

Q INSIGHTS HQ

NZ TELECOMMUNICATIONS CUSTOMER SATISFACTION TRACKING

Six Monthly Report | July 2025 - December 2025

Purpose of this research

This research monitors consumer satisfaction with Retail Service Quality (RSQ) for mobile and broadband services.

It helps the Commerce Commission identify areas for improvement, measure the success of its RSQ initiatives, and meet obligations under section 9A of the Telecommunications Act 2001.

Conducted with Insights HQ, the ongoing programme provides consumers with clear information, promotes transparency and competition among Retail Service Providers (RSPs), and enables customers to factor service quality into their choices – driving better performance through acquisition and retention pressure.

Additional data and the questionnaire are available on request.

Methodology

RESIDENTIAL

July – December 2025

2,355

broadband customers

2,058

mobile customers

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

Fieldwork was conducted monthly with this report focusing on the 6 months from July – December 2025.

Data are weighted to reflect the New Zealand population
Margin of error on 2,355 completes is +/- 2.02
Margin of error on 2,058 completes is +/- 2.16

SME

July – December 2025

678

broadband customers

760

mobile customers

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).

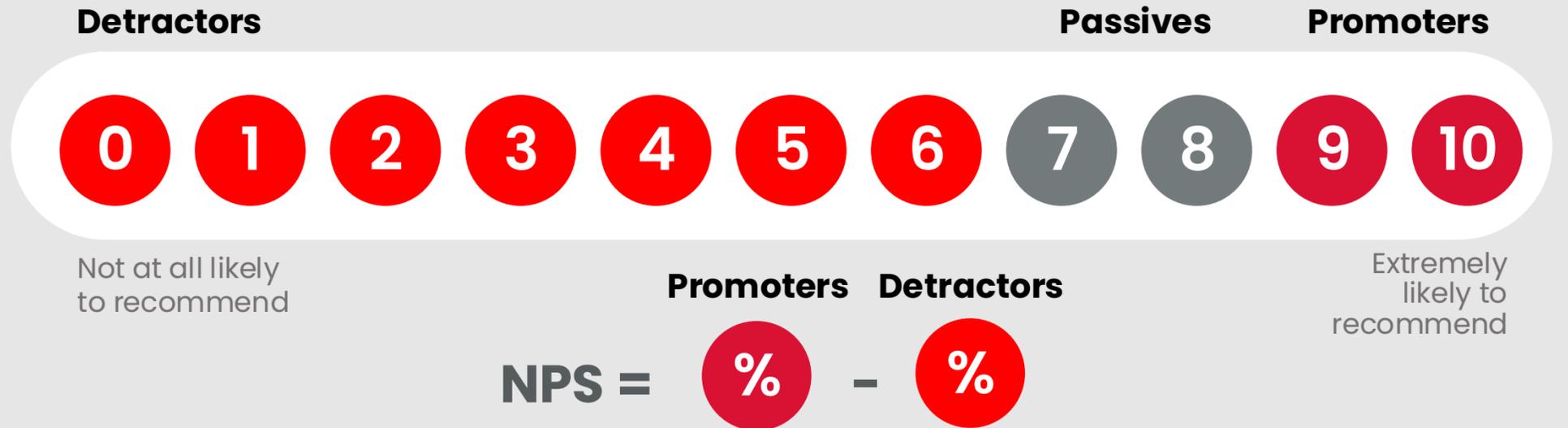
Fieldwork was conducted monthly with this report focusing on the 6 months from July – December 2025.

Data are weighted to reflect SME FTE/region
Margin of error on 678 completes is +/- 3.76
Margin of error on 760 completes is +/- 3.56

What is a 'favourable' score?

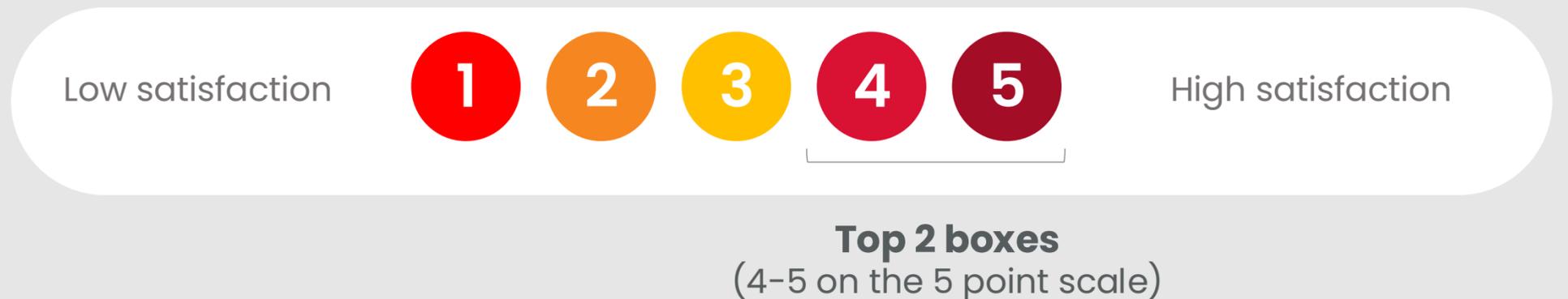
The data and report includes NPS and Satisfaction scores, with commentary highlighting what is and is not a 'favourable' score.

NPS



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



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**.



 **INSIGHTS HQ**

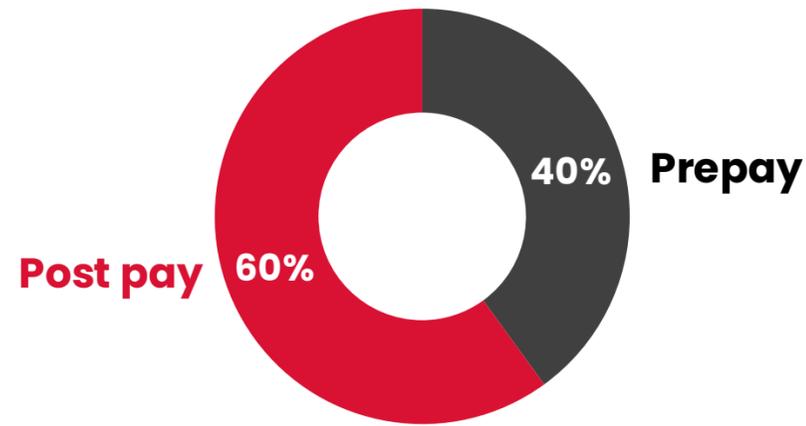
RESIDENTIAL INSIGHTS

NPS and Satisfaction

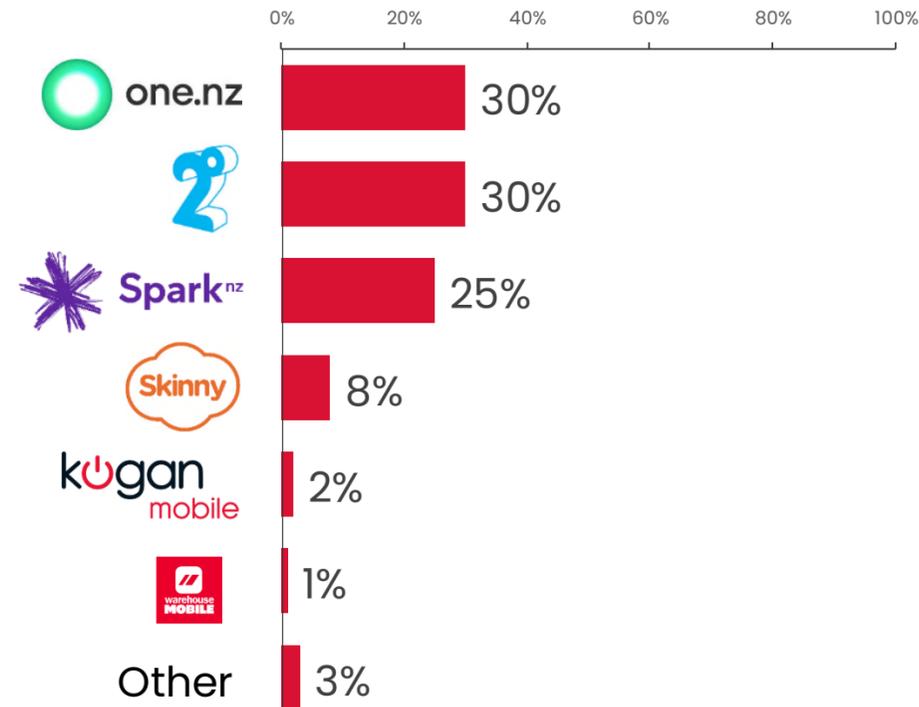
Products + Providers

Residential

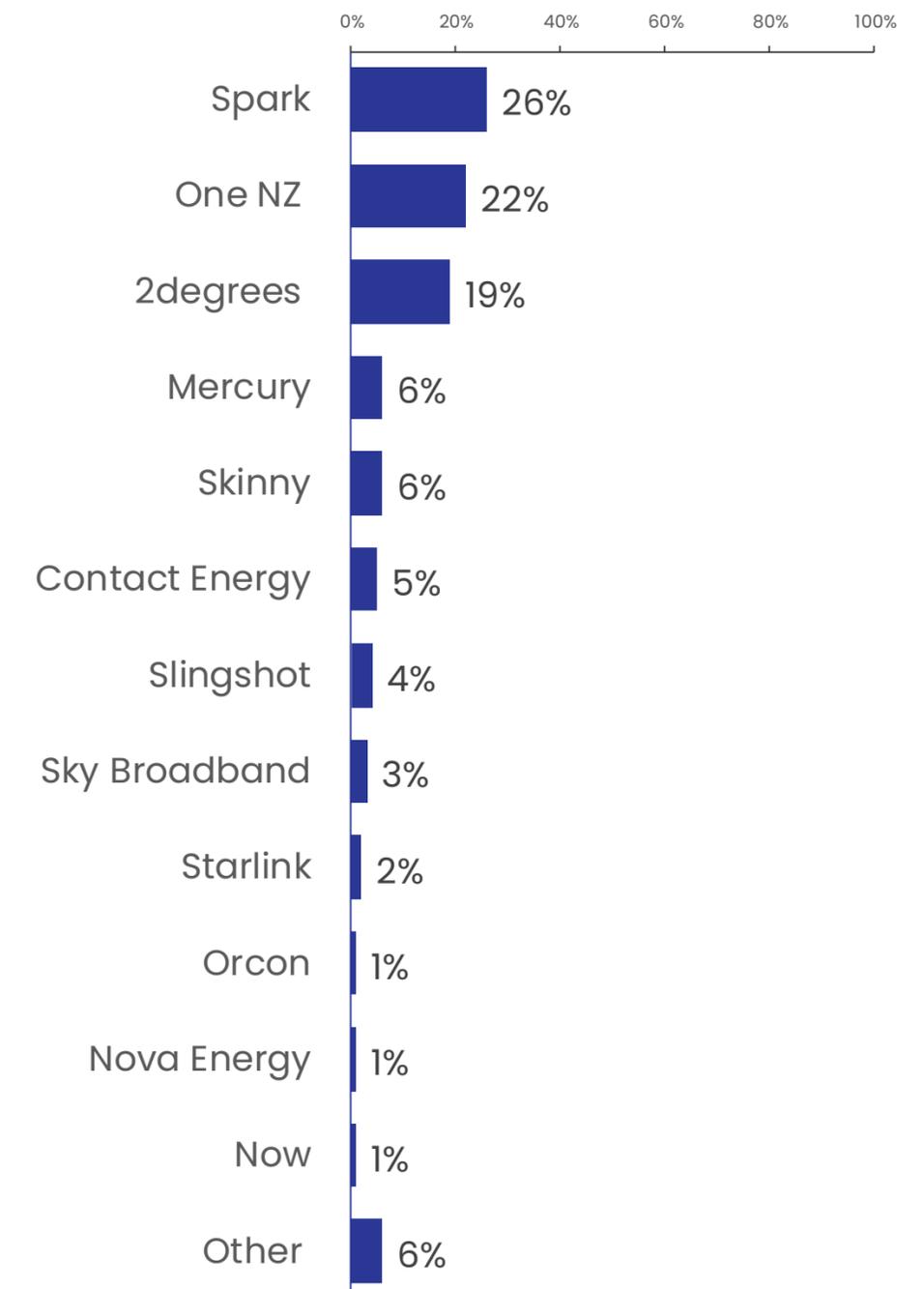
MOBILE PLAN



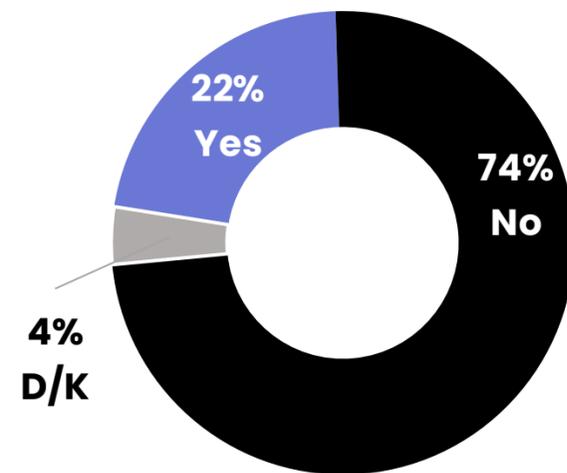
MOBILE PROVIDER



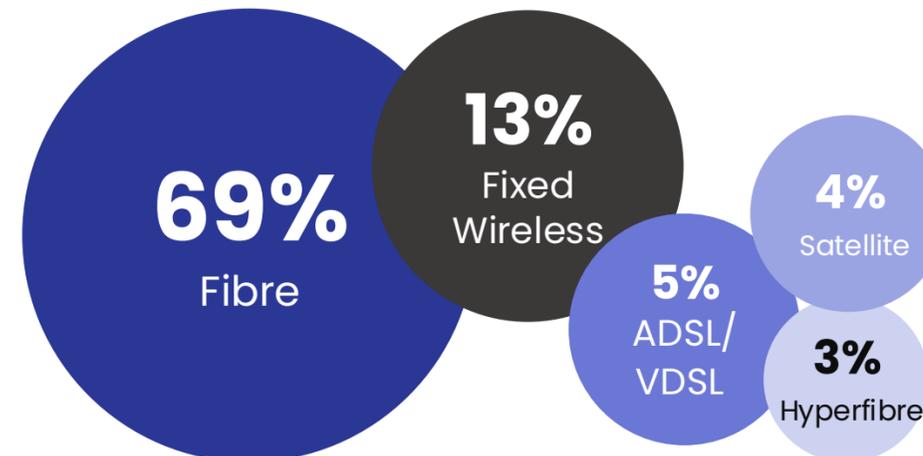
BROADBAND PROVIDER



ELECTRICITY BUNDLE

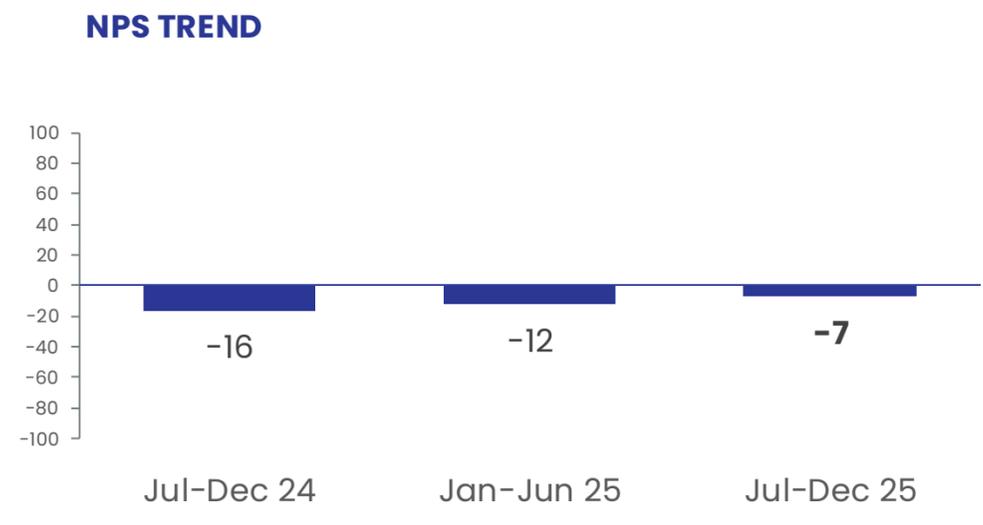
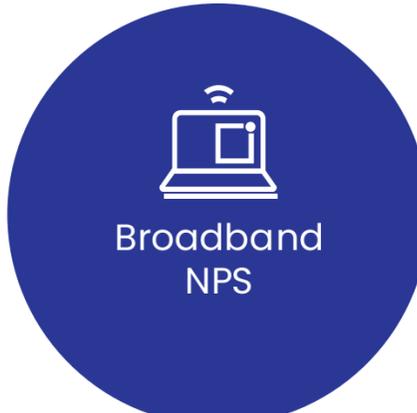
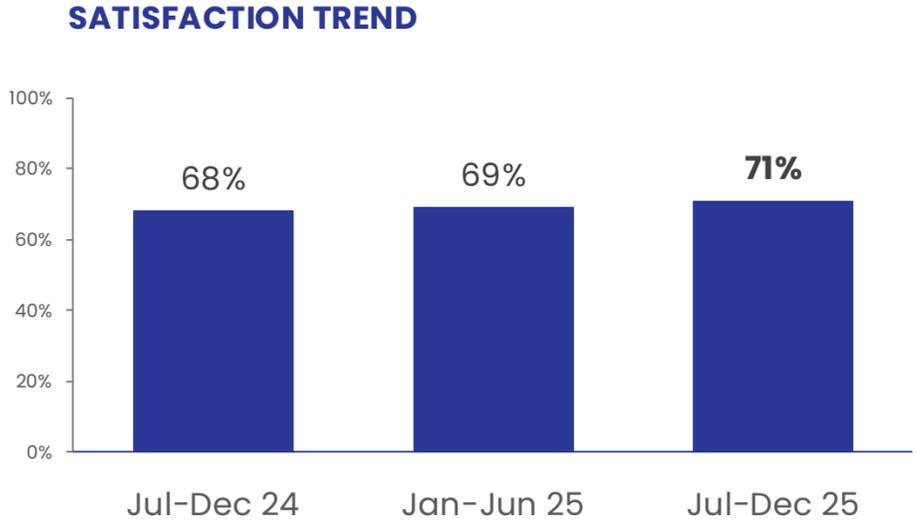
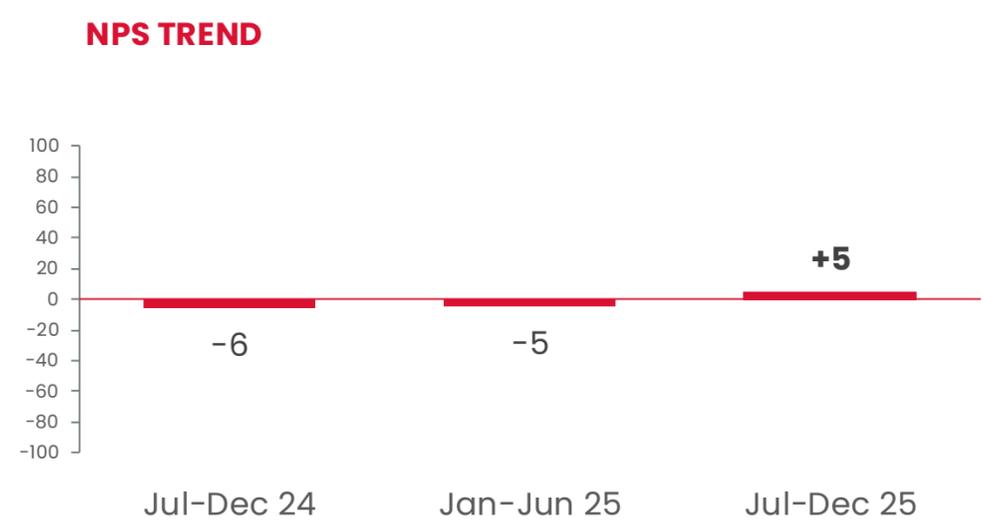
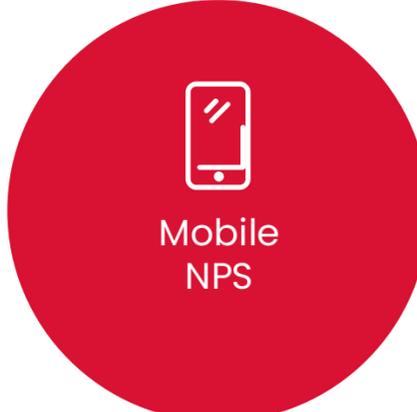
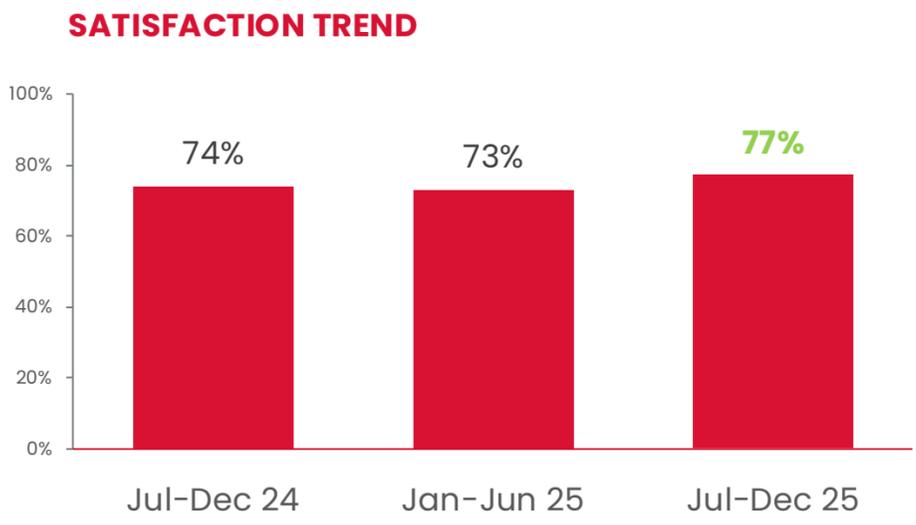


BROADBAND TECHNOLOGY



Overall Satisfaction - Trend

Net Promoter Score - Trend



% significantly above prior wave
% significantly below prior wave

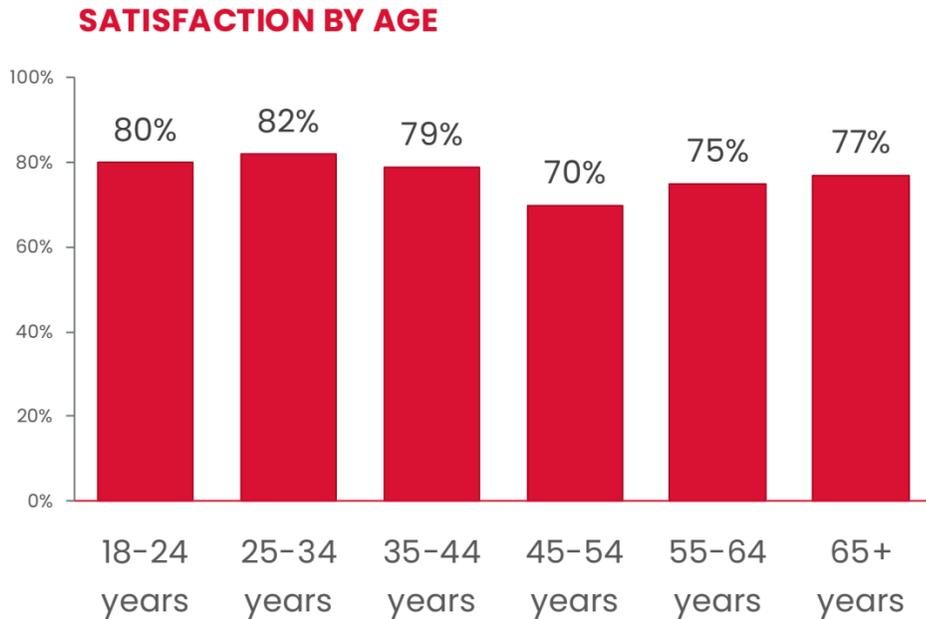
NOTE: significance testing not included for NPS

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

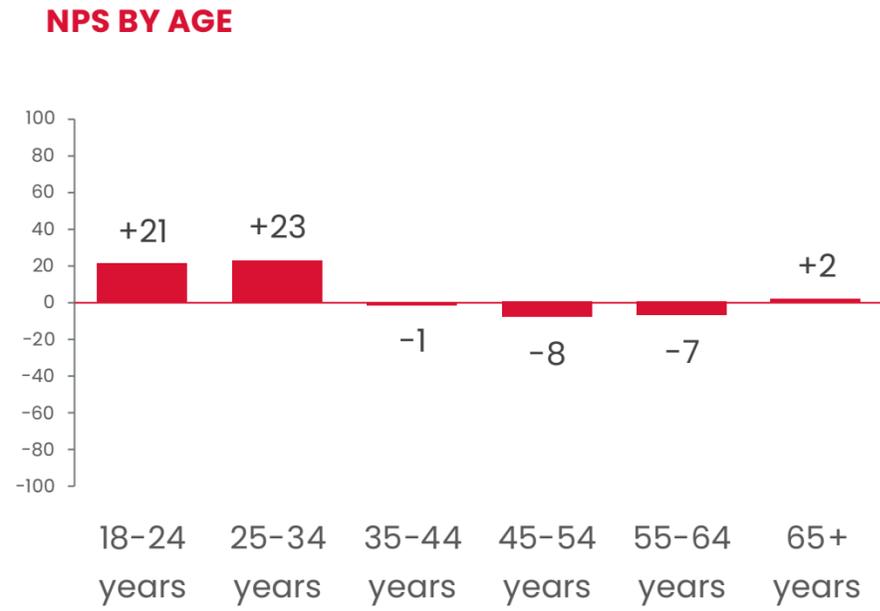
Overall Satisfaction - Age

Promoter Score - Age

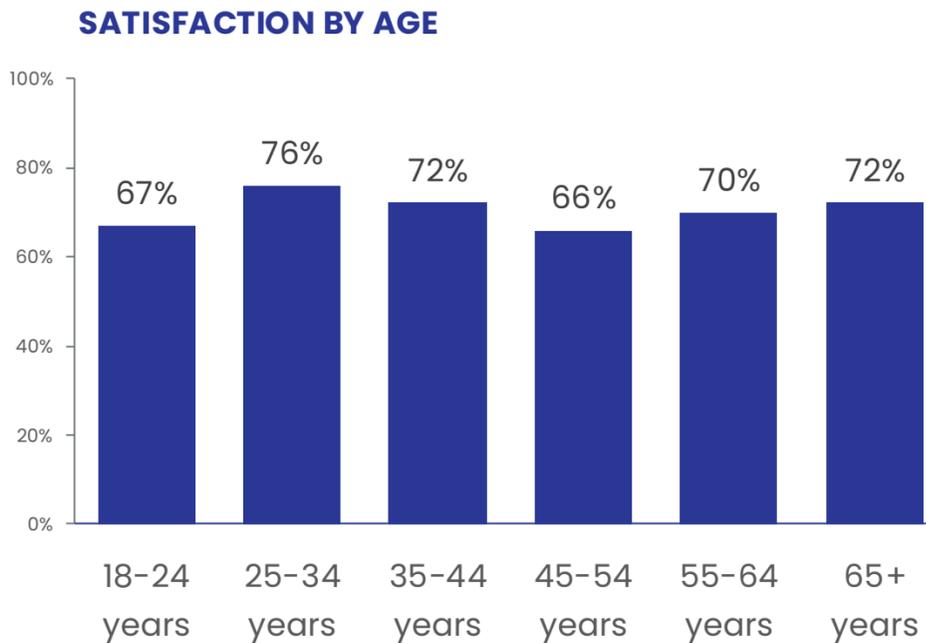
Overall Mobile Satisfaction
77%



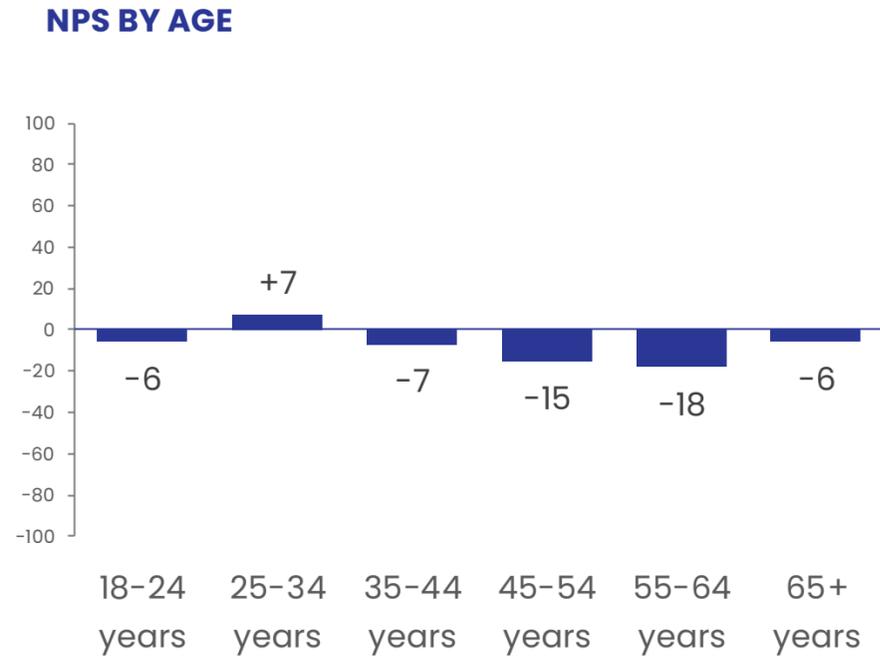
Overall Mobile NPS
+5



Overall Broadband Satisfaction
71%



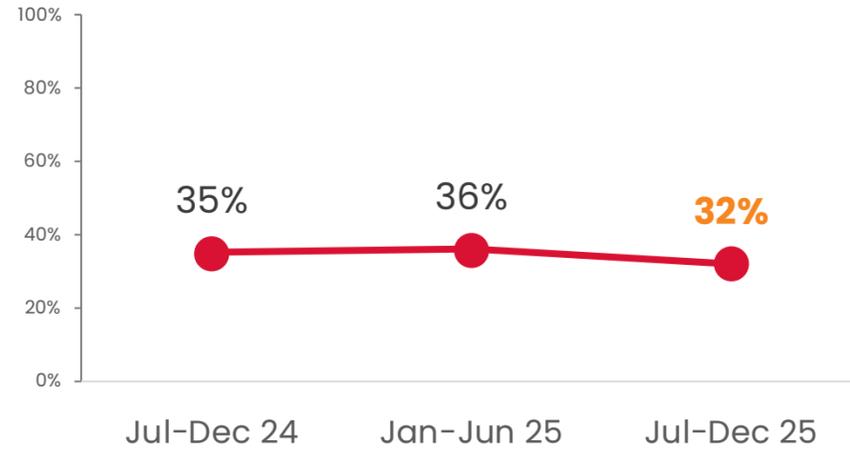
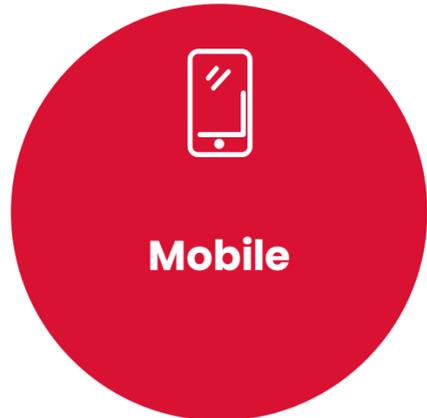
Overall Broadband NPS
-7



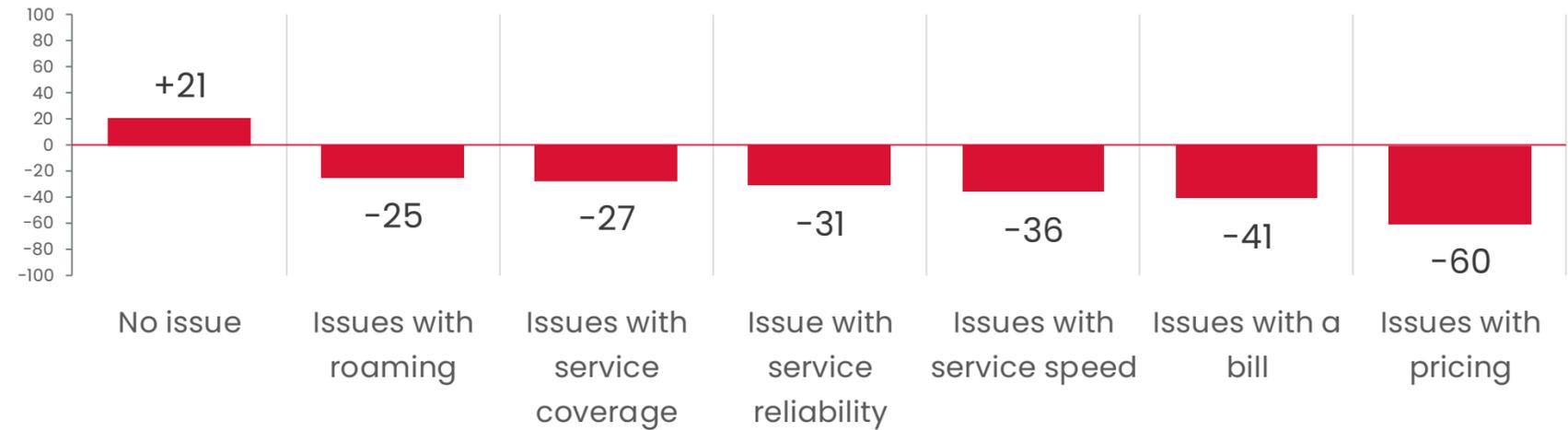
Q. Overall, how satisfied or dissatisfied are you with your provider for your broadband / household internet service / mobile service? Please take into account their products and services, as well as your experience of dealing with them. (Scale 1-5)
 Q. Considering your experience with your provider,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

NPS and Issues experienced

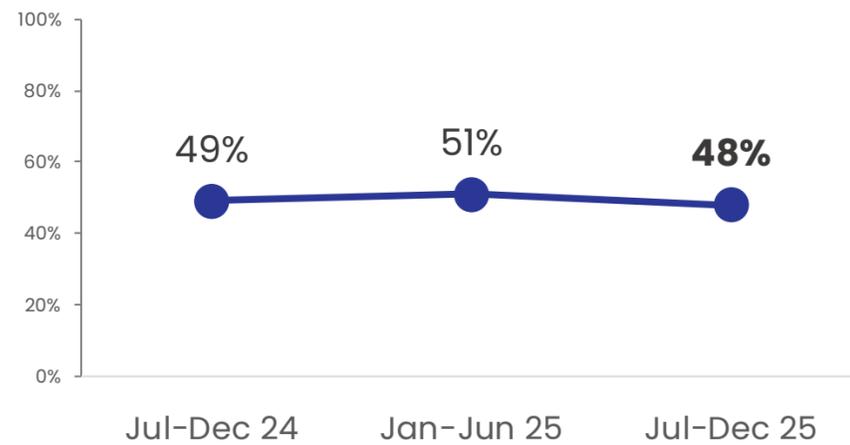
EXPERIENCED AN ISSUE



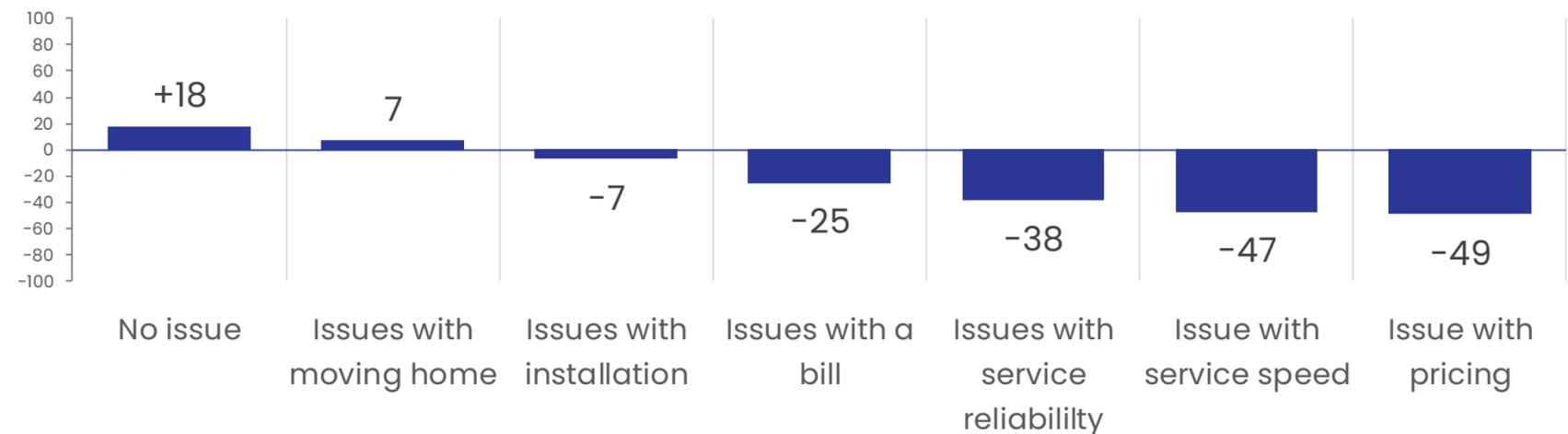
NPS BY ISSUES EXPERIENCED – CURRENT WAVE



EXPERIENCED AN ISSUE



NPS BY ISSUES EXPERIENCED – CURRENT WAVE

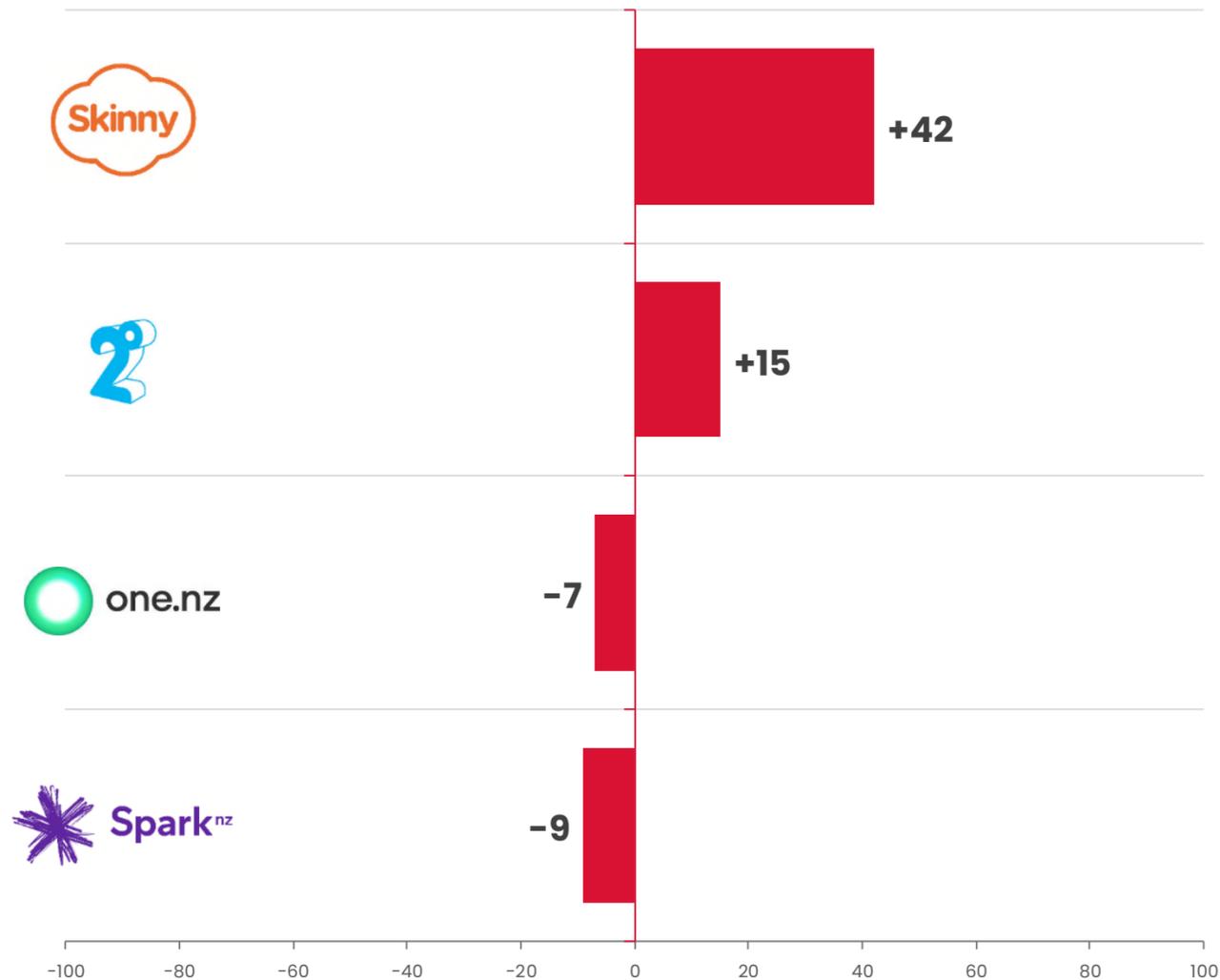


% significantly above prior wave
 % significantly below prior wave

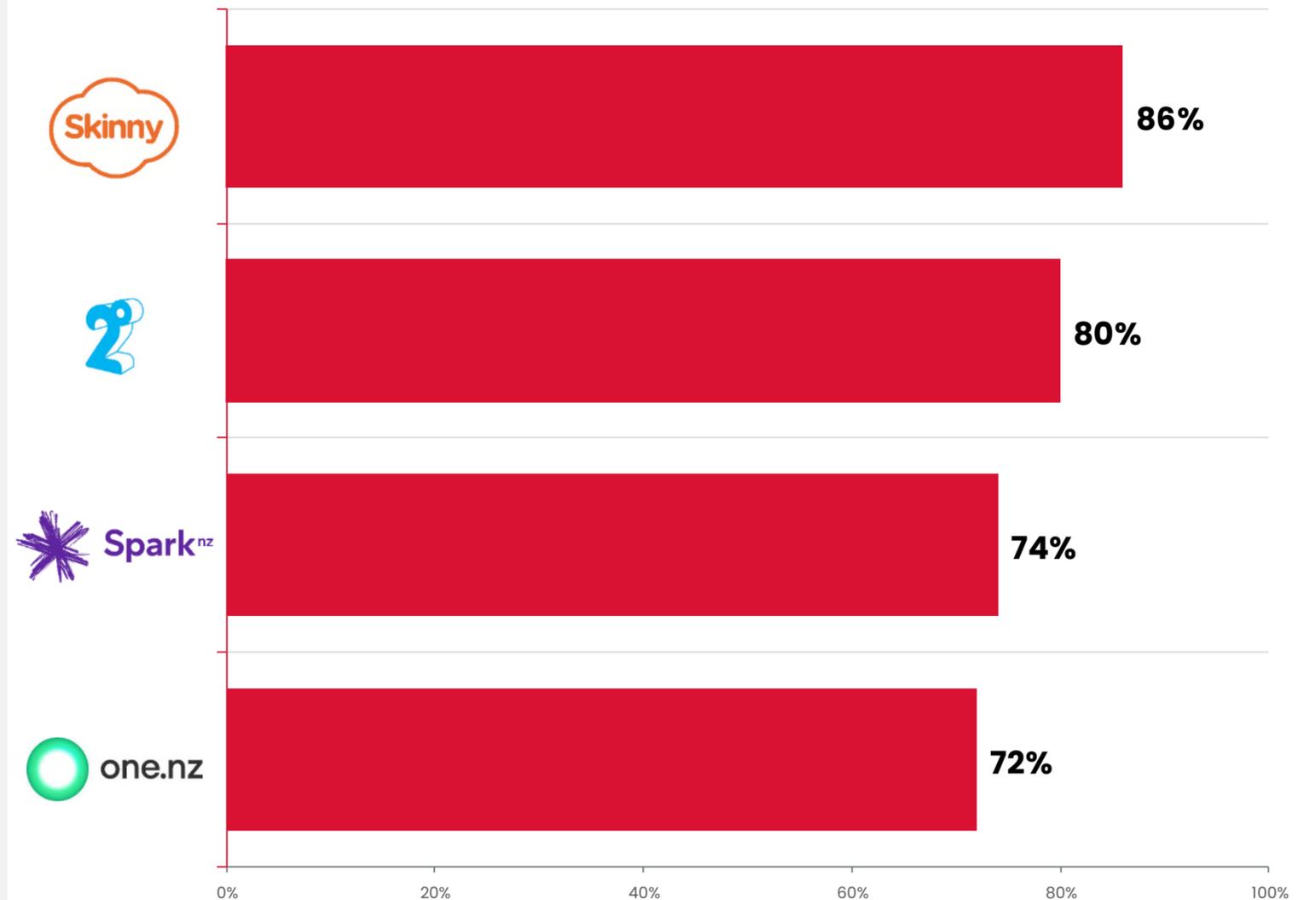
Q. In the last 6 months, have you experienced any of the following issues with your Mobile service?
 Q. In the last 6 months, have you experienced any of the following issues with your Broadband internet service?

Mobile NPS and Satisfaction by Provider

NET PROMOTER SCORE – CURRENT WAVE



SATISFACTION – CURRENT WAVE



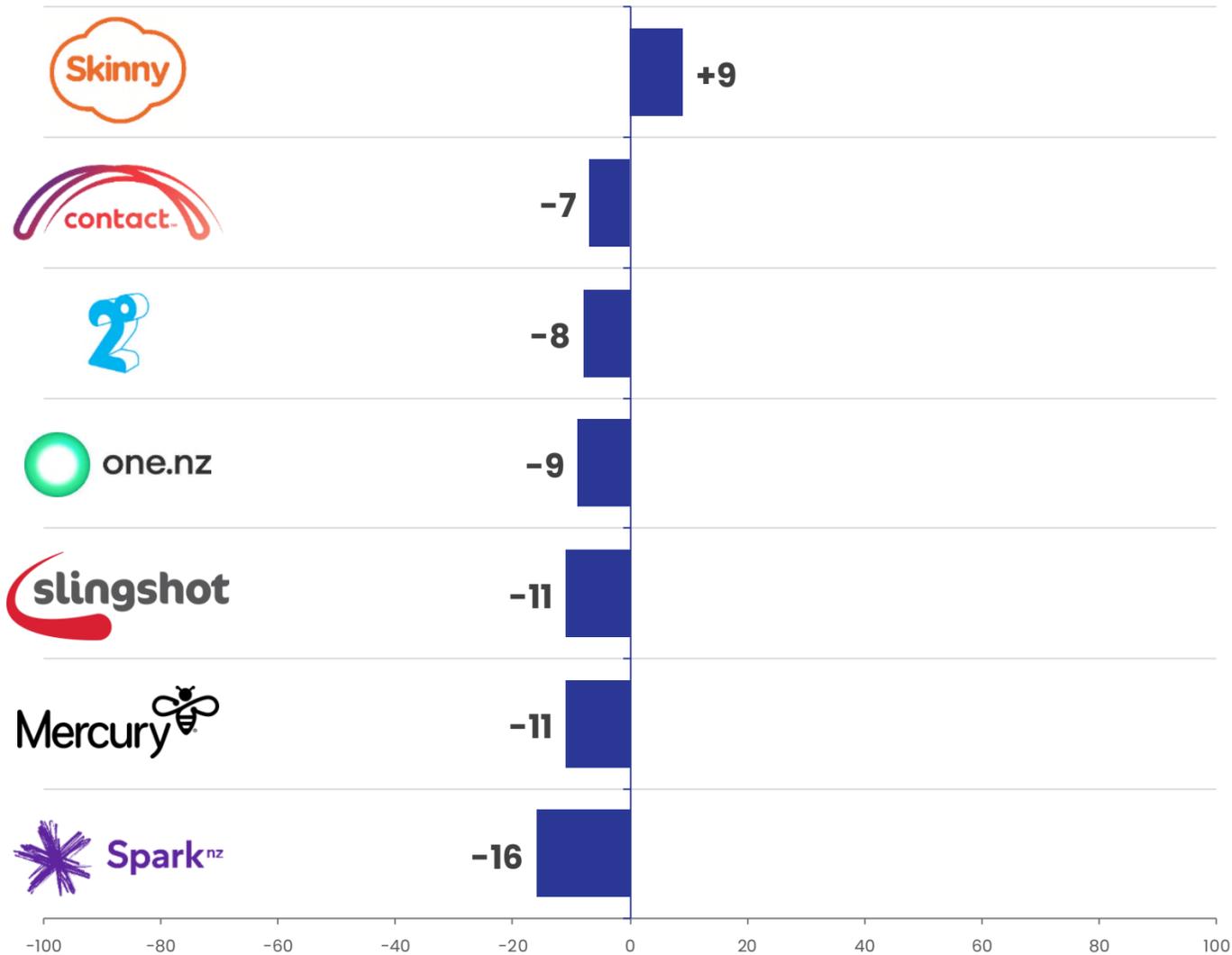
Q. Considering your experience with your provider, how likely would you be to recommend them to a friend or family member? (Scale 0-10).

Q. Overall, how satisfied or dissatisfied are you with your provider for your broadband/ household internet service / mobile service? Please take into account their products and services, as well as your experience of dealing with them. (Scale 1-5).

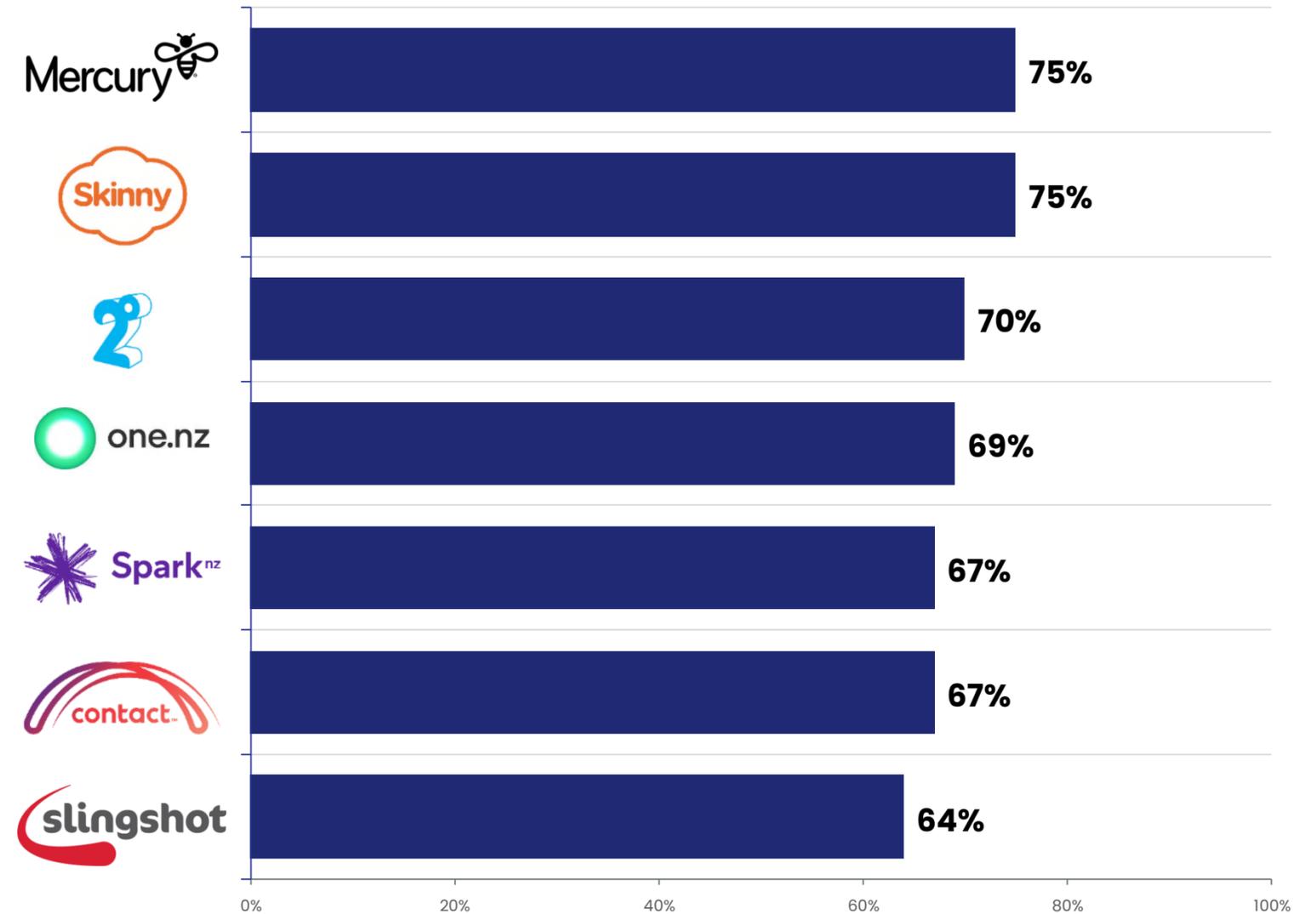
Sorted high to low based on current wave

Broadband NPS and Satisfaction by Provider

NET PROMOTER SCORE – CURRENT WAVE



SATISFACTION – CURRENT WAVE



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

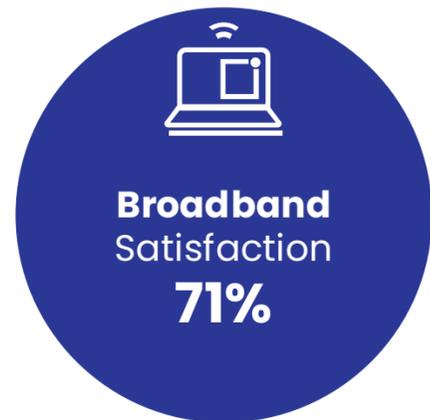
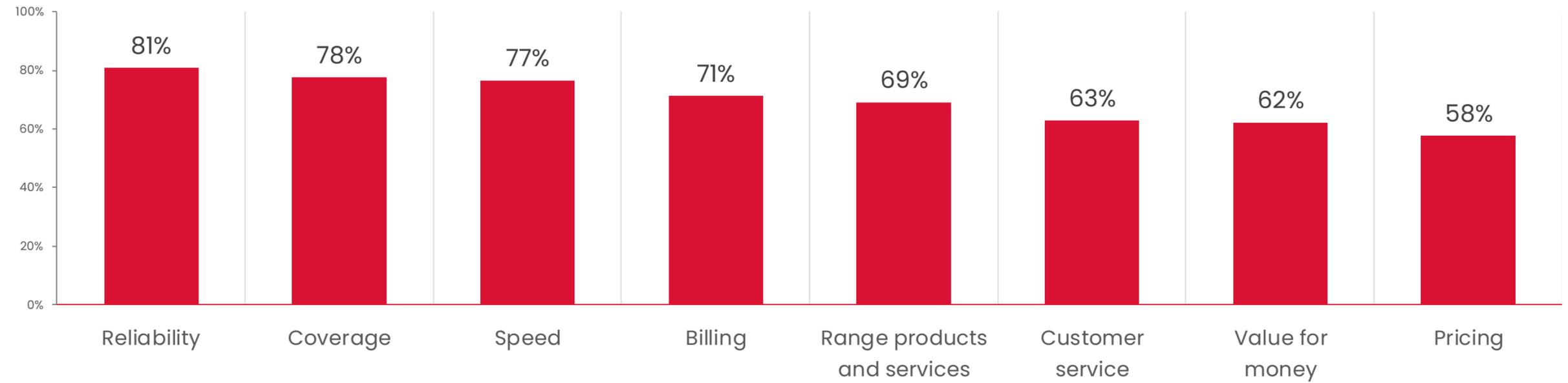
Q. Overall, how satisfied or dissatisfied are you with your provider for your broadband/ household internet service / mobile service? Please take into account their products and services, as well as your experience of dealing with them. (Scale 1-5).

Sorted high to low based on current wave

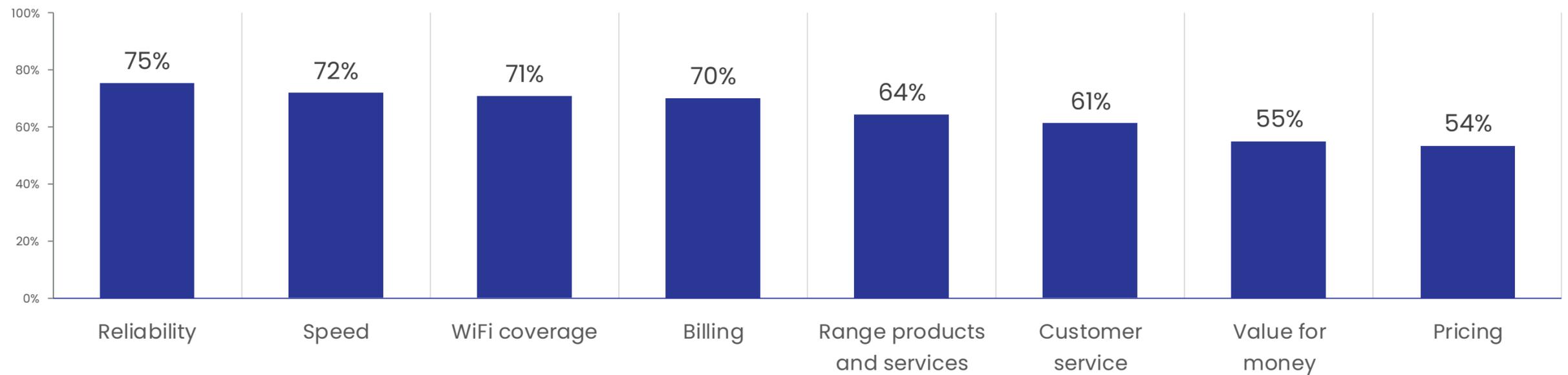
Satisfaction



MOBILE SATISFACTION – CURRENT WAVE



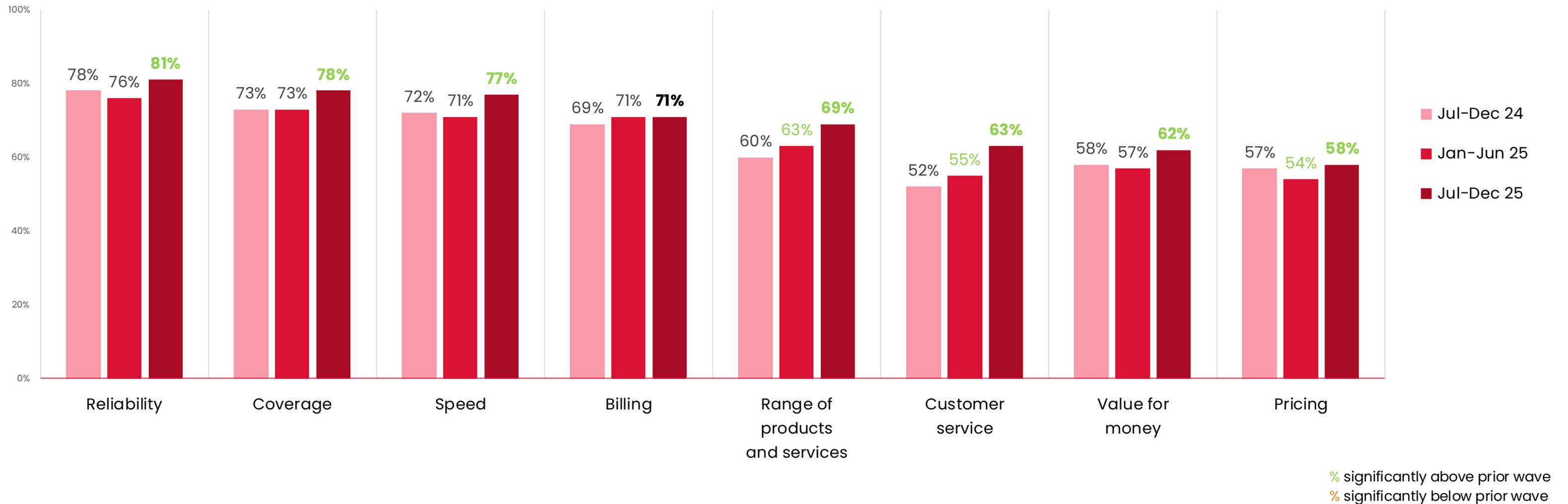
BROADBAND SATISFACTION – CURRENT WAVE





Mobile Satisfaction Trended

MOBILE SATISFACTION – TRENDING



One Thing to Improve Overall Mobile Satisfaction

	Jul-Dec 24	Jan-Jun 25	Jul-Dec 25
More competitive pricing	34%	33%	35%
More reliable connection	9%	9%	8%
Better range of plans to suit my needs	10%	9%	7%
Better customer service	7%	8%	5%
Faster connection speed	5%	5%	4%
Better support to help me pick a plan to suit my needs	3%	3%	3%
Open-term, not fixed-term contracts	2%	2%	2%
Other	7%	6%	6%
I am satisfied there is nothing else they could do	17%	17%	21%
Don't know	7%	7%	8%

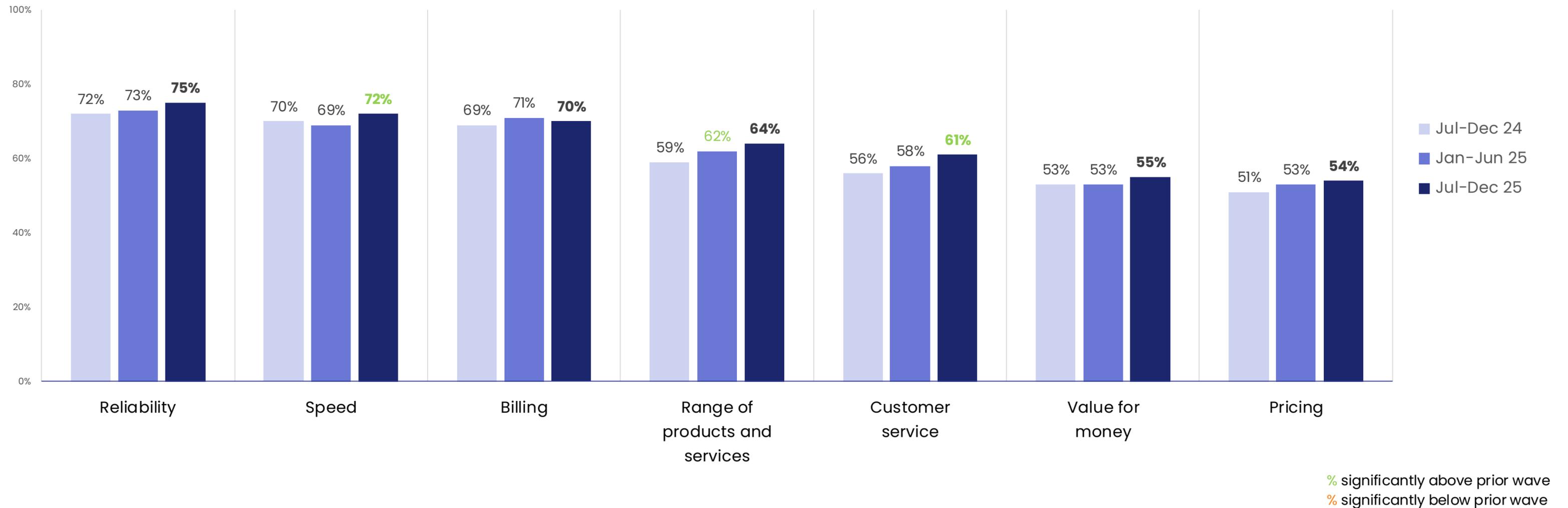
% significantly above prior wave

% significantly below prior wave



Broadband Satisfaction Trended

BROADBAND SATISFACTION – TRENDING





One Thing to Improve Overall Broadband Satisfaction

	Jul-Dec 24	Jan-Jun 25	Jul-Dec 25
More competitive pricing	38%	36%	39%
More reliable connection	9%	11%	10%
Faster connection speed	11%	10%	9%
Better customer service	6%	8%	6%
Better range of plans to suit my needs	4%	5%	4%
Better support to help me pick a plan to suit my needs	3%	3%	3%
Open-term, not fixed-term contracts	3%	3%	3%
Other	3%	3%	3%
I am satisfied there is nothing else they could do	17%	15%	16%
Don't know	6%	7%	7%

% significantly above prior wave

% significantly below prior wave



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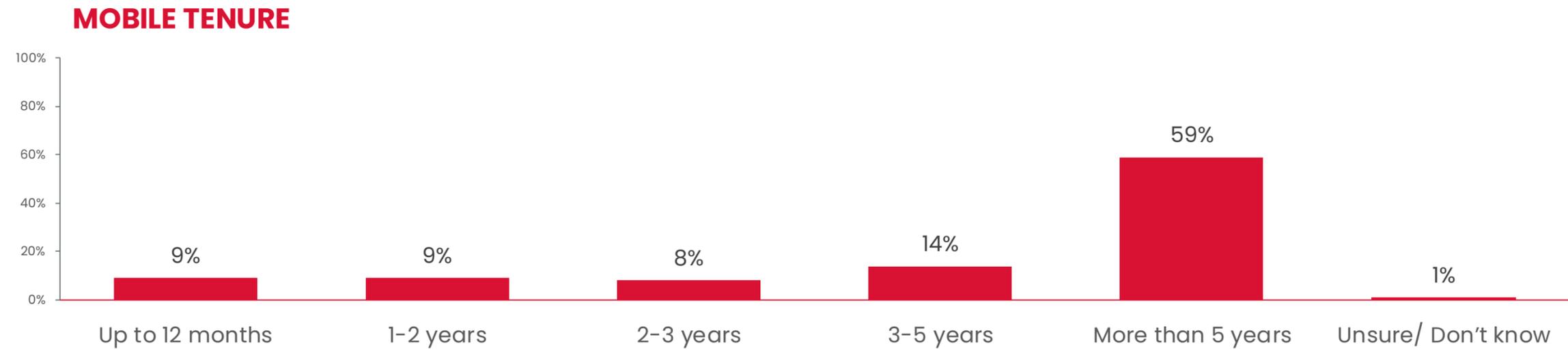
RESIDENTIAL INSIGHTS

Tenure and Switching Behaviour

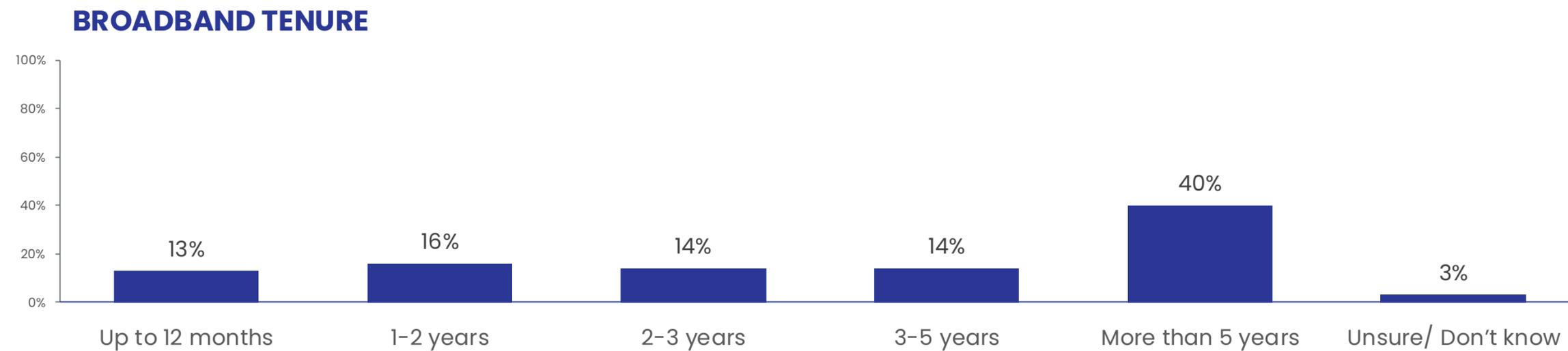
Tenure



Mobile



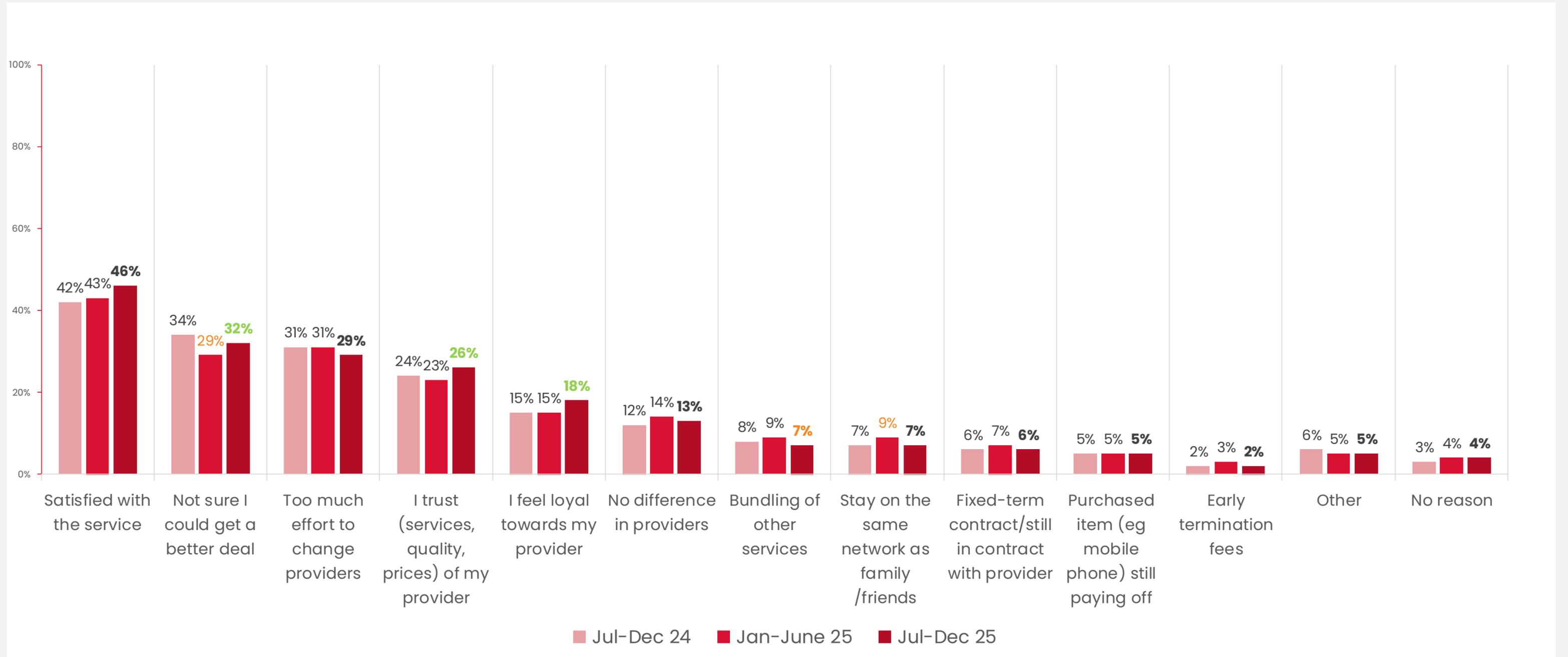

Broadband



Reasons for staying with current mobile provider - Trending



MOBILE – REASON FOR STAYING

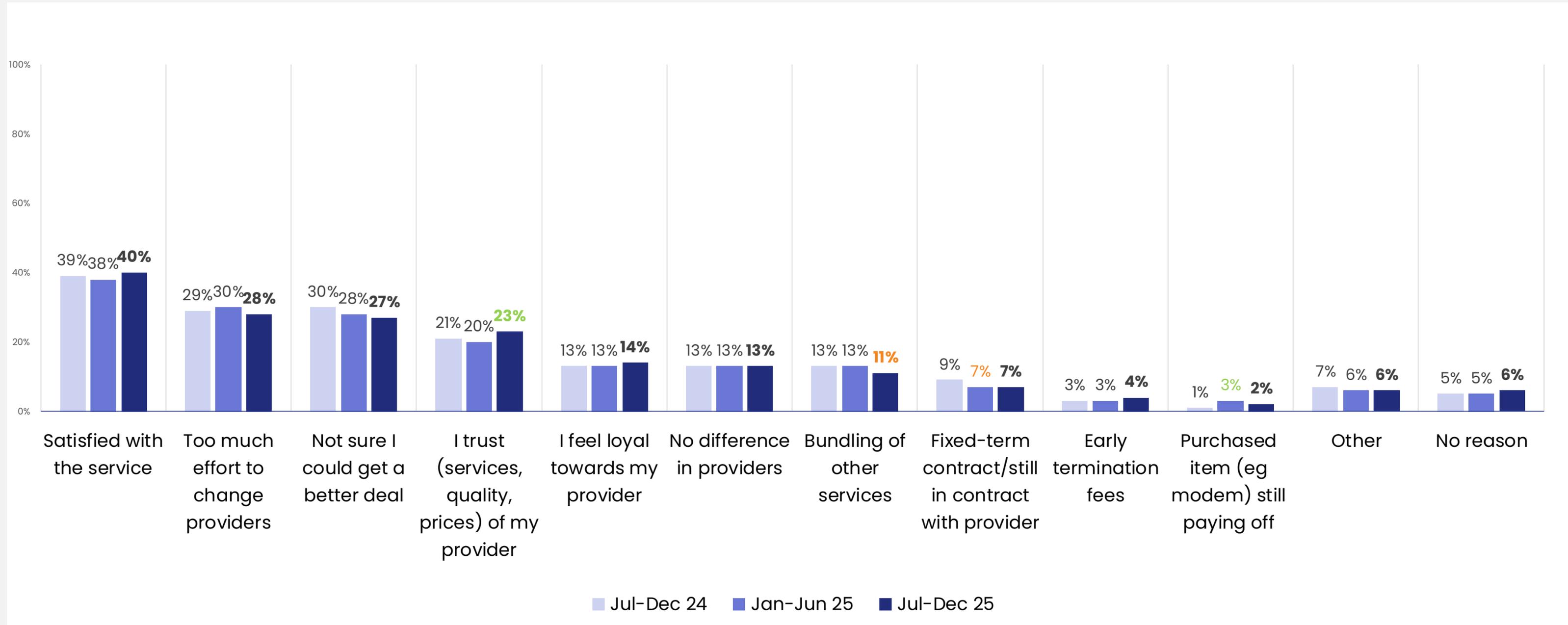


% significantly above prior wave
% significantly below prior wave

Reasons for staying with current broadband provider - Trending



BROADBAND – REASON FOR STAYING

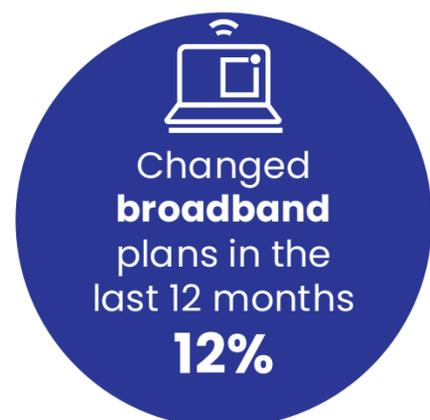


% significantly above prior wave
 % significantly below prior wave

Changing plans with same provider



Top 2 Box (Satisfaction / Agreement)	Jul-Dec 24	Jan-Jun 25	Jul-Dec 25
Changed mobile plan with same provider	12%	16%	11%
Satisfaction with the process of changing your mobile plan	72%	65%	73%
Satisfaction with the information provided about the new plan / offer before you selected it	70%	61%	71%
Satisfaction with the communications you received during the plan change process	n/a	n/a	66%
Agree with: I received the plan I was told I would get when I signed up for the plan	n/a	n/a	80%



Top 2 Box (Satisfaction / Agreement)	Jul-Dec 24	Jan-Jun 25	Jul-Dec 25
Changed broadband plan with same provider	12%	15%	12%
Satisfaction with the process of changing your broadband plan	64%	69%	63%
Satisfaction with the information provided about the new the plan / offer before you selected it	63%	70%	63%
Satisfaction with the communications you received during the plan change process	n/a	n/a	63%
Agree with: I received the plan I was told I would get when I signed up for the plan	n/a	n/a	72%

NOTE: "n/a" not asked this wave

% significantly above prior wave

% significantly below prior wave

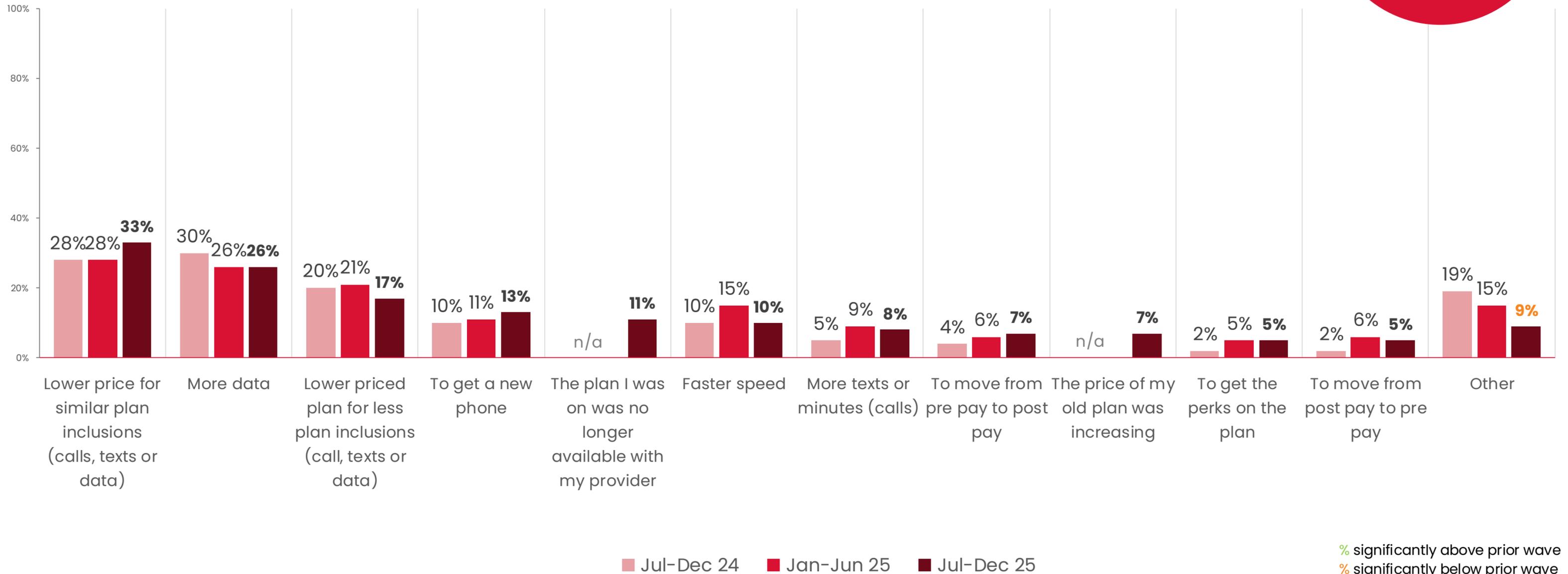
Q. In the last 12 months, have you changed a plan relating to your...
Q. Overall, how satisfied were you with...

Reasons for changing mobile plans with the same provider



Changed **mobile** plans in the last 12 months
11%

REASONS FOR CHANGING PLANS – TRENDING



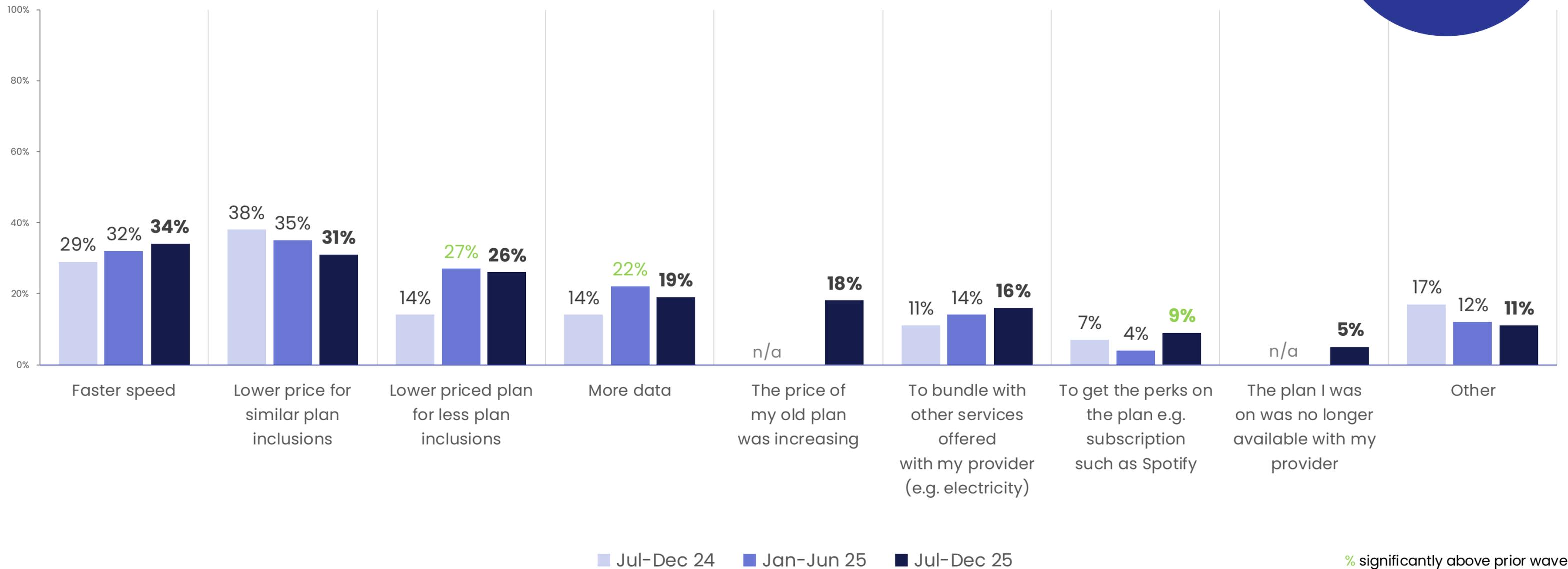
NOTE: "n/a" not asked this wave

Reasons for changing broadband plans with the same provider



Changed **broadband** plans in the last 12 months
12%

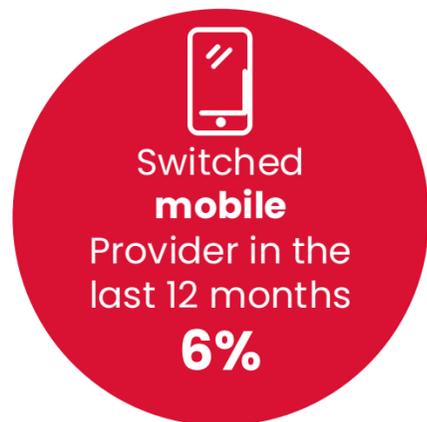
REASONS FOR CHANGING PLANS – TRENDING



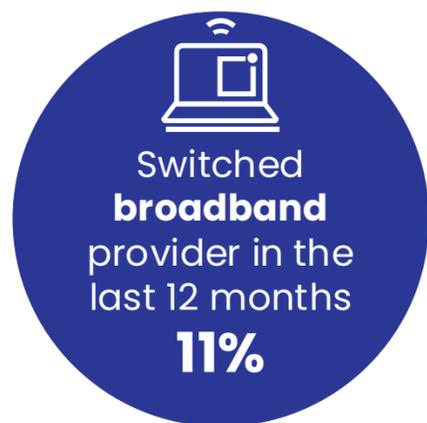
% significantly above prior wave
% significantly below prior wave

NOTE: "n/a" not asked this wave

Switching providers



Top 2 Box (Satisfaction / Agreement)	Jul-Dec 24	Jan-Jun 25	Jul-Dec 25
Changed mobile provider	6%	7%	6%
Satisfaction with the overall process of switching (e.g. what happened during the switch, not the outcome of the switch)	64%	72%	79%
Satisfaction with the information provided on the plan / offer before you signed up	70%	69%	82%



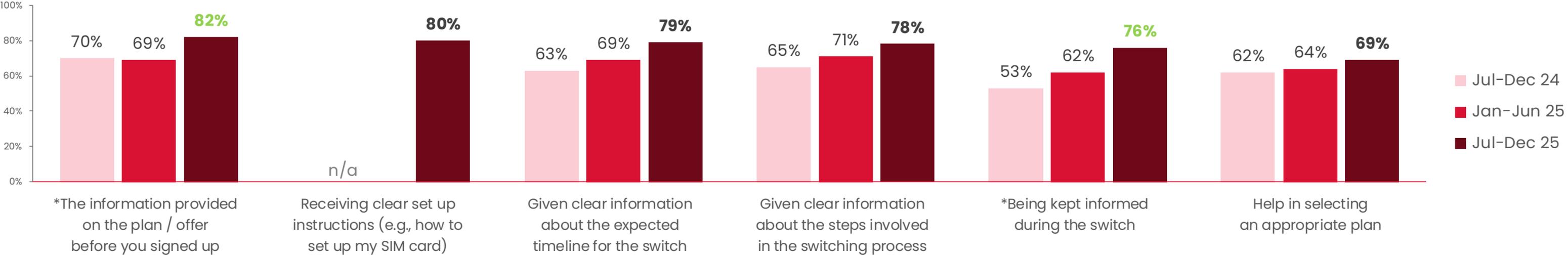
Top 2 Box (Satisfaction / Agreement)	Jul-Dec 24	Jan-Jun 25	Jul-Dec 25
Changed broadband provider	10%	12%	11%
Satisfaction with the overall process of switching	74%	73%	71%
Satisfaction with the information provided on the plan / offer before you signed up	69%	73%	75%

% significantly above prior wave
 % significantly below prior wave

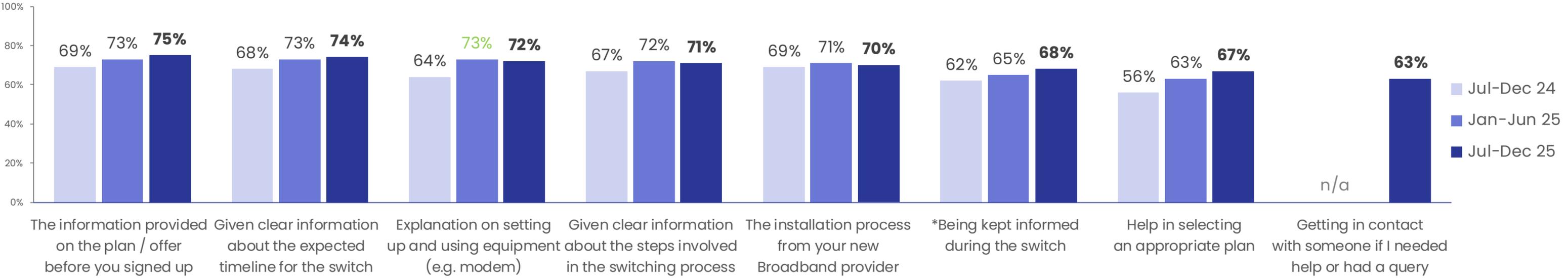
Q. In the last 12 months, have you switched / changed telecommunication providers relating to your...

Switching to different provider experience - Trending

MOBILE SATISFACTION WITH... (TOP 2 BOX)



BROADBAND SATISFACTION WITH... (TOP 2 BOX)



Q. Overall, how satisfied were you with...
* note wording changes

NOTE: "n/a" not asked this wave

% significantly above prior wave
% significantly below prior wave



Reasons started looking to switch mobile providers

	Jul-Dec 24	Jan-Jun 25	Jul-Dec 25
I wanted to pay less	53%	41%	59%
My loyalty was not getting rewarded	15%	17%	21%
I had an issue with customer service	14%	18%	15%
I wanted more data	29%	29%	14%
I saw an advert / offer from a new provider	15%	11%	11%
I had an issue with coverage	6%	11%	10%
I wanted to have my bills with the same provider	3%	7%	10%
I had billing issues	4%	6%	7%
To be on the same network as family/friends	9%	4%	7%
I wanted faster speed	13%	18%	5%
I was not getting the speed I was promised	2%	3%	5%
Other	14%	18%	19%

Multiple responses given



Reasons started looking to switch broadband providers

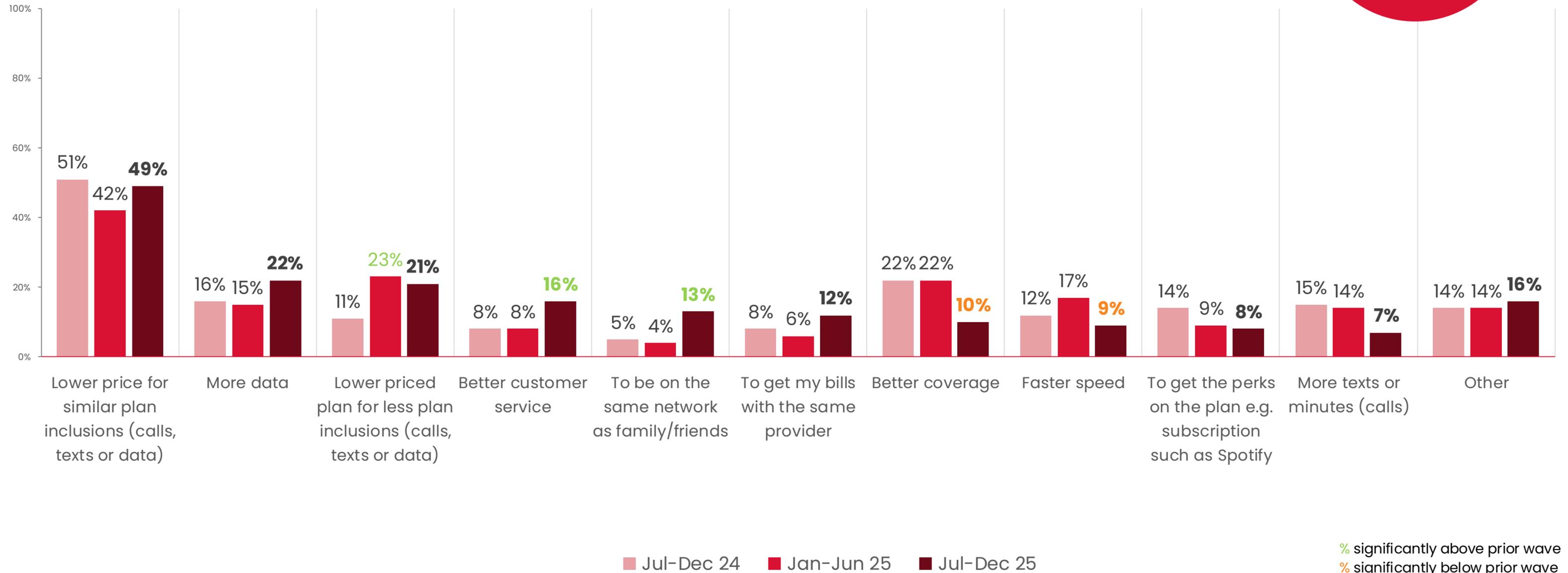
	Jul-Dec 24	Jan-Jun 25	Jul-Dec 25
I wanted to pay less	52%	42%	40%
I wanted faster speed	20%	25%	21%
My loyalty was not getting rewarded	21%	19%	21%
Issue with reliability i.e. I was not getting the speed I was promised	16%	18%	16%
I saw an advert / offer from a new provider	10%	14%	15%
Having trouble with Wi-fi connectivity in my home (dead zones)	n/a	n/a	15%
I had an issue with customer service	13%	21%	14%
I couldn't get the connection I wanted (fibre, wireless etc.)	6%	7%	13%
I wanted to have my bills with the same provider	10%	12%	11%
I had billing issues	5%	4%	11%
I wanted more data	13%	19%	10%
Other	15%	13%	13%

n/a not asked
Multiple responses given

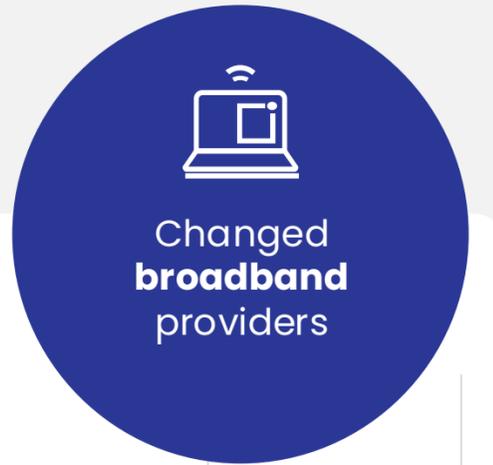
Reasons for choosing new mobile provider



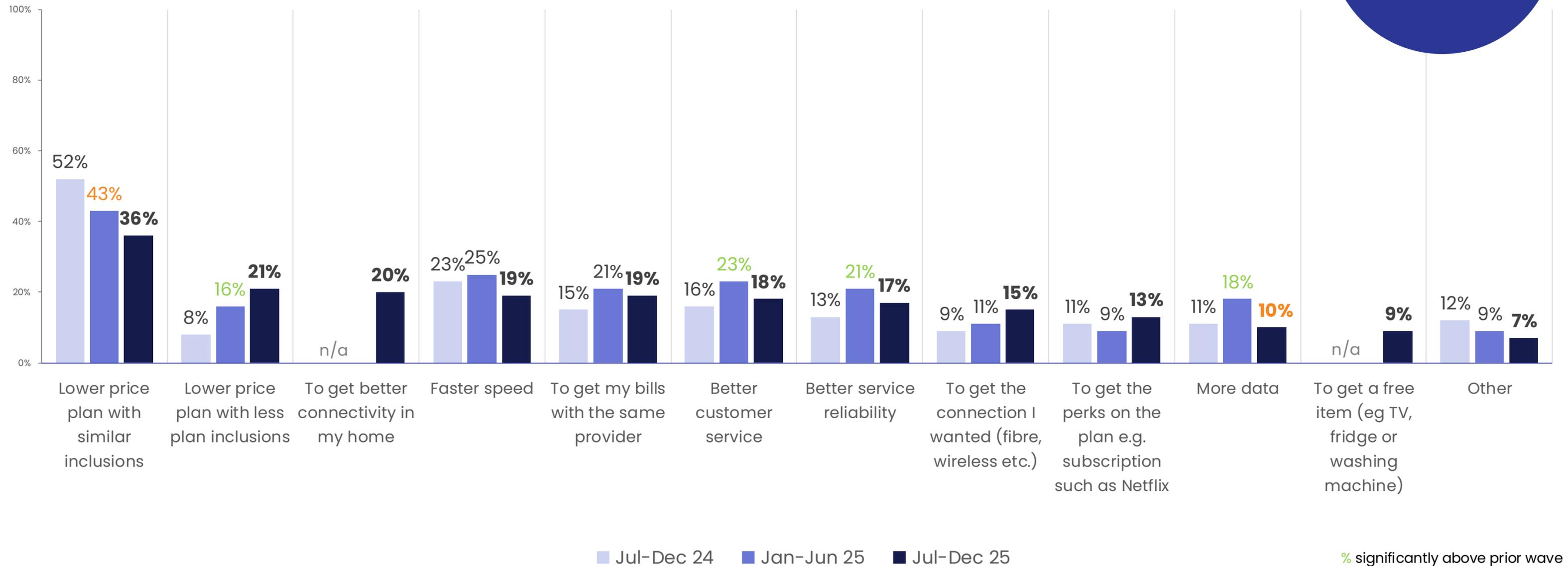
REASONS FOR CHOOSING NEW MOBILE PROVIDER – TRENDING



Reasons for choosing new broadband provider



REASONS FOR CHOOSING NEW BROADBAND PROVIDER – TRENDING



% significantly above prior wave
 % significantly below prior wave

NOTE: "n/a" not asked this wave



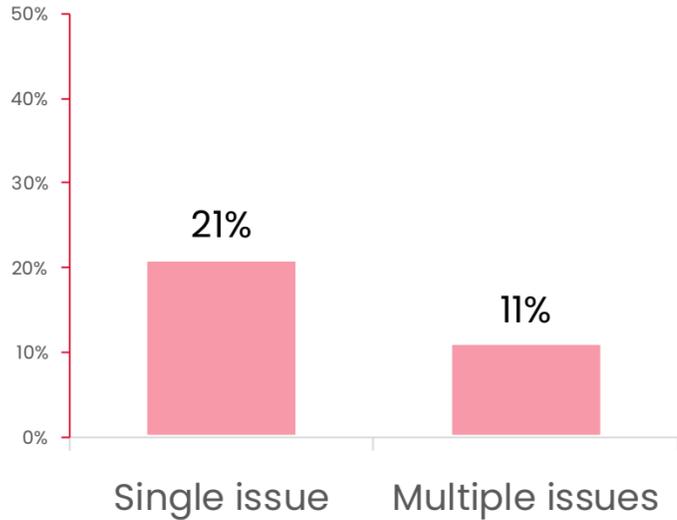
 **INSIGHTS HQ**

RESIDENTIAL INSIGHTS

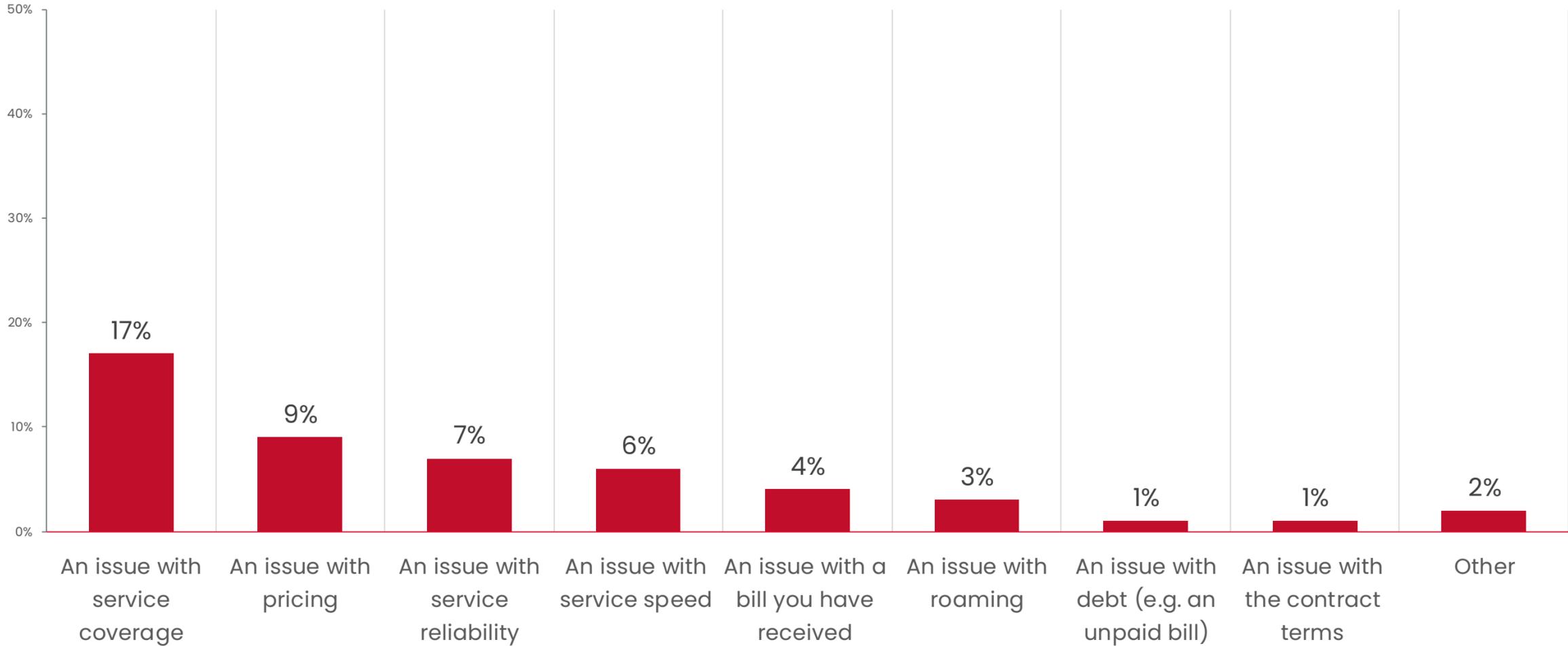
Issues and Response

Mobile issues experienced by customers


32%
of **mobile** customers
have experienced
an **issue** with their
mobile service in the
past
6 months

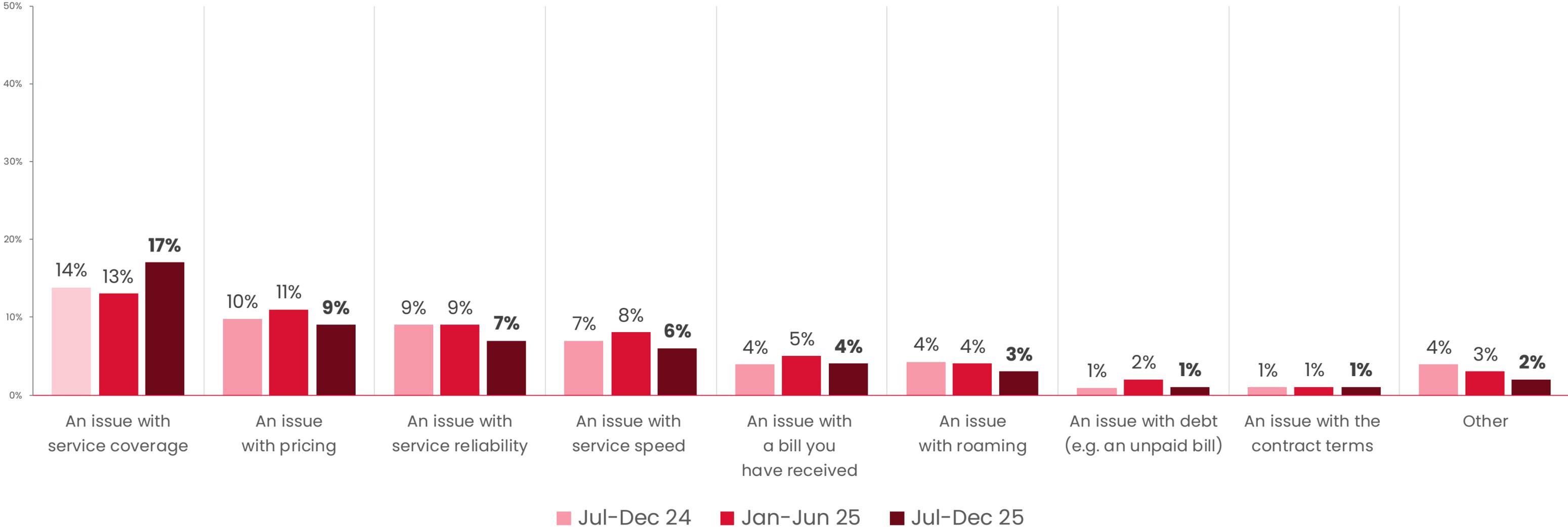


ISSUES WITH MOBILE PROVIDER



Mobile issues experienced by customers - Trending

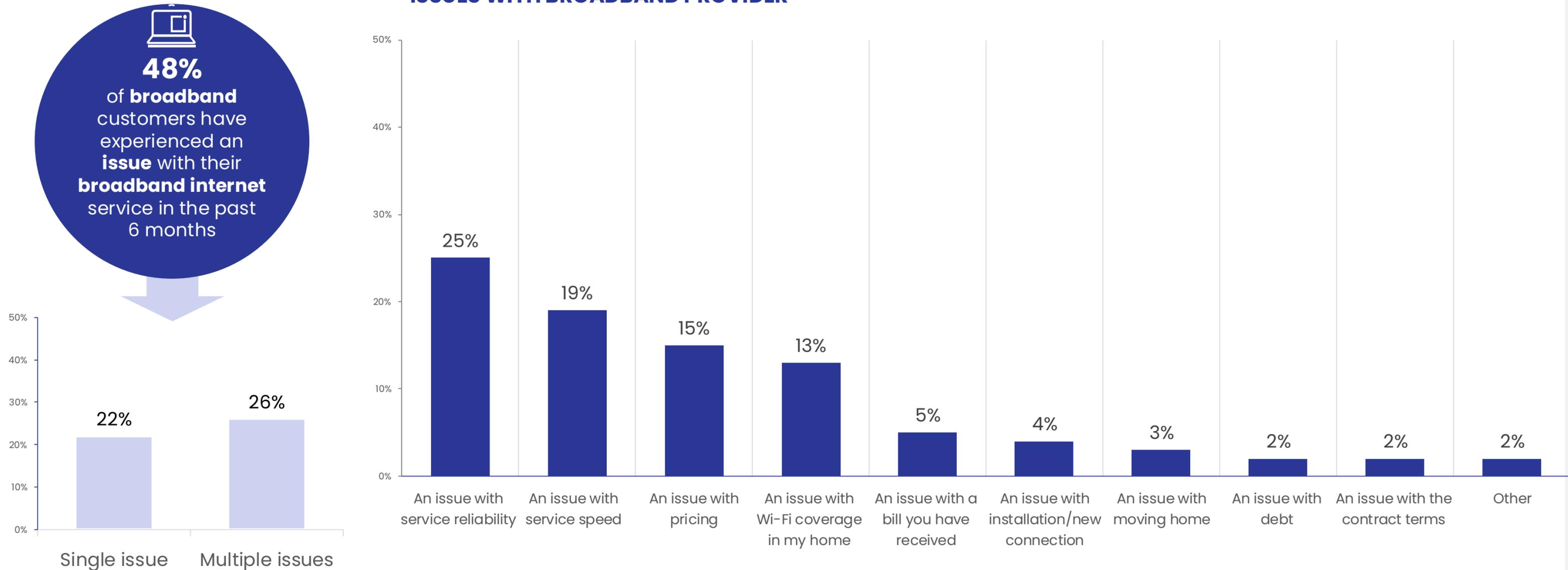
ISSUES WITH MOBILE PROVIDER



Multiple responses given

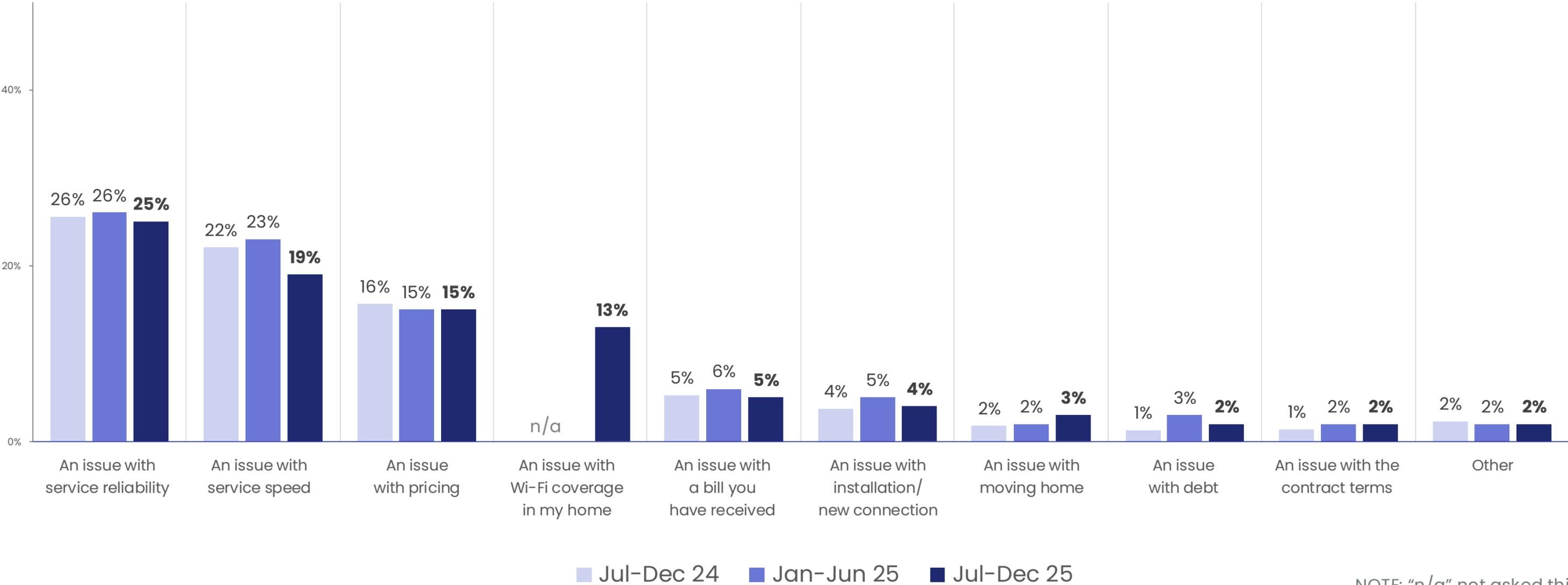
Q. In the last 6 months, have you experienced any of the following issues with your mobile service? (Multiple response question)

Broadband issues experienced by customers



Broadband issues experienced by customers - Trending

ISSUES WITH BROADBAND PROVIDER



NOTE: "n/a" not asked this wave
Multiple responses given



Q INSIGHTS HQ

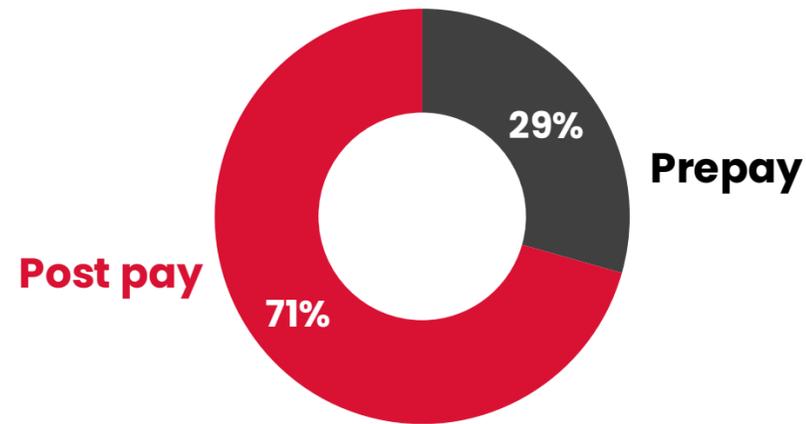
SME INSIGHTS

NPS and Satisfaction

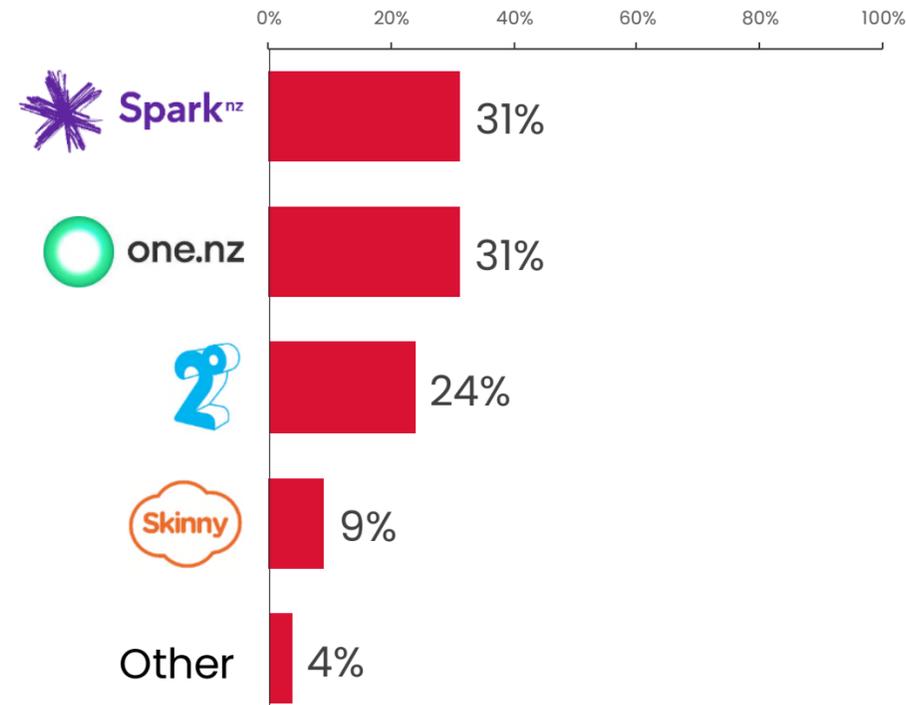
Products + Providers

SME

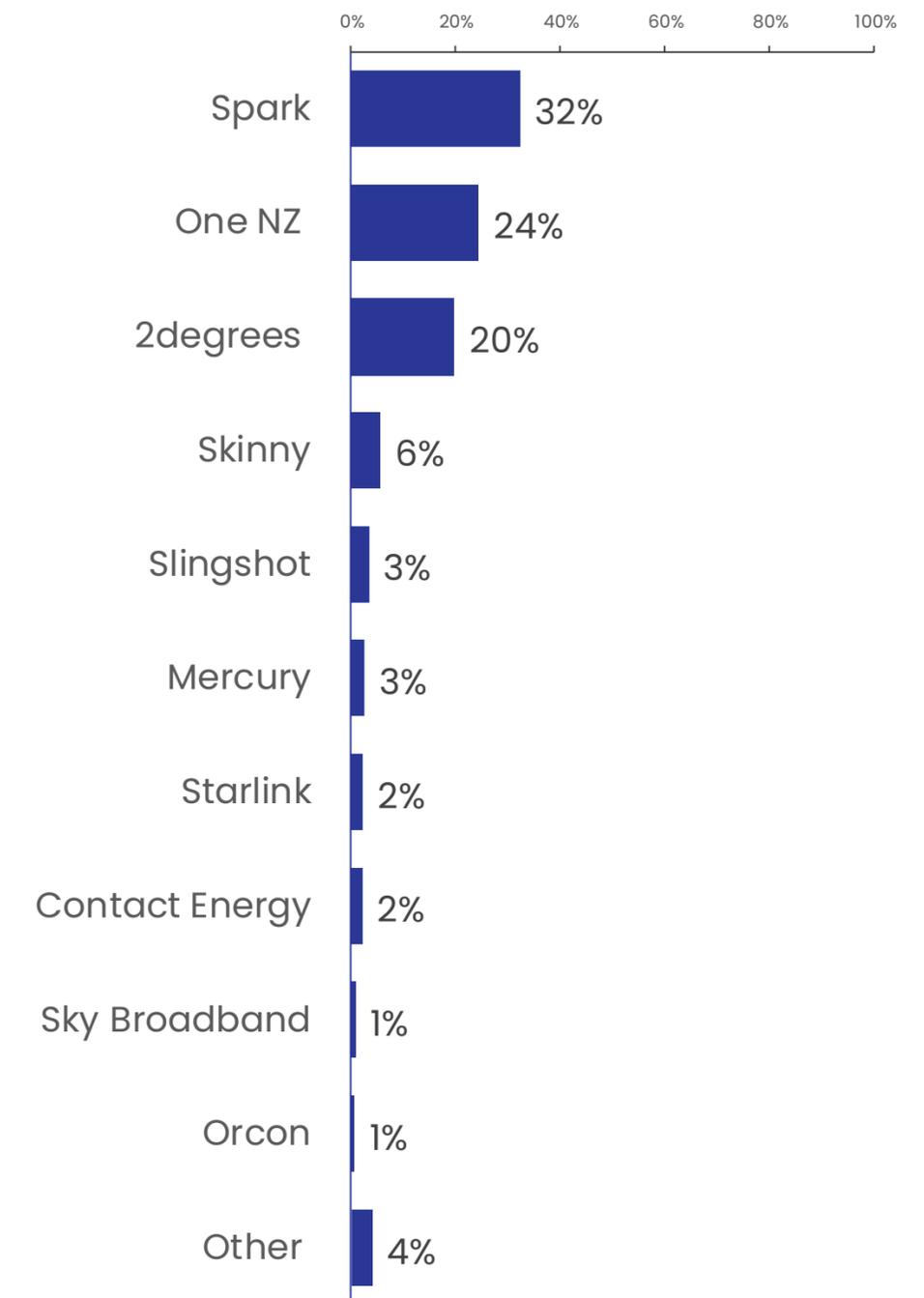
MOBILE PLAN



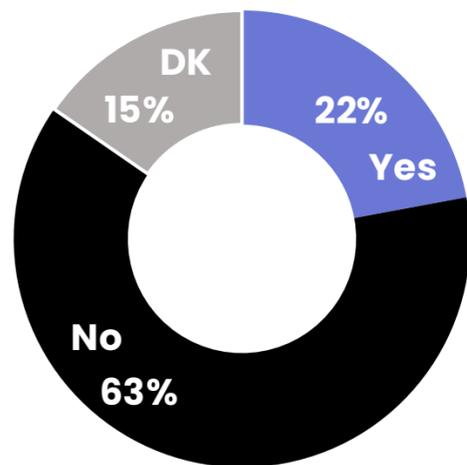
MOBILE PROVIDER



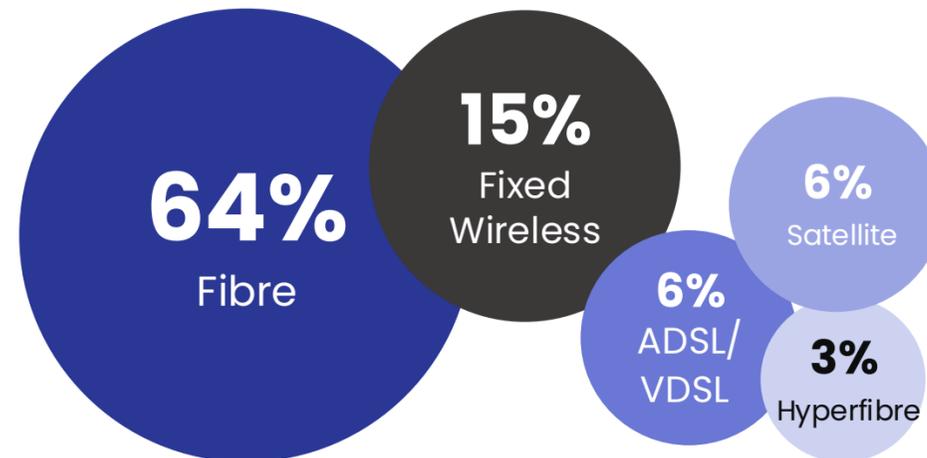
BROADBAND PROVIDER



ELECTRICITY BUNDLE



BROADBAND TECHNOLOGY

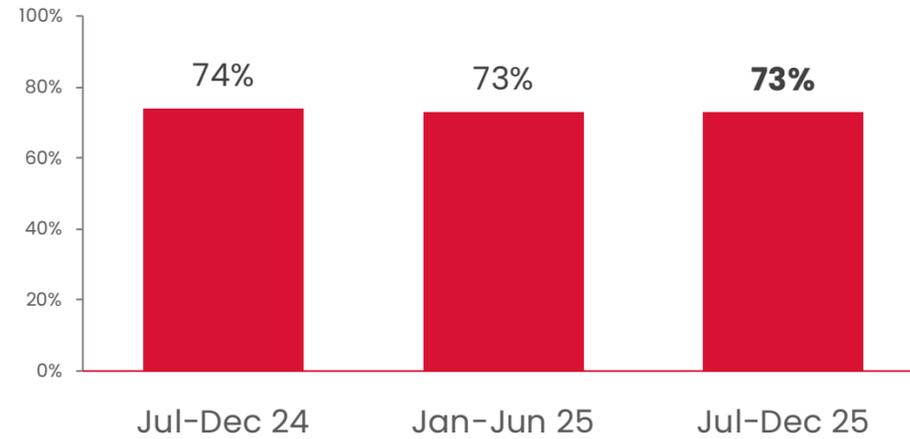


Overall Satisfaction - Trend

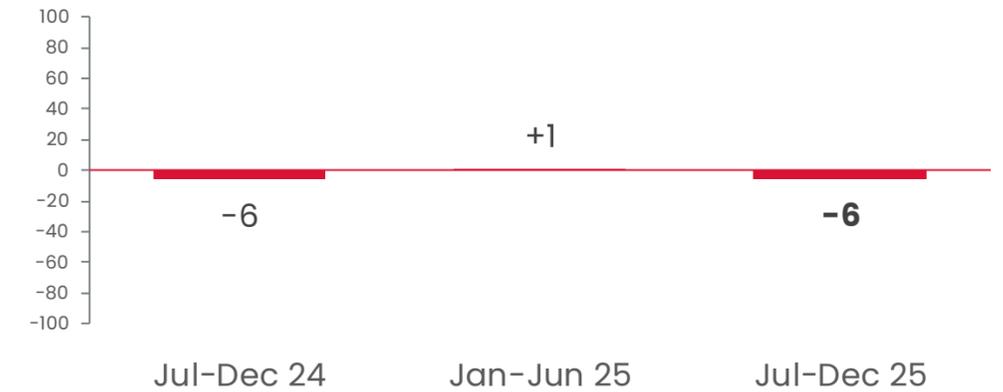
Net Promoter Score - Trend



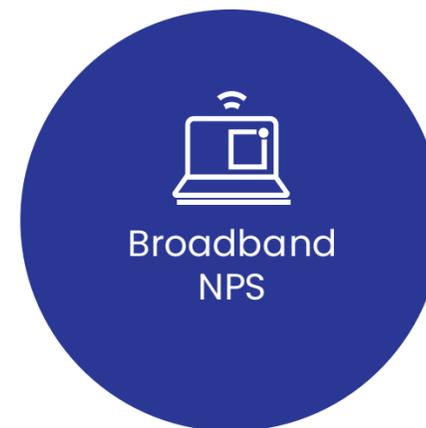
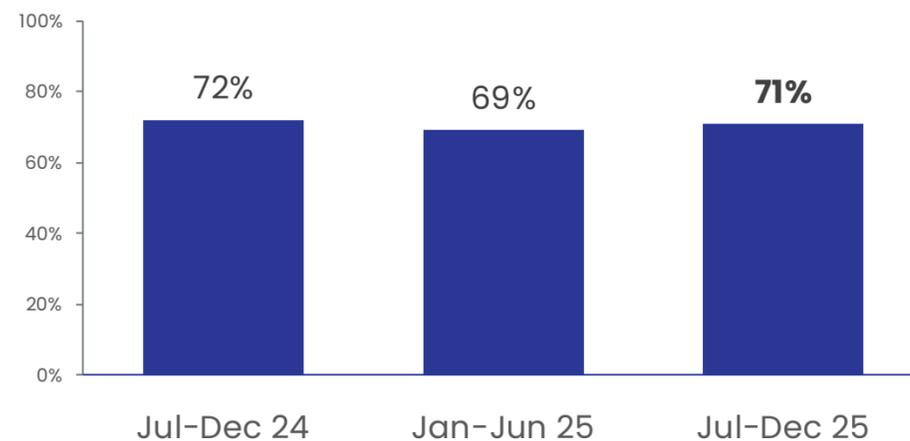
SATISFACTION TREND



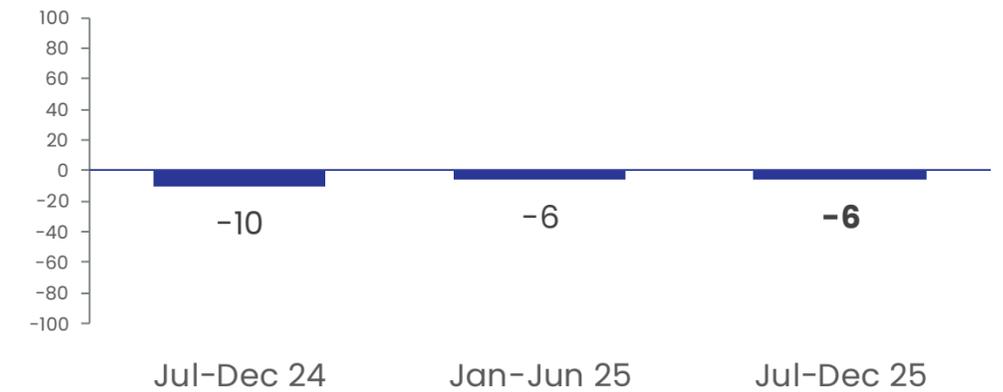
NPS TREND



SATISFACTION TREND



NPS TREND



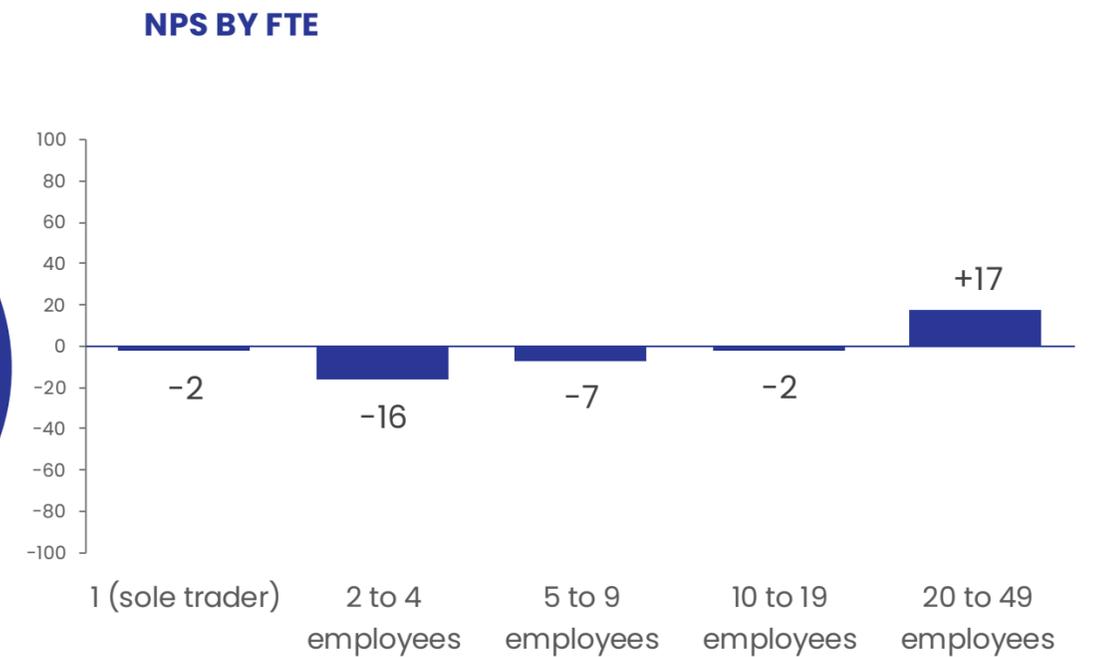
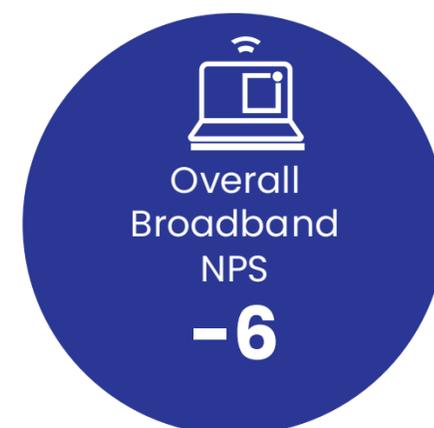
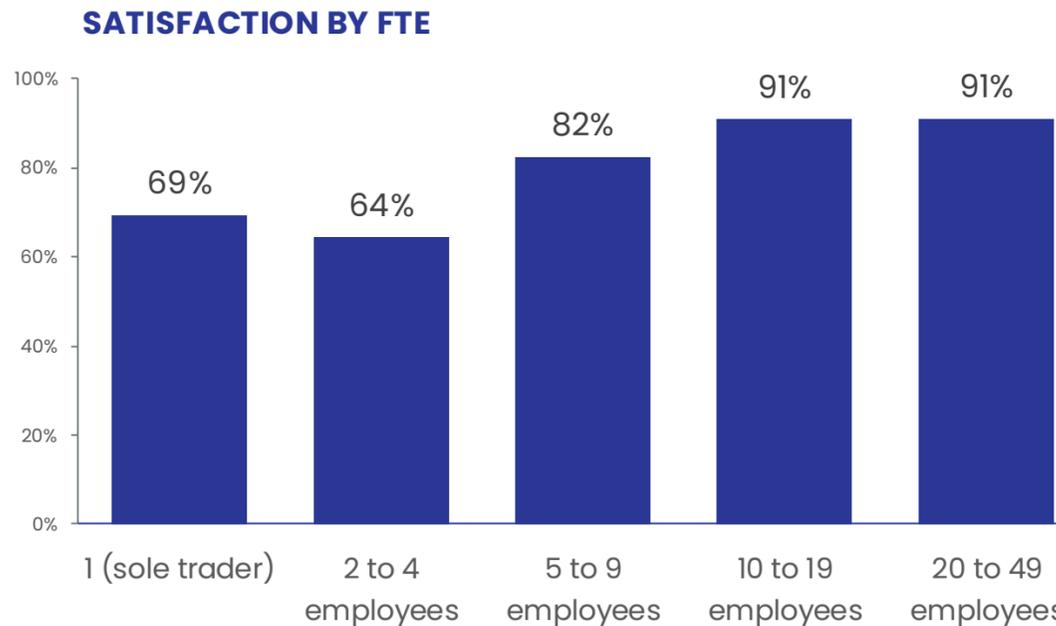
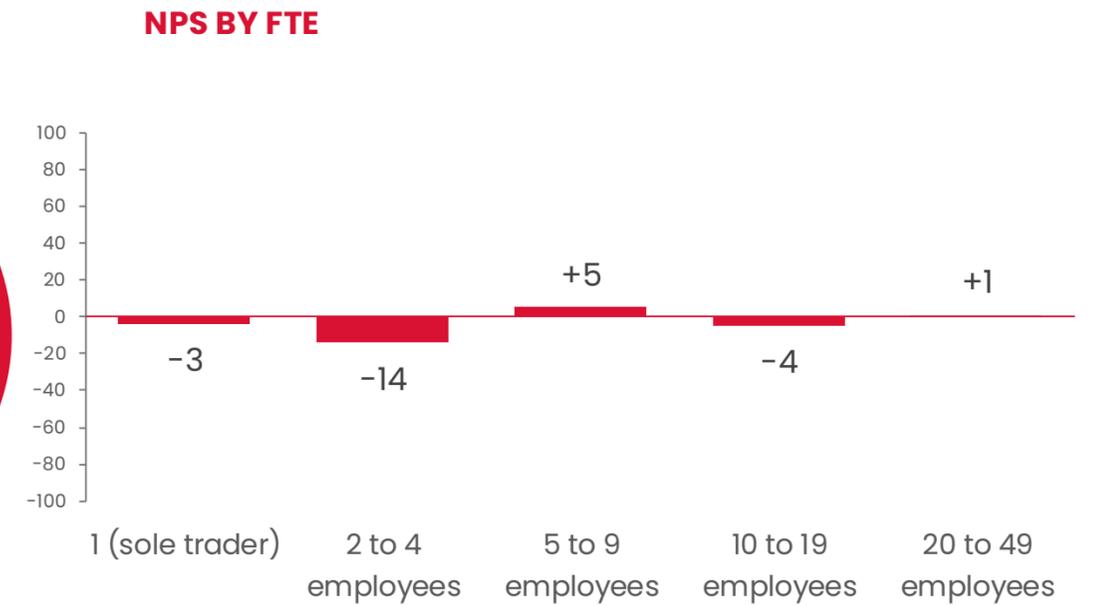
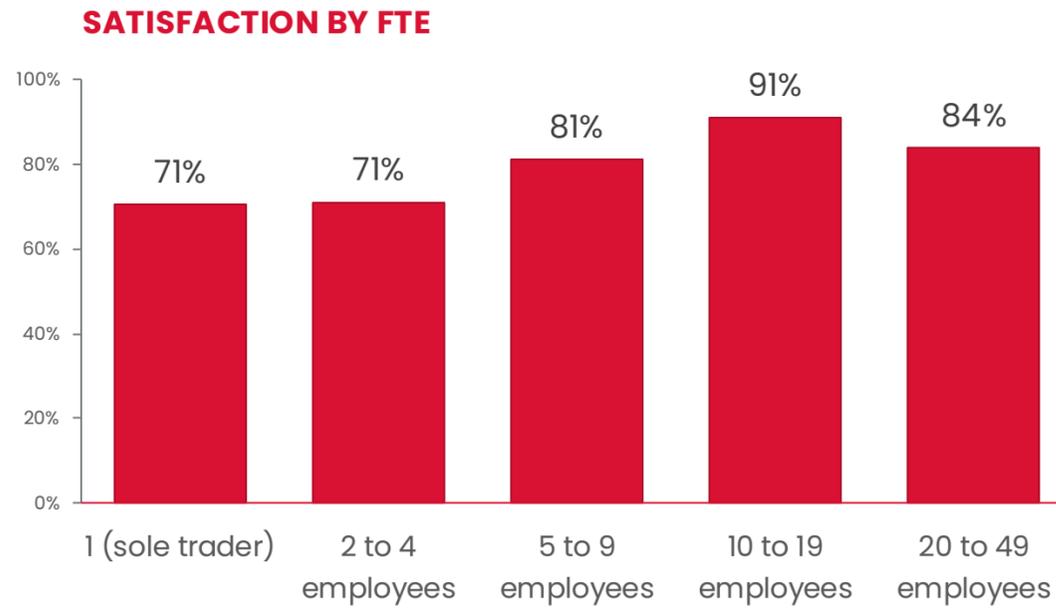
% significantly above prior wave
 % significantly below prior wave

NOTE: significance testing not included for NPS

Q. And how satisfied are you with [mobile provider] for your mobile service in relation to the following aspects? (Scale 1-5)
 Q. And how satisfied are you with [broadband provider] for your broadband / business internet service in relation to the following aspects? (Scale 1-5)
 Q. Considering your experience with your current providers, how likely would you be to recommend them to a friend or family member? (Scale 0-10)

Overall Satisfaction – Full-Time Employees (FTE)

Promoter Score – Full-Time Employees (FTE)

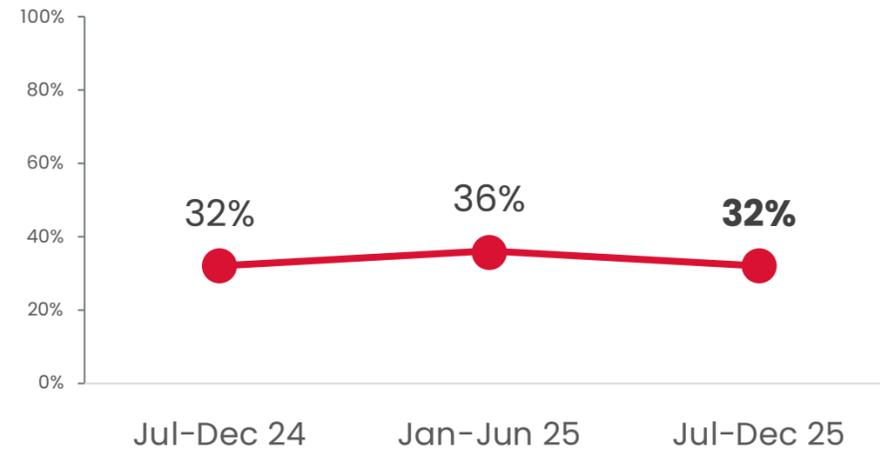


Q. And how satisfied are you with [mobile provider] for your mobile service in relation to the following aspects? (Scale 1-5)
 Q. And how satisfied are you with [broadband provider] for your broadband / business internet service in relation to the following aspects? (Scale 1-5)
 Q. Considering your experience with your current providers, how likely would you be to recommend them to a friend or family member? (Scale 0-10)
 Q. Including yourself, how many people currently work in your business across all locations?

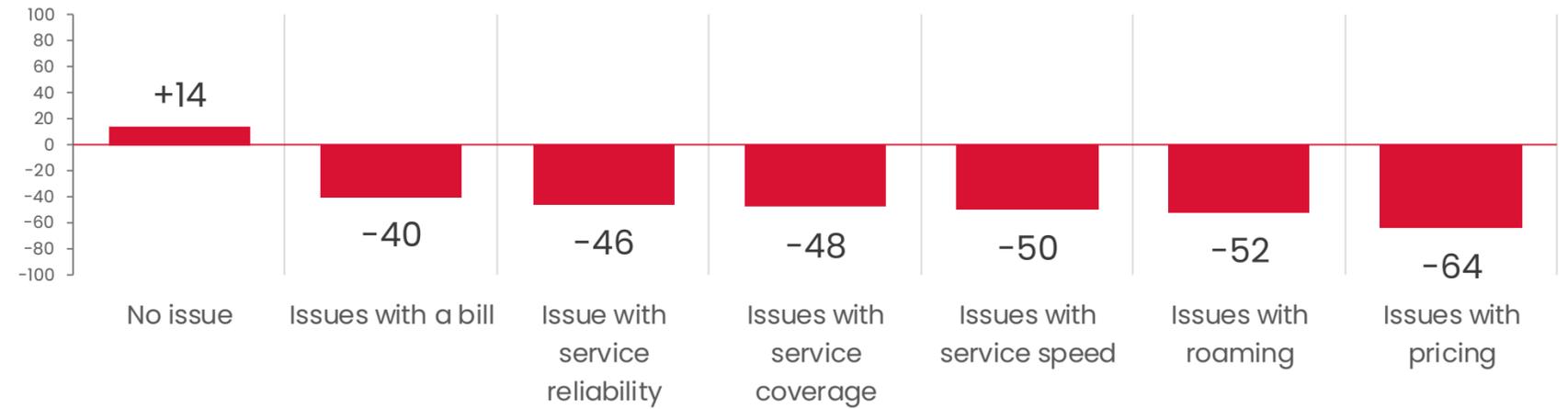
NPS and Issues Experienced



EXPERIENCED AN ISSUE



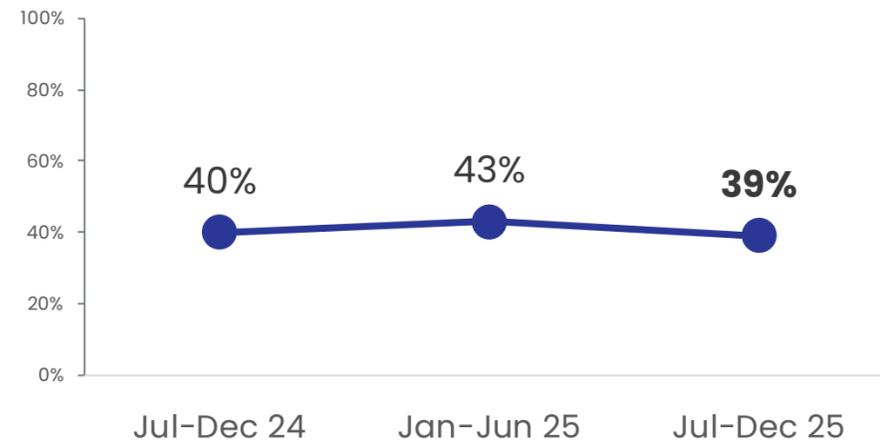
NPS BY ISSUES EXPERIENCED – CURRENT WAVE



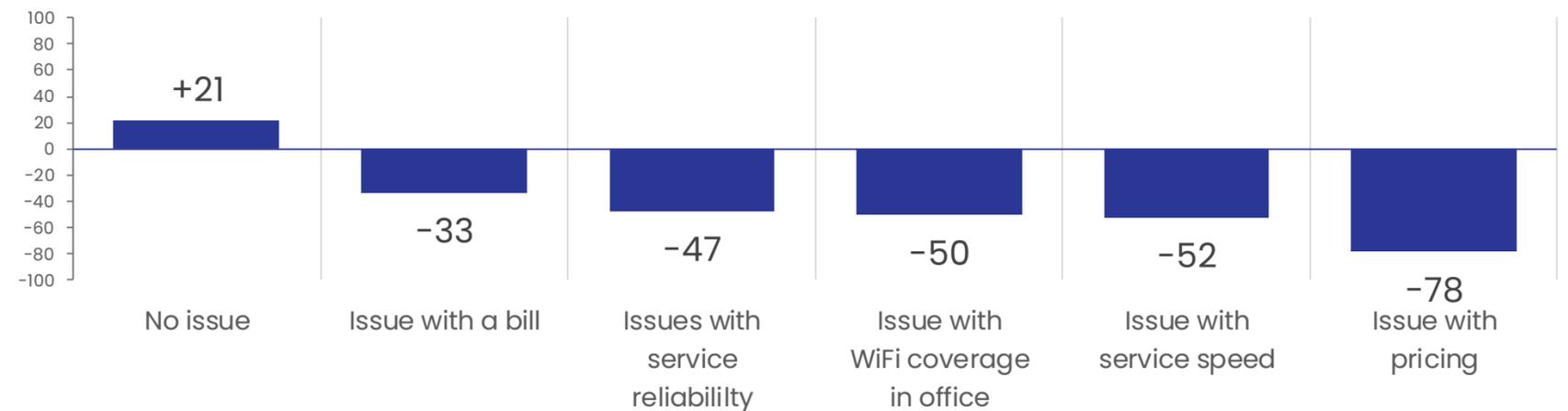
NOTE: other issues too small to report (n<25)



EXPERIENCED AN ISSUE



NPS BY ISSUES EXPERIENCED – CURRENT WAVE



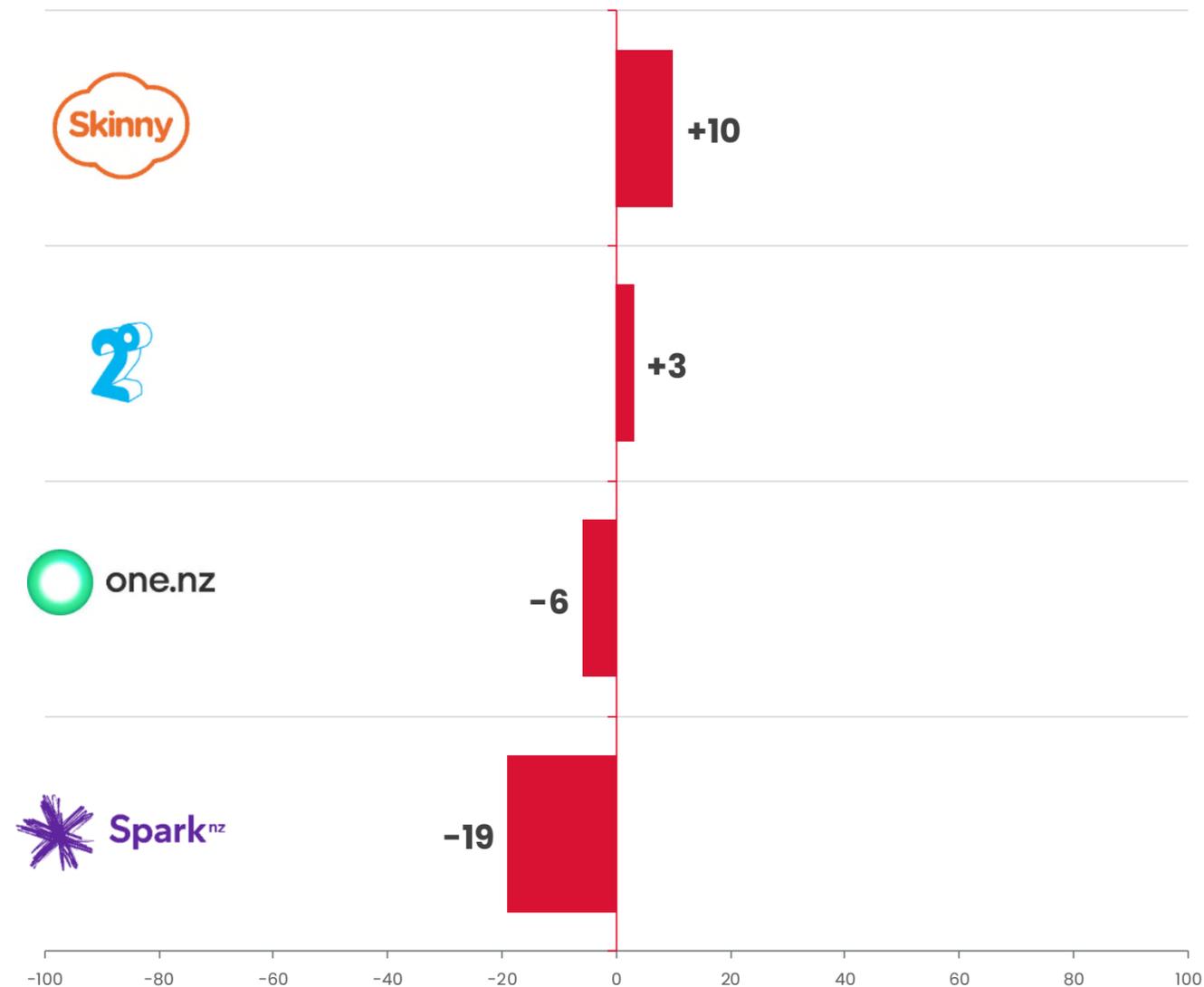
NOTE: other issues too small to report (n<25)

% significantly above prior wave
 % significantly below prior wave

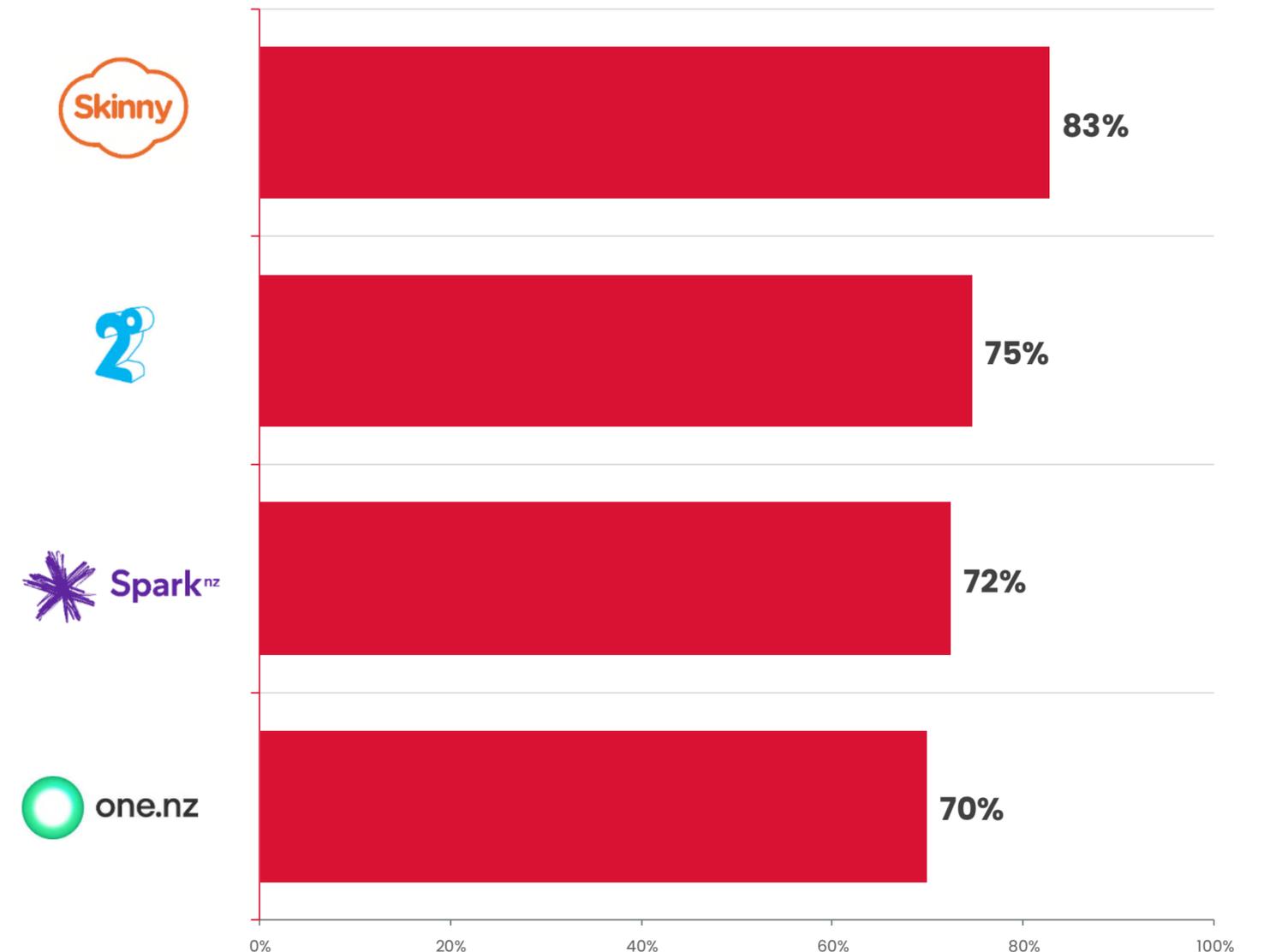
Q. In the last 6 months, has the business / company you work for experienced any of the following issues with their Mobile service?
 Q. In the last 6 months, has the business / company you work for experienced any of the following issues with their Broadband internet service?

Mobile NPS and Satisfaction by Provider

NET PROMOTER SCORE – CURRENT WAVE



SATISFACTION – CURRENT WAVE

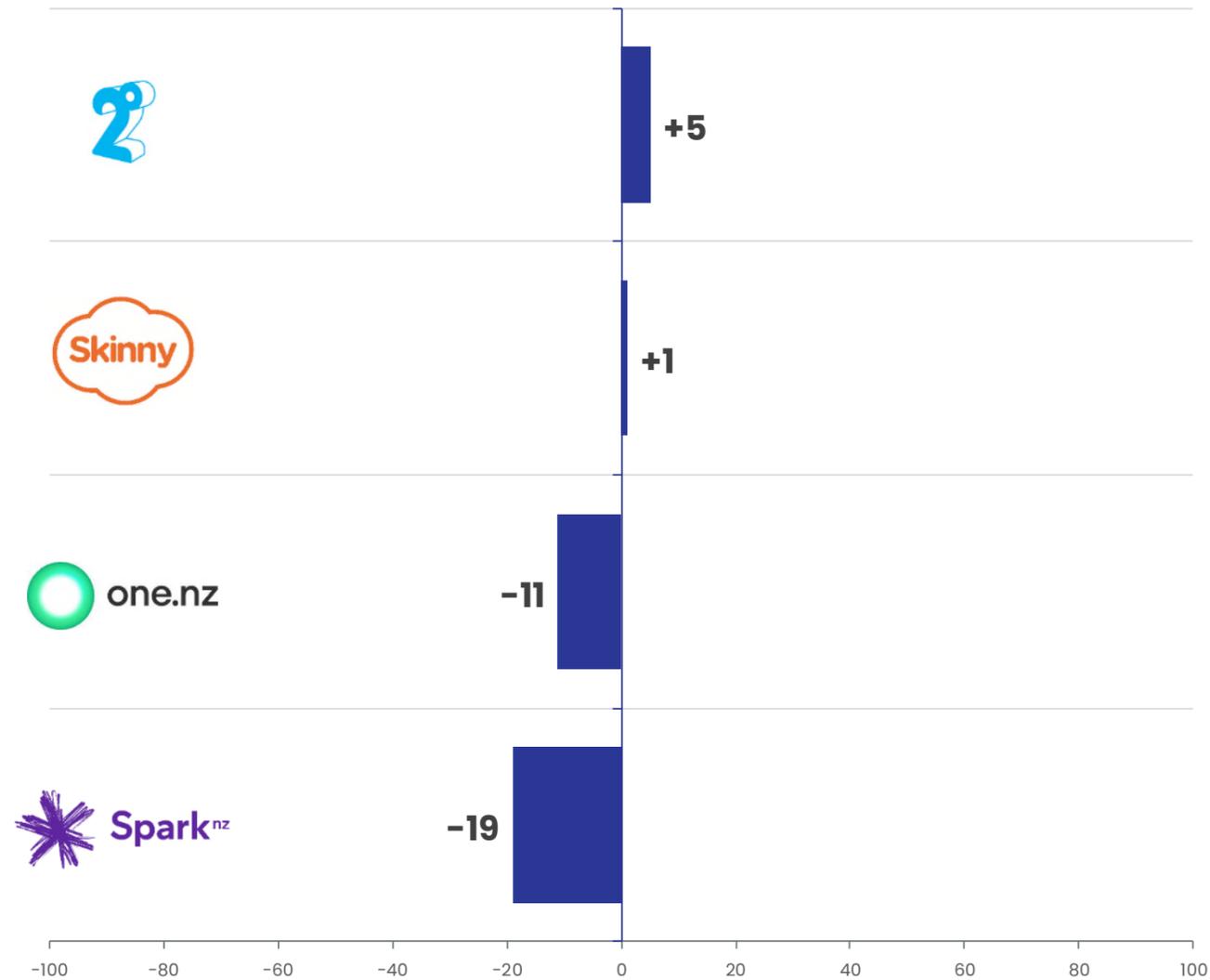


Q. And how satisfied are you with [mobile provider] for your mobile service in relation to the following aspects? (Scale 1-5)
 Q. Considering your experience with your current providers, how likely would you be to recommend them to a friend or family member? (Scale 0-10)
 Q. Which telecommunication company do you use for its mobile? If you use more than one, please think about your main provider.
 Sorted high to low based on current wave

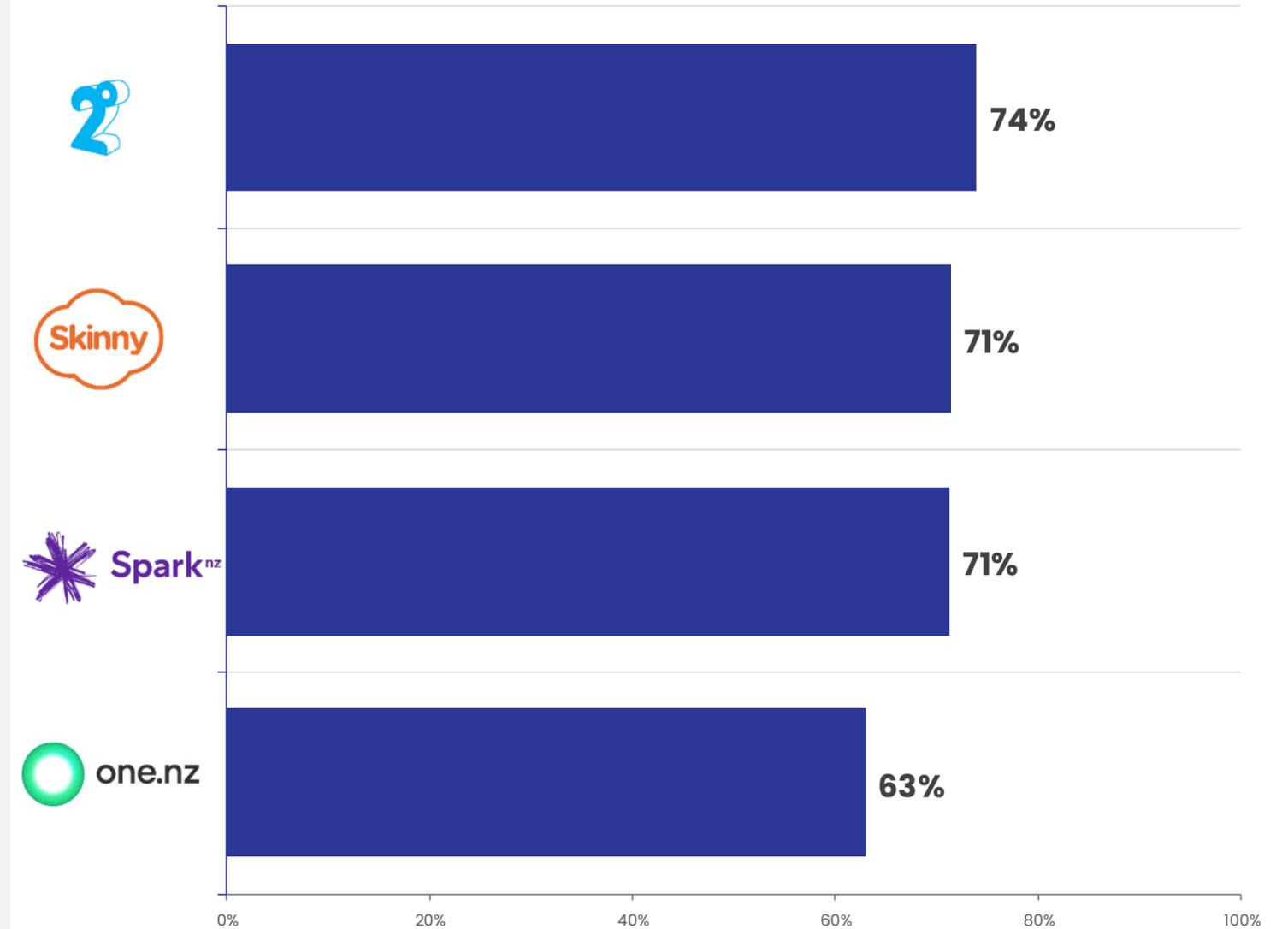


Broadband NPS and Satisfaction by Provider

NET PROMOTER SCORE – CURRENT WAVE



SATISFACTION – CURRENT WAVE



Q. And how satisfied are you with [broadband provider] for your broadband / business internet service in relation to the following aspects? (Scale 1-5)

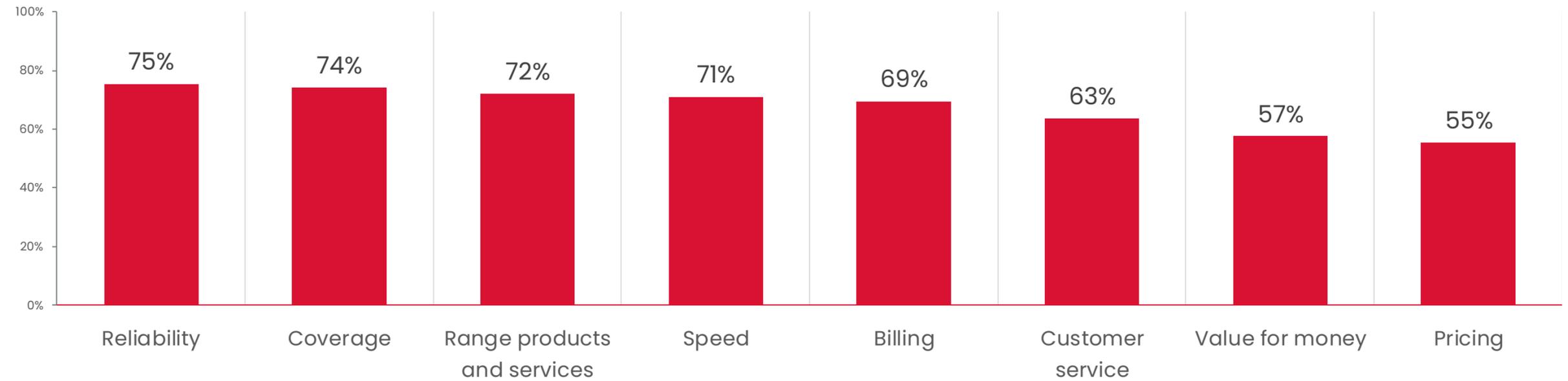
Q. Considering your experience with your current providers, how likely would you be to recommend them to a friend or family member? (Scale 0-10)

Q. Which telecommunication company does the business / company you work for use for its broadband? If you use more than one, please think about your main provider. Sorted high to low based on current wave

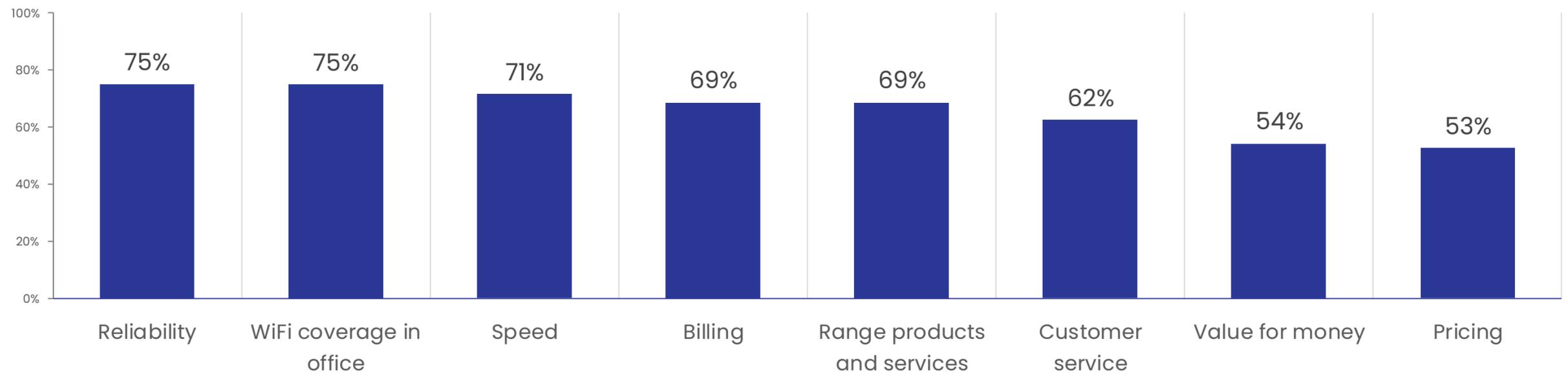
Satisfaction



MOBILE SATISFACTION – CURRENT WAVE



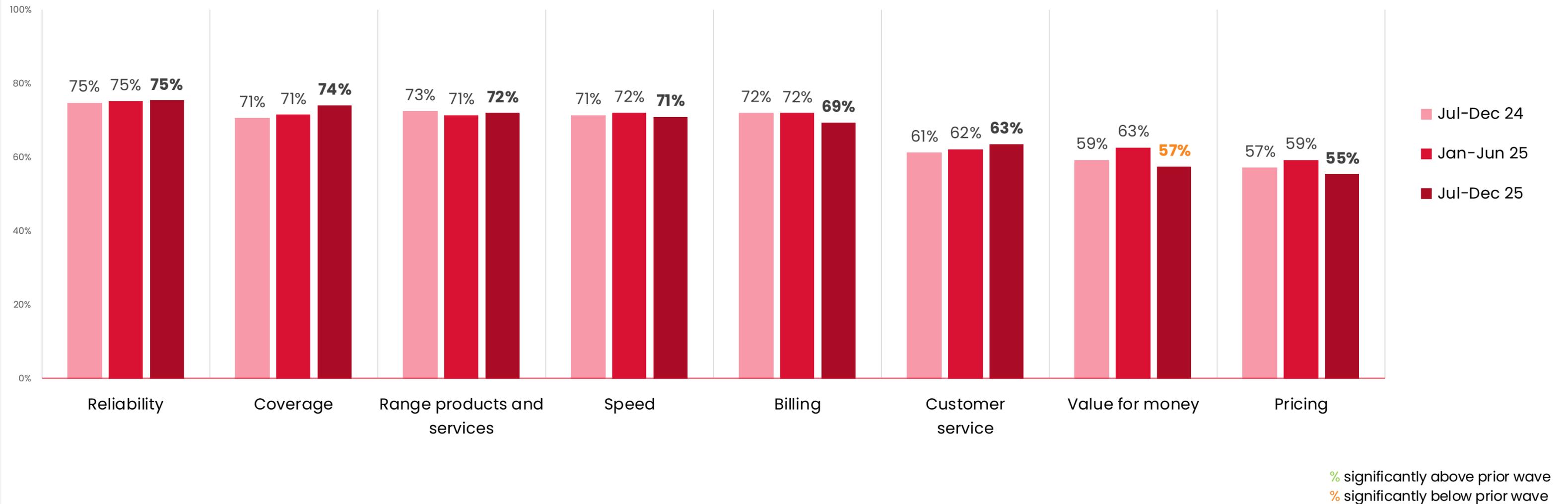
BROADBAND SATISFACTION – CURRENT WAVE





Mobile Satisfaction Trended

MOBILE SATISFACTION – TRENDING



One Thing to Improve Overall Mobile Satisfaction

	Jul-Dec 24	Jan-Jun 25	Jul-Dec 25
More competitive pricing	34%	29%	31%
Better customer service	8%	8%	10%
Faster connection speed	8%	9%	9%
More reliable connection	11%	11%	8%
Better range of plans to suit my needs	7%	6%	7%
Open-term, not fixed-term contracts	3%	5%	3%
Better support to help me pick a plan to suit my needs	3%	4%	2%
Other	4%	4%	4%
I am satisfied there is nothing else they could do	16%	18%	18%
Don't know	6%	7%	8%

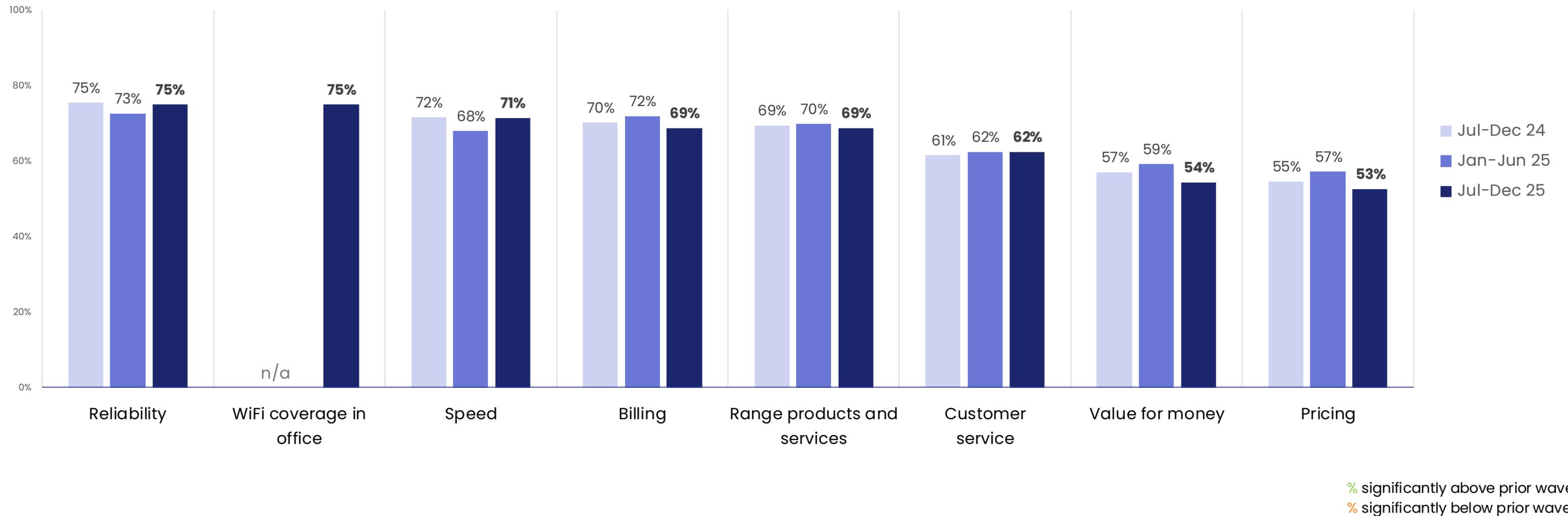
% significantly above prior wave

% significantly below prior wave



Broadband Satisfaction Trended

BROADBAND SATISFACTION – TRENDING



NOTE: "n/a" not asked this wave



One Thing to Improve Overall Broadband Satisfaction

	Jul-Dec 24	Jan-Jun 25	Jul-Dec 25
More competitive pricing	35%	30%	34%
More reliable connection	9%	9%	10%
Faster connection speed	15%	12%	9%
Better customer service	7%	8%	6%
Better range of plans to suit my needs	4%	5%	5%
Better support to help me pick a plan to suit my needs	3%	3%	2%
Open-term, not fixed-term contracts	2%	5%	2%
Other	2%	3%	3%
I am satisfied there is nothing else they could do	18%	18%	21%
Don't know	6%	7%	6%

% significantly above prior wave

% significantly below prior wave



Q INSIGHTS HQ

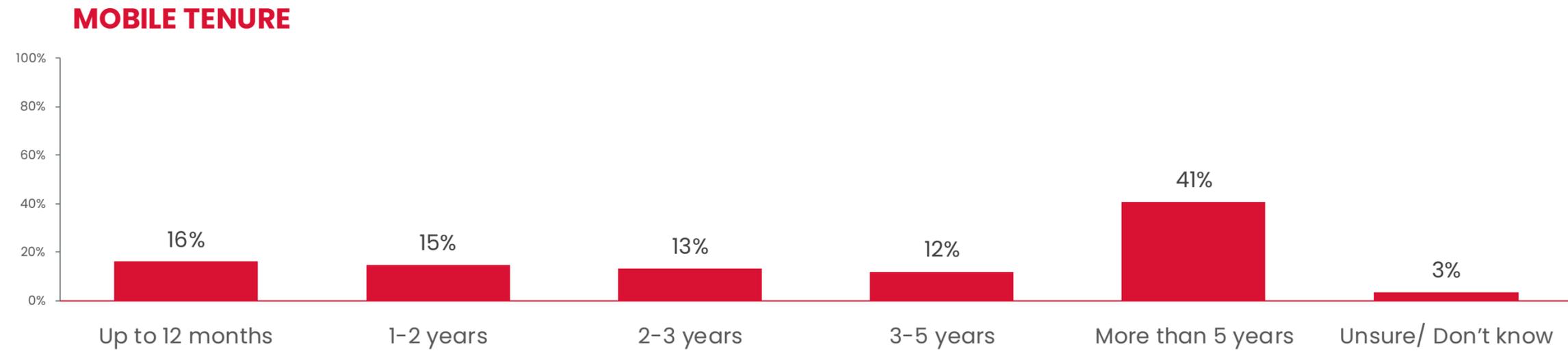
SME INSIGHTS

Tenure and Switching Behaviour

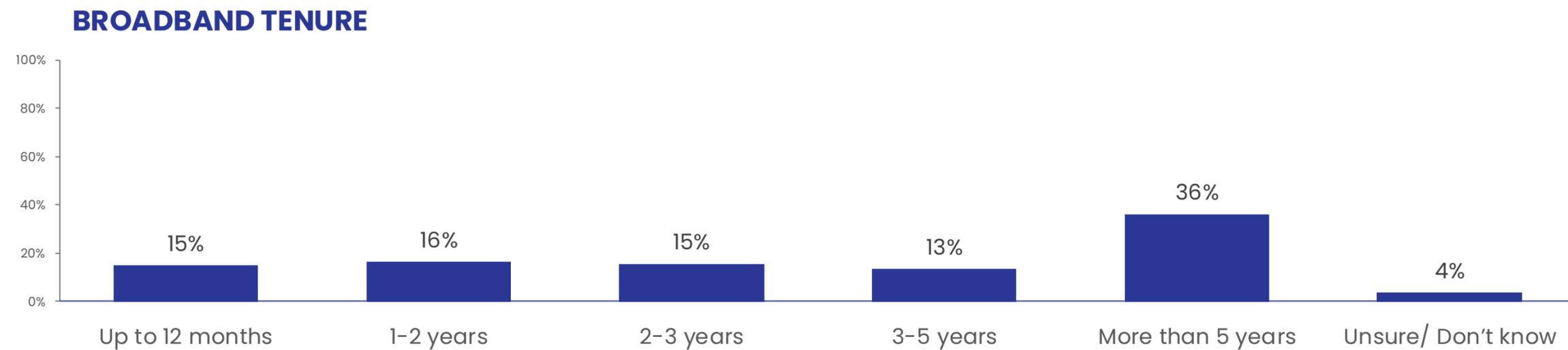
Tenure



Mobile



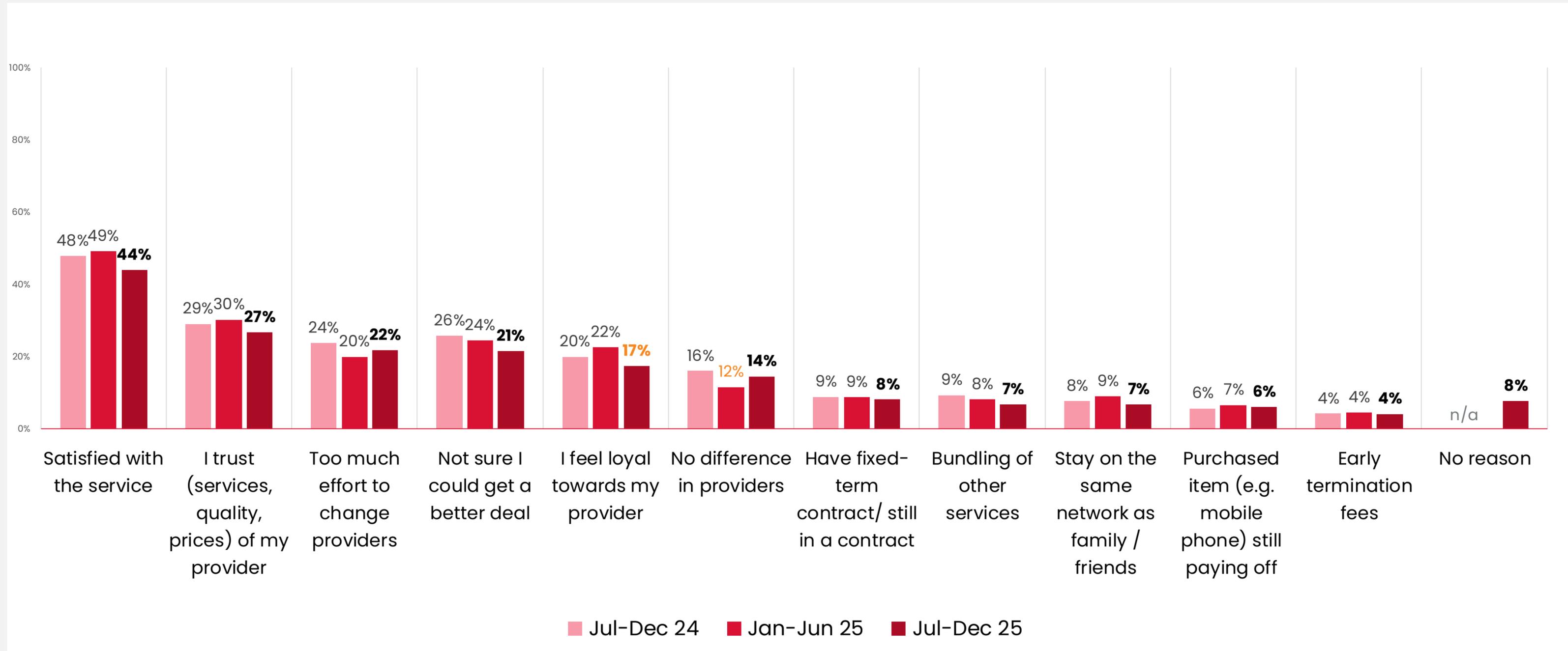
Broadband



Reasons for staying with current mobile provider - Trending



MOBILE – REASON FOR STAYING



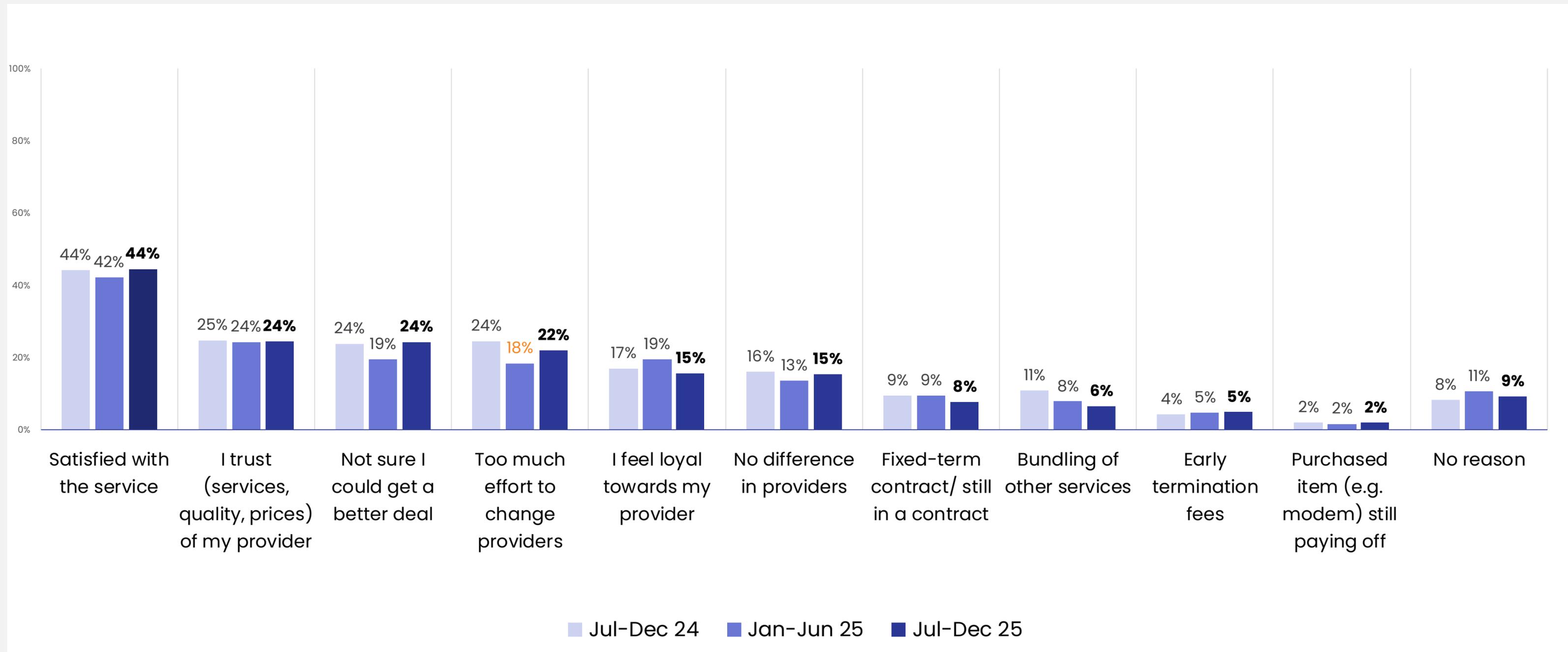
NOTE: "n/a" not asked this wave
 % significantly above prior wave
 % significantly below prior wave

Q. What is the main reason(s) for the business / company you work for staying with its current mobile provider?

Reasons for staying with current broadband provider - Trending



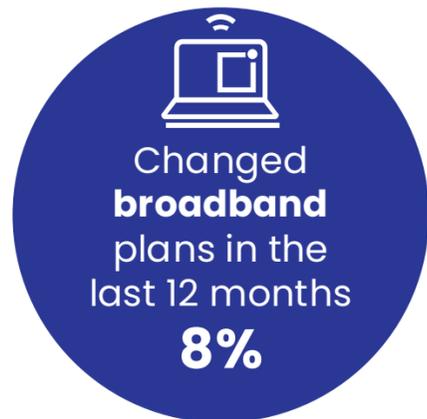
BROADBAND – REASON FOR STAYING



Changing plans with same provider



Top 2 Box (Satisfaction / Agreement)	Jul-Dec 24	Jan-Jun 25	Jul-Dec 25
Changed mobile plan with same provider	10%	10%	10%
Satisfaction with the process of changing your mobile plan	63%	53%	60%
Satisfaction with the information provided about the new plan / offer before you selected it	60%	55%	58%
Satisfaction with the communications you received during the plan change process	n/a	n/a	56%
Agree with: I received the plan I was told I would get when I signed up for the plan	n/a	n/a	73%



Top 2 Box (Satisfaction / Agreement)	Jul-Dec 24	Jan-Jun 25	Jul-Dec 25
Changed broadband plan with same provider	6%	7%	8%
Satisfaction with the process of changing your broadband plan	47%	45%	66%
Satisfaction with the information provided about the new the plan / offer before you selected it	47%	51%	58%
Satisfaction with the communications you received during the plan change process	n/a	n/a	64%
Agree with: I received the plan I was told I would get when I signed up for the plan	n/a	n/a	63%

NOTE: "n/a" not asked this wave

% significantly above prior wave

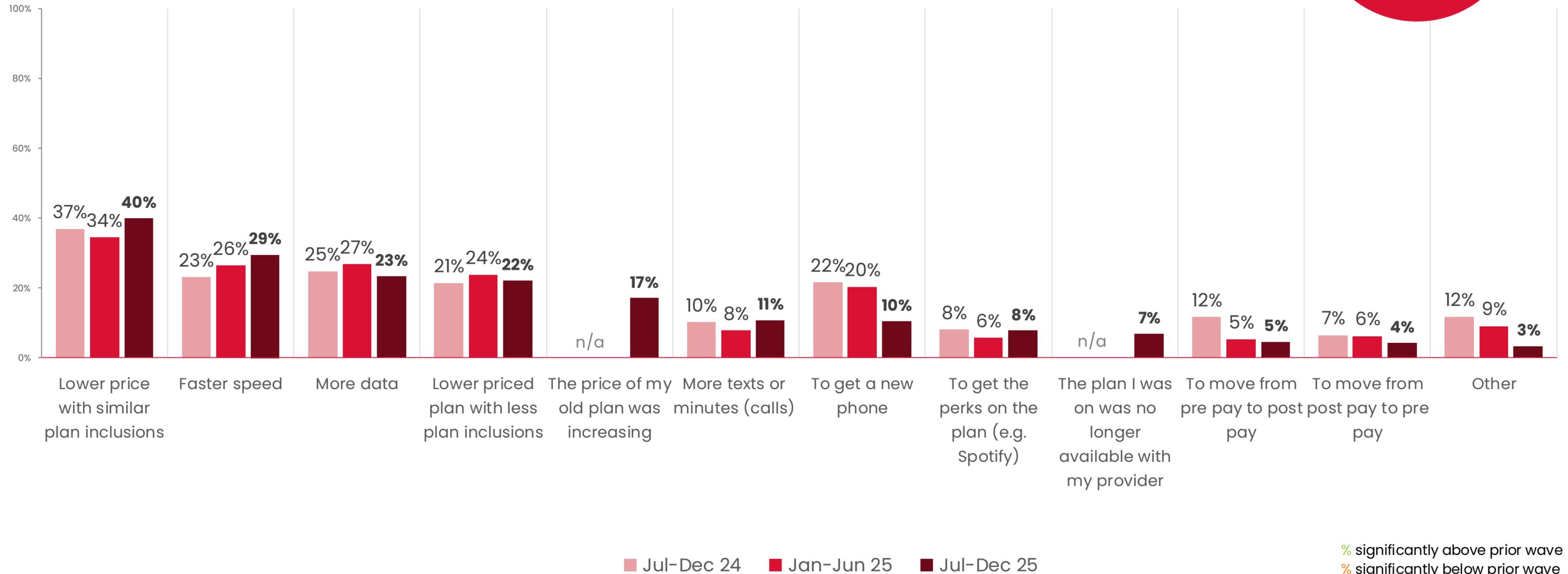
% significantly below prior wave

Q. In the last 12 months, has the business / company you work for changed a plan relating to its...
Q. Overall, how satisfied were you with...

Reasons for changing mobile plans with the same provider

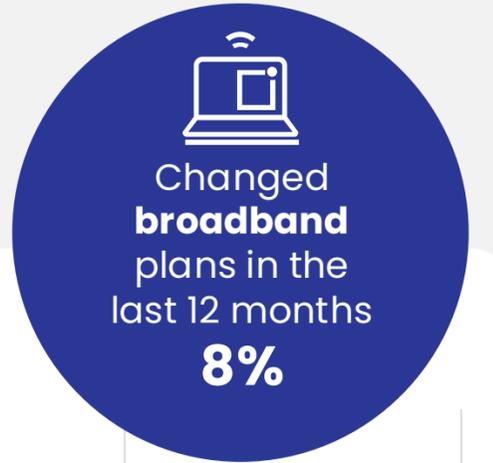
Changed **mobile** plans in the last 12 months **10%**

REASONS FOR CHANGING PLANS – TRENDING

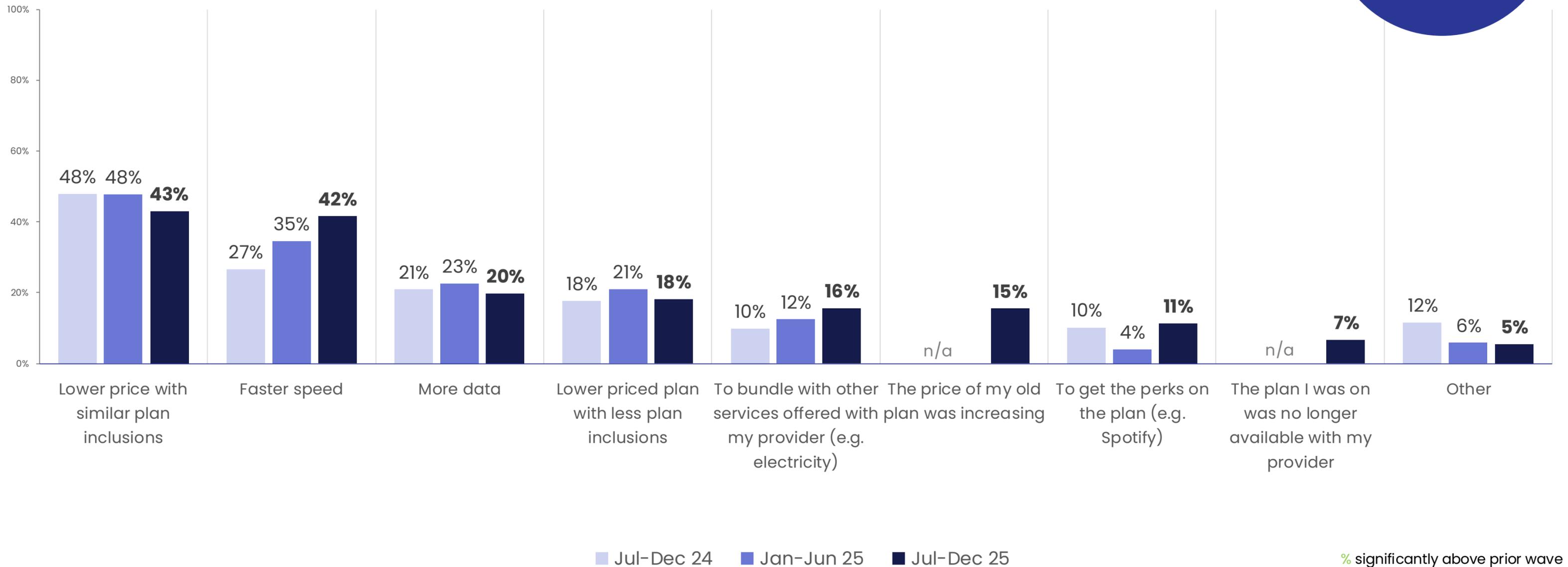


NOTE: "n/a" not asked this wave

Reasons for changing broadband plans with the same provider



REASONS FOR CHANGING PLANS – TRENDING



% significantly above prior wave

% significantly below prior wave

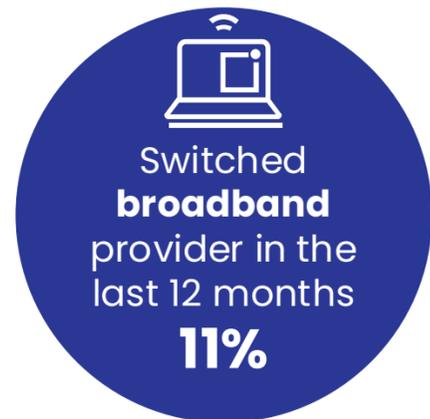
NOTE: "n/a" not asked this wave

Switching providers



Top 2 Box (Satisfaction / Agreement)

	Jul-Dec 24	Jan-Jun 25	Jul-Dec 25
Changed mobile provider	7%	10%	9%
Satisfaction with the overall process of switching (e.g. what happened during the switch, not the outcome of the switch)	76%	66%	70%
Satisfaction with the information provided on the plan / offer before you signed up	79%	64%	64%



Top 2 Box (Satisfaction / Agreement)

	Jul-Dec 24	Jan-Jun 25	Jul-Dec 25
Changed broadband provider	8%	11%	11%
Satisfaction with the process of changing your broadband plan	74%	61%	67%
Satisfaction with the information provided about the new the plan / offer before you selected it	66%	61%	63%

Q. In the last 12 months, have you switched / changed telecommunication providers relating to your...

Q. Thinking about when you switched your business mobile to [mobile provider] please indicate how satisfied you were with the following aspects of the switching process?

Q. Thinking about when you switched to [broadband provider] please indicate how satisfied you were with the following aspects of the switching process?

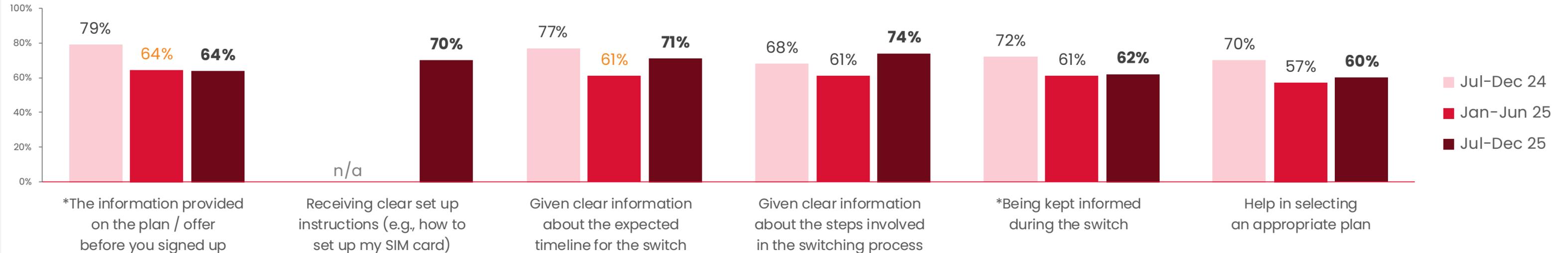
NOTE: "n/a" not asked this wave

% significantly above prior wave

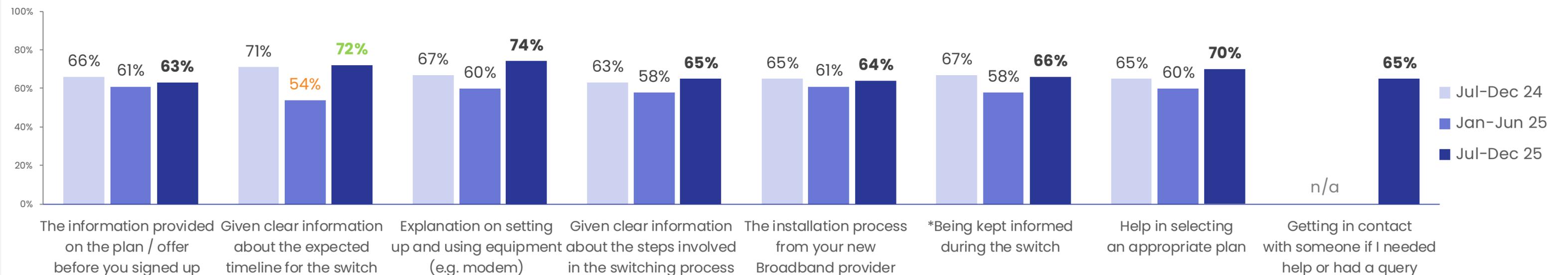
% significantly below prior wave

Switching to different provider experience - Trending

MOBILE SATISFACTION WITH... (TOP 2 BOX)



BROADBAND SATISFACTION WITH... (TOP 2 BOX)





Reasons started looking to switch mobile providers

	Jul-Dec 24	Jan-Jun 25	Jul-Dec 25
I wanted to pay less	51%	32%	30%
My loyalty was not being rewarded	8%	9%	23%
I wanted faster speed	25%	16%	21%
I had an issue with customer service	13%	9%	20%
I wanted more data	29%	19%	15%
I was not getting the speed I was promised	5%	12%	14%
I saw an advert / offer from a new provider	7%	15%	12%
I had an issue with coverage	12%	20%	12%
I wanted to have my bills with the same provider	4%	18%	11%
I had billing issues	4%	5%	9%
Other	8%	1%	4%

Multiple responses given



Reasons started looking to switch broadband providers

	Jul-Dec 24	Jan-Jun 25	Jul-Dec 25
My loyalty was not getting rewarded	6%	14%	25%
I wanted to pay less	55%	38%	25%
I had an issue with customer service	14%	17%	22%
I wanted faster speed	31%	23%	16%
I couldn't get the connection I wanted (fibre, wireless etc.)	9%	8%	16%
I had an issue with reliability i.e. I was not getting the speed I was promised	18%	15%	14%
I wanted more data	15%	18%	13%
I wanted to have my bills with the same provider	3%	23%	12%
I saw an advert / offer from a new provider	9%	16%	12%
I was having trouble with Wi-Fi connectivity in my office (dead zones)	n/a	n/a	11%
I had billing issues	0%	5%	11%
Other	10%	5%	6%

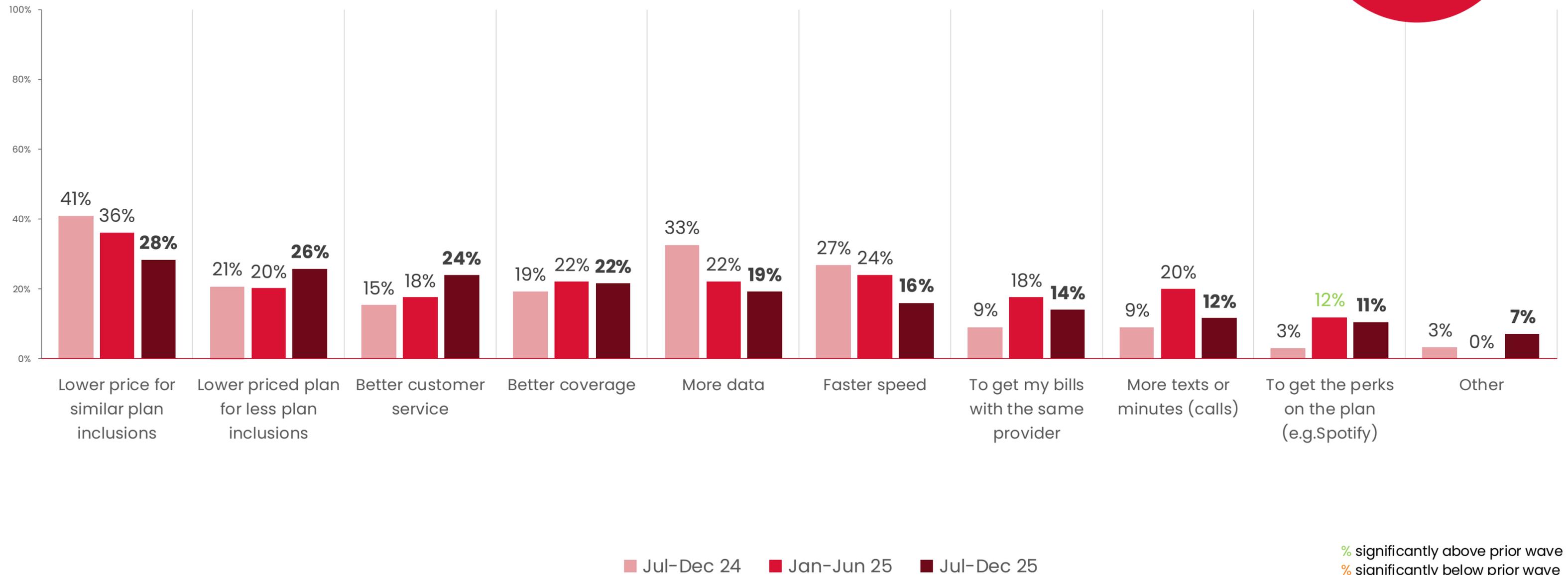
NOTE: "n/a" not asked this wave
Multiple responses given

Reasons for choosing new mobile provider



Changed
mobile
providers

REASONS FOR CHOOSING NEW MOBILE PROVIDER – TRENDING

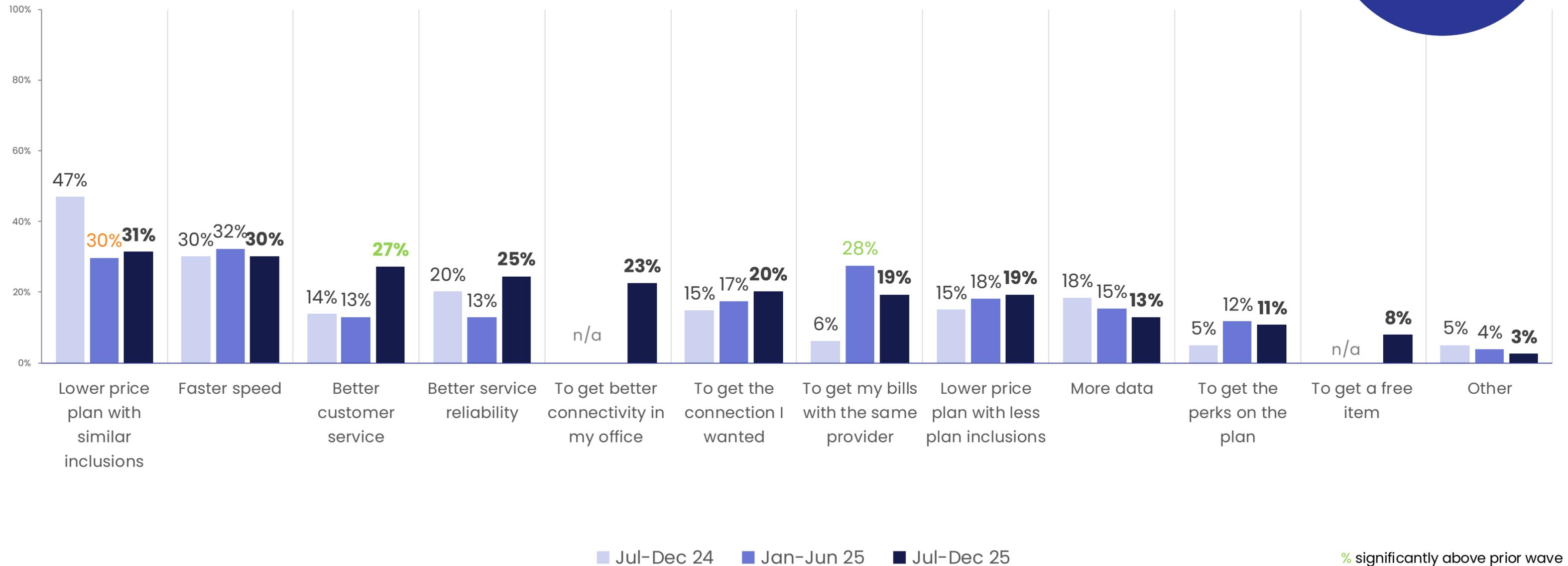


Reasons for choosing new broadband provider



Changed
broadband
providers

REASONS FOR CHOOSING NEW BROADBAND PROVIDER – TRENDING



% significantly above prior wave

% significantly below prior wave

NOTE: "n/a" not asked this wave

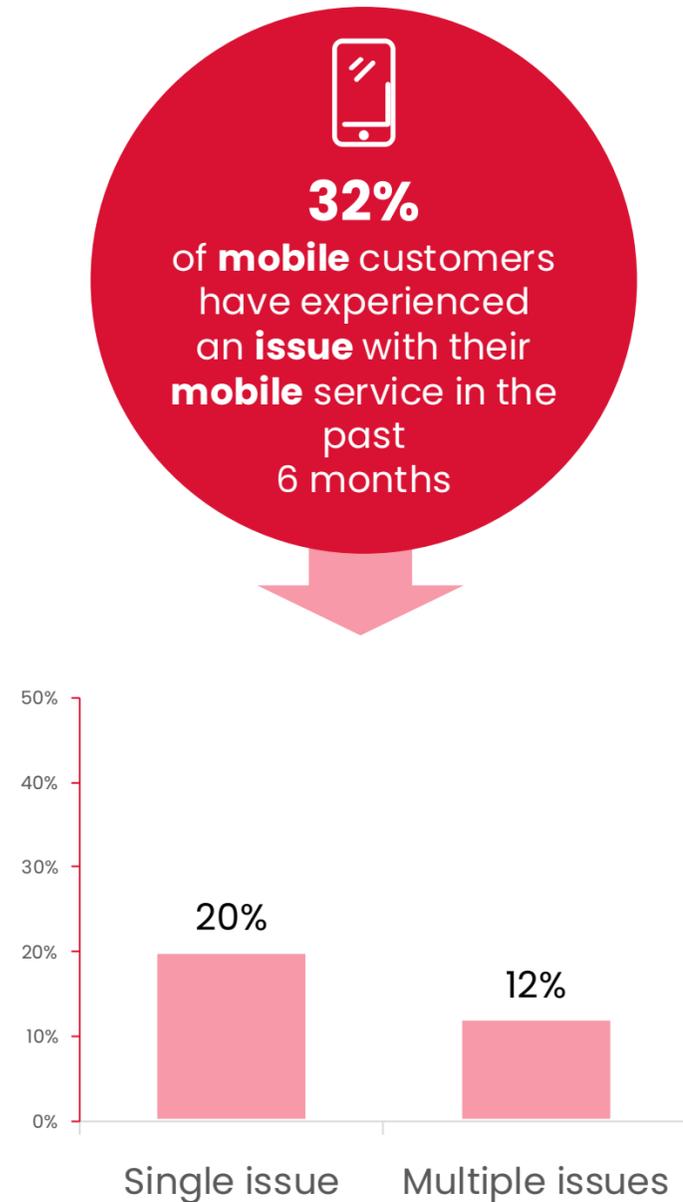


 **INSIGHTS HQ**

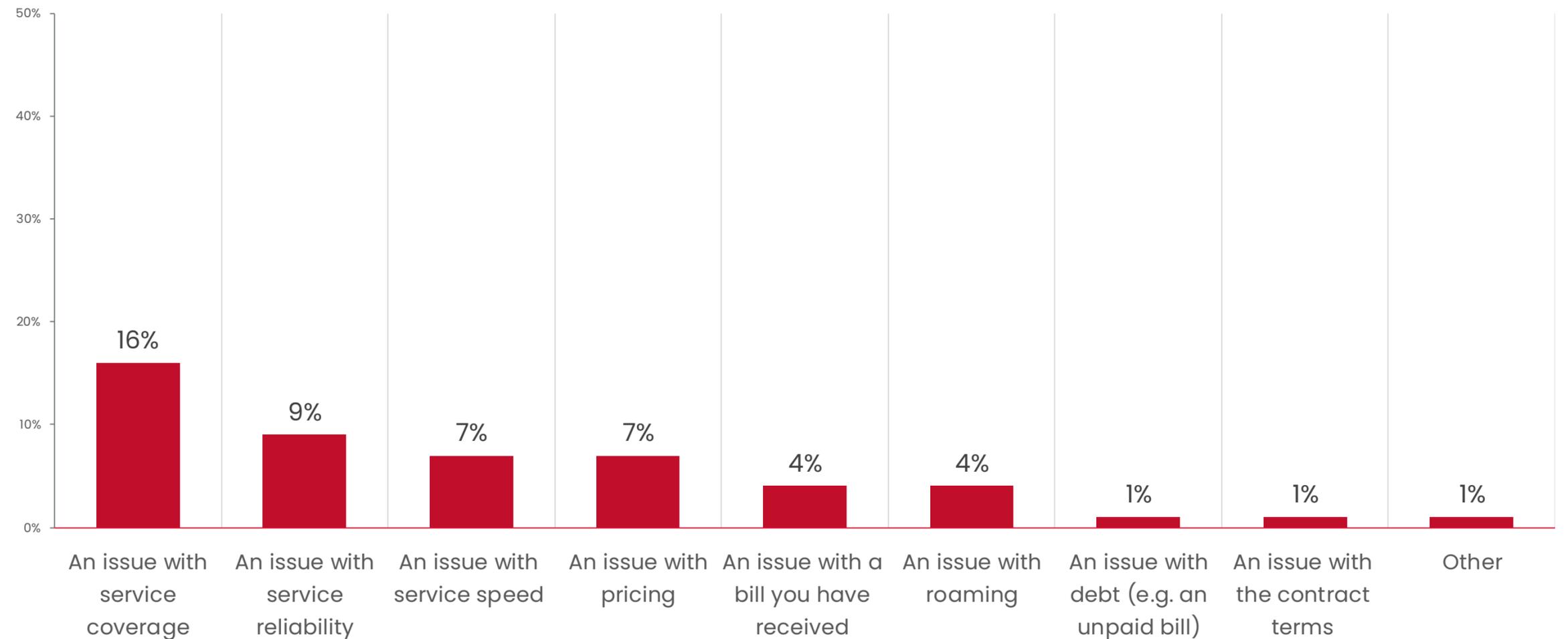
SME INSIGHTS

Issues and Response

Mobile issues experienced by customers

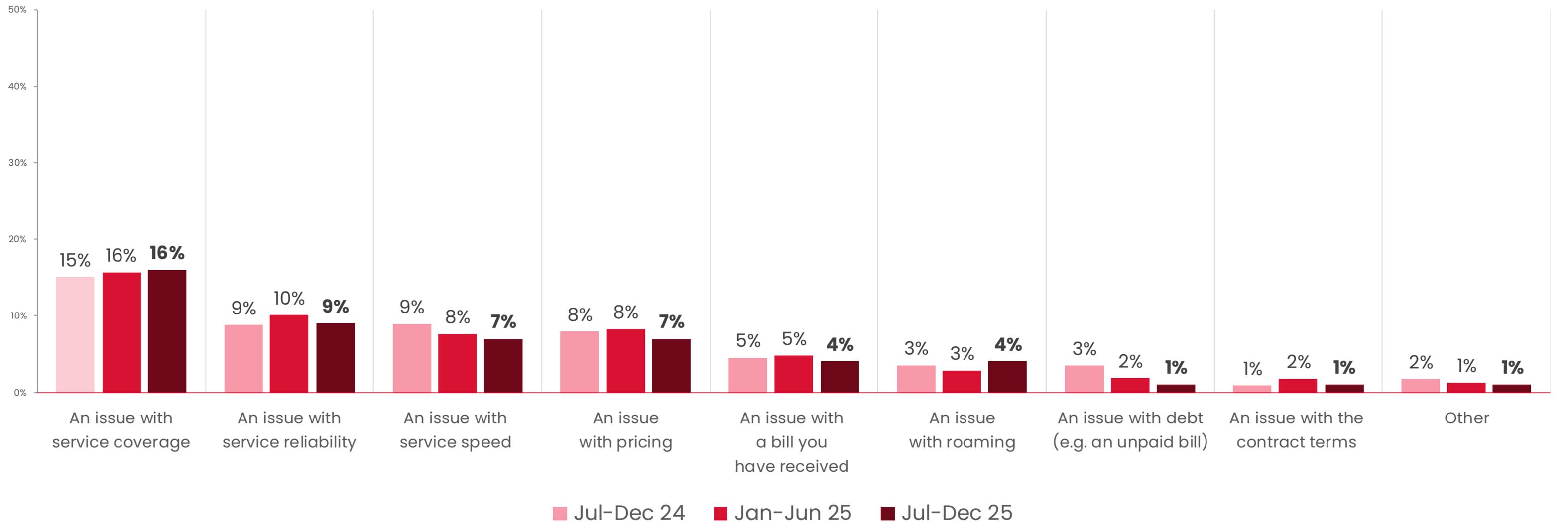


ISSUES WITH MOBILE PROVIDER



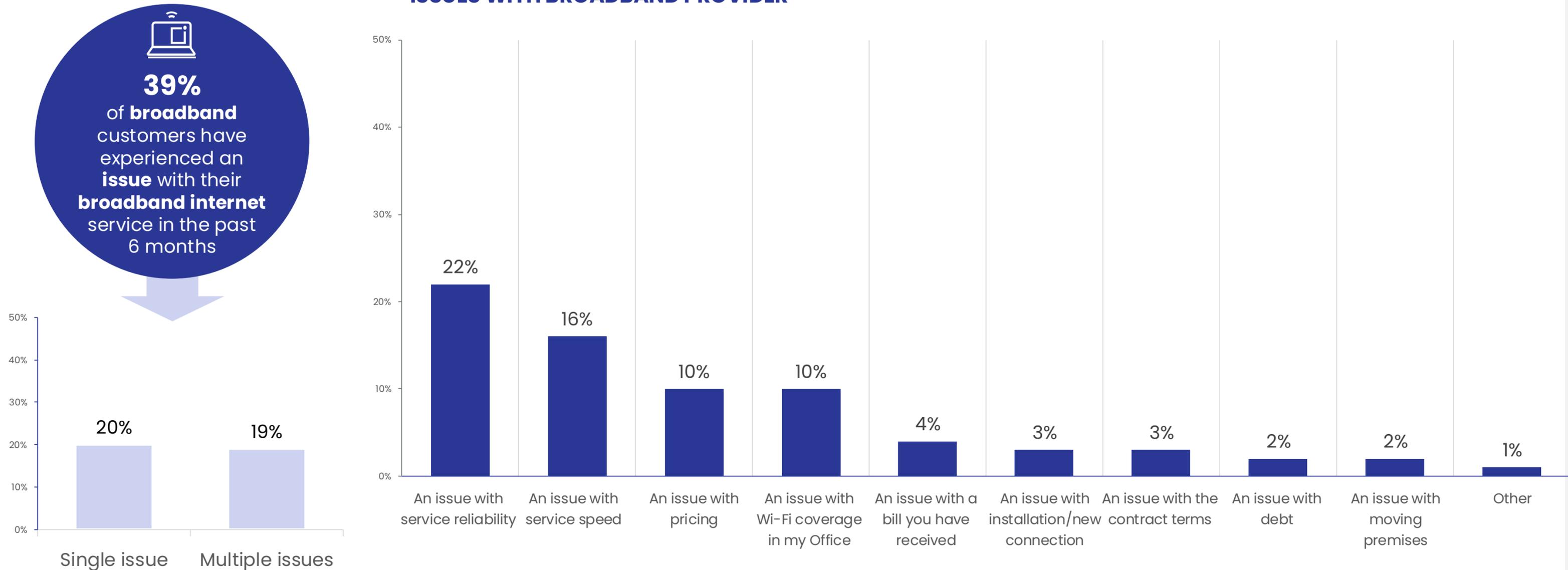
Mobile issues experienced by customers - Trending

ISSUES WITH MOBILE PROVIDER



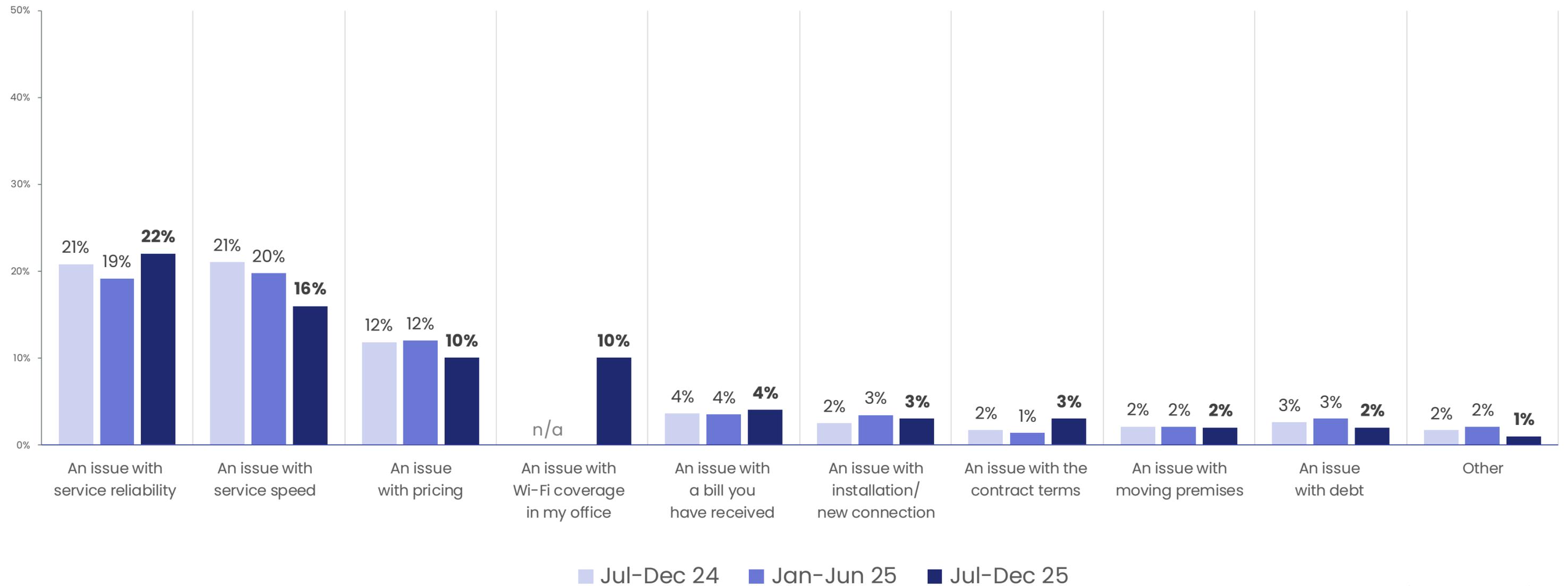
Multiple responses given

Broadband issues experienced by customers



Broadband issues experienced by customers - Trending

ISSUES WITH BROADBAND PROVIDER



Multiple responses given
NOTE: "n/a" not asked this wave



Q INSIGHTS HQ

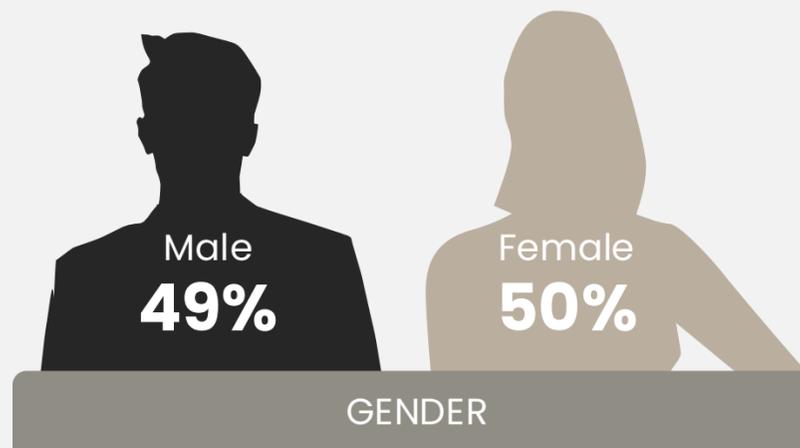
RESIDENTIAL APPENDIX

- Demographics
- Tenure
- Residential Base Sizes

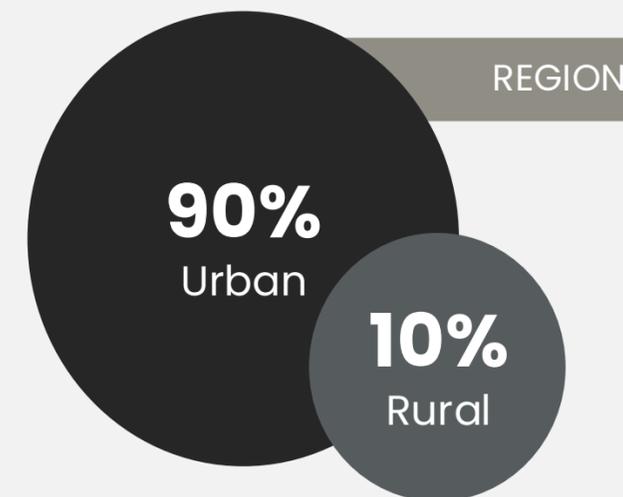
Demographics

Residential

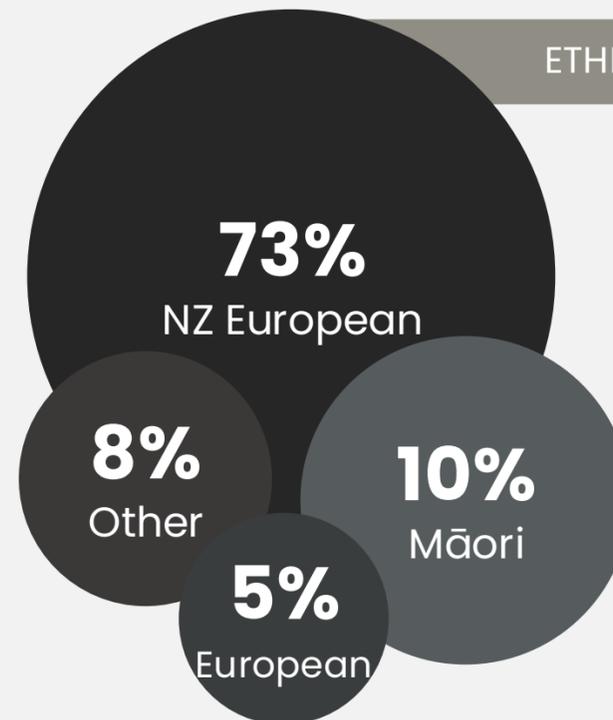
AGE



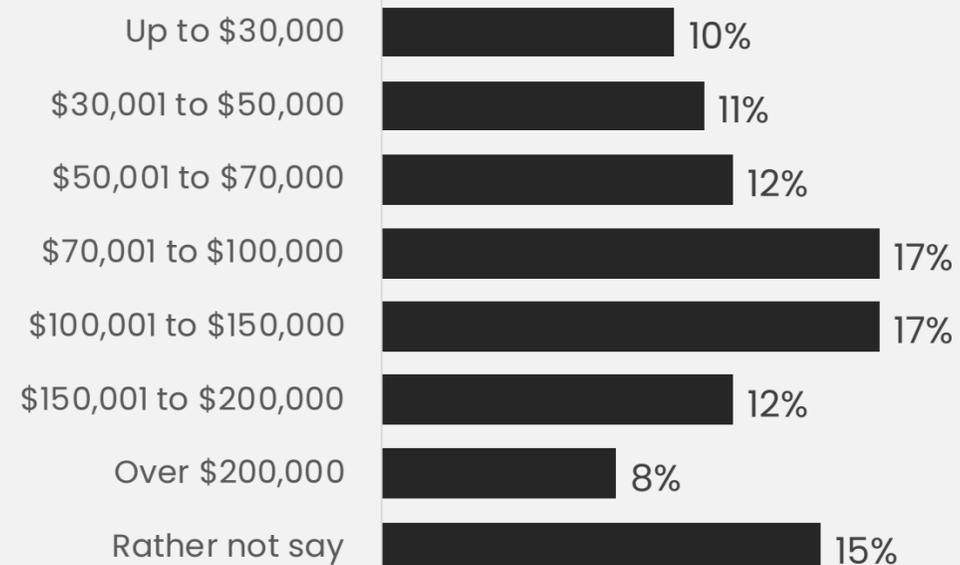
REGION



ETHNICITY



HOUSEHOLD INCOME



Tenure



Mobile

	Under 25 years	25-34 years	35-44 years	45-54 years	55-64 years	65+ years
Up to 12 months	15%	15%	8%	8%	6%	4%
1-5 years	48%	45%	29%	27%	22%	20%
More than 5 years	35%	39%	62%	66%	72%	75%
Unsure / don't know	2%	1%	2%	1%	1%	1%

	Spark	One NZ	2degrees	Skinny
Up to 12 months	6%	5%	9%	10%
1-5 years	25%	19%	36%	53%
More than 5 years	68%	74%	55%	36%
Unsure / don't know	1%	1%	1%	1%



Broadband

	Under 25 years	25-34 years	35-44 years	45-54 years	55-64 years	65+ years
Up to 12 months	21%	19%	14%	9%	10%	6%
1-5 years	53%	62%	48%	45%	33%	25%
More than 5 years	21%	16%	36%	43%	56%	66%
Unsure / don't know	6%	3%	3%	3%	2%	3%

	Spark	One NZ	Slingshot	Mercury	2degrees	Skinny	Contact Energy
Up to 12 months	8%	9%	1%	17%	15%	14%	20%
1-5 years	28%	33%	52%	45%	55%	66%	68%
More than 5 years	61%	54%	47%	36%	25%	17%	10%
Unsure / don't know	2%	4%	1%	2%	4%	3%	1%

% significantly higher
% significantly lower

Residential Base Sizes

TOTAL	Jul – Dec 24	Jan – Jun 25	Jul – Dec 25
Mobile Satisfaction n=	2139	2125	2058
Broadband Satisfaction n=	2378	2435	2355
Mobile NPS n=	2092	2081	2058
Broadband NPS n=	2313	2367	2355

MOBILE BRANDS	Jul – Dec 24	Jan – Jun 25	Jul – Dec 25
Skinny n=	204	199	157
2 Degrees n=	577	570	607
Spark n=	589	592	539
OneNZ n=	665	647	625

BROADBAND BRANDS	Jul – Dec 24	Jan – Jun 25	Jul – Dec 25
Skinny n=	138	148	127
2 Degrees n=	399	400	444
Spark n=	669	655	614
OneNZ n=	478	521	521
Mercury n=	136	133	132
Contact n=	102	99	103
Slingshot n=	129	119	88

SWITCHING	Jul – Dec 24	Jan – Jun 25	Jul – Dec 25
Stay with Current Mobile n=	2007	1987	1926
Stay with Current Broadband n=	2139	2136	2106
Switch Plans Mobile n=	261	333	281
Switch Plans Broadband n=	282	361	292
Switch Providers Mobile n=	132	138	132
Switch Providers Broadband n=	246	299	249



Q INSIGHTS HQ

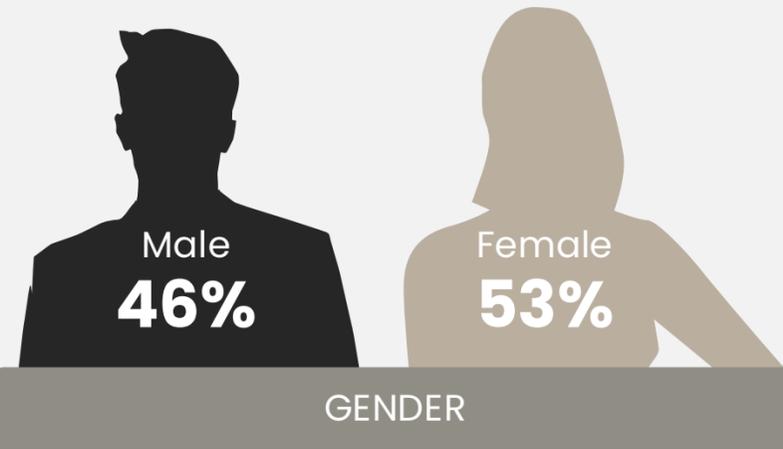
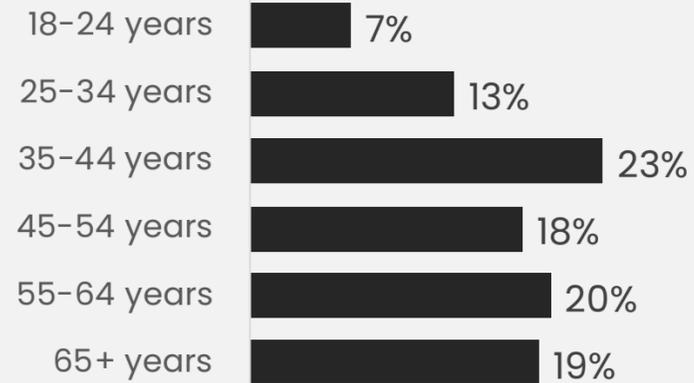
SME APPENDIX

- Demographics
- Tenure
- SME Base Sizes

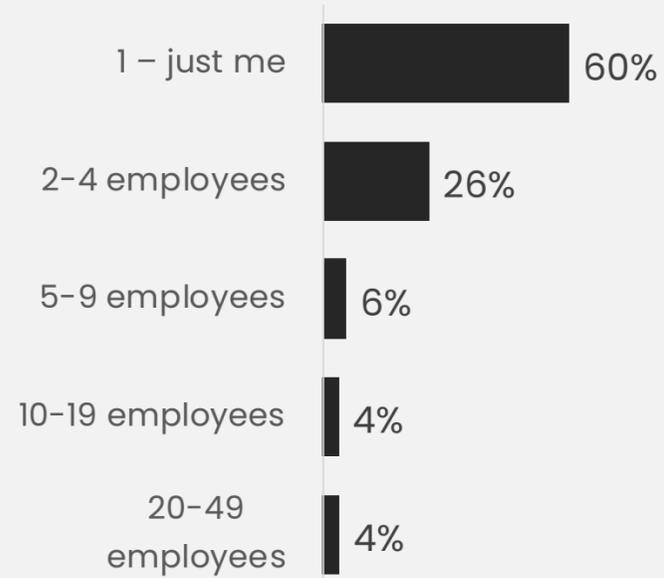
Demographics

SME

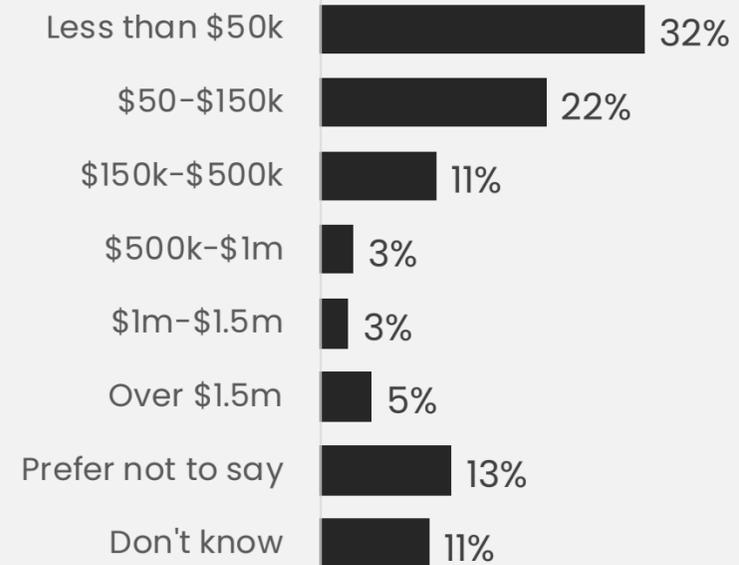
AGE



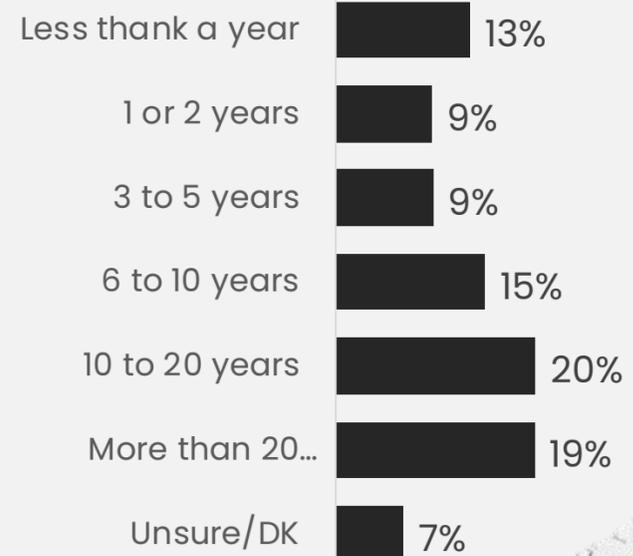
FULL TIME EMPLOYEES



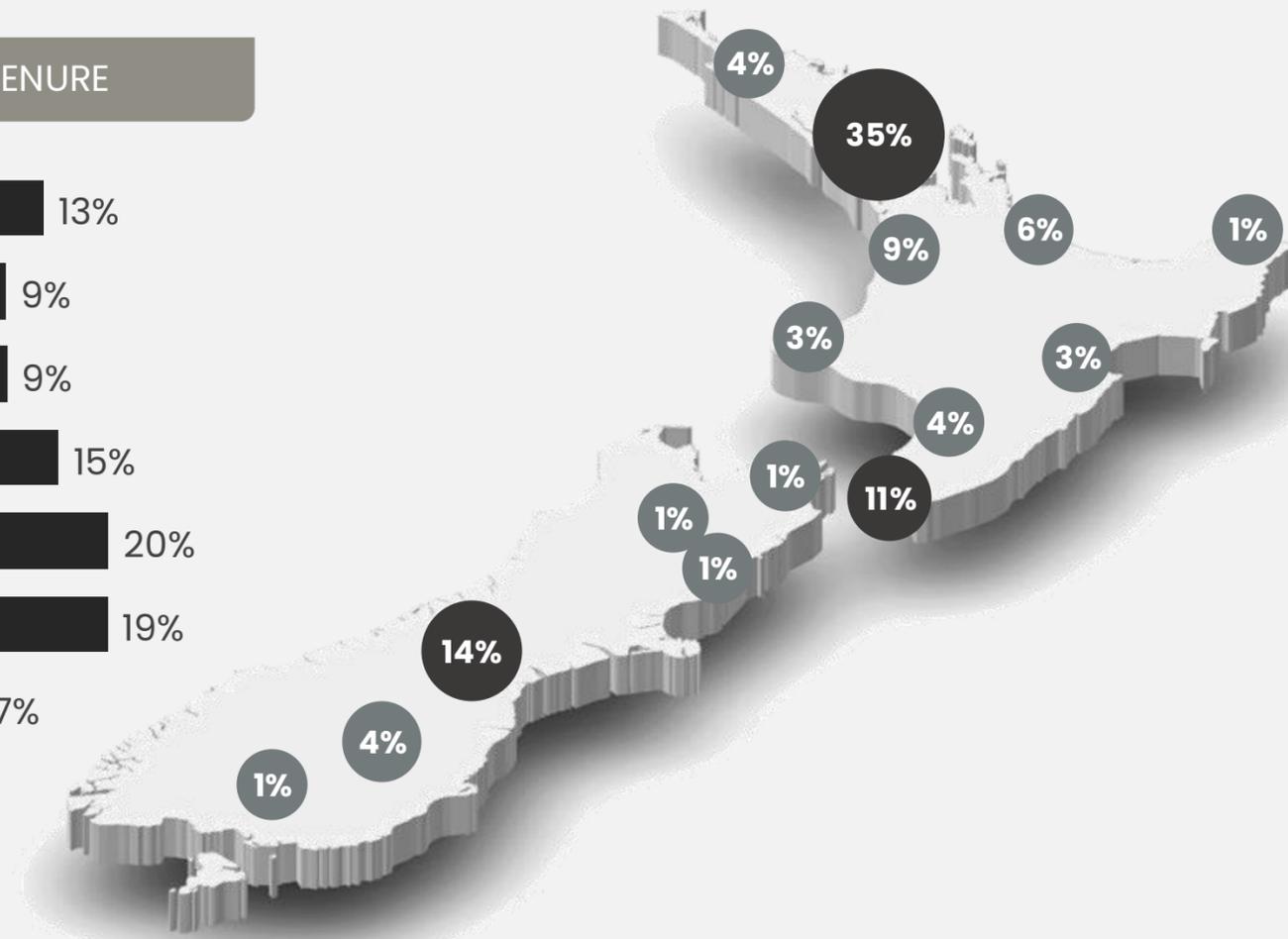
BUSINESS TURNOVER



BUSINESS TENURE



REGION



Tenure



Mobile

	Under 25 years	25-34 years	35-44 years	45-54 years	55-64 years	65+ years
Up to 12 months	36%	25%	14%	18%	13%	6%
1-5 years	42%	54%	49%	46%	33%	17%
More than 5 years	11%	13%	36%	34%	50%	76%
Unsure / don't know	11%	7%	2%	2%	3%	1%

	Spark	One NZ	2degrees	Skinny
Up to 12 months	9%	15%	18%	19%
1-5 years	30%	38%	48%	61%
More than 5 years	57%	46%	28%	17%
Unsure / don't know	4%	1%	5%	3%



Broadband

	Under 25 years	25-34 years	35-44 years	45-54 years	55-64 years	65+ years
Up to 12 months	28%	21%	13%	20%	10%	9%
1-5 years	58%	55%	54%	44%	41%	29%
More than 5 years	11%	17%	30%	33%	46%	59%
Unsure / don't know	3%	7%	3%	3%	3%	3%

	Spark	One NZ	2degrees	Skinny
Up to 12 months	6%	16%	19%	34%
1-5 years	35%	47%	57%	46%
More than 5 years	55%	33%	20%	15%
Unsure / don't know	5%	3%	4%	5%

% significantly higher
% significantly lower

SME Base Sizes

TOTAL	Jul – Dec 24	Jan – Jun 25	Jul – Dec 25
Mobile Satisfaction n=	807	735	760
Broadband Satisfaction n=	758	655	678
Mobile NPS n=	804	731	742
Broadband NPS n=	749	647	662
MOBILE BRANDS	Jul – Dec 24	Jan – Jun 25	Jul – Dec 25
Skinny n=	68	66	67
2 Degrees n=	196	198	184
Spark n=	236	203	235
OneNZ n=	273	242	239
BROADBAND BRANDS	Jul – Dec 24	Jan – Jun 25	Jul – Dec 25
Skinny n=	44	51	38
2 Degrees n=	126	132	137
Spark n=	212	173	215
OneNZ n=	211	177	166
SWITCHING	Jul – Dec 24	Jan – Jun 25	Jul – Dec 25
Stay with Current Mobile n=	707	617	691
Stay with Current Broadband n=	697	579	604
Switch Plans Mobile n=	109	110	114
Switch Plans Broadband n=	68	72	87
Switch Providers Mobile n=	60	74	69
Switch Providers Broadband n=	61	76	74

THANKS