NZ Telecommunications Consumer Satisfaction Monitoring

Channel Preference

December 2024

INSIGHTS HQ

Purpose of this research

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

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

For this quarter, October – December 2024, questions were asked to:

- Understand channel preference for different tasks among residential customers
- Understand channel preference for different tasks among business customers

Methodology

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

RESIDENTIAL Oct - Dec 2024	SME Oct - Dec 2024
1083 mobile customers and 1210 broadband customers	359 mobile customers and 343 broadband customers
The residential sample was an adult sample (18+) nationally representative of the New Zealand population (age, gender, region).	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 deck focusing on the 3 months from October December 2024.	Fieldwork was conducted monthly with this deck focusing on the 3 months from October December 2024.

Sample qualification criteria

- Main decision maker OR shared responsibility for making decisions about broadband internet service at home

- Main decision maker OR shared responsibility for making decisions about mobile phone plan / monthly payment / pre-pay.

- Currently have broadband internet at home OR mobile provider and telecommunications provider is known

Sample qualification criteria

- Main decision maker OR shared responsibility for making decisions about Internet at the business/company you work for or own

- Business has its own business plan with broadband and current broadband provider is known

- Main decision maker OR shared responsibility for making decisions about mobile phone plan / monthly payment / pre-pay for the business

- Business has its own business plan with mobile and current mobile provider is known

Weighting methodology

RESIDENTIAL — Weighted to ensure nationally representative sample by age, gender and region			Auckland	Canterbury	Wellington	Rest of North Island	Rest of South Island
Male	18-24		3.0%	1.0%	0.7%	2.5%	0.7%
	25-34		3.5%	1.2%	1.0%	2.5%	0.7%
	35-44		2.7%	1.0%	1.0%	2.2%	0.7%
	45-54		2.7%	1.2%	1.0%	2.5%	1.0%
	55-64		2.2%	1.0%	0.7%	2.5%	1.0%
	65+		2.2%	1.2%	1.0%	3.5%	1.0%
Female	18-24		2.7%	1.0%	0.7%	2.2%	0.7%
	25-34		3.5%	1.0%	1.0%	2.5%	0.7%
	35-44		2.7%	1.0%	1.0%	2.5%	0.7%
	45-54		2.7%	1.2%	1.0%	2.7%	1.0%
	55-64		2.2%	1.0%	0.7%	2.7%	1.0%
	65+		2.5%	1.5%	1.0%	3.5%	1.2%

SME — Weighted to ensure nationally representative sample by region and FTE		
REGION	FTE	%
Auckland	1	22%
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.

RESIDENTIAL INSIGHTS

Channel Preference

Channel Preference
Mobile tasks

In general, mobile customers prefer to telephone for an issue, while online and app is preferred for more transactional tasks such as checking, buying add-ons and finding information. They also have a low preference for messaging and chat functions.
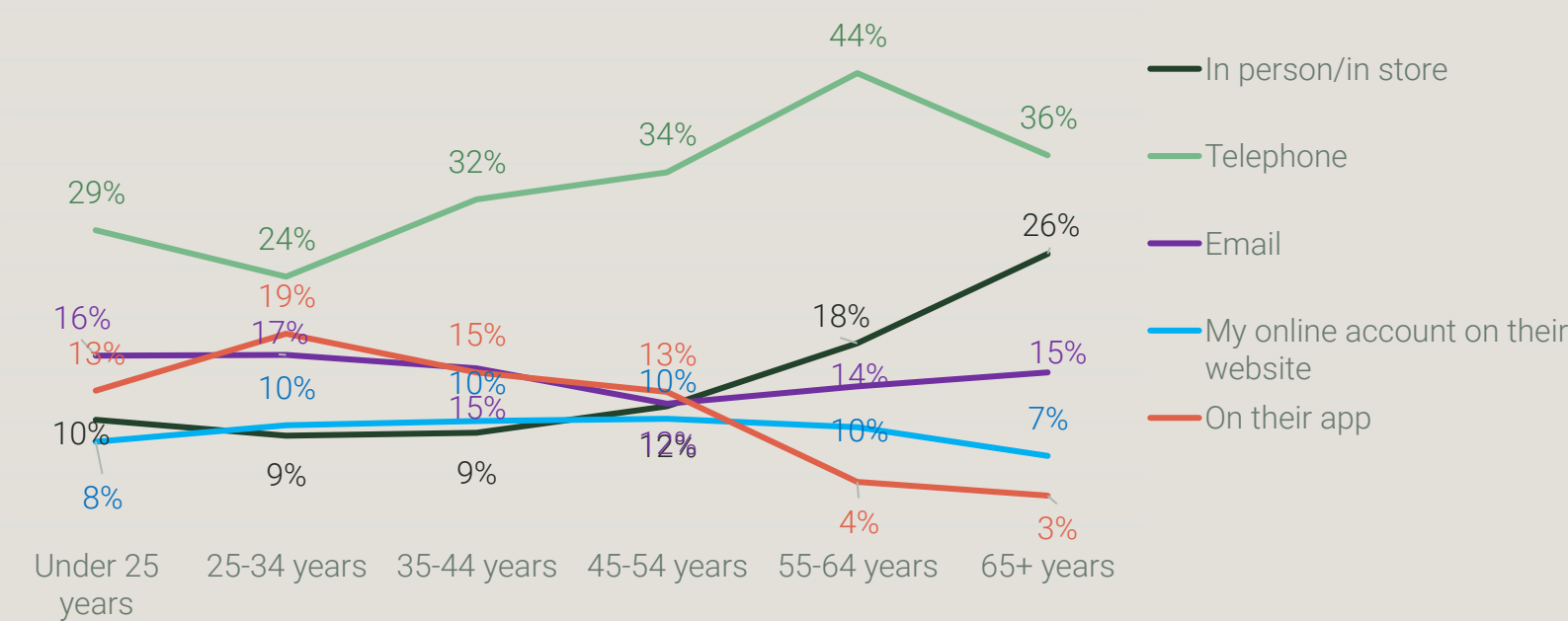
	Telephone	In person/in store	Email	SMS / messaging app e.g. WhatsApp	Chat function on their website or app	My online account on their website	On their app
An issue with a bill i.e. an unpaid bill or a billing error	33%	15%	15%	2%	11%	9%	11%
An issue with service coverage, reliability or speed	32%	14%	11%	3%	11%	7%	16%
Leaving the provider	22%	12%	12%	2%	4%	17%	18%
Changing my plan	17%	17%	7%	1%	4%	17%	32%
Information about prices or a plan	12%	14%	10%	2%	6%	24%	27%
Buying an add-on e.g. a roaming or data pack	11%	11%	5%	2%	3%	17%	45%
Checking my bill	9%	6%	17%	2%	4%	20%	37%
Checking my minutes, text or data balance	8%	4%	7%	5%	3%	18%	51%

Thinking about your mobile, what would be your preferred way of interacting with %"Mbl-Provider% for each of the following?
Base: Oct-Dec 24 Mobile customers n=1083. Excludes "don't know"
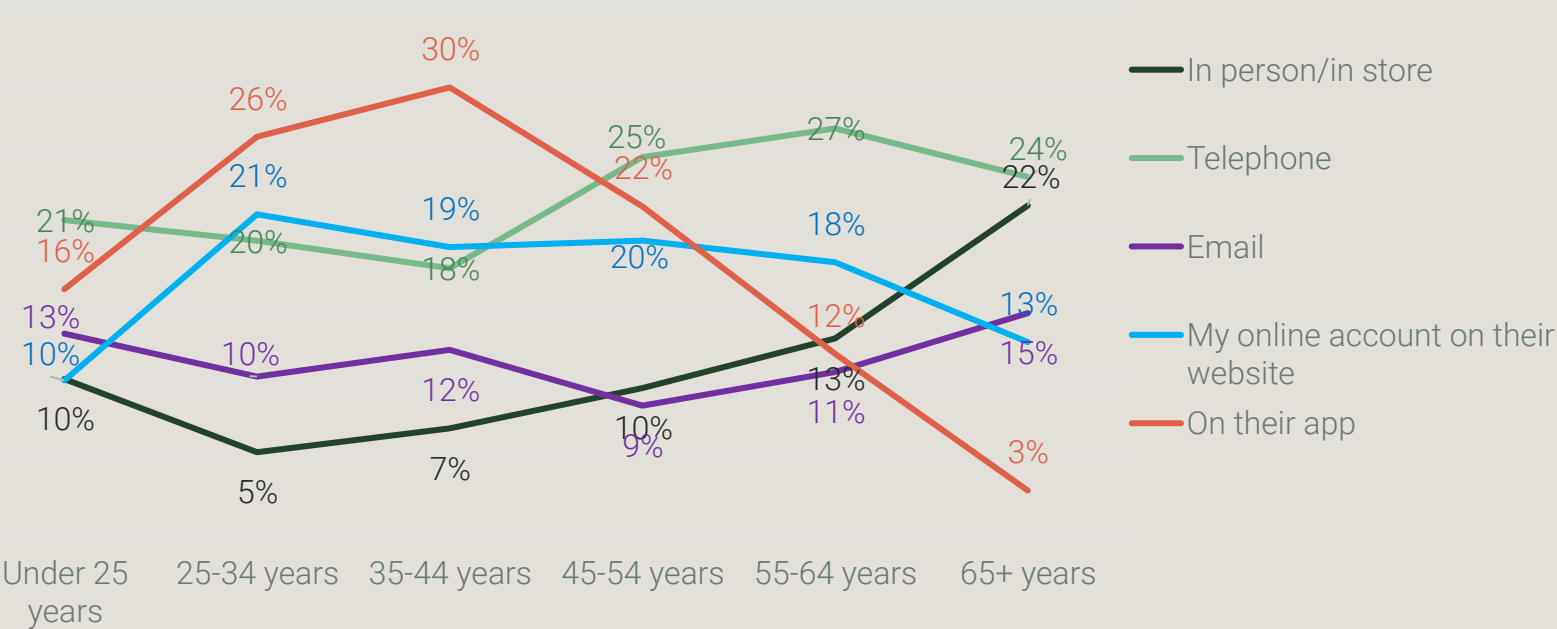
Channel Preference Mobile tasks

In many areas there are significant differences between age groups with younger age groups often preferring online contact (app or online account) and older age groups often preferring person to person contact (telephone or instore).

Billing issue

- In person/in store
- Telephone
- Email
- My online account on their website
- On their app

Leaving Provider

- In person/in store
- Telephone
- Email
- My online account on their website
- On their app

Service issue

- In person/in store
- Telephone
- Email
- My online account on their website
- On their app

Changing Plan

- In person/in store
- Telephone
- Email
- My online account on their website
- On their app
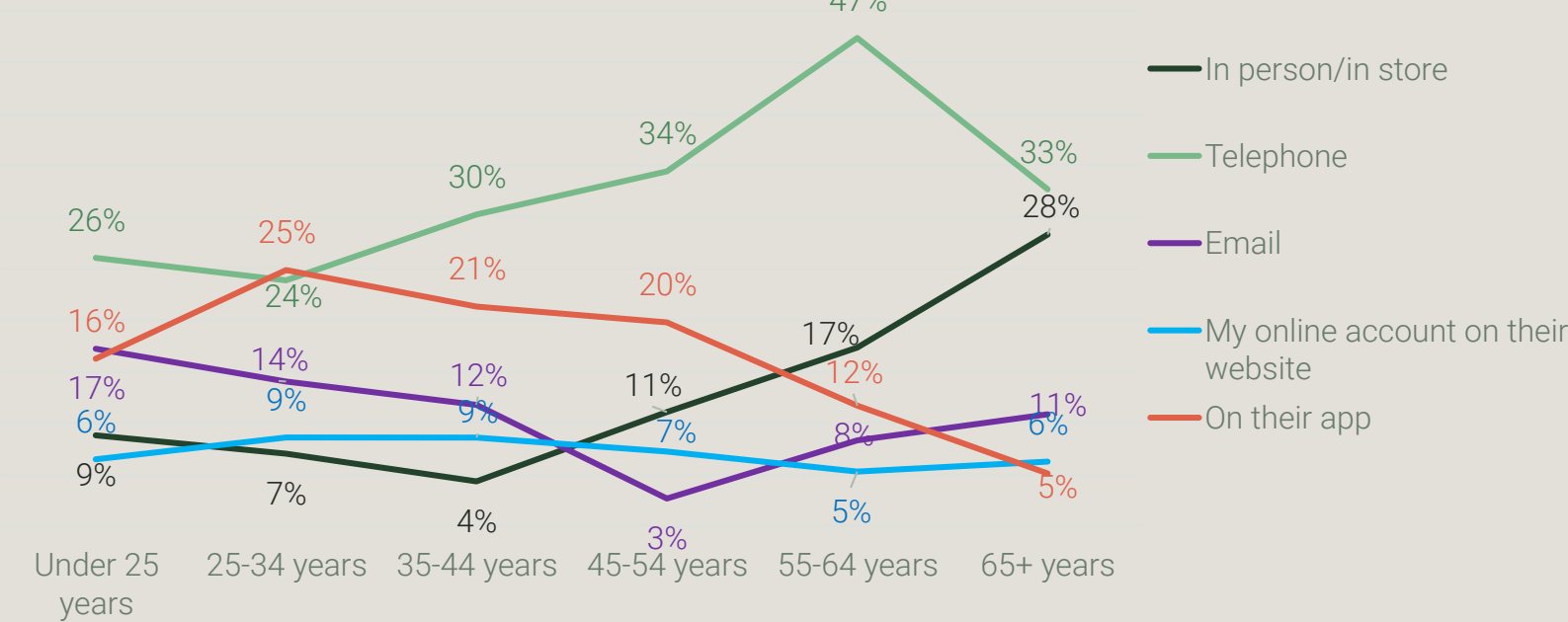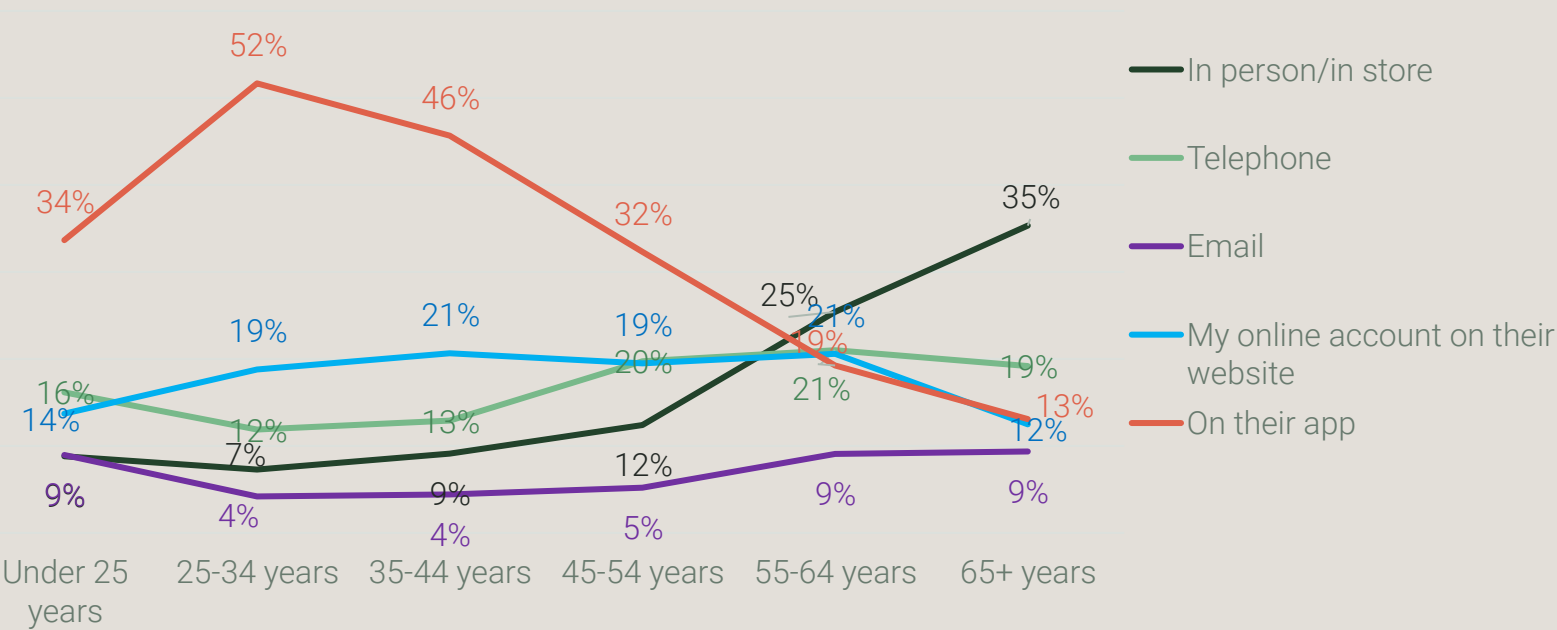
Channel Preference
Mobile tasks

Information about Plan

Legend:
- In person/in store
- Telephone
- Email
- My online account on their website
- On their app

X-axis: Under 25 years, 25-34 years, 35-44 years, 45-54 years, 55-64 years, 65+ years

On their app: 31%, 37%, 41%, 30%, 24%, 10%
My online account: 15%, 31%, 25%, 29%, 21%, 20%
In person/in store: 10%, 6%, 8%, 6%, 19%, 31%
Telephone: 13%, 9%, 8%, 12%, 16%, 18%
Email: 12%, 12%, 6%, 11%, 10%, 11%

Checking bill

Legend:
- In person/in store
- Telephone
- Email
- My online account on their website
- On their app

On their app: 36%, 51%, 57%, 46%, 28%, 13%
My online account: 15%, 14%, 17%, 20%, 29%, 26%
Email: 12%, 20%, 16%, 17%, 11%, 14%
Telephone: 14%, 5%, 3%, 6%, 16%, 14%
In person/in store: 8%, 2%, 1%, 2%, 9%, 13%

Buying Add-on

Legend:
- In person/in store
- Telephone
- Email
- My online account on their website
- On their app

On their app: 41%, 66%, 70%, 49%, 33%, 16%
My online account: 14%, 14%, 14%, 20%, 22%, 15%
Telephone: 11%, 4%, 5%, 10%, 16%, 15%
In person/in store: 6%, 2%, 3%, 7%, 15%, 31%
Email: 8%, 4%, 3%, 5%, 3%, 6%

Checking usage

Legend:
- In person/in store
- Telephone
- Email
- My online account on their website
- On their app

On their app: 39%, 71%, 76%, 61%, 42%, 24%
My online account: 13%, 9%, 10%, 18%, 26%, 27%
Telephone: 15%, 3%, 1%, 5%, 11%, 13%
Email: 12%, 3%, 3%, 3%, 5%, 11%
In person/in store: 4%, 1%, 0%, 3%, 5%, 11%

Channel Preference Broadband tasks

As with mobile, customers prefer to telephone for an issue, while online and app is preferred for more transactional tasks such as checking, plan changes and finding information. They also have a low preference for messaging and chat functions.
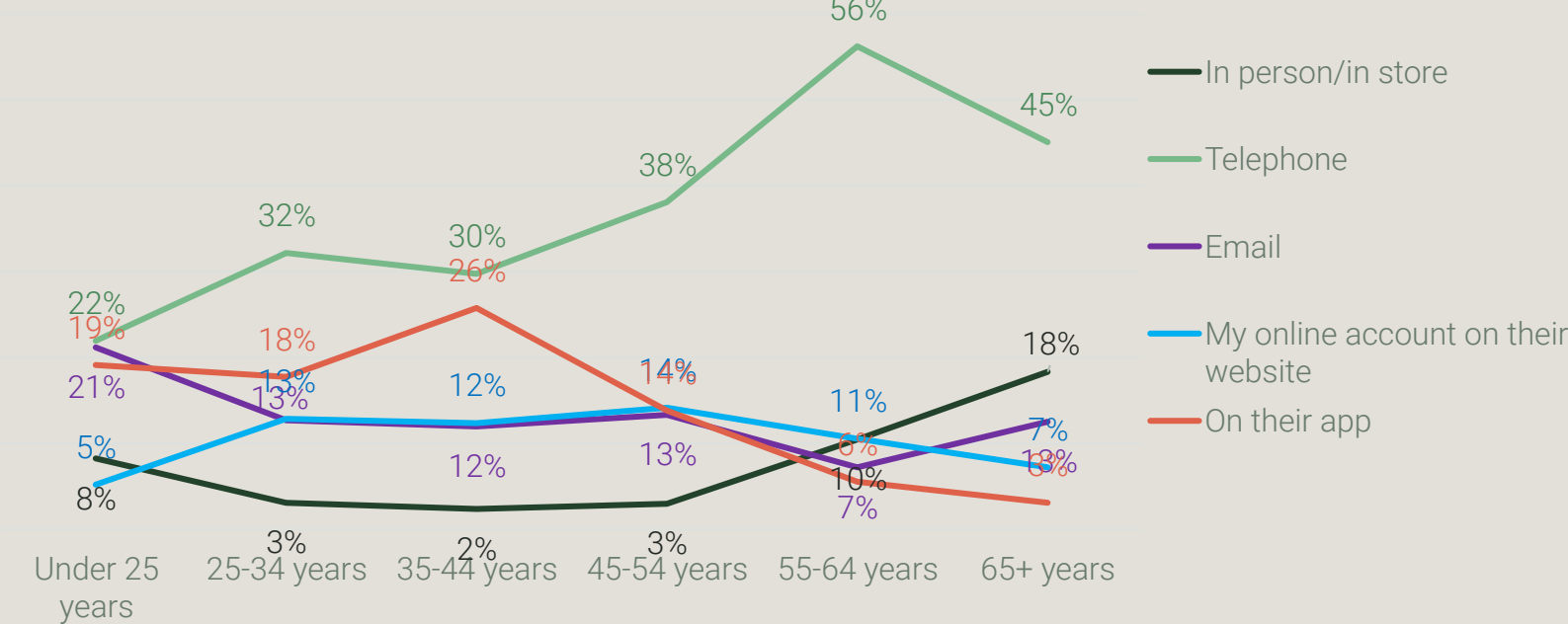
	Telephone	In person/in store	Email	SMS / messaging app e.g. WhatsApp	Chat function on their website or app	My online account on their website	On their app
An issue with service coverage, reliability or speed	38%	8%	13%	2%	11%	10%	14%
An issue with a bill i.e. an unpaid bill or a billing error	37%	10%	16%	2%	9%	13%	11%
Moving home	29%	10%	12%	2%	5%	20%	16%
Leaving the provider	26%	9%	13%	3%	5%	20%	16%
Changing my plan	22%	12%	9%	2%	5%	25%	21%
Information about prices or a plan	14%	10%	11%	2%	5%	29%	24%
Checking my bill	12%	5%	16%	2%	4%	29%	29%
Checking my data balance	9%	4%	8%	3%	3%	29%	36%

Thinking about your broadband, what would be your preferred way of interacting with %"BB-Provider% for each of the following?
Base: Oct-Dec 24 Broadband customers n=1210 Excludes "don't know"
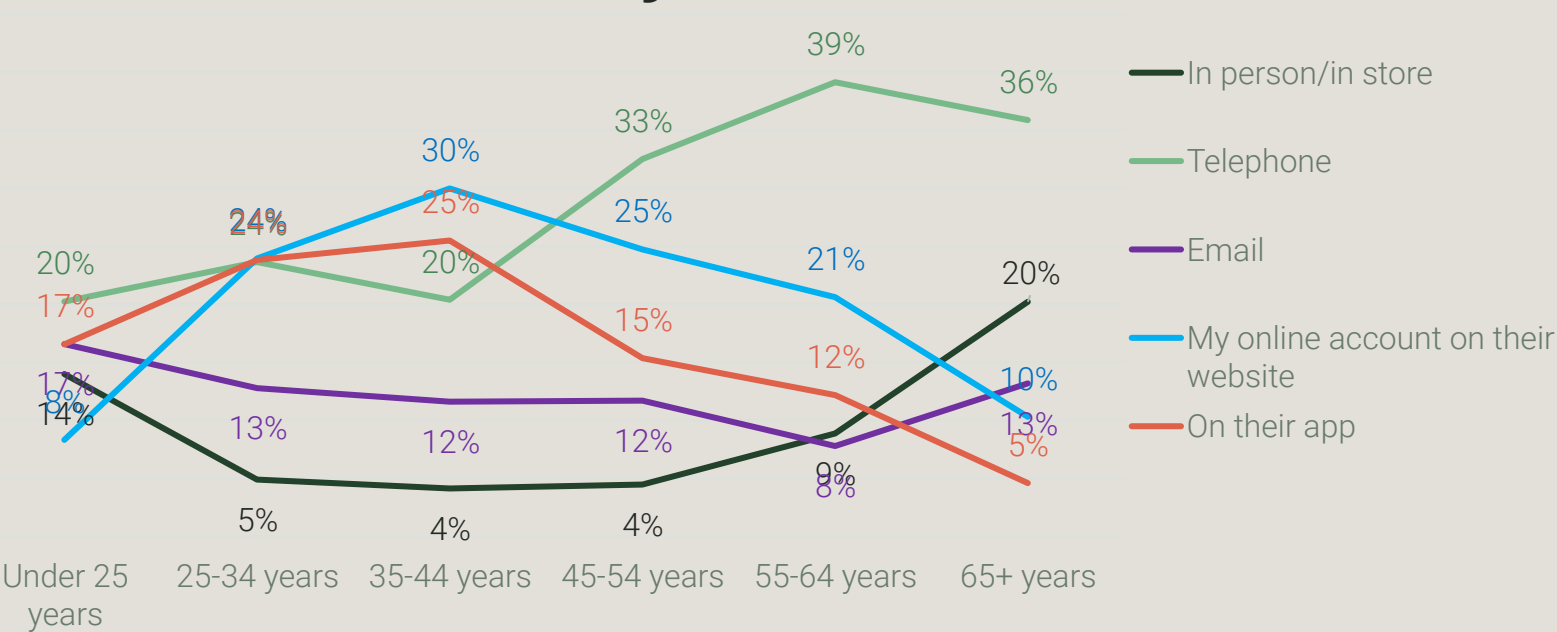
Channel Preference Broadband tasks

Like Mobile, in many areas there are significant differences between age groups with younger age groups often preferring online contact (app or online account) and older age groups often preferring person to person contact (telephone or instore).
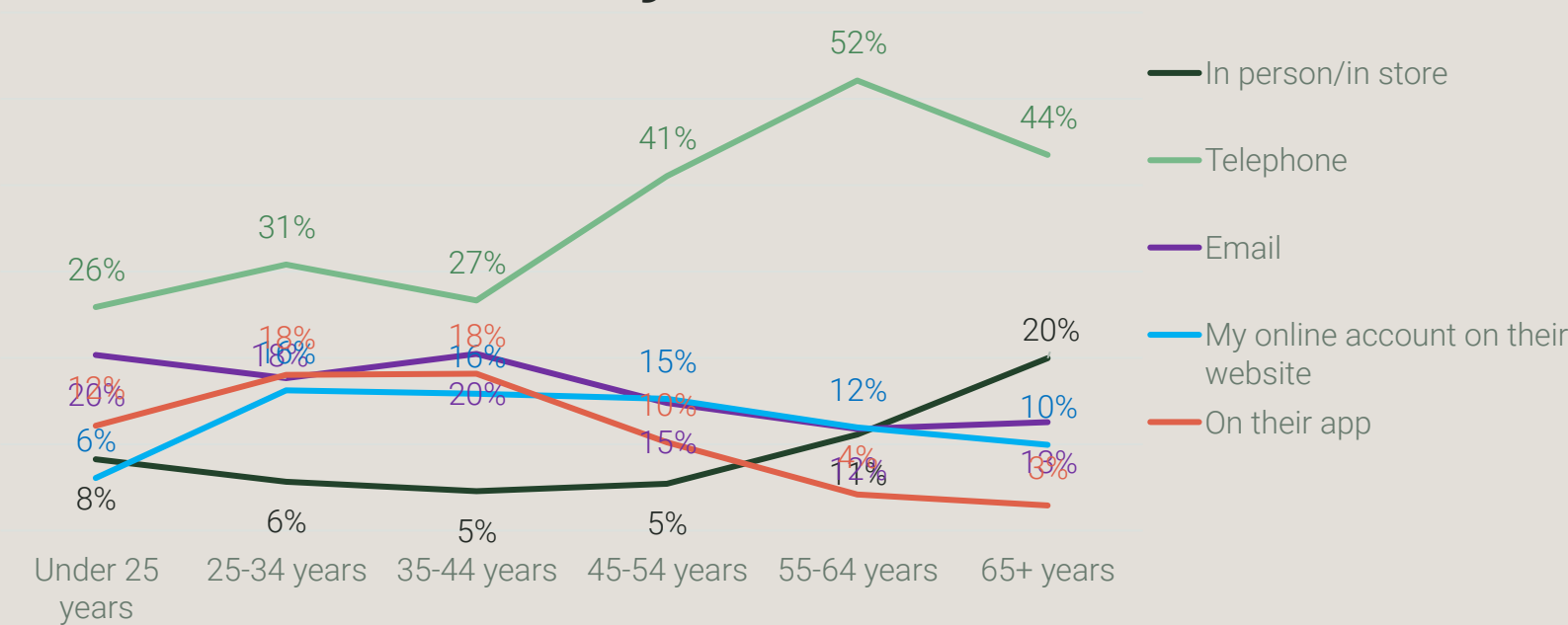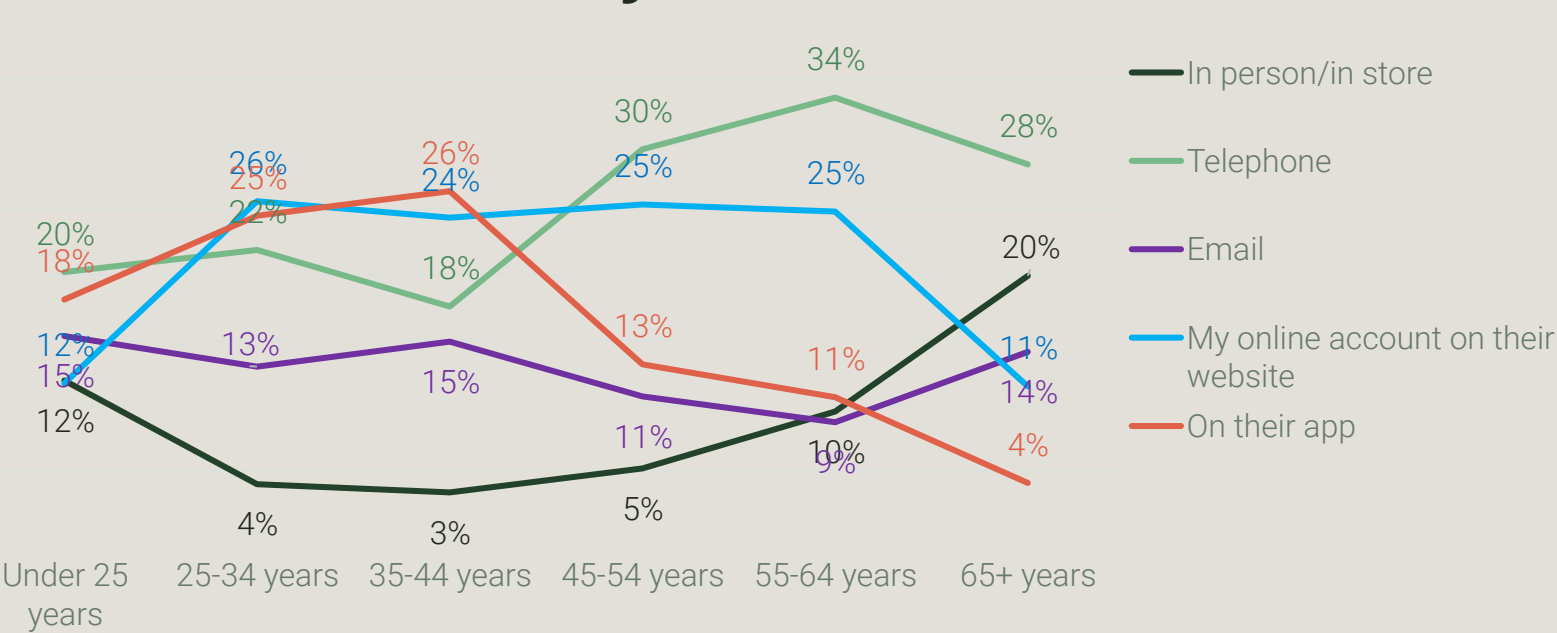
Service issue

Legend:
- In person/in store
- Telephone
- Email
- My online account on their website
- On their app

Moving Home

Legend:
- In person/in store
- Telephone
- Email
- My online account on their website
- On their app

Billing issue

Legend:
- In person/in store
- Telephone
- Email
- My online account on their website
- On their app

Leaving Provider

Legend:
- In person/in store
- Telephone
- Email
- My online account on their website
- On their app

Channel Preference Broadband tasks

Changing Plan

Legend:
- In person/in store
- Telephone
- Email
- My online account on their website
- On their app

Checking bill

Legend:
- In person/in store
- Telephone
- Email
- My online account on their website
- On their app

Information about Plan

Legend:
- In person/in store
- Telephone
- Email
- My online account on their website
- On their app

Checking usage

Legend:
- In person/in store
- Telephone
- Email
- My online account on their website
- On their app
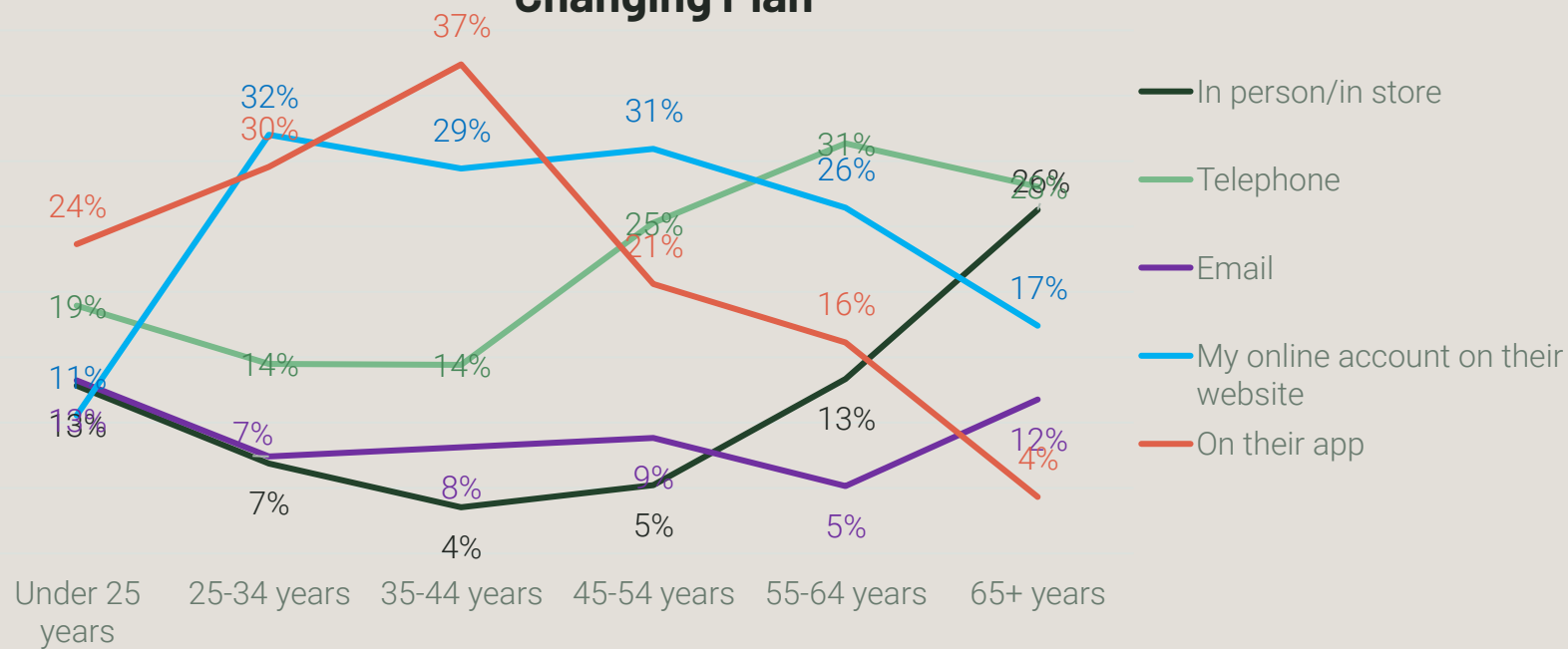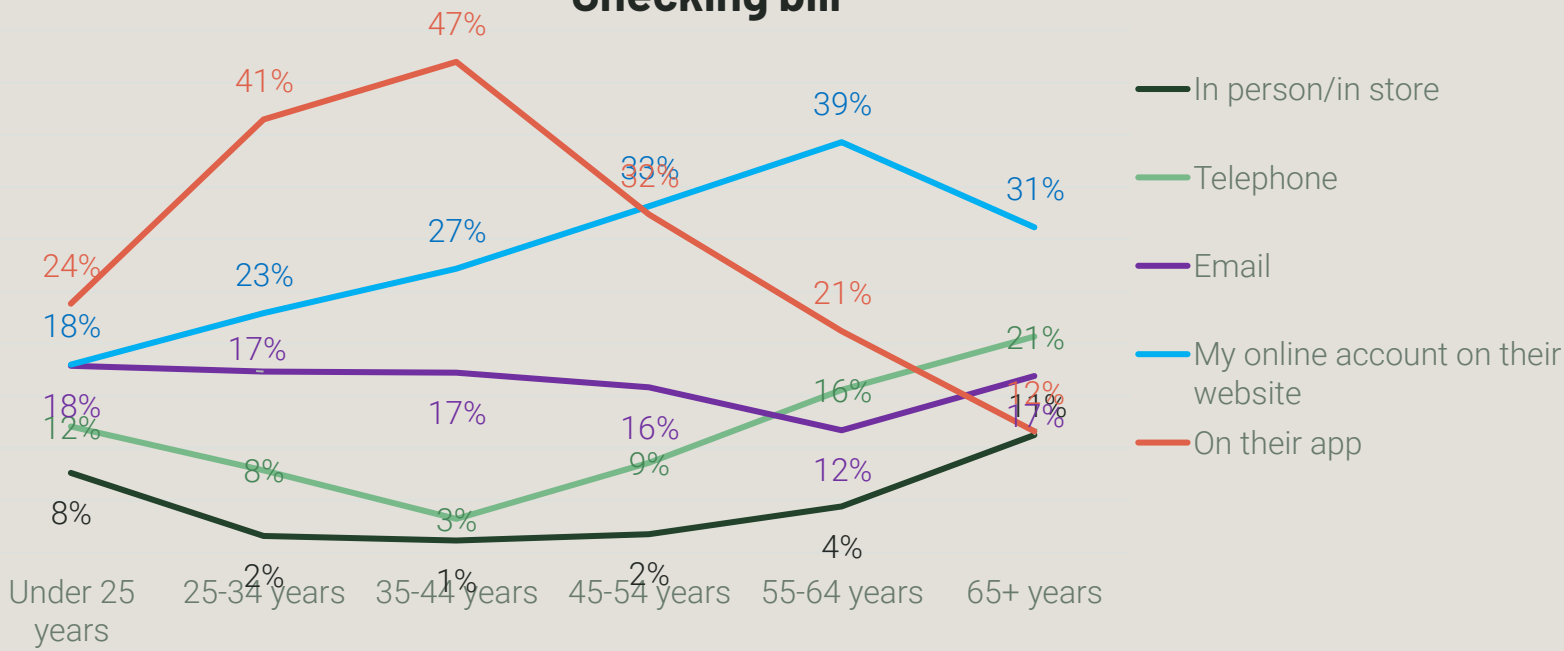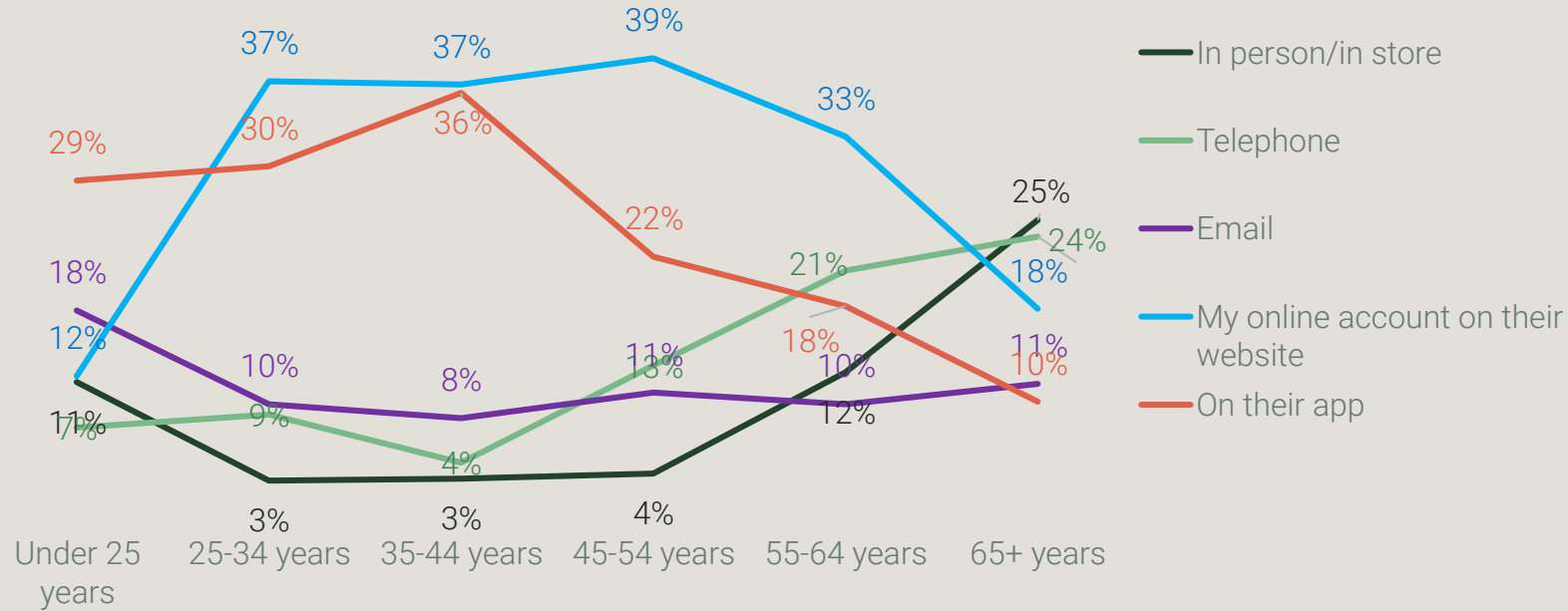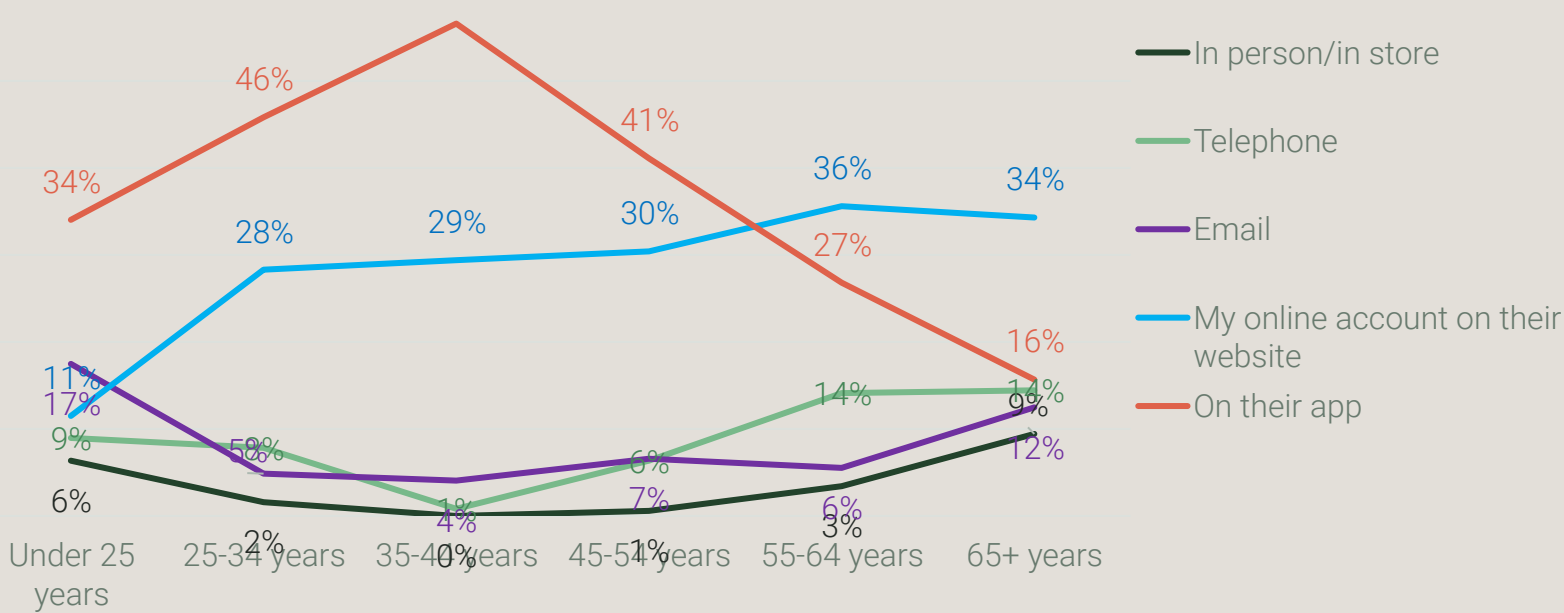
INSIGHTS HQ

SME Insights

Channel Preference

Channel Preference Mobile tasks

In general, mobile SME customers prefer to telephone for an issue, while online and app is preferred for more transactional tasks such as checking, buying add-ons and finding information. They show similar low preference for messaging or chat functions as residential consumers but have a higher preference for email.

	Telephone	In person/in store	Account / relationship manager	Email	SMS / messaging app (e.g. WhatsApp)	Chat function on their website or app	My online account on their website	On their app
An issue with a bill (i.e. an unpaid bill or a billing error)	36%	11%	4%	19%	3%	6%	7%	13%
An issue with service coverage, reliability or speed	34%	13%	3%	16%	4%	8%	7%	12%
Leaving the provider	22%	16%	3%	21%	3%	3%	10%	16%
Changing my plan	19%	14%	4%	15%	3%	4%	13%	27%
Information about prices or a plan	15%	12%	3%	18%	3%	5%	16%	25%
Buying an add-on (e.g. a roaming or data pack)	14%	10%	2%	12%	4%	4%	15%	34%
Checking my bill	9%	6%	1%	23%	3%	3%	20%	32%
Checking my minutes, text or data balance	9%	6%	1%	11%	8%	3%	15%	42%

Thinking about your mobile, what would be your preferred way of interacting with %"Mbl-Provider% for each of the following?
Base: Oct-Dec 24 Mobile customers n=359 Excludes "don't know"

Channel Preference Broadband tasks

Broadband SME customers prefer to telephone for an issue, moving office or leaving the provider, while online and app is preferred for more transactional tasks such as checking and buying add-ons. They show similar low preference for messaging or chat functions as residential consumers but have a higher preference for email.

	Telephone	In person/in store	Account / relationship manager	Email	SMS / messaging app (e.g. WhatsApp)	Chat function on their website or app	My online account on their website	On their app
An issue with a bill (i.e. an unpaid bill or a billing error)	36%	9%	4%	20%	2%	8%	6%	12%
An issue with service coverage, reliability or speed	35%	7%	4%	16%	5%	8%	8%	14%
Moving office	25%	10%	5%	21%	2%	5%	12%	12%
Leaving the provider	24%	12%	4%	21%	3%	3%	13%	14%
Changing my plan	22%	10%	4%	15%	3%	6%	16%	20%
Information about prices or a plan	15%	9%	3%	18%	4%	4%	21%	22%
Buying extra data pack	12%	8%	1%	14%	5%	4%	18%	29%
Checking my bill	10%	6%	1%	23%	4%	5%	23%	27%
Checking my data balance	10%	5%	1%	14%	5%	4%	24%	32%

Thinking about your broadband, what would be your preferred way of interacting with %"BB-Provider% for each of the following?
Base: Oct-Dec 24 Broadband customers n=343 Excludes "don't know"

Thank you

Insights HQ