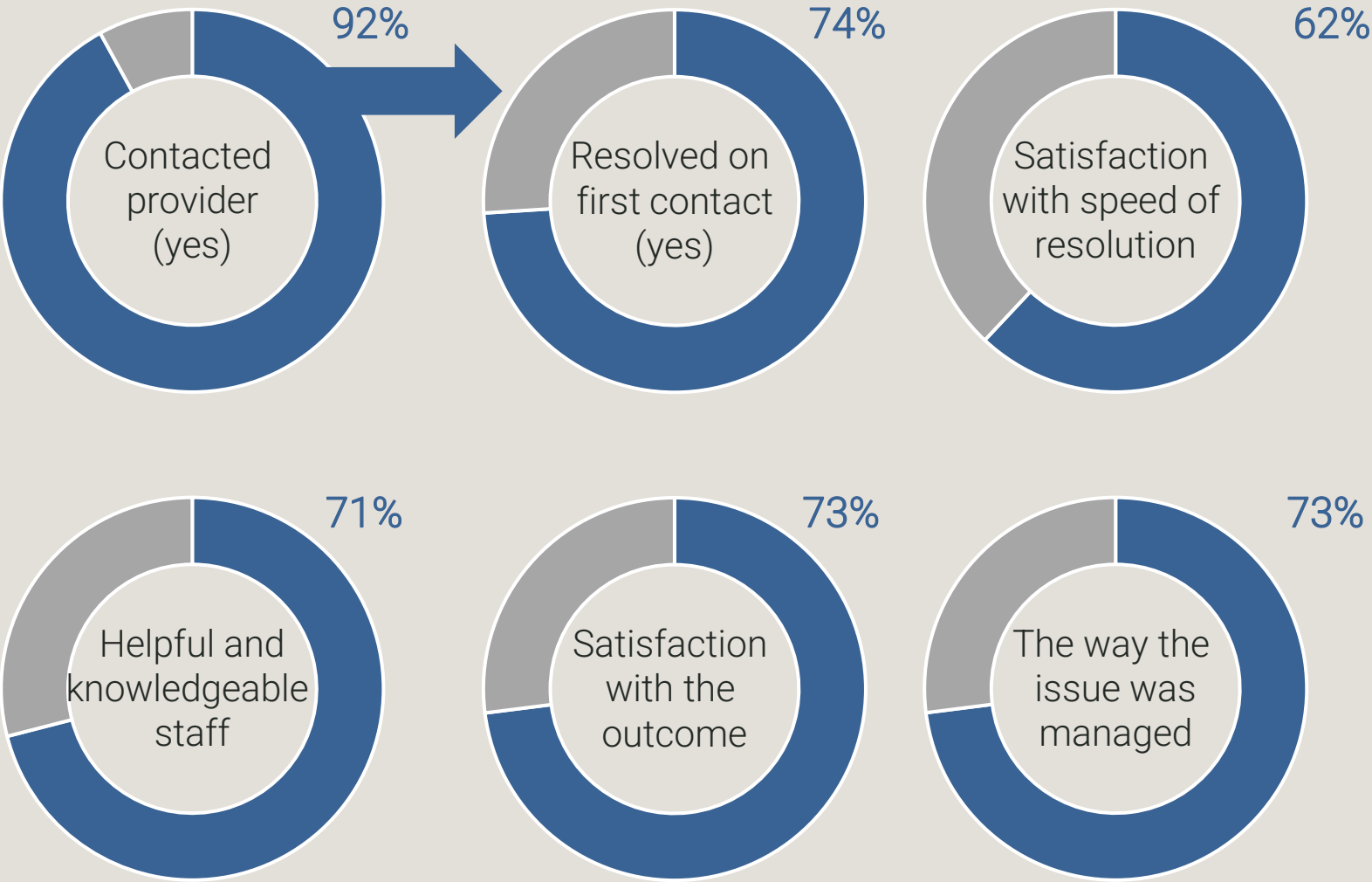


Did you contact your provider about this issue? Was this issue resolved on the first contact? How long did it take to resolve your issue successfully and completely, including any time spent waiting e.g. on the phone or in store? How satisfied were you with how long it took to resolve the issue? How satisfied or dissatisfied were you with how helpful and knowledgeable their staff were with the issue you had? How many times did you have to contact your provider to resolve this issue? And overall, how satisfied or dissatisfied were you with the outcome? And overall, how satisfied or dissatisfied were you with the way your provider managed the issue? Can you provide more details on the issue you had with your [issue], was it related to any of the below issues? Below is a list of different things you may have experienced as a result of having an issue with [issue].
Base: Broadband customers who experienced billing issue (n=149) and contact provider about issue (n=128)

Broadband Issue deep dive

Installation / new connection

5% of consumers had an issue with broadband installation, of those, 92% contacted their provider.



Did you contact your provider about this issue? Was this issue resolved on the first contact? How long did it take to resolve your issue successfully and completely, including any time spent waiting e.g. on the phone or in store? How satisfied were you with how long it took to resolve the issue? How satisfied or dissatisfied were you with how helpful and knowledgeable their staff were with the issue you had? How many times did you have to contact your provider to resolve this issue? And overall, how satisfied or dissatisfied were you with the outcome? And overall, how satisfied or dissatisfied were you with the way your provider managed the issue?

Base: Broadband customers who experienced installation issue (n=115) and contact provider about issue (n=105)

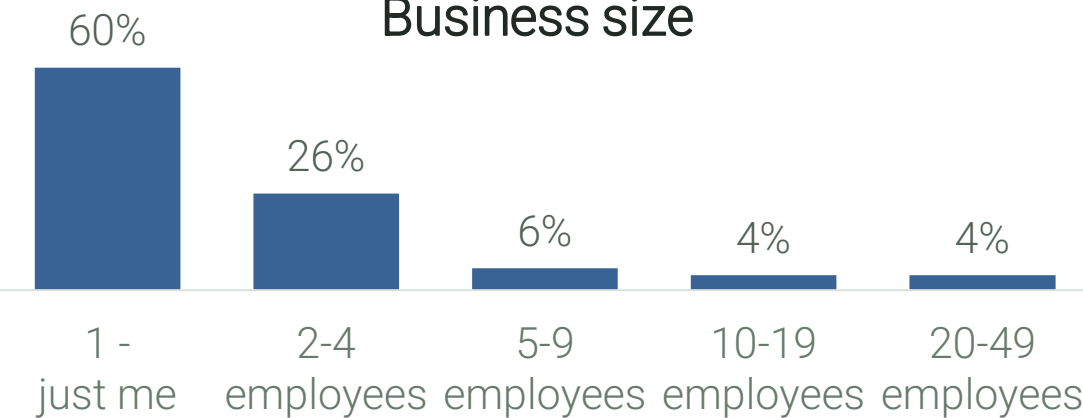


SME Insights

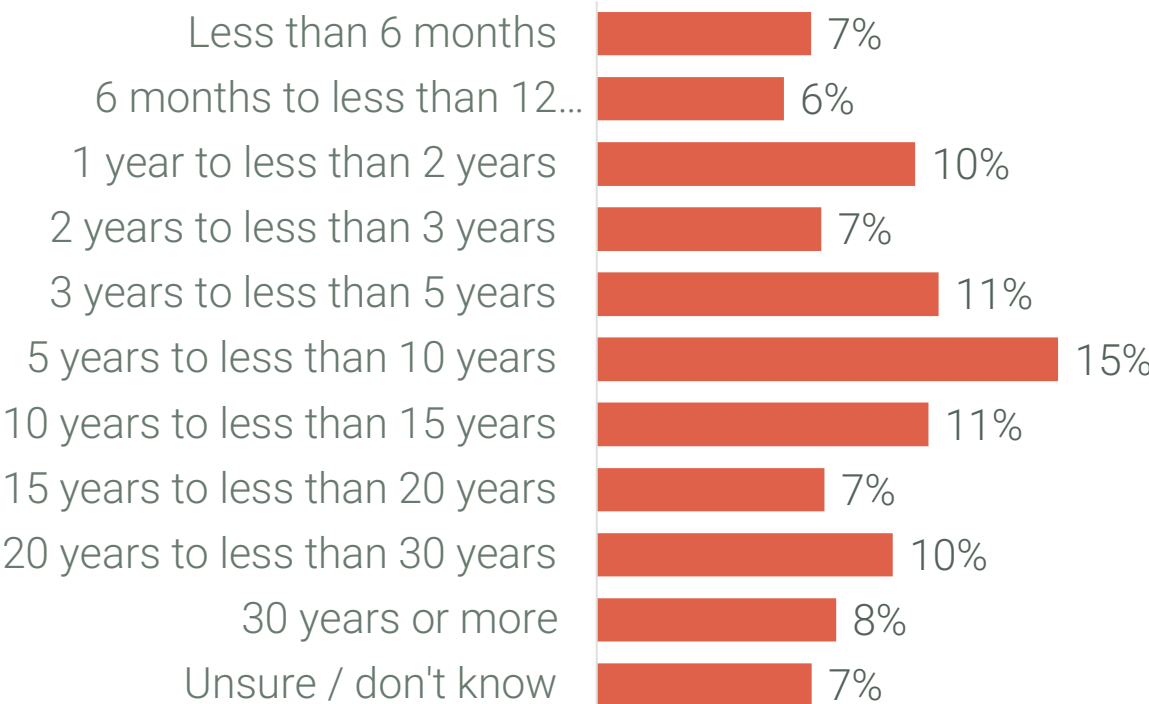
NPS and Satisfaction

Firmographics – Business

Business size

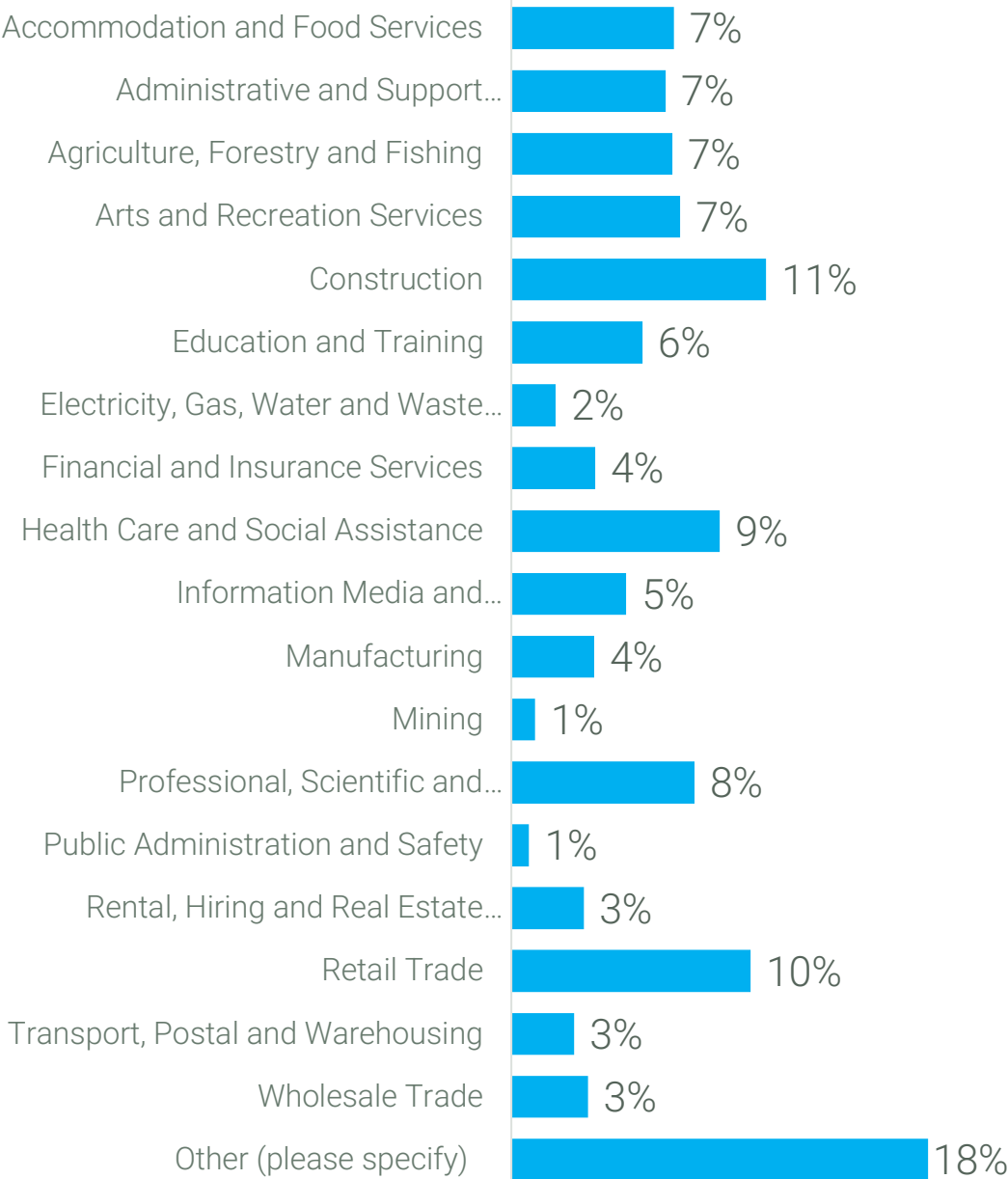


Age of company

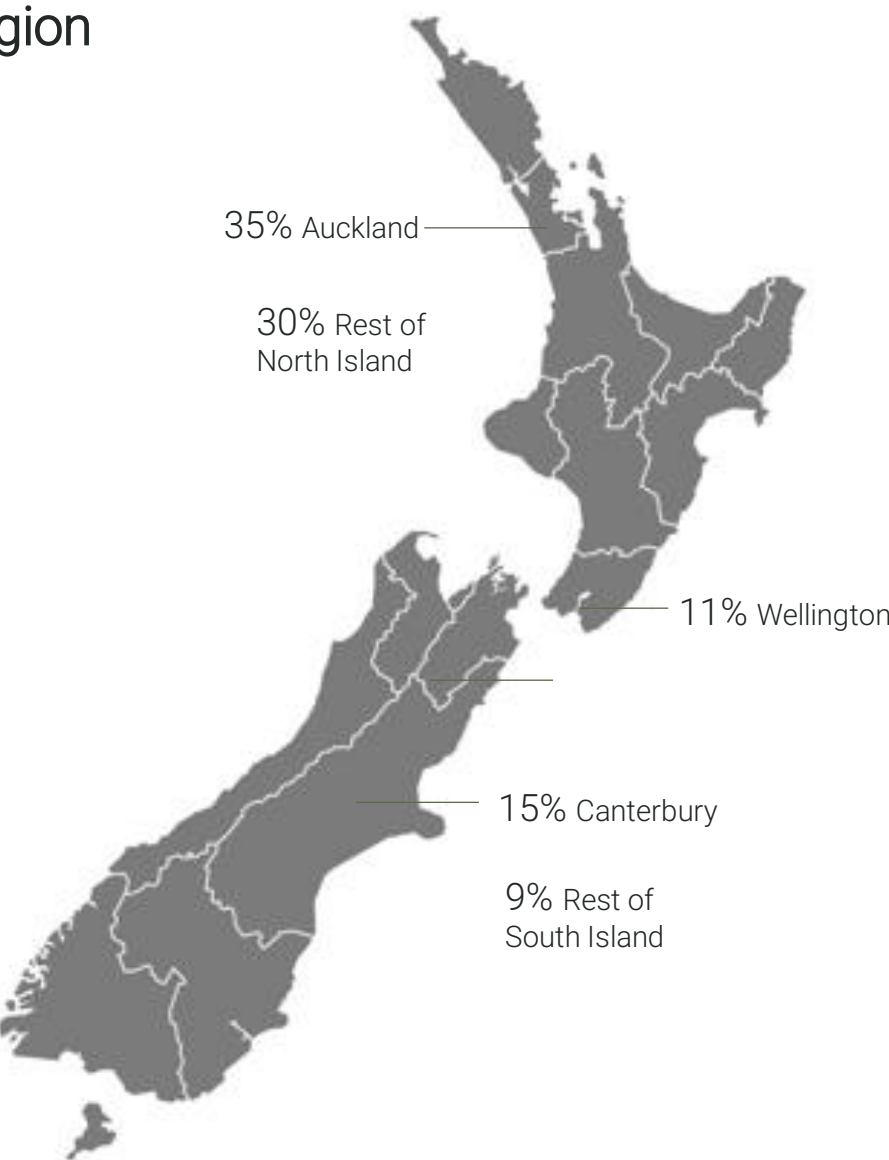


Sector

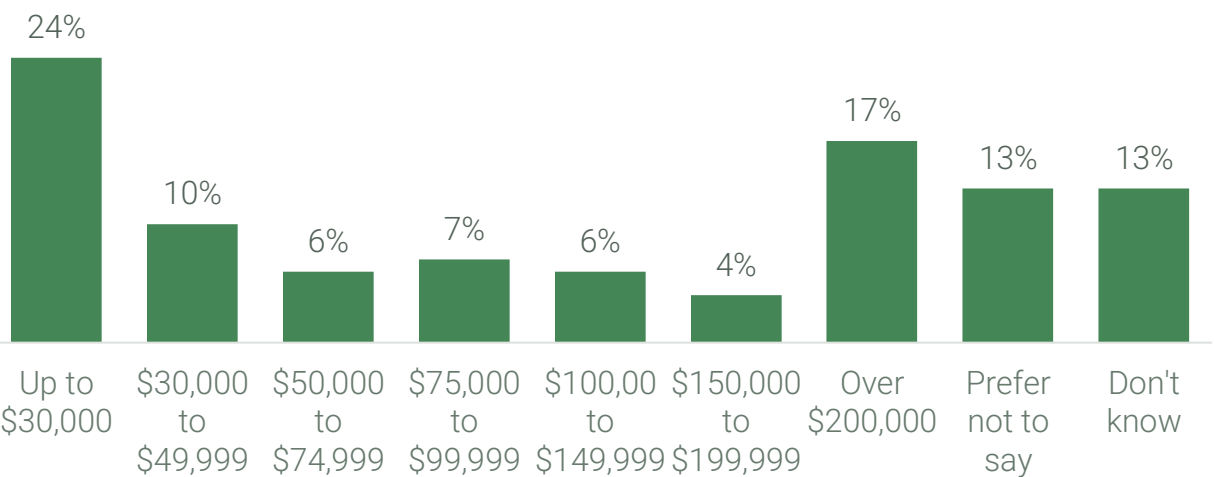
Multiple choice question



Region

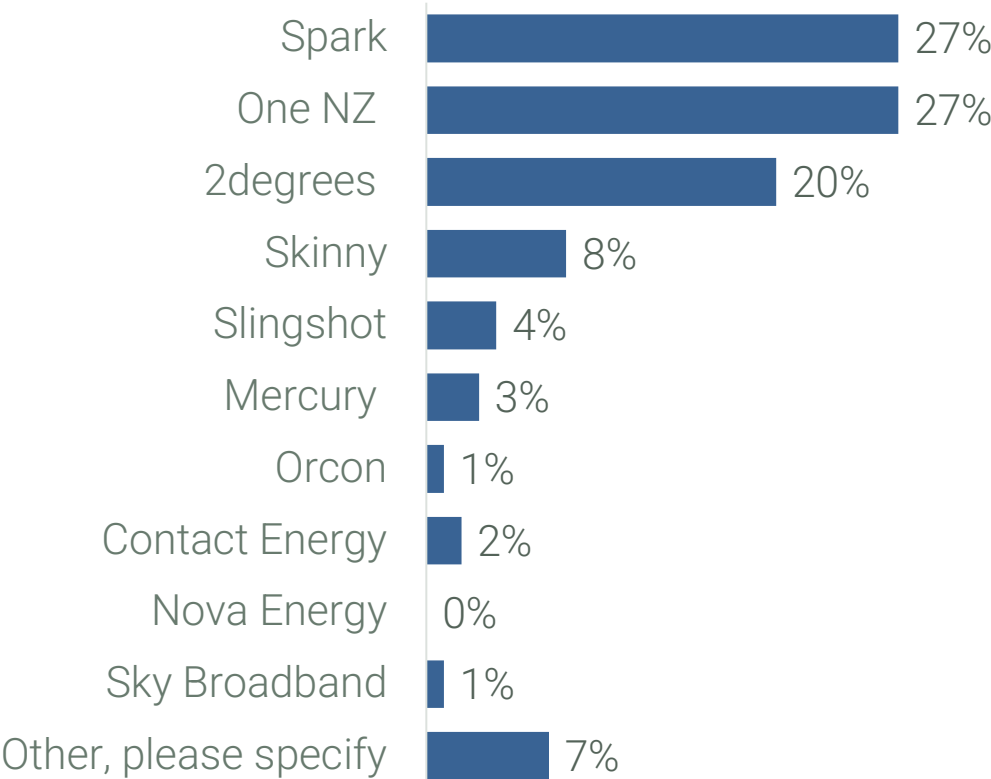


Business Revenue

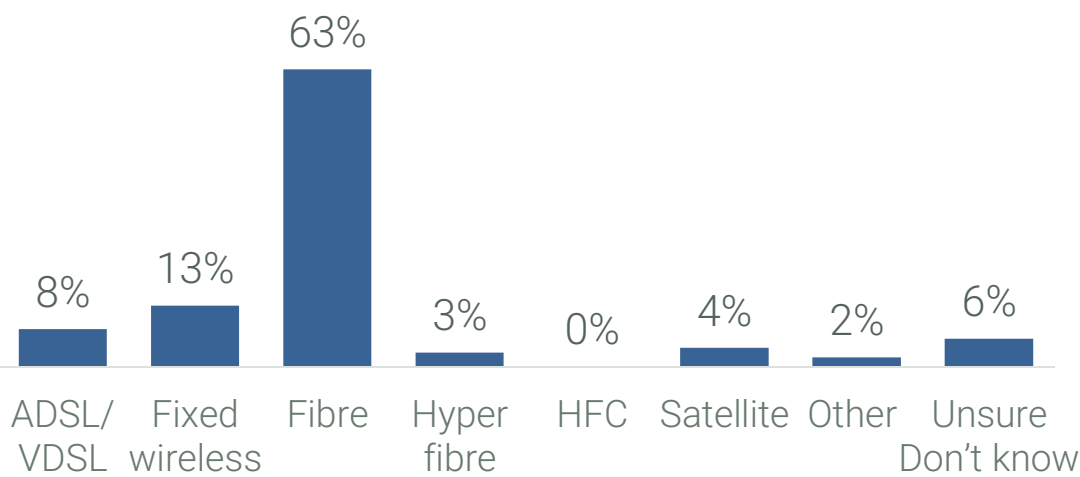


Products and Providers - SME

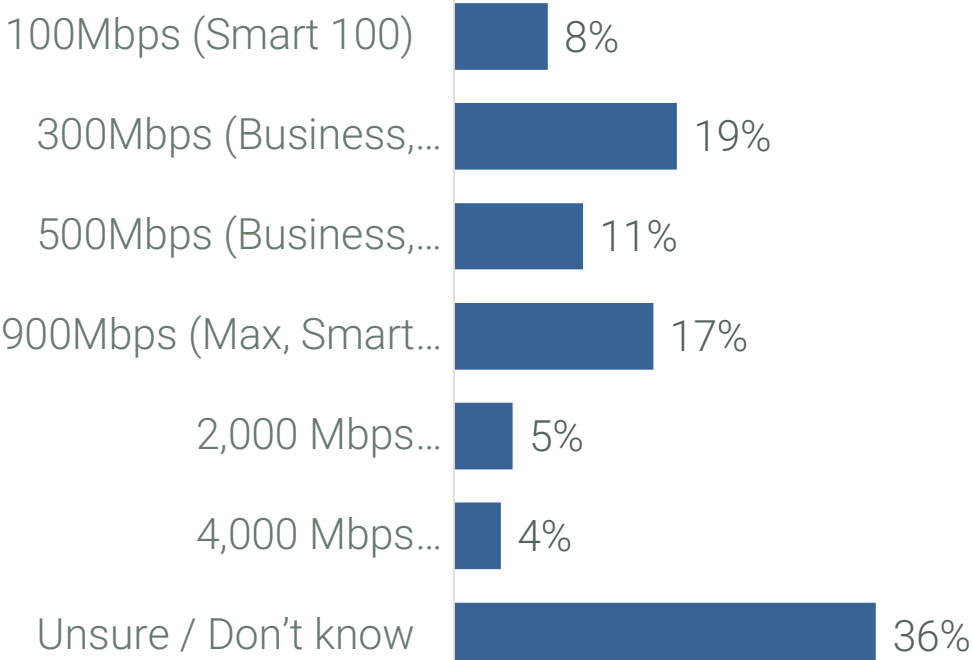
Broadband Provider



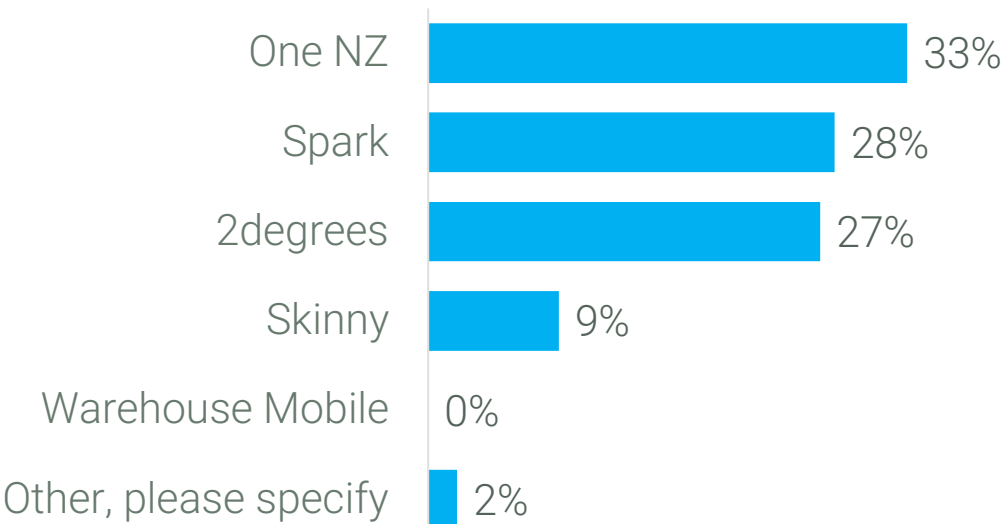
Broadband Technology



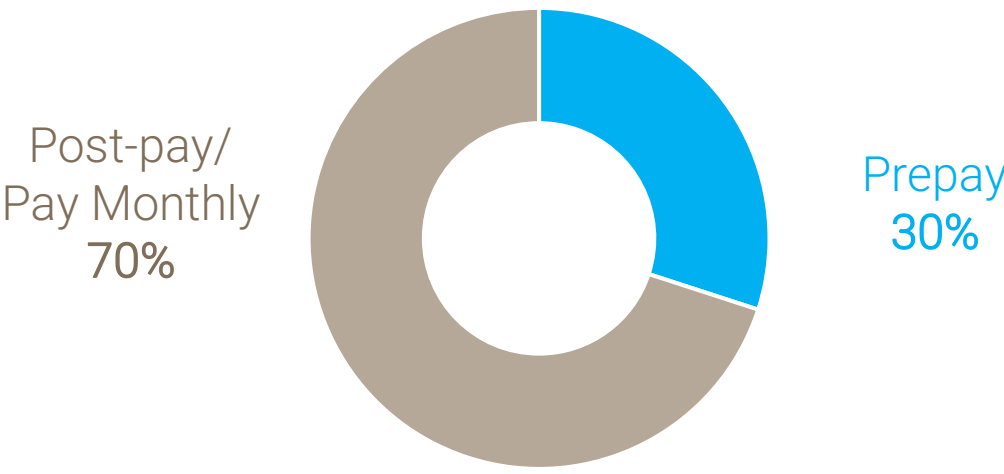
Fibre Speed



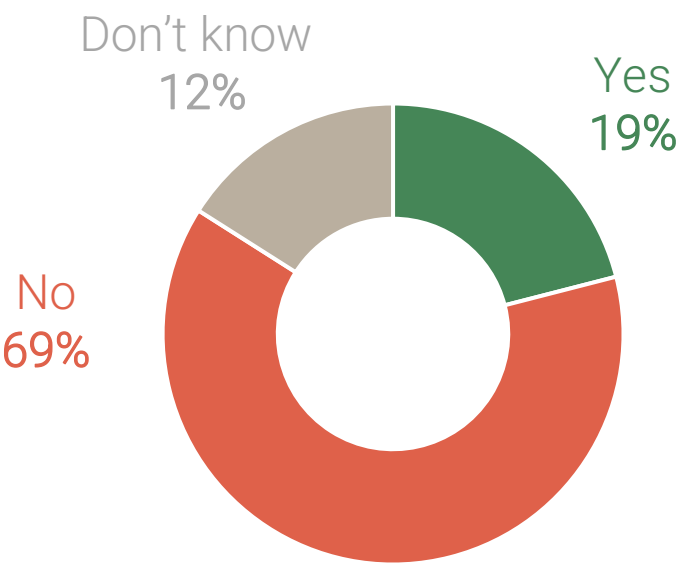
Mobile Provider



Mobile Plan



Electricity Bundle



SME SUMMARY – January – June 2025

Neither mobile nor broadband hit the favourable threshold of +20. Broadband posts an NPS of -6, while mobile NPS is at +1, with NPS significantly lower among SMEs with 5-9 employees.

Just under three quarters of mobile customers (73%), and 69% of broadband customers said they were satisfied with their provider.

Satisfaction has declined slightly while NPS has improved, albeit slightly, since July - December 2024.

Skinny and 2degrees have positive NPS scores for mobile; all broadband providers post negative NPS scores.

Providers receive low scores for value for money, customer service and pricing among both broadband and mobile SME customers. All aspects of mobile and broadband satisfaction fall below the favourable threshold of 80%.

12% of broadband consumers switched broadband provider and 11% switched mobile provider in the last 12 months.

Overall satisfaction with switching fails to meet the 80% satisfaction benchmark for both mobile (76%) and broadband (69%).

36% of mobile customers have experienced an issue with their mobile service in the past 6 months. 43% of broadband customers have experienced an issue with their broadband internet service in the past 6 months.

Net Promoter Score

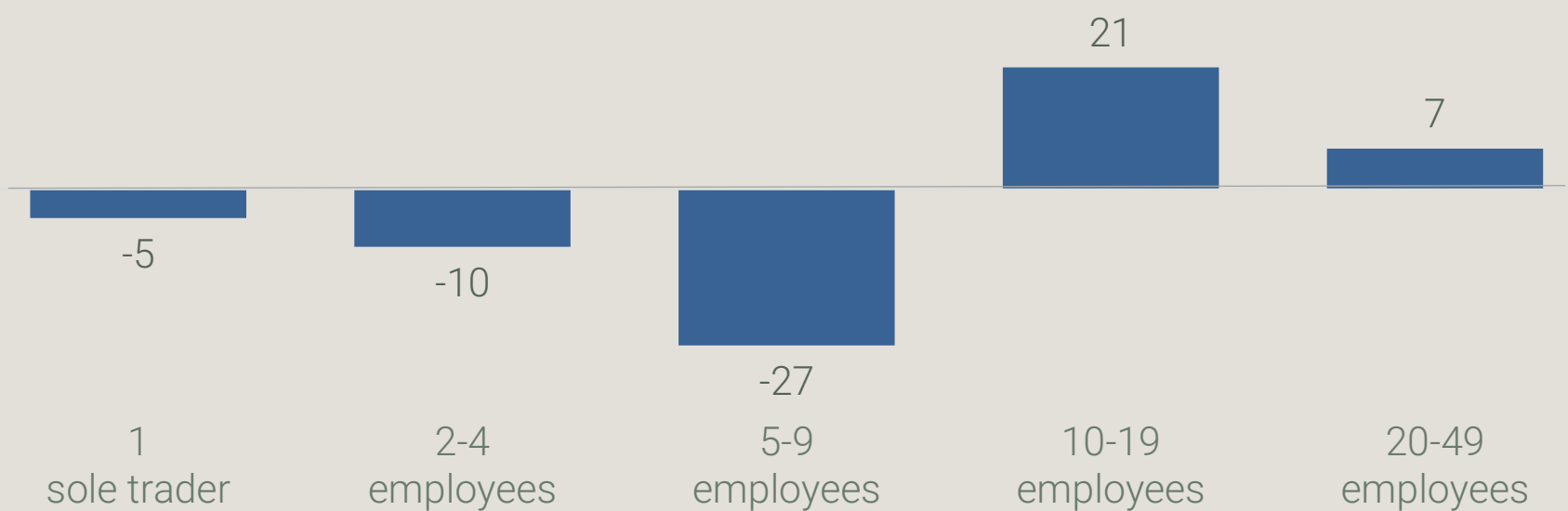
Neither mobile nor broadband hit the favourable threshold of +20.
Broadband posts an NPS of -6, while mobile NPS is at +1, with NPS significantly lower among SMEs with 5-9 employees.



Mobile NPS
+1



Broadband NPS
-6



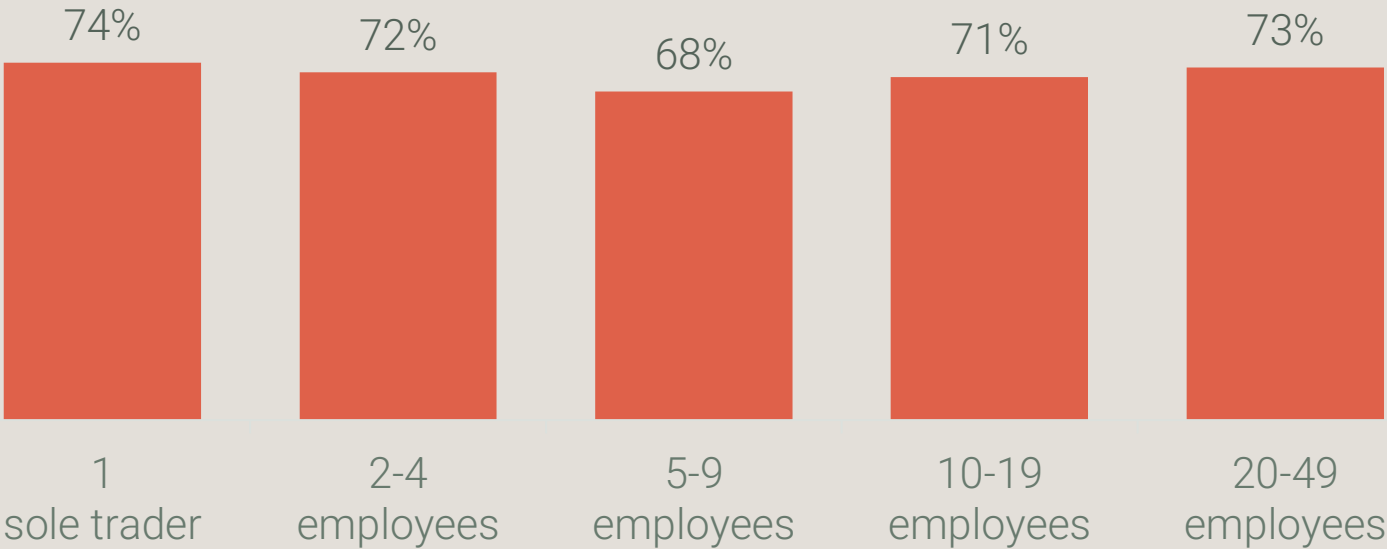
NPS measures the loyalty of customers to a company, based on their ratings on a 0-10 scale, customers are classified into three categories: Promoters (9-10), Passives (7-8), Detractors (0-6). NPS is then calculated using the following formula: $NPS = (\text{Percentage of Promoters} - \text{Percentage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

Overall satisfaction

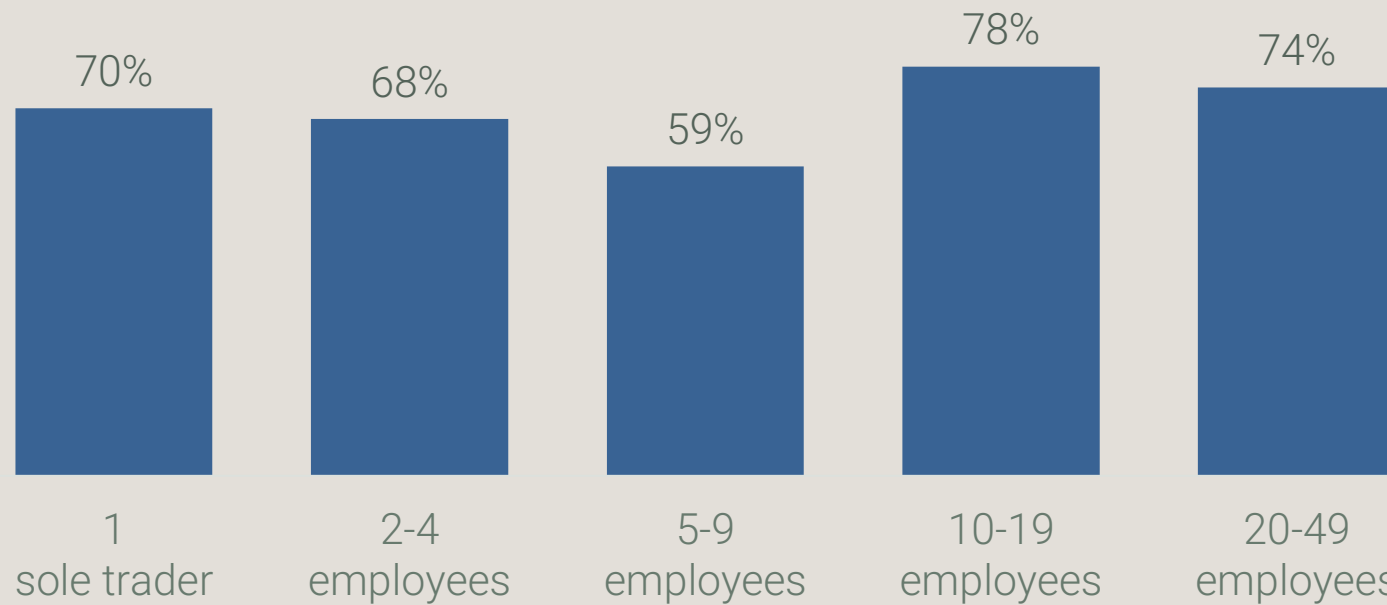
Neither mobile or broadband meet the favourable threshold of 80%. Just under three quarters of mobile customers (73%), and 69% of broadband customers said they were satisfied with their provider.



Mobile
Satisfaction
73%



Broadband
Satisfaction
69%



NPS and satisfaction trended

NPS has increased slightly but satisfaction continued to decline since Jul-Dec 2024.

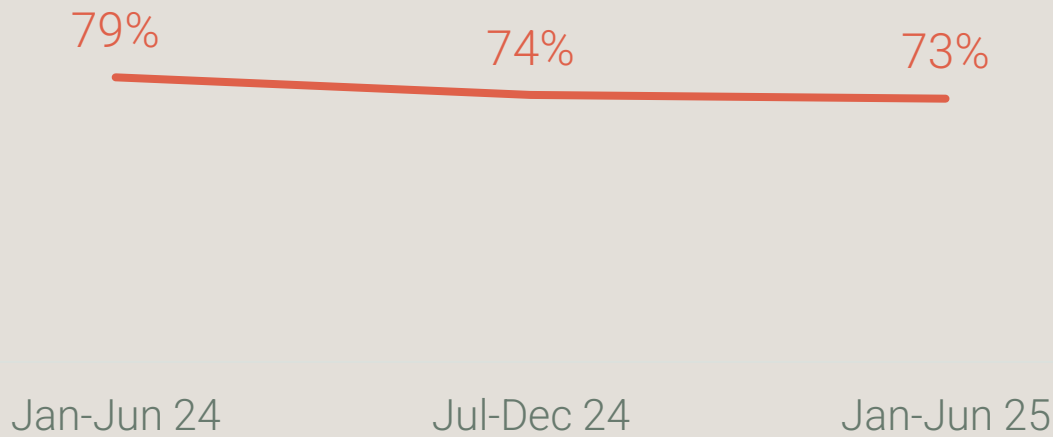


Mobile

Net Promoter Score



Satisfaction

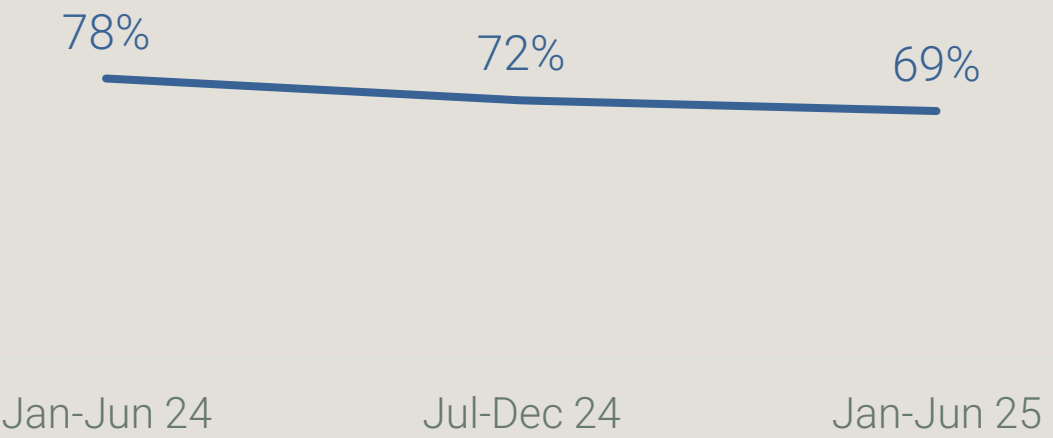


Broadband

Net Promoter Score



Satisfaction



Considering your experience with your provider, how likely would you be to recommend them to a friend or family member? (Scale 0-10)
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 1-5)
Base: Jan – Jun 25 Broadband provider Population=657, Mobile provider Population=736.

NPS and satisfaction by provider

Skinny and 2degrees have positive NPS scores for mobile and only Skinny Mobile exceeds the favourable threshold of +20. Broadband provider NPS score remains negative with the exception of 2degrees (0).



Mobile



Broadband

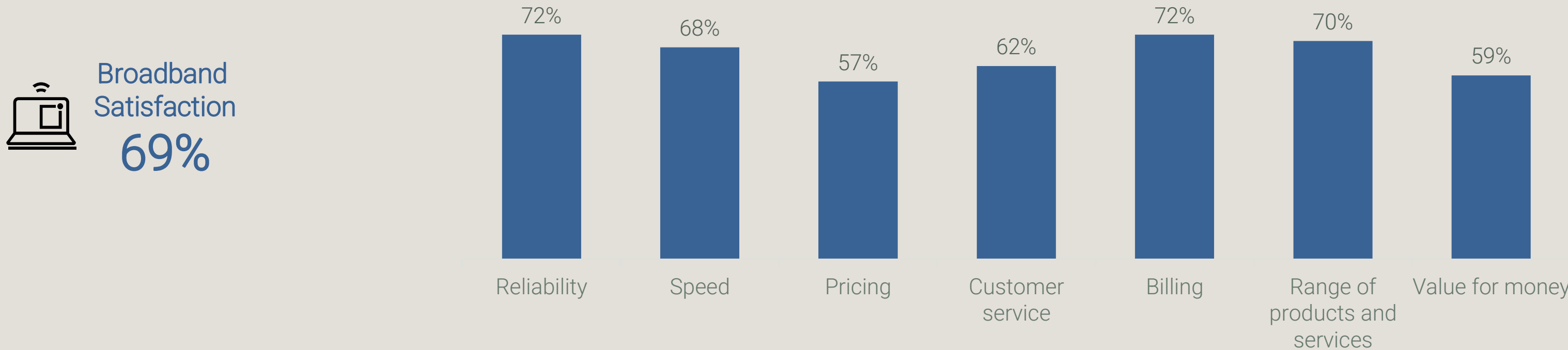
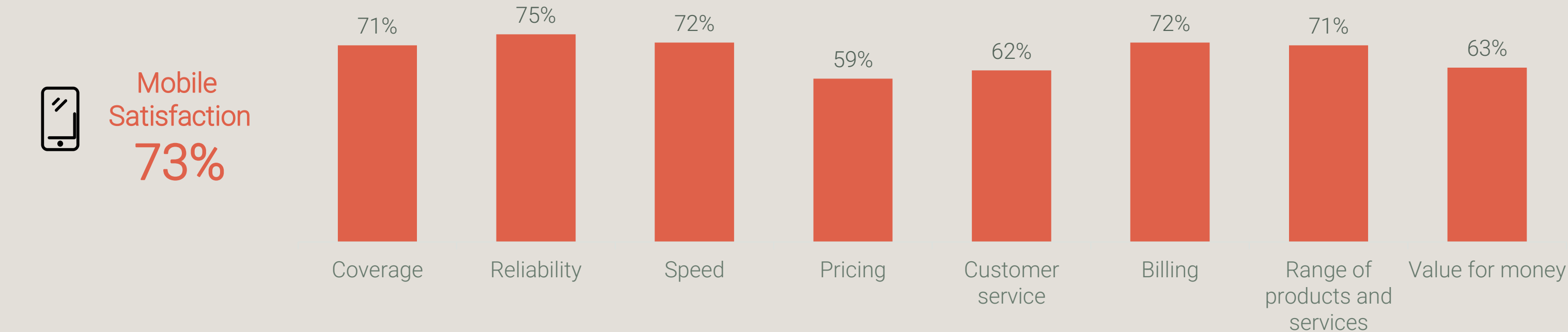


Considering your experience with your provider, how likely would you be to recommend them to a friend or family member? (Scale 0-10)
Overall, how satisfied or dissatisfied are you with your provider for your broadband / household internet service / mobile service? Please take into account their products and services, as well as your experience of dealing with them. (Scale 1-5)
Base: Jan – Jun 25 Spark mobile customers n=205, One NZ mobile customers n=242, 2degrees mobile customers n=198, Skinny mobile customers n=66.
Spark broadband customers n=175, One NZ broadband customers n=177, 2degrees broadband customers n=132.

Satisfaction

(rating 4-5 on 5 point scale)


Providers receive low scores for value for money, customer service and pricing among both broadband and mobile SME customers. All aspects of mobile and broadband satisfaction fall below the favourable threshold of 80%.



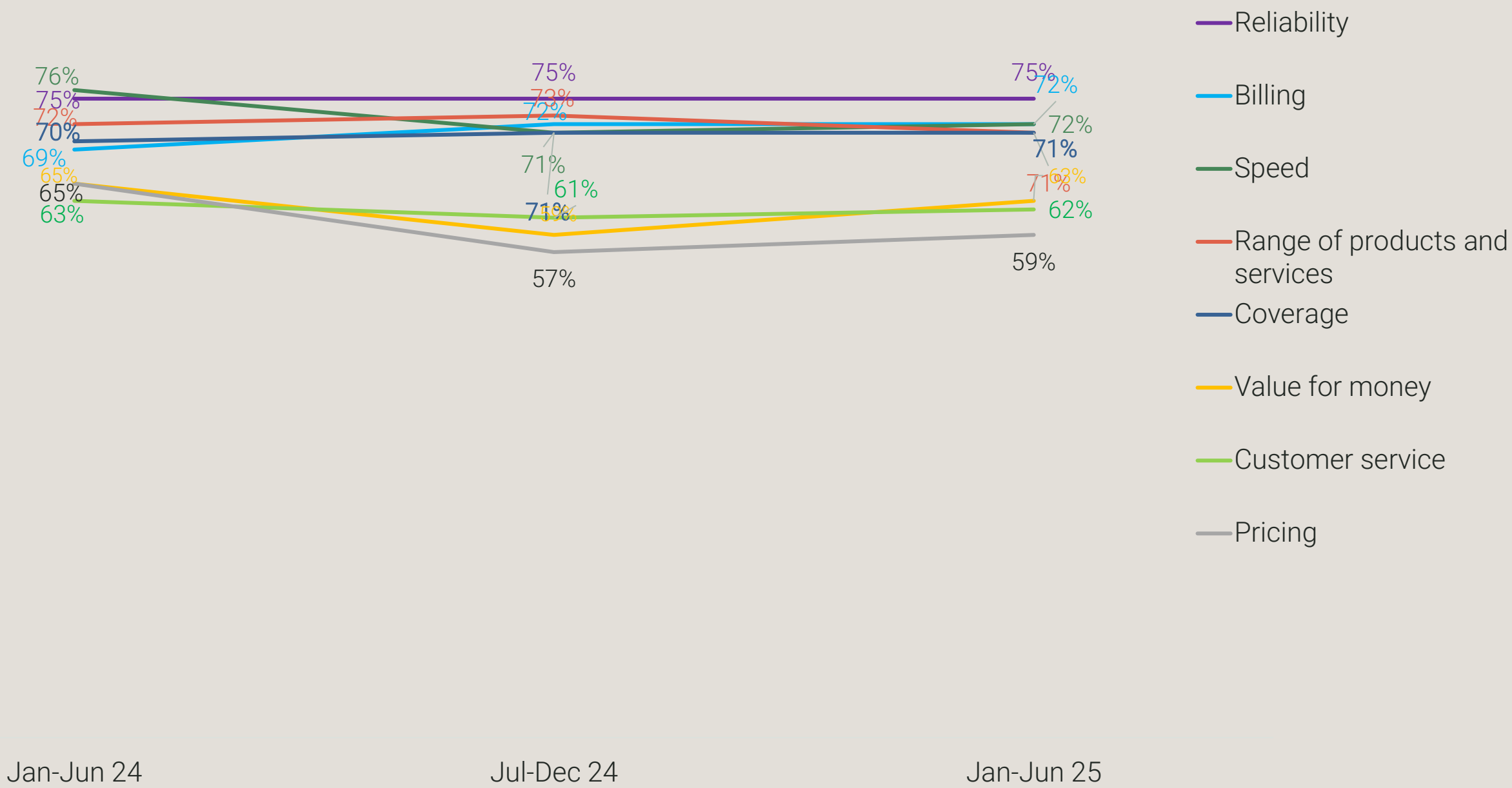
How satisfied are you with %“Mobile-Provider”% for your mobile service in relation to the following aspects?
How satisfied are you with %“Broadband-Provider”% for your broadband service in relation to the following aspects?
Base: Jan – Jun 25 Broadband provider Population=657, Mobile provider Population=736.

Mobile Satisfaction Trended

Many aspects are relatively unchanged, however, satisfaction with mobile pricing and mobile speed has declined since early 2024.

 **Mobile**

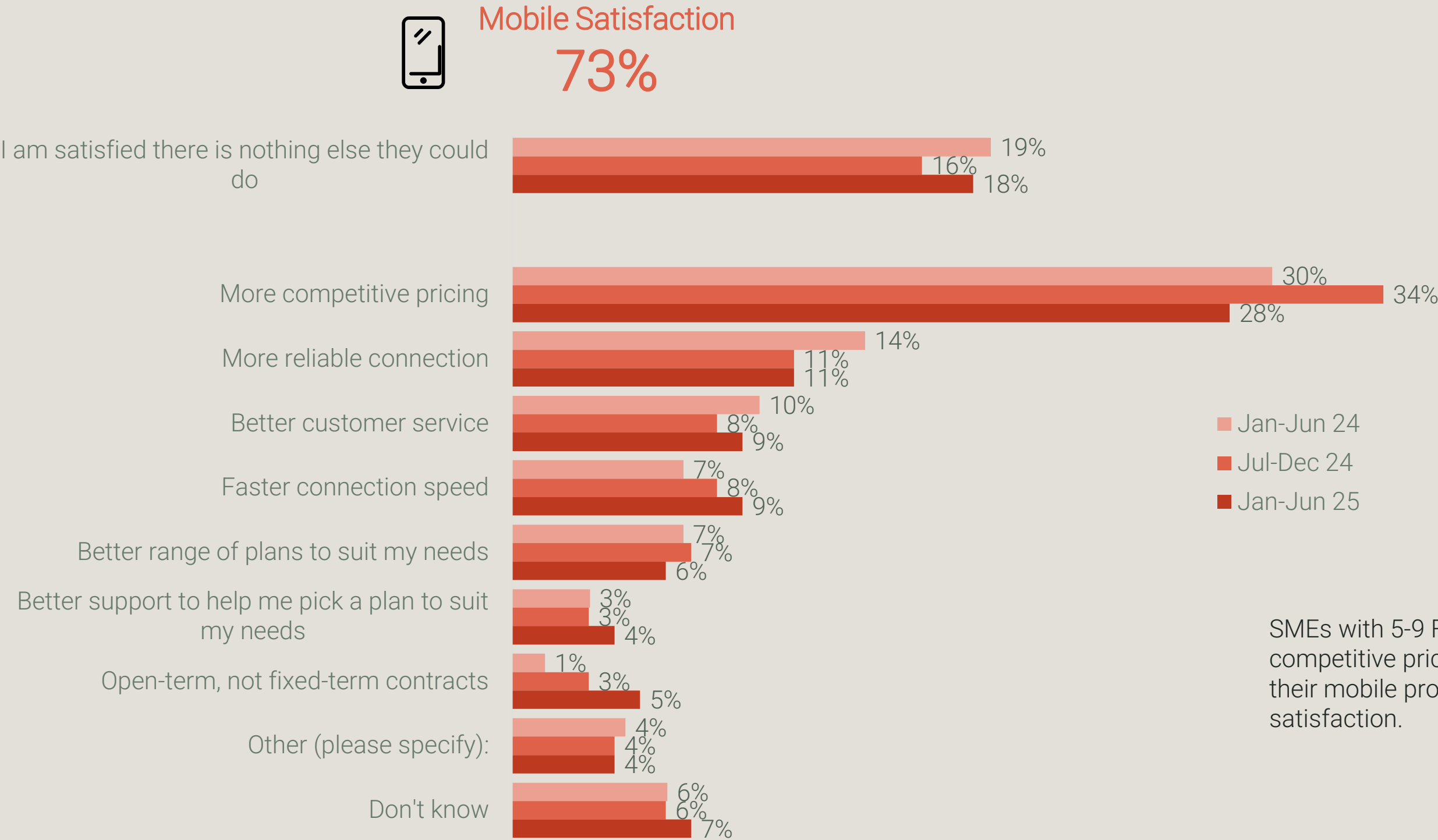
Satisfaction
(rating 4-5 on 5 point scale)



How satisfied are you with %“Mobile-Provider”% for your mobile service in relation to the following aspects?
Base: Jan – Jun 25 Mobile provider Population=736.

How to improve mobile provider satisfaction

When prompted, 28% of mobile customers cite more competitive pricing as the one thing their provider could do to improve service.



SMEs with 5-9 FTE are more likely to cite competitive pricing (44%) as the one thing their mobile provider could do to improve satisfaction.

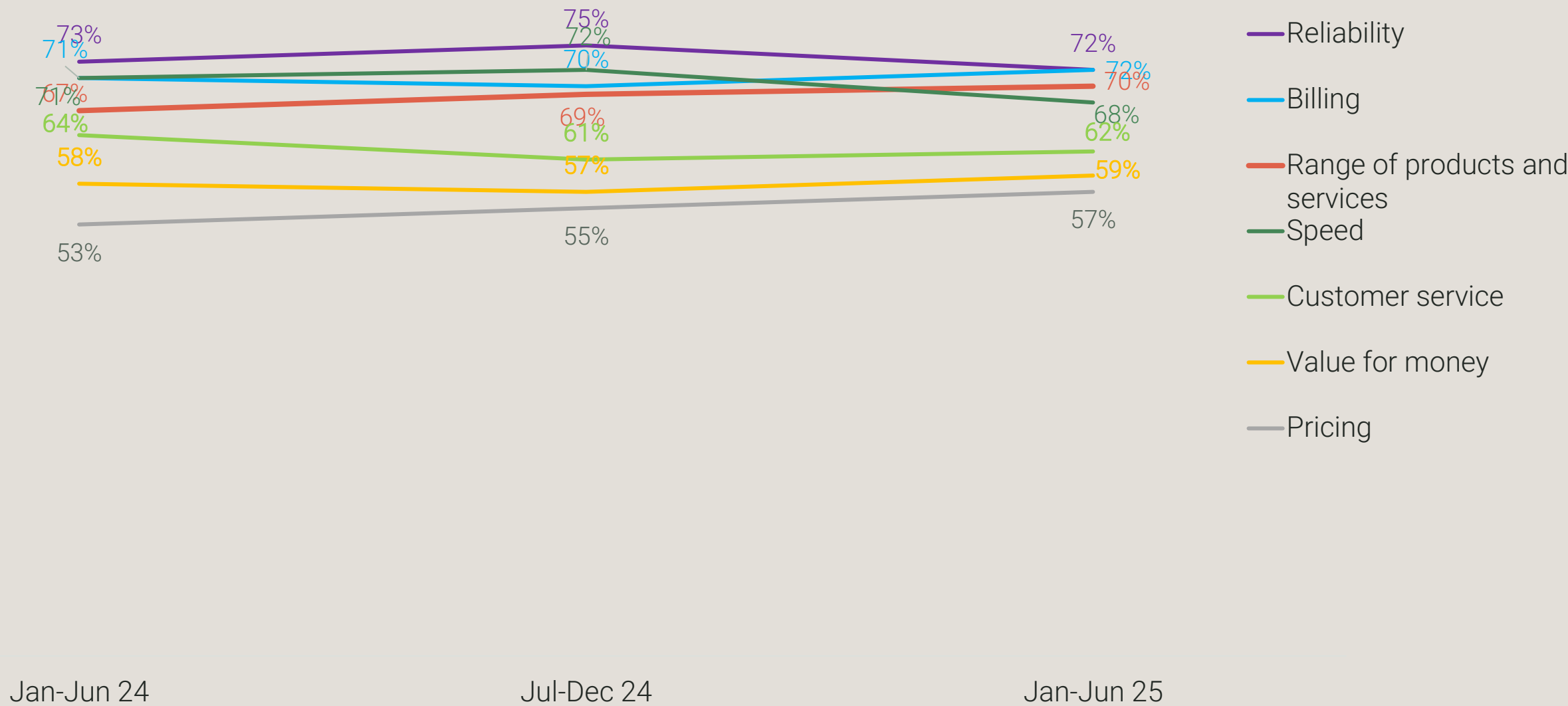
Broadband Satisfaction Trended

Satisfaction with Broadband pricing, and product range has increased slightly since early 2024.



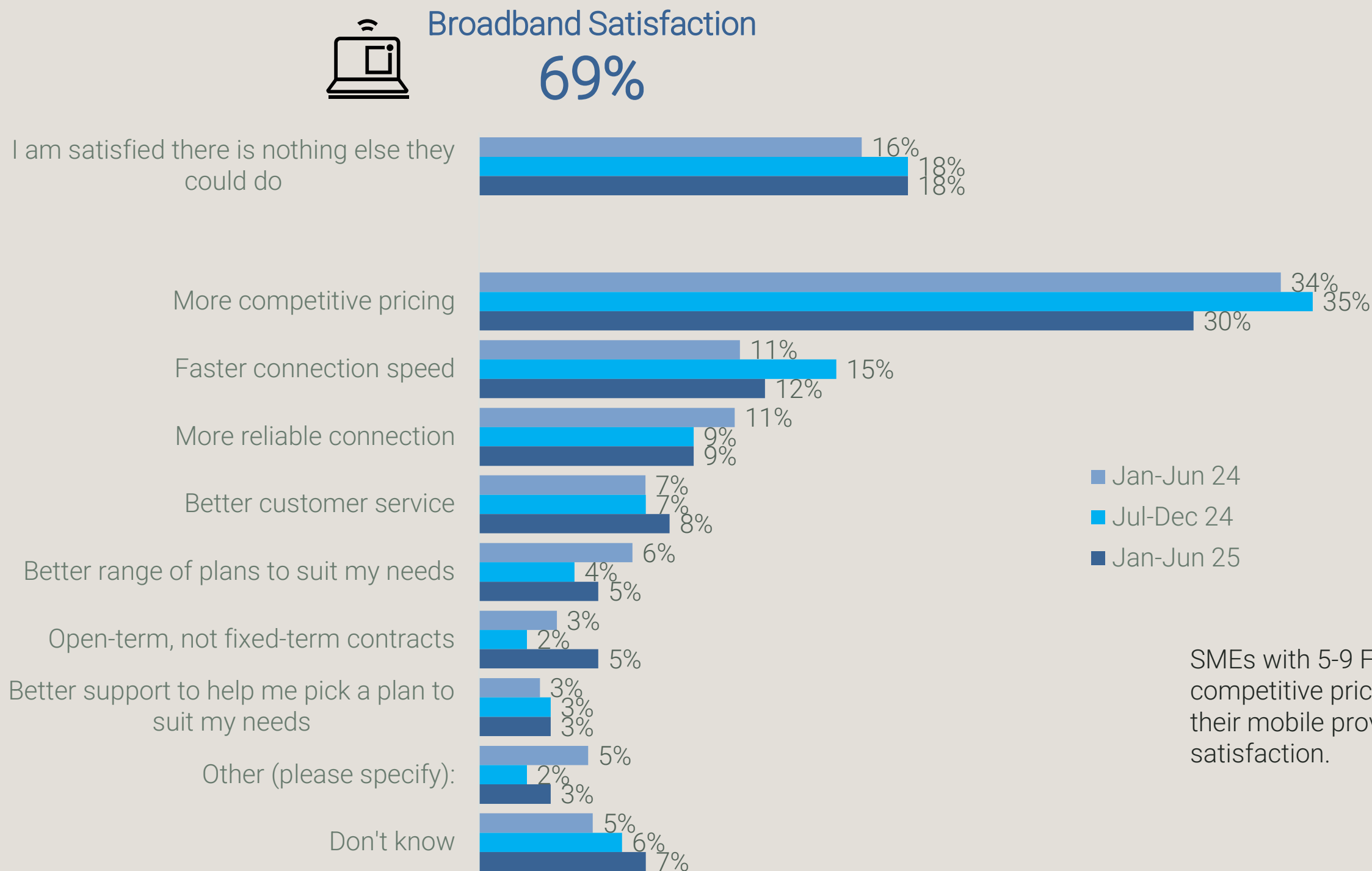
Broadband

Satisfaction
(rating 4-5 on 5 point scale)



How to improve broadband provider satisfaction

When prompted 30% of broadband customers cite more competitive pricing as the one thing their provider could do to improve service.



SMEs with 5-9 FTE are more likely to cite competitive pricing (44%) as the one thing their mobile provider could do to improve satisfaction.



 **INSIGHTS HQ**

SME Insights

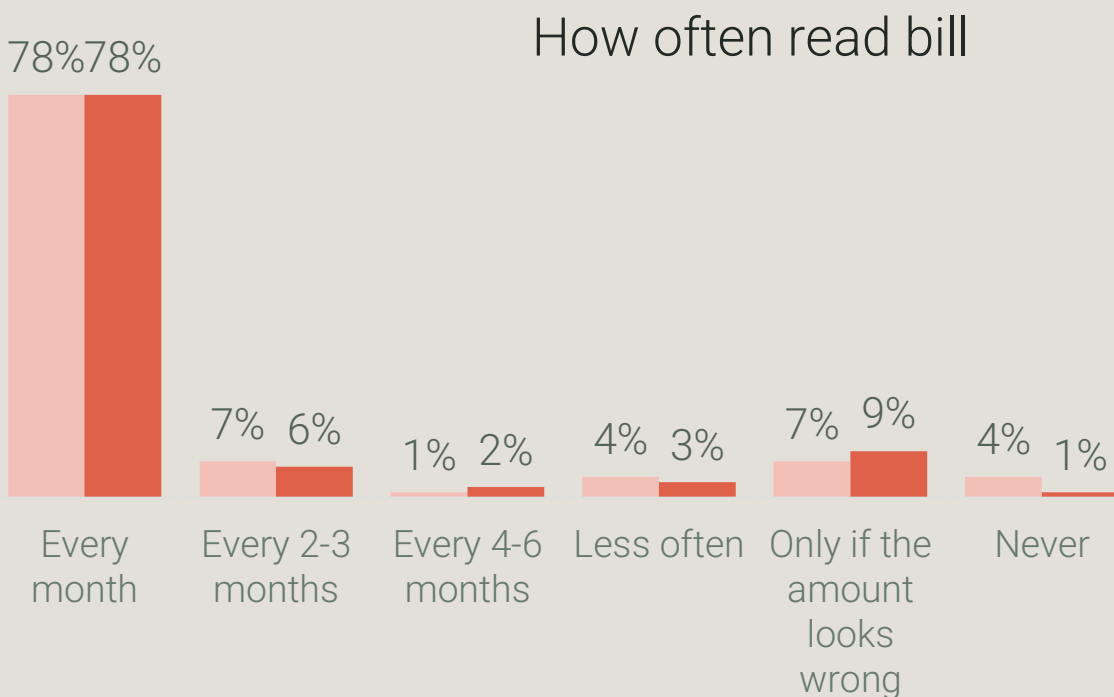
Billing

Billing comprehension

Of those who read their bill, the majority (67% - 69%) find the bill easy to understand.

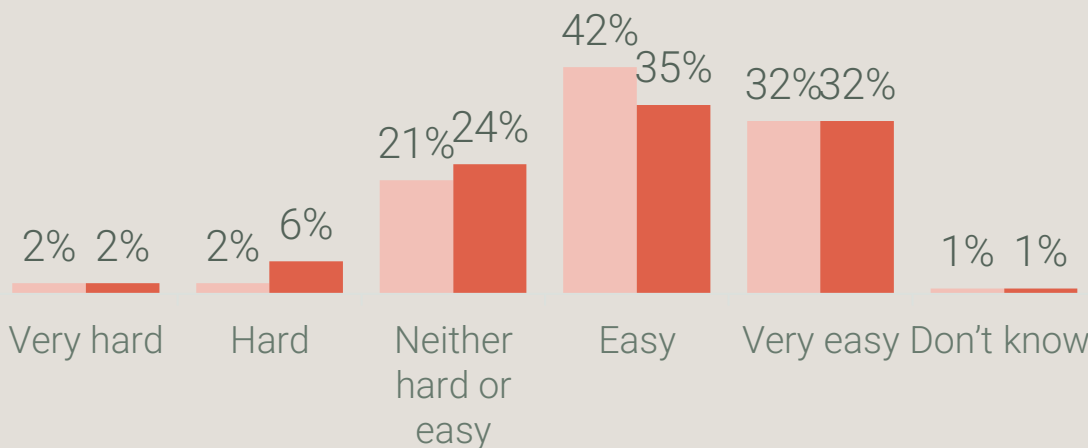


Mobile

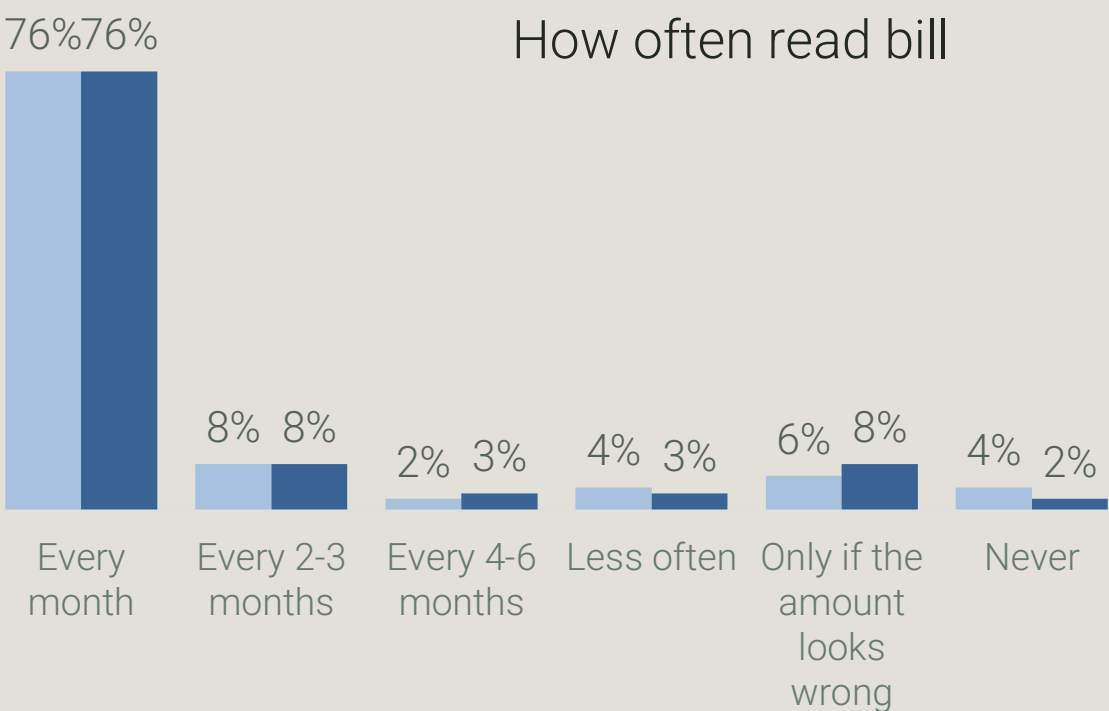


Jul-Dec 24
Jan-Jun 25

Billing comprehension

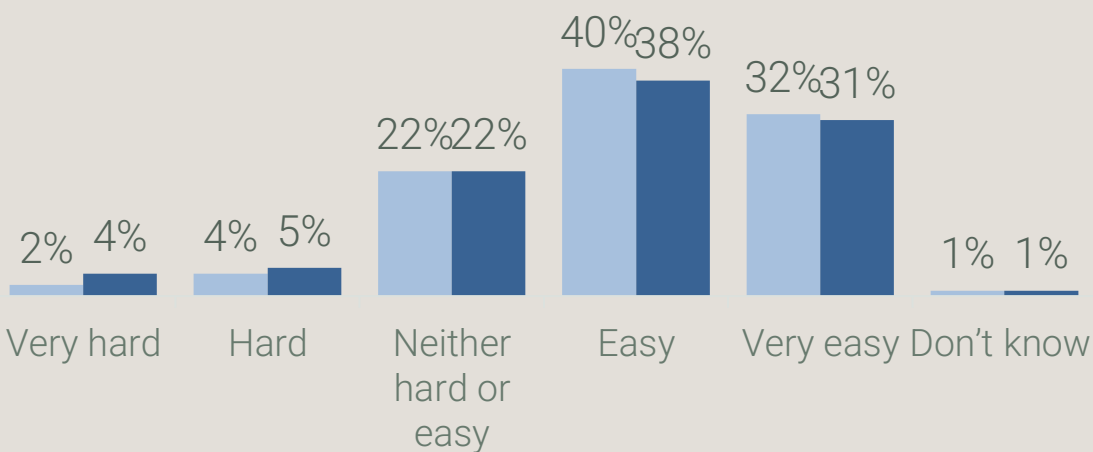


Broadband



Jul-Dec 24
Jan-Jun 25

Billing comprehension





Q INSIGHTS HQ

SME Insights

Tenure and Switching Behaviour

Tenure

Tenure is similar among mobile and broadband customers.



Mobile



Broadband

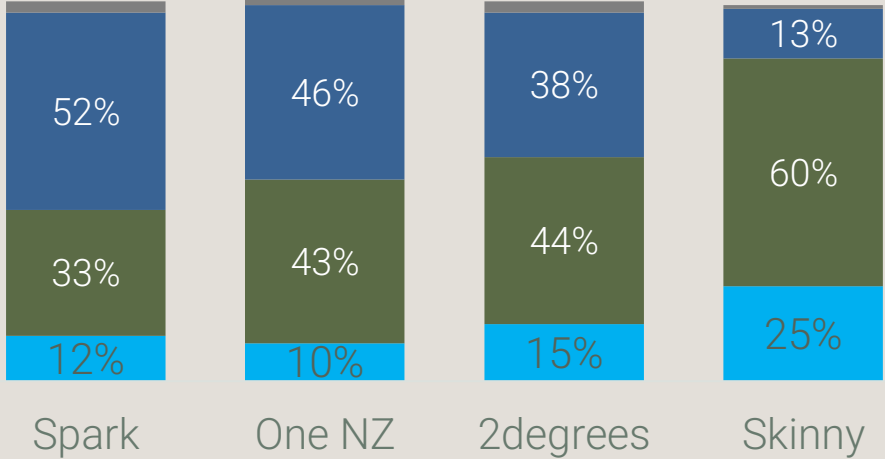
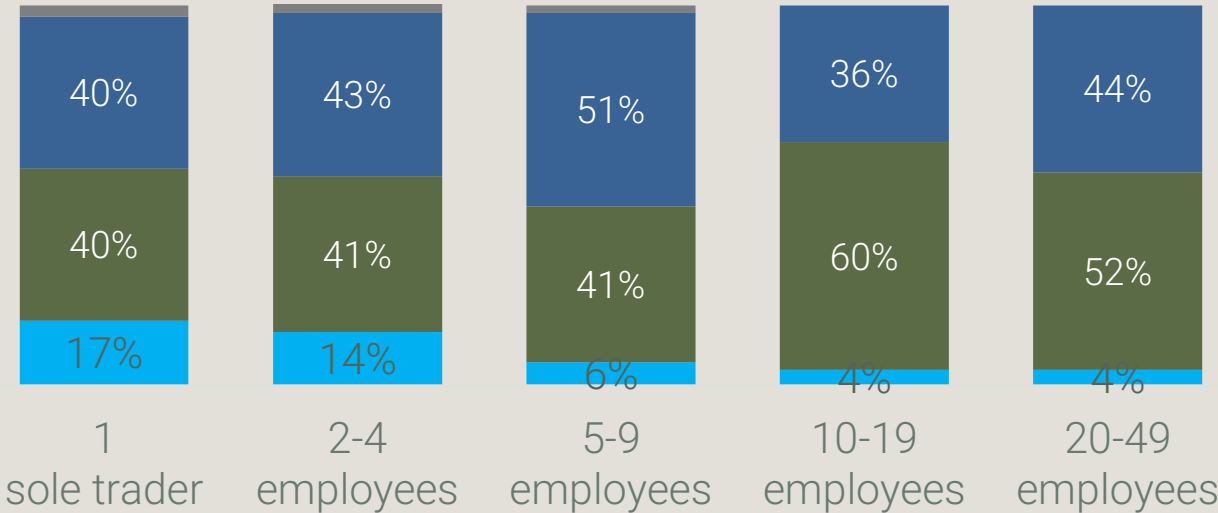


Tenure

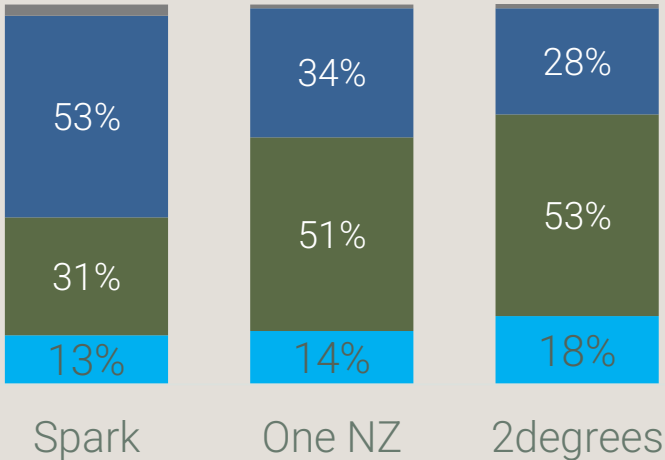
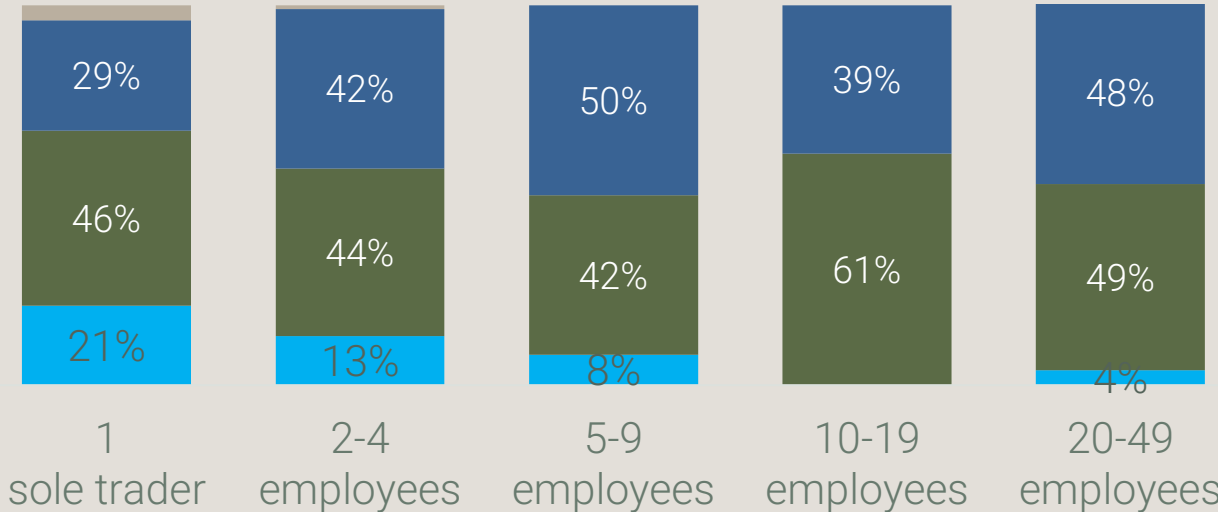
Mobile and broadband provider tenure does not correlate strongly with business size.
Spark and One NZ have the longest tenure customers, 2degrees have shorter tenure customers in broadband.



Mobile



Broadband



- More than 5 years
- 1-5 years
- Up to 12 months

About how long have you been a customer of...
Base: Jan – Jun 25 Spark mobile customers n=172, One NZ mobile customers n=198, 2degrees mobile customers n=162, Skinny mobile customers n=56.
Spark broadband customers n=175, One NZ broadband customers n=177, 2degrees broadband customers n=132.

Changing plans with same provider

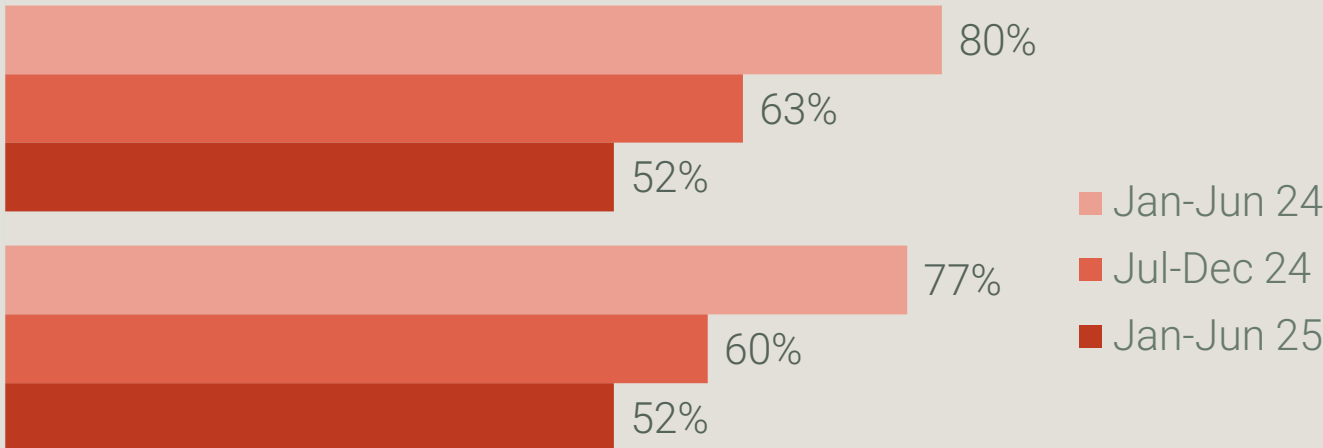
Changing mobile and broadband plans with the same provider is low. We see significant declines in satisfaction with changing mobile plans. Satisfaction when changing broadband plans remains low.



14%
changed mobile plans in the last 12 months

Satisfaction with the process of changing your mobile plan

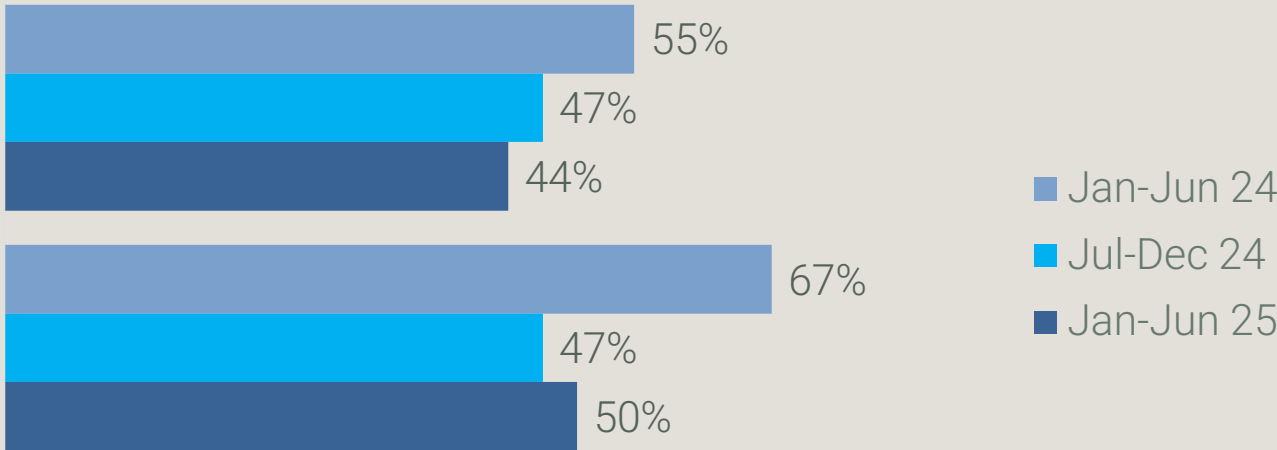
Satisfaction with the information provided on the plan / offer when you were deciding on your new mobile plan



11%
changed broadband plans in the last 12 months

Satisfaction with the process of changing your broadband plan

Satisfaction with the information provided on the plan / offer when you were deciding on your new broadband plan



In the last 12 months, have you changed a plan relating to your....
Overall, how satisfied were you with...
Base: Jan – Jun 25 Broadband provider Population=657, Mobile provider Population=736.
Base: Jan – Jun 25 Changed Broadband plan with same provider =73, Changed Mobile plan with same provider=93.

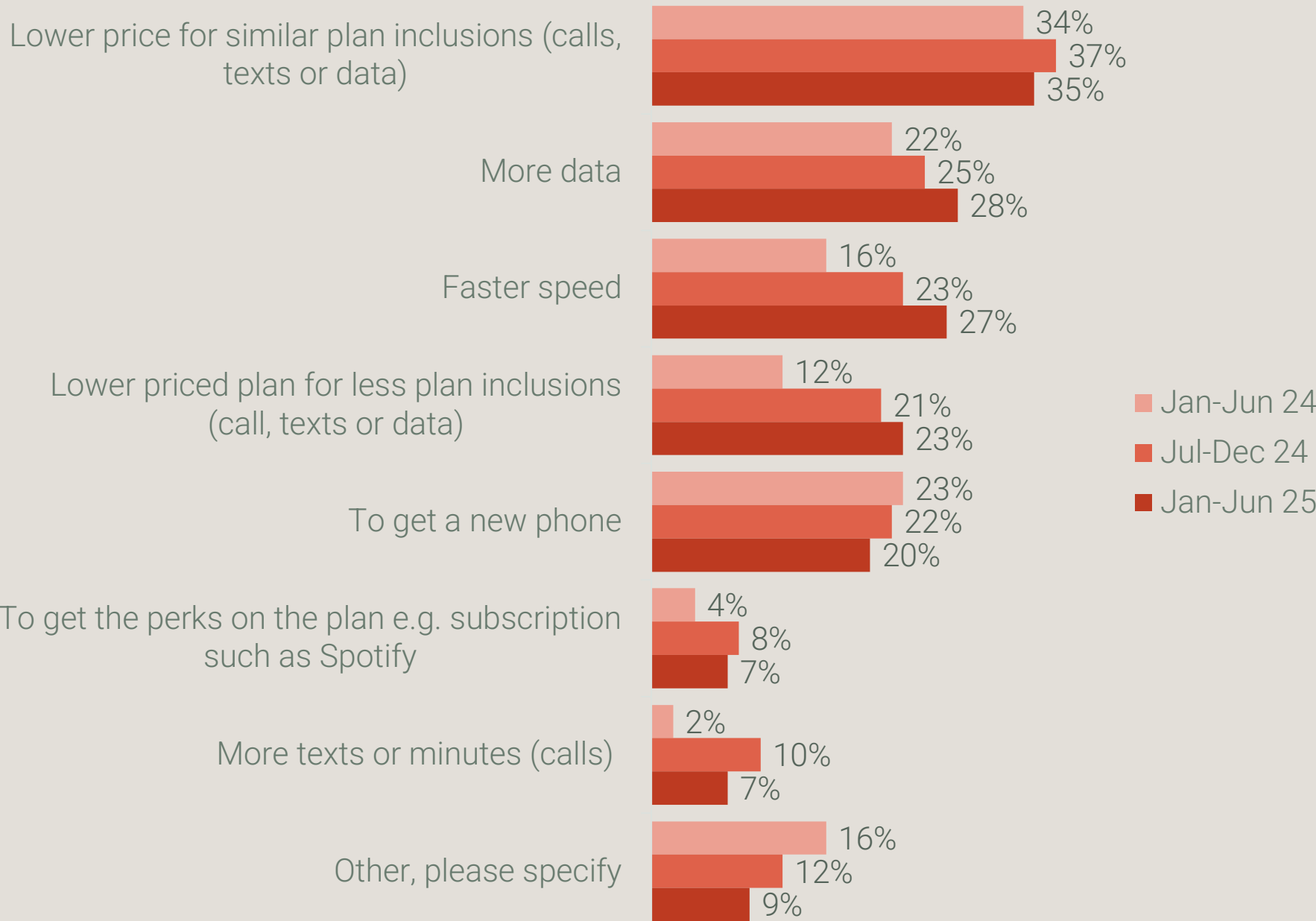
Reasons for changing plans with the same provider

Lower prices for similar plan inclusions remain the main driver of changing plans with the same provider.



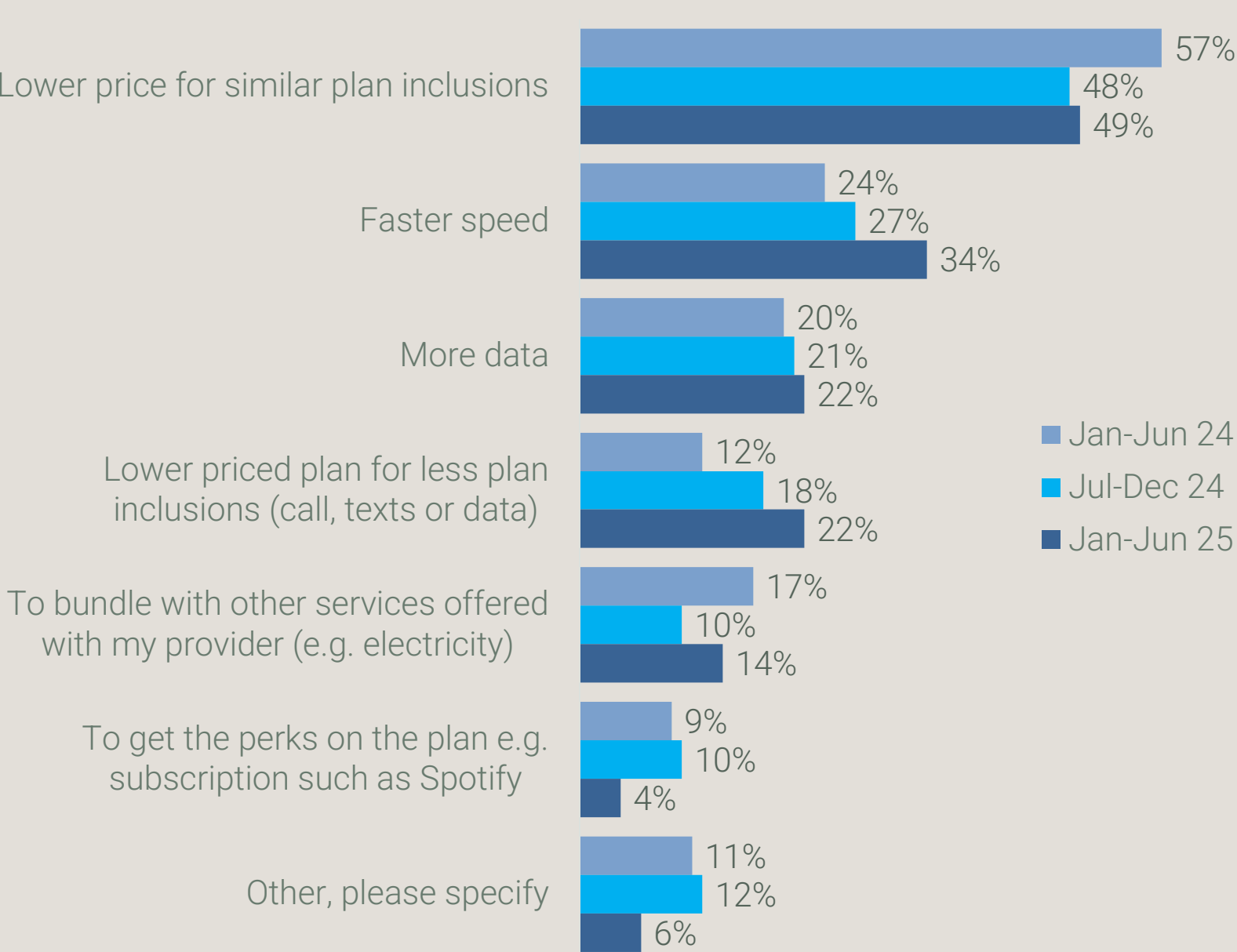
14%

changed mobile plans in the last 12 months



11%

changed broadband plans in the last 12 months



Switching provider

12% of broadband consumers switched broadband provider and 11% switched mobile provider in the last 12 months. Overall satisfaction with switching fails to meet the 80% satisfaction benchmark for both mobile and broadband.



11%
switched **mobile**
provider in the
last 12 months

(7% switched provider in Jul-Dec 2024)

Overall satisfaction with switching
provider



76%

Satisfaction with the information
provided on the plan / offer when you
were deciding on your new mobile plan



79%



12%
switched **broadband**
provider in the
last 12 months

(8% switched provider in Jul-Dec 2024)

Overall satisfaction with switching
provider



69%

Satisfaction with the information
provided on the plan / offer when you
were deciding on your new broadband
plan



66%

Reasons for staying with current provider

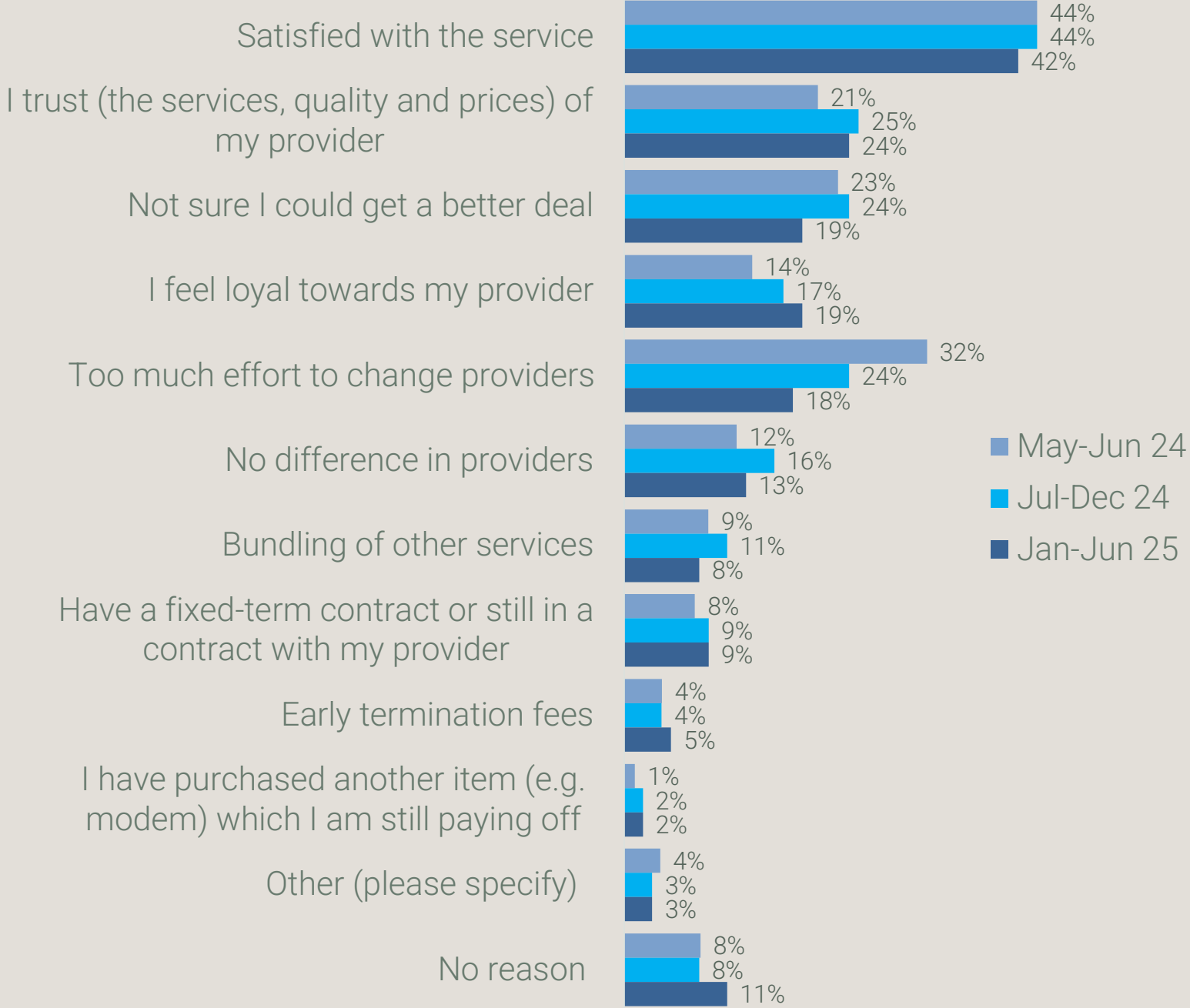
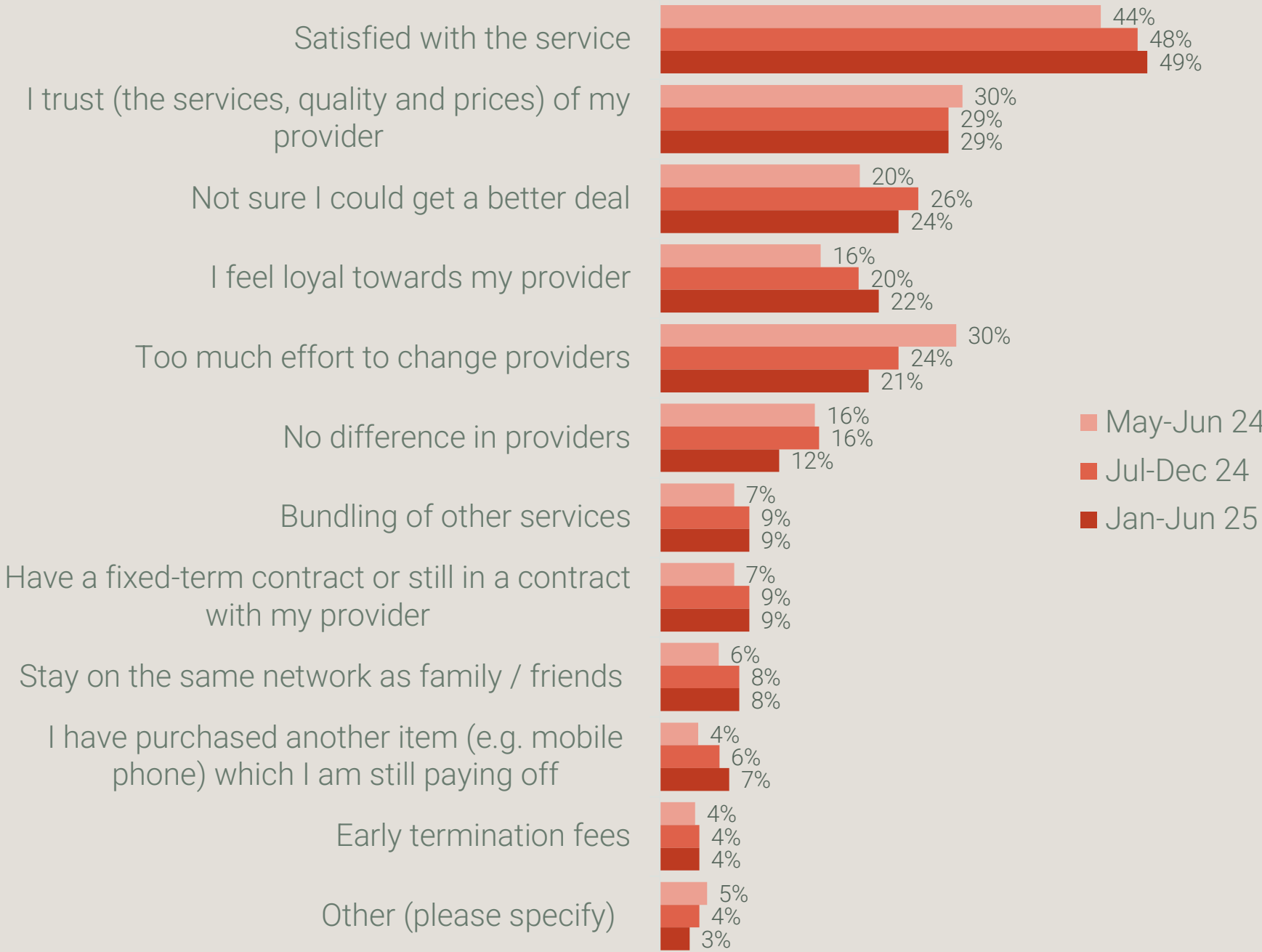
The main reasons consumers are staying with their current provider is because they are satisfied with the service, trust their provider and not being sure if they can get a better deal elsewhere.



Mobile



Broadband



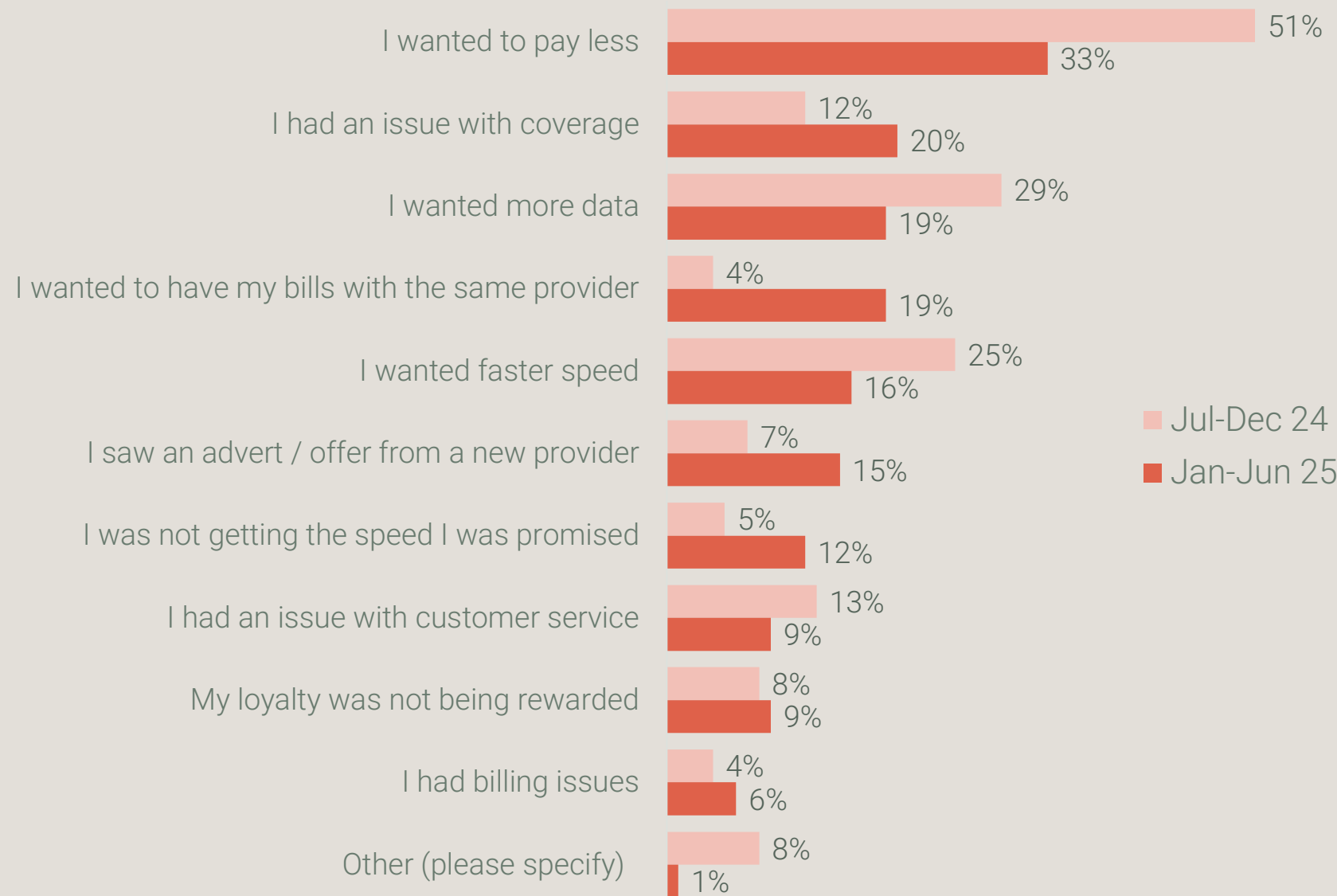
Reasons for leaving provider

Paying less is the main driver of consumers looking to leave their mobile and/or broadband provider; however, this has declined since Jul-Dec 2024.



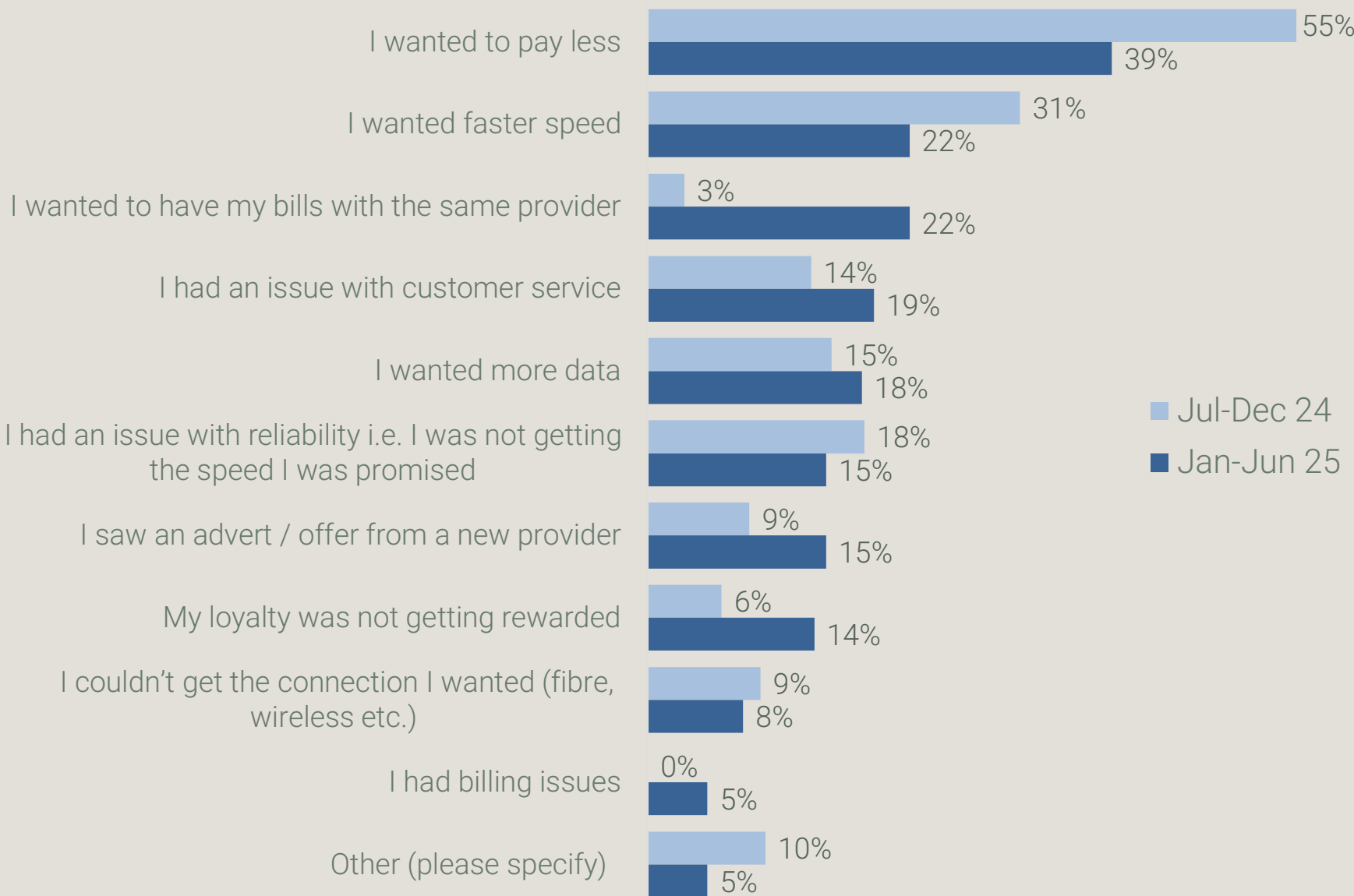
11%

switched **mobile** provider in the last 12 months
(7% switched provider in Jul-Dec 2024)



12%

switched **broadband** provider in the last 12 months
(8% switched provider in Jul-Dec 2024)



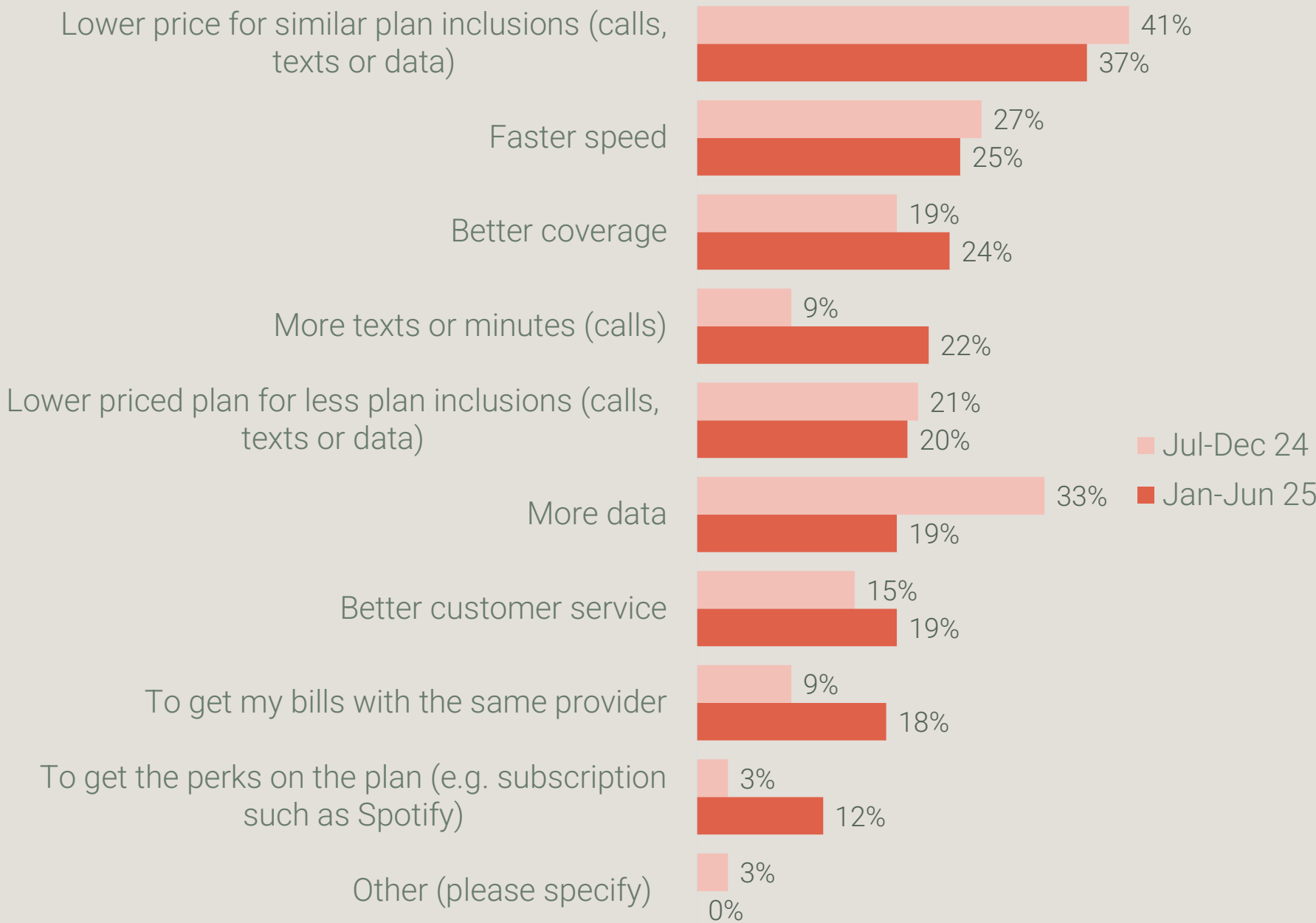
Reasons for choosing new provider

When choosing a new mobile provider, consumers are mainly influenced by lower prices for similar inclusions, however this has declined among broadband switchers, many of whom want to bundle bills with the same provider.



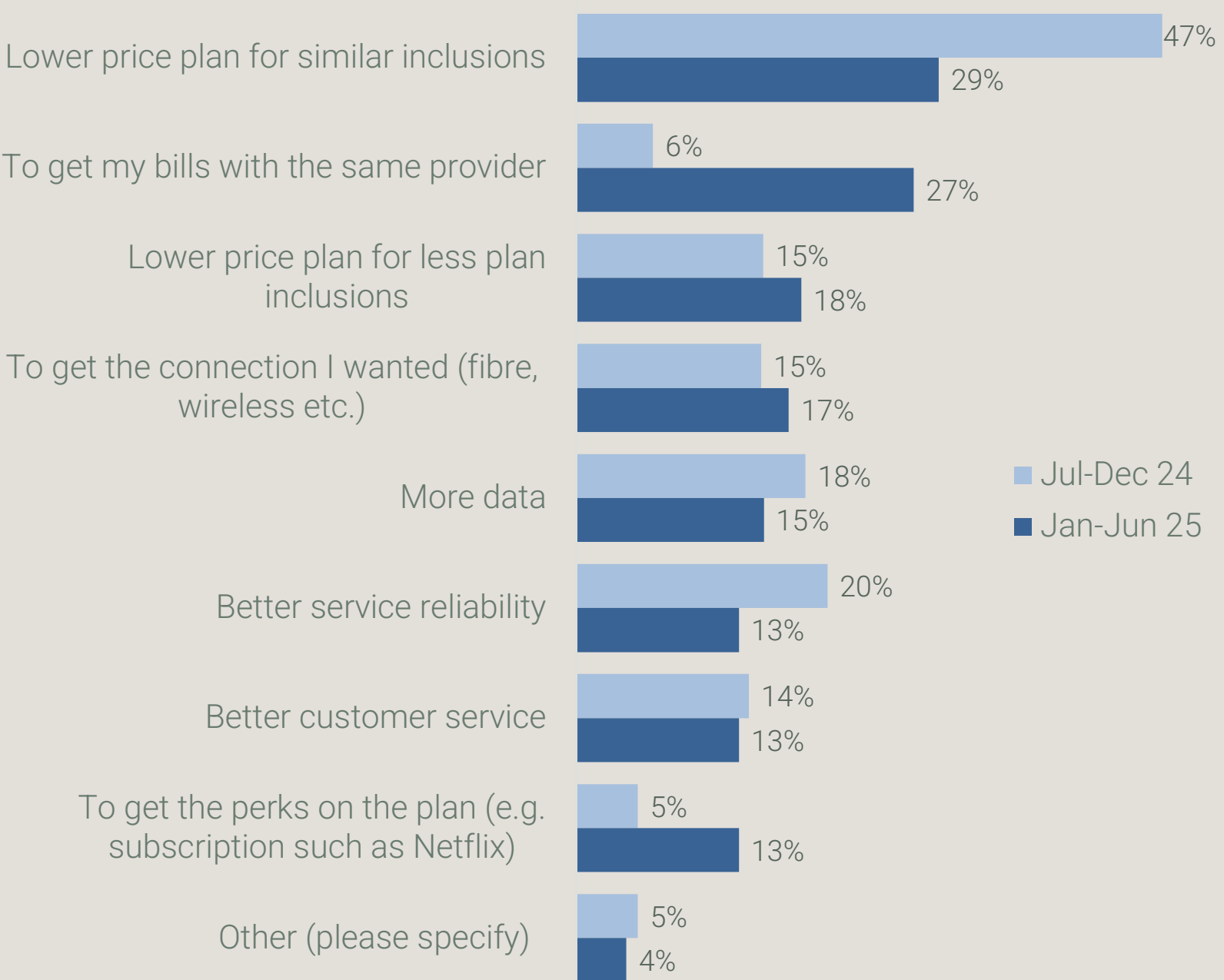
11%

switched **mobile** provider in the last 12 months
(7% switched provider in Jul-Dec 2024)



12%

switched **broadband** provider in the last 12 months
(8% switched provider in Jul-Dec 2024)



And for which of the following reasons did you choose to switch "current provider"? (Multiple response question)
Base: Jan – Jun 25 Switched broadband provider =61, Switched mobile provider =60.

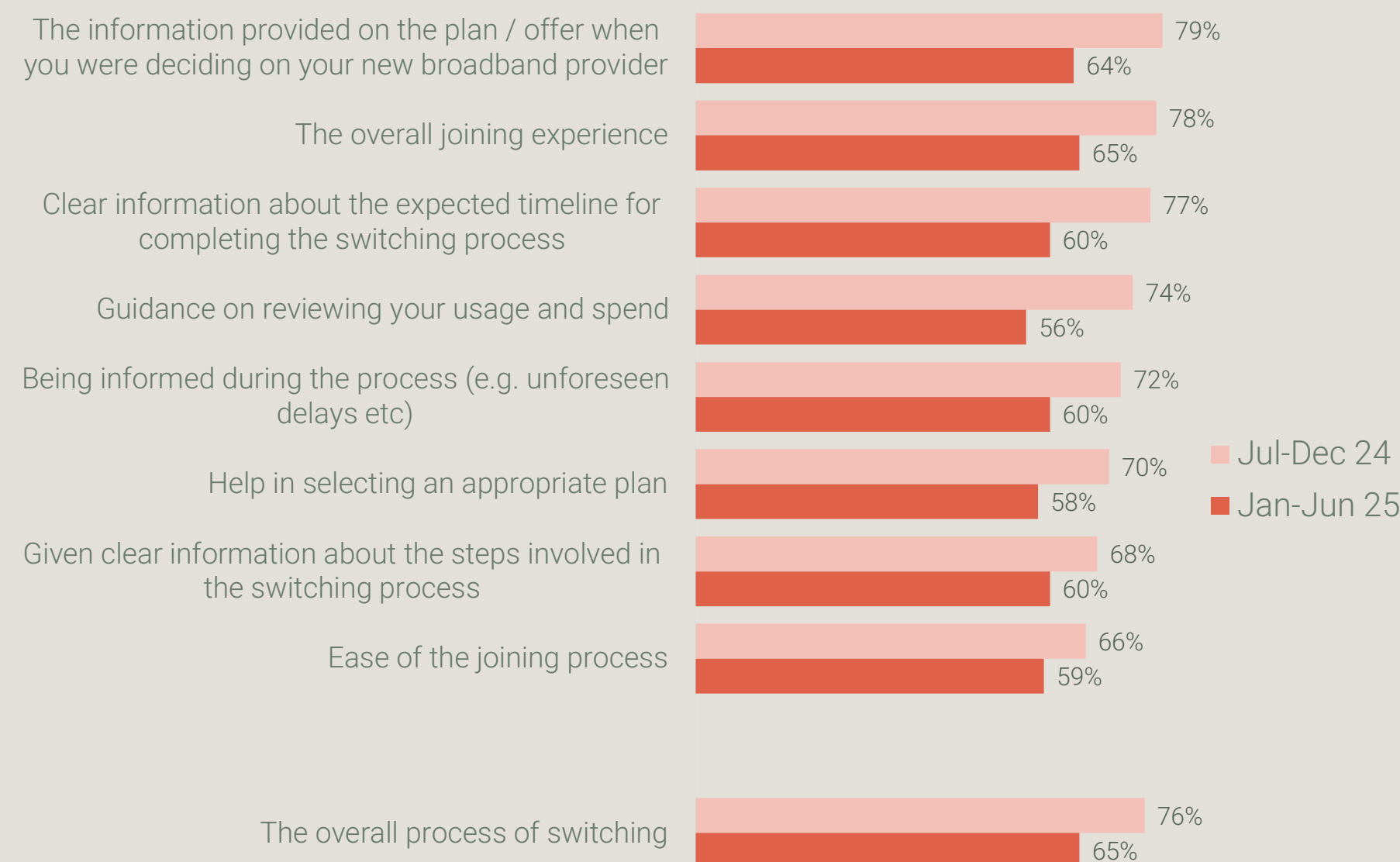
Satisfaction when joining new provider

Satisfaction with mobile and broadband fails to meet the favourable threshold and has declined across all aspects of the joining experience.



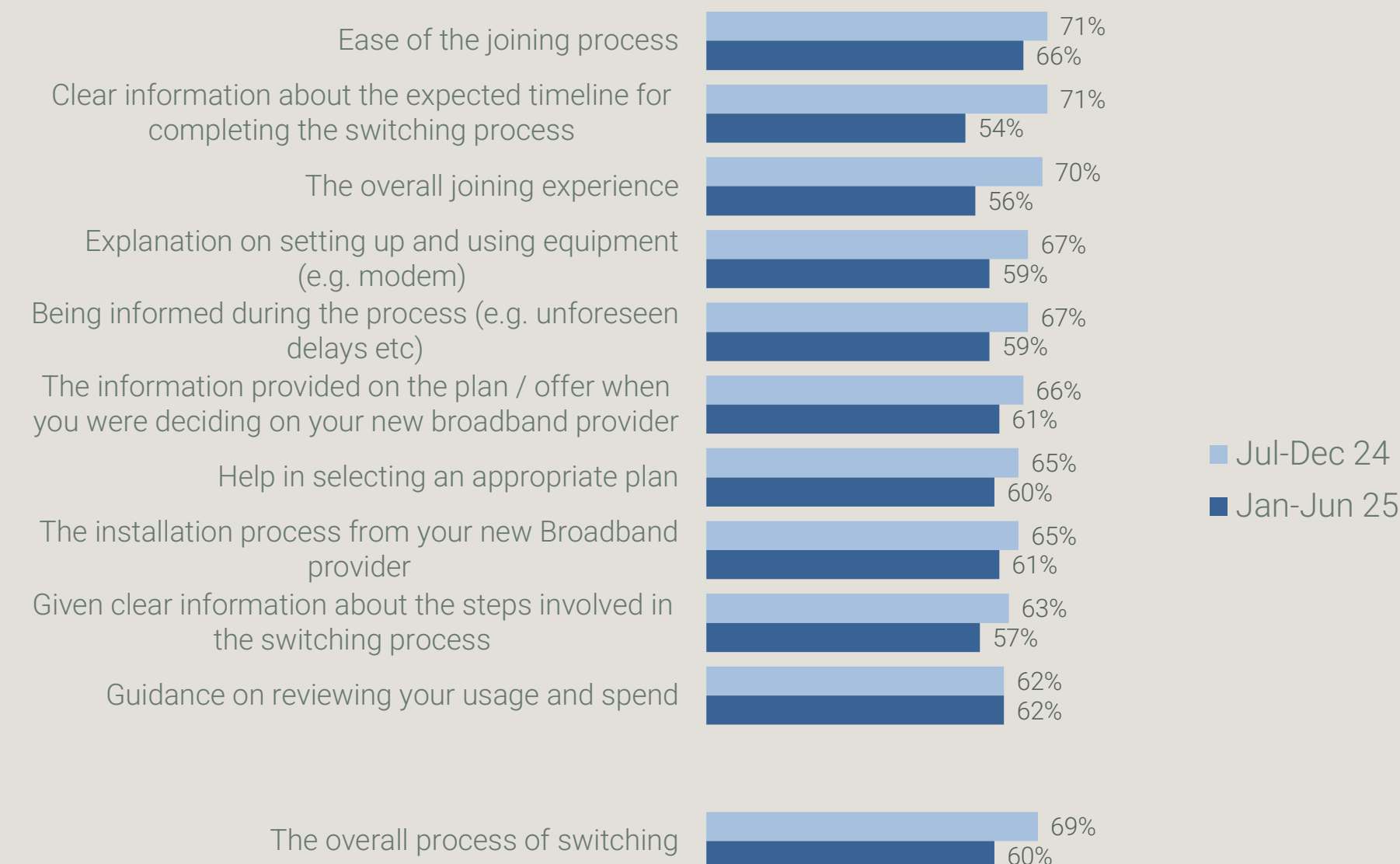
11%

switched **mobile** provider in the last 12 months
(7% switched provider in Jul-Dec 2024)



12%

switched **broadband** provider in the last 12 months
(8% switched provider in Jul-Dec 2024)



Thinking about when you switched your broadband to %"BB-Provider"% please indicate how satisfied you were with the following aspects of the joining process?
Base: Jan – Jun 25 Switched broadband provider =61, Switched mobile provider =60.



SME Insights

Issues and Response

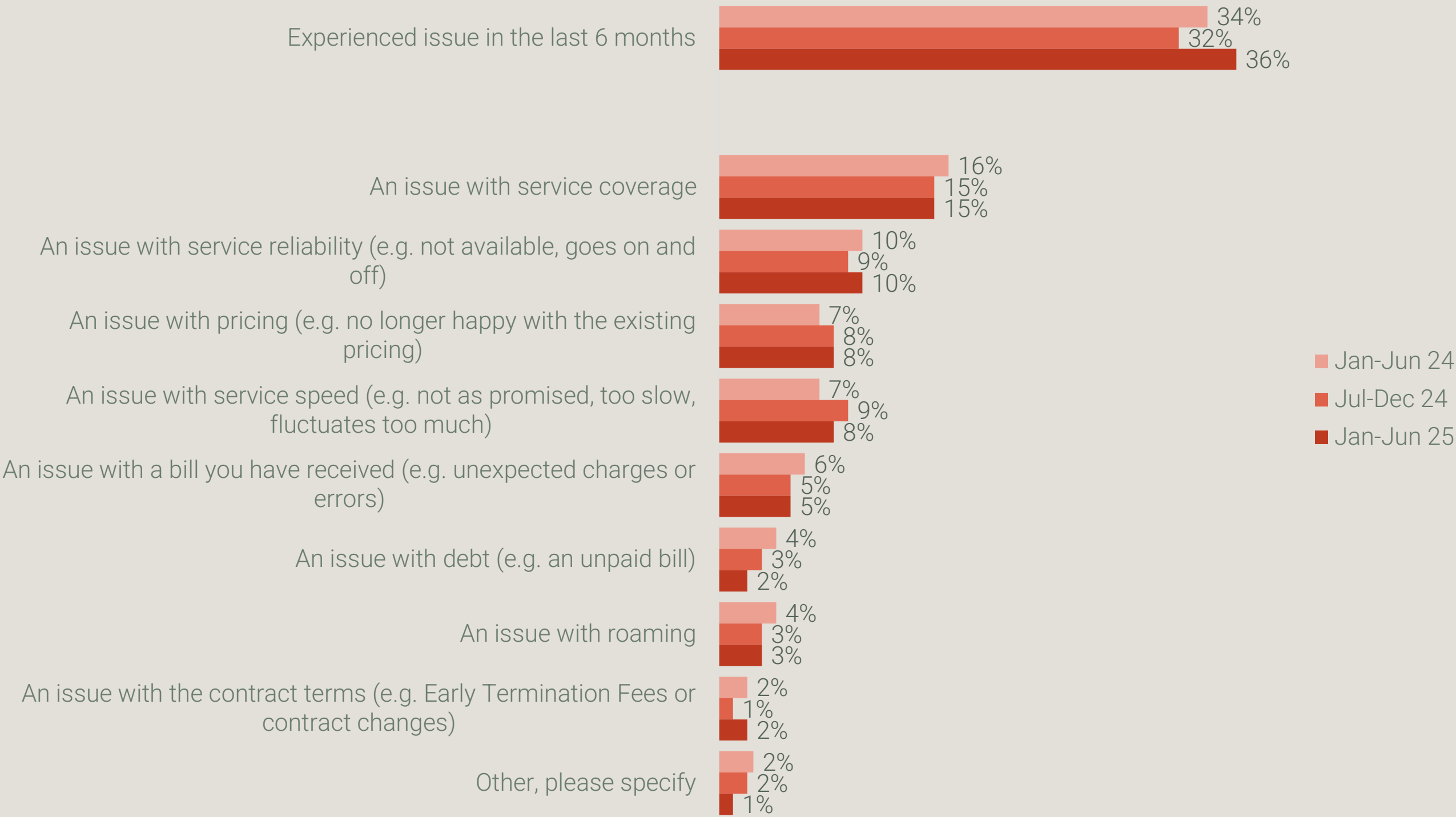
Mobile Issues

The most common issues experienced with mobile is service coverage.



36%

of Mobile customers have experienced an issue with their mobile service in the past 6 months

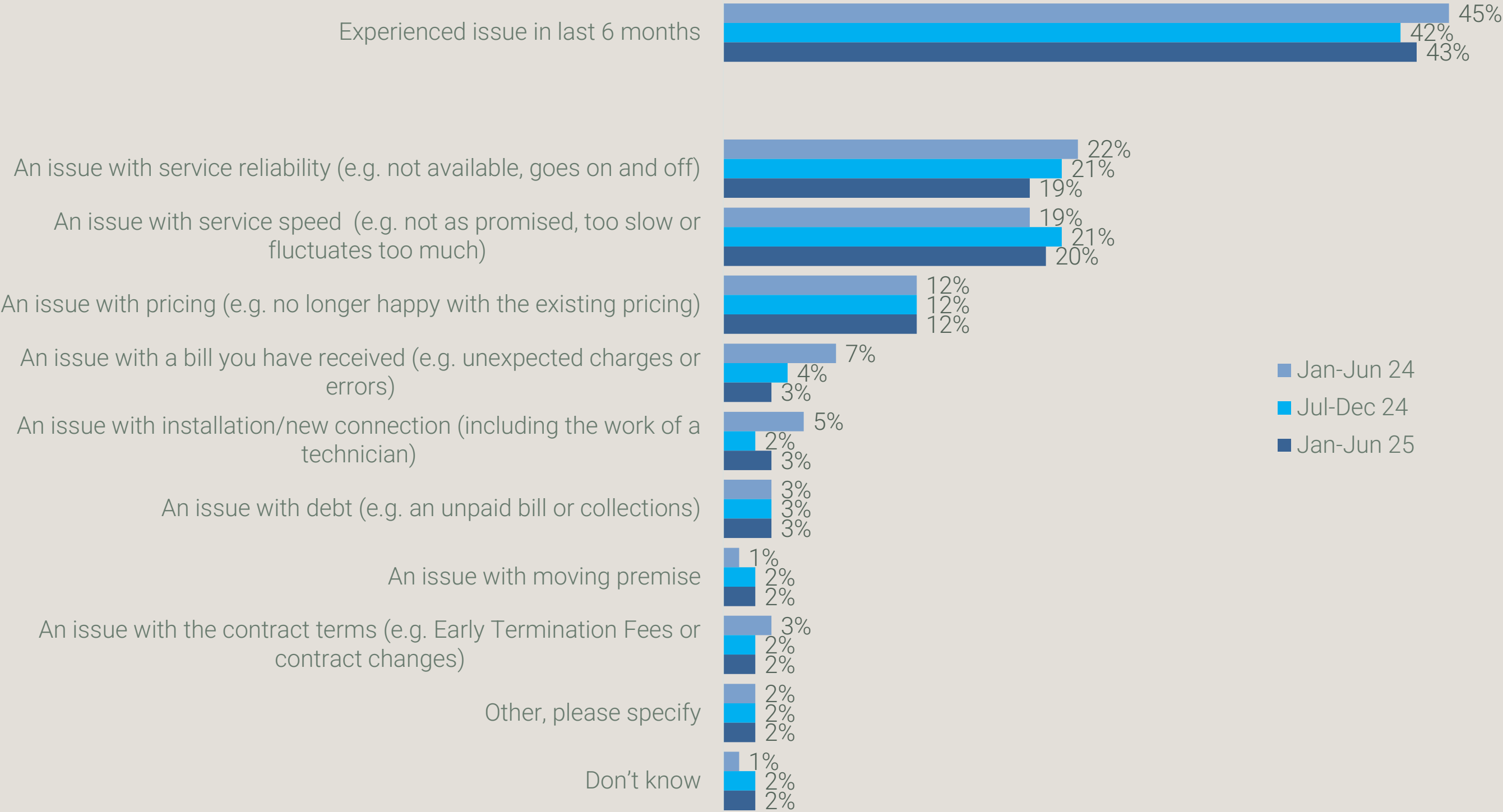


Broadband Issues

43% of consumers have had issues with their broadband services in the last six months.



43%
of broadband customers
have experienced an issue
with their broadband
internet service in the
past 6 months



Thank you

Insights HQ