

# Research New Zealand

## Consumer Telecommunications Survey

July 2021



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## 1.0 EXECUTIVE SUMMARY

A recent amendment to the Telecommunications Act (resulting from a review of telecommunication services by the Ministry of Business, Innovation and Employment (MBIE) in 2018) added several key aspects aimed at improving telecommunications Retail Service Quality (**RSQ**). In particular, the Act mandated that the Commerce Commission (**the Commission**) regularly monitor RSQ and provide information that helps consumers make informed choices about which telecommunications (phone and broadband) providers and services to choose.

### Purpose and information objectives

To meet these obligations, the Commission has commissioned a **statistically significant** and **large scale, nationally representative** survey. The results of this survey are presented in this report and include information on:

1. Consumers' **experiences and opinions of RSQ**, as defined by the Act.
2. The **'pain points' associated with dealing** with telecommunications service providers.
3. The **type of information** that would provide the most benefit to consumers in making these choices about potential providers.

### Method

The survey was developed and conducted in **three** work streams as follows:

1. Work Stream 1 – **Qualitative research** – completed in order to help inform the development of the questionnaire for the survey research.

A carefully selected sample of n=18 respondents was interviewed between 16 and 23 March 2021 in three focus groups. Respondents were recruited on the basis that they had recently switched providers or plans and had also been experiencing problems with their services/providers. Soft quotas were placed on age and gender to ensure the sample was reasonably representative in terms of demographics.

2. Work Stream 2 – **Cognitive testing** – completed in order to ensure the questions in the survey questionnaire, as well as their order, were worded appropriately and would be understood by the average survey respondent.

The cognitive testing simulated a real-life interviewing situation, with respondents initially completing the questionnaire online and then being interviewed about that experience. A total of n=10 respondents were interviewed in this way between 12 and

19 May 2021; n=5 in relation to their broadband (internet) provider and n=5 in relation to their mobile provider.

3. Work Stream 3 – **Survey research** – completed online, with a nationally representative sample of n=2,126 New Zealanders, 18 years and over, who identified themselves as being ‘personally responsible for paying and making decisions about the telecommunications products and services they use’.

Interviewing was completed between 2 and 28 June 2021. The results have been weighted by gender and age in order to ensure they are demographically representative of the adult population. Results based on the total weighted sample are subject to a maximum margin of error of 2.2% (at the 95% confidence level).

## Main findings

### About the survey sample

Ninety-six percent of the survey sample comprised consumers with a broadband (internet) service and 98% had a mobile service. The average respondent had a relationship with 1.7 service providers.

Survey questions were initially asked about all the providers used by respondents in order to establish their overall opinion about Retail Service Quality (RSQ).

In the interests of time and minimising respondent burden, the potential pain ‘pain points’ associated with dealing with providers was investigated in relation to one technology (internet or mobile), one provider and one type of matter with that provider.

## Overall opinion about Retail Service Quality

Most respondents stated they were satisfied with their overall relationship with their service provider(s), while most said they recommend them.

Table 1 (overleaf) summarises the key results for these important indicators of RSQ.

This shows that, on average, 78% of respondents were satisfied with their provider(s) and 72% would recommend them.

Based on the results of the recommendation question, the Net Promoter Score (NPS) has been calculated to be +13 using the conventional formula. This reflects the fact that 38% of respondents rated their provider with a 9-10 (i.e. equivalent to them being a 'Promoter') and 25% with a 0-6 (i.e. equivalent to them being a 'Detractor'). The remainder (34%) rated their likelihood to recommend their service provider(s) in the mid-range of the 11-point recommendation scale (i.e. with a 7-8, equivalent to them being a 'Passive' customer). 'Passive' customers are not taken into account when calculating the NPS.

The table also shows respondents' opinions about the performance/quality of the service provided by their providers. At one extreme, satisfaction was highest for the 'coverage and availability' of their provider's service (80%). However, at the other extreme, satisfaction was lowest for the 'level of support provided by their provider, including their technical support' (67%). Most satisfaction scores are in the 60-70% range.

Table 1: Retail Service Quality

	Average	Spark	Voda fone	2degrees	Skinny	Slingshot	Trustpower	Orcon	My Republic	Warehouse Mobile	Other
Unweighted base =	2126	963	946	657	244	191	153	79	46	39	186
	%	%	%	%	%	%	%	%	%	%	%
<b>Overall satisfaction</b>	78	78	75	83	87	78	66	72	78	80	80
<b>Recommendation</b>	38	37	32	45	55	36	36	31	35	43	43
<b>Net Promoter Score</b>	13	11	1	27	41	7	4	2	13	30	23
<b>Satisfaction with ...</b>											
Coverage & availability	80	83	78	77	85	79	75	90	84	73	80
Speed & stability	78	80	77	80	85	70	69	83	78	82	79
Pricing	70	64	66	77	86	67	62	66	72	95	77
Clarity of communications	70	69	67	74	77	72	68	64	68	61	73
Quality of customer service	68	67	62	73	70	70	69	69	71	50	74
Ease of contact	68	66	64	74	71	72	72	70	65	58	70
Level of support, including technical support	67	68	64	71	66	71	71	73	62	57	72

\* Results for Flip and Kogan not shown because of small sub-sample sizes. However, their results are included in the calculation of the Average.

## Service issues

Against this background and in relation to their **broadband (internet)** service:

1. Over one-half of respondents stated they **had experienced a service issue** in relation to their internet service in the last 2 years (56%).
2. Most frequently, this was identified as being an issue with **performance** – that is, ‘speed, stability, or a fault’ (31%). Of all the issues experienced, this was typically identified as the issue having the ‘**biggest impact**’ (41%) (Table 2).
3. Over one-half of respondents stated that, the issue which had the ‘biggest impact’, required **effort** on their part to resolve (54%).
4. A little over one-half stated they were **satisfied** with the outcome (57%).
5. Over one-fifth did **not** contact their service provider about this issue (21%) and 29% of these respondents said that this was because it ‘would have made no difference’.



In relation to their **mobile** service:

1. A lower percentage of respondents stated they **had experienced a service issue** in relation to their mobile service in the last 2 years (38%).
2. The issue having the '**biggest impact**' was '**service availability**' (25%), followed by an issue with 'a bill' (17%), 'service performance' (16%) and the quality of the 'customer service' received (13%) (Table 2).
3. Almost two-thirds of respondents stated that, the issue which had the 'biggest impact', required **effort** on their part to resolve (60%).
4. A little over one-half stated they were **satisfied** with the outcome (58%).
5. Over one-quarter did **not** contact their service provider about this issue (29%) and 44% of these respondents said that this was because it 'would have made no difference'.

**Comparing** the service issues between respondents' internet and mobile service use, the following can be noted:

1. Overall, respondents **more frequently** stated they had experienced a service issue in relation to their **internet** service in the last 2 years (56%) compared with their mobile service (38%).
2. The **range of issues** were experienced **more frequently** by **internet** than mobile users. For example, issues relating to service issues were experienced by almost three times as many internet users compared with mobile users (31% and 11% respectively).
3. The issue having the 'biggest impact' **differs** in each case; **service performance** in terms of **internet** users (41%) and **service availability** in terms of **mobile** users (25%). However, service performance was also an issue for mobile users (16%), as was an issue to do with a bill (17%).

**Table 2: Issues experienced in last 2 years – Internet compared with Mobile service**

	Internet %	Mobile %
<b>All issues experienced</b>		
	Unweighted base =	2032* 2091*
An issue with service performance (speed, stability, fault)	31	11
An issue with service availability	18	12
An issue with a bill you had received	13	10
An issue with customer service	13	9
An issue with equipment supplied/rented/purchased/installed	10	5
An issue with a new connection/installation (including the work of a technician)	10	5
An issue with the terms and conditions of a contract/plan	6	6
An issue with the disconnection of a service (including switching to a new company)	3	2
Another issue	1	1
No issues experienced in the last 2 years	42	61
Don't know	2	1
<b>Issue that had the 'biggest impact'</b>		
	Unweighted base =	1079* 770*
An issue with service performance (speed, stability, fault)	41	16
An issue with service availability	14	25
An issue with a bill you had received	10	17
An issue with a new connection/ installation (including the work of a technician)	9	7
An issue with customer service	9	13
An issue with equipment supplied/rented/purchased/installed	8	8
An issue with the terms and conditions of a contract/plan	4	9
An issue with the disconnection of a service (including switching to a new company)	2	3
Other	2	3
Don't know	1	0

## The 'pain points' associated with dealing with service providers

In order to identify potential 'pain points' when consumers deal with service providers, respondents were asked to identify all the reasons they had contact with their service provider in the last 2 years.

Table 3 shows that 65% of **internet** users had had contact with their provider in the last 2 years and this was the case for 50% of **mobile** users.

In the case of **internet users**, this contact was most frequently contact to 'obtain information about a service' (i.e. product disclosure) (22%), to 'switch to a new plan with the same provider' (22%), to 'arrange a new connection/installation' (19%) and/or to 'report a fault' (18%).

In comparison, **mobile users** most frequently had contact to 'switch to a new plan with the same provider' (20%) or to 'obtain information about a service' (i.e. product disclosure) (19%).

**Table 3: Provider contact in last 2 years**

	Total	Internet	Mobile
Unweighted base =	2125*	1061	1064
	%	%	%
To get information about a service you currently use or you were thinking of using (e.g. information about pricing, performance, specifications)	21	22	19
To switch to a new plan with the same provider	21	22	20
To arrange a new connection/installation	14	19	9
To report a fault	13	18	7
To discuss a contract issue (e.g. unexpected or unfair terms and conditions with your contract)	11	11	10
To switch to a new provider	3	3	2
Other	3	3	3
No contact in the last 2 years	38	30	46
Don't know	4	5	4

Total may exceed 100% because of multiple responses.

Sub-sample based on respondents who reported having at least one mobile or internet provider (i.e. excludes landline-only respondents).

Depending on the range of different reasons why respondents had with their service provider(s) in the last 2 years, they were asked to comment on **one** specific matter in detail, including how much effort was required on their part to deal with their provider in relation to this matter, what created the effort and whether they were satisfied with the outcome.

Table 4 (overleaf) shows the level of effort involved in dealing with providers on each of six specific matters and their overall satisfaction. This shows that:

1. On average, about one-third of respondents at a minimum stated it required **effort** on their part to resolve the matter – with an average of 39% across all matters.
2. The highest level of effort was expended in terms of contact relating to a **‘contract issue’** (53%) and the lowest for contact relating to ‘product disclosure’ (33%), ‘switching to a new provider’ (33%) and ‘switching plans with the same provider’ (31%),
3. Overall, **mobile** users were more likely than internet users to state that effort was required on their part.
4. Notwithstanding the effort required, over one-half of respondents stated they were **satisfied** with the contact they had with their service provider, regardless of the reason for the contact – with an average of 69% across all matters.
5. With the exception of switching from an existing to a new provider, the highest level of satisfaction was recorded in relation to those matters they required the **least** effort; that is, ‘switching plans’ (77%) and getting ‘a new connection/installation’ (76%). In comparison, the lowest level of satisfaction was recorded in relation to the matter that required the most effort; that is, a ‘contract issue’ (53%).
6. Despite the effort required, **mobile** users were in general more likely than internet users to state they were satisfied.

**Table 4: Effort and overall satisfaction with provider contact in last 2 years**

	Total	Internet	Mobile
Unweighted base =	1179*	1061	1064
	%	%	%
<b>Percentage stating that personal effort was involved in contact about:</b>			
A contract issue	53	46	59
Reporting a fault	43	42	47
A new connection/installation	40	36	50
Product disclosure	33	36	31
Switching plans	33	33	32
Switching from existing to a new provider	31	30	32
<i>Overall average</i>	39	-	-
<b>Percentage stating they were satisfied with their service provider in relation to contact about:</b>			
A contract issue	53	53	52
Reporting a fault	54	52	59
A new connection/installation	76	75	79
Product disclosure	72	69	75
Switching plans	77	75	79
Switching from existing to a new provider	41	32	56
<i>Overall average</i>	69	-	-

Total may exceed 100% because of multiple responses.

\*Sub-sample based on respondents who had had contact with a provider in the last 2 years.

Base numbers for each will vary depending on the extent to which the matter has been experienced in the last 2 years.

Table 5 (overleaf) identifies the factors that created the effort in relation to the specific matter that respondents were asked to comment on. The table lists the matters, from left to right, in terms of the matters that created the most effort; therefore, matters relating to 'a contract issue' are first. The table does not show the results between internet and mobile users because of the small sub-sample sizes involved:

Focusing on the three matters that required the most effort on the part of respondents (i.e. 'a contract issue', 'reporting a fault' and 'a new connection/installation'):

1. Overall, the same three factors were consistently mentioned as the Top 3, regardless of the matter:
  - a. 'You had to wait a long time before you got to speak/communicate with someone' – average of 62%.
  - b. 'You were transferred to and needed to repeat yourself to multiple people' – average of 61%.
  - c. 'Staff didn't have the knowledge/authority to make decisions/take action' – average of 57%.
2. Other factors were also mentioned with some frequency in relation to particular matters. For example, in the case of 'a new connection':
  - a. 'Staff didn't get back to you or you were disconnected from customer service' (61%).
  - b. 'You had difficulties understanding the staff (accent or speaking too quickly)' (60%).

**Table 5: Reasons effort was required to deal with telecommunication providers during different types of contact**

	Type of Contact						Average %
	Contract Issues %	Report- ing a fault %	New connect- ion %	Switching plans %	Product disclosure %	Switching providers %	
<b>Reasons for effort ...</b>							
Unweighted base =	46* - 82*	60* - 91*	43*-87*	99*-117*	43*-67*	10* **	262*- 445*
You had to wait a long time before you got to speak to/ communicate with someone	60	71	64	59	59	66	62
You were transferred to, and needed to repeat yourself to multiple people	70	57	63	60	54	59	61
Staff didn't have the knowledge/ authority to make decisions/take action	67	50	59	59	48	32	57
Customer service was not available when required	53	47	57	55	29	40	50
Staff didn't get back to you or you were disconnected from customer service	53	46	61	47	35	20	49
You had difficulties understanding the staff (accent or speaking too quickly)	44	49	60	59	42	50	49
You had difficulties finding the contact details for customer service	55	38	49	51	42	57	48

Total may exceed 100% because of multiple responses.

Bold numbers identify the main reason for effort for each type of contact had with a provider.

\*Base numbers for each will vary depending on the extent to which the matter has been experienced in the last 2 years.

\*\*Caution: low base number of respondents - results are indicative only.

## Decision-making information

In the last 12 months, 41% of respondents stated they had looked for information to make decisions about the telecommunication services they used. This is a relatively high percentage and may reflect the fact that many respondents stated they had recently become a customer of their service provider (e.g. 33% had become a customer in the last 2 years and a further 22% in the last 2-3 years).

These respondents most frequently stated they looked for information relating to 'fees and pricing' (67%), followed by information about 'product/service specifications' (41%). Thirty percent stated they looked for information which would enable them to make comparisons between service providers.

Against this background, respondents most frequently identified 'telecommunication websites' (64%) and 'friends and family' (61%) as the information sources that were helpful/credible. In comparison, they were less likely to identify 'government departments' as helpful/credible (43%). Consumer New Zealand's helpful/credibility rating was 56%.

## Conclusion

The main findings outlined above essentially establish a **baseline** from which changes in consumers' experiences and opinions of RSQ may be monitored and evaluated over time, including the extent to which their contact with service providers is difficult and requires effort on their part.

It is clear from the results to this survey that, whilst both overall consumer satisfaction (78%) and recommendation (72%), other results point to the fact that consumers have an **interactional** or **transactional** relationship with their service provider(s); fundamentally based on:

1. Practical factors such as **price and coverage and availability** (refer to Section 4.4).
2. Low expectations – evidenced by the fact that significant percentages of internet and mobile users had experienced issues, particularly around the **customer service response** from their providers and especially contact relating to 'contract issues' and 'reporting a fault'.

Of particular note is the fact that almost one-third of mobile users experiencing an issue did **not** contact their provider (29%) and of these, almost one-in-two (44%) did not because they felt it 'would have made no difference'.



## 2.0 Purpose, objectives and method

In 2018, the Ministry of Business, Innovation and Employment (MBIE) conducted a review of telecommunications services. A direct result of this review was an amendment to the Telecommunications Act (**the Act**).

This amendment added several key aspects aimed at improving telecommunications Retail Service Quality (**RSQ**). In particular, the Act mandated that the Commerce Commission (**the Commission**) regularly monitor RSQ and provide information that helps consumers make informed choices about which telecommunications (phone and broadband) providers and services to choose.

### 2.1 Purpose

To meet these obligations, the Commission has commissioned a **statistically significant** and **large-scale, nationally representative** survey; the results of which are presented in this report. The survey has been designed to be **repeatable**; thereby facilitating the tracking of RSQ on a longitudinal basis.

### 2.2 Information objectives

Specifically, the survey has measured consumers' experiences and opinions of RSQ, as defined by the Act; namely:

1. Customer service and fault service levels.
2. Installation issues.
3. Contract issues.
4. Product disclosure.
5. Billing. The switching process and related information.
6. Service performance, speed and availability.

In addition, the survey has collected **qualitative** information to help the Commission understand and test its assumptions in terms of:

1. The 'pain points' associated with dealing with telecommunications service providers.
2. How consumers make their choices in choosing a potential provider.
3. The type of information that would provide the most benefit to consumers in making these choices.

## 2.3 Method

The 'survey' was developed and conducted in **three** work streams as follows:

1. Work Stream 1 – Qualitative research.
2. Work Stream 2 – Cognitive testing.
3. Work Stream 3 – Survey research.

### 2.3.1 Qualitative research

The qualitative research was completed in order to help inform the development of the questionnaire for the survey research. That is:

1. To identify how best to phrase the questions that are asked to examine consumers' experiences and opinions of RSQ, as defined by the Act.
2. To identify any potential areas of questioning not previously considered, which might help to understand the issues faced by consumers when dealing with providers ('pain points') and optimising the advantages and benefits of the service providers and technologies they choose.

The qualitative research was completed in the form of three focus groups, each comprising n=6 respondents, between 16 and 23 March 2021. A total of n=18 respondents were interviewed as follows:

1. Group 1 – Focused on broadband (internet) services.
2. Group 2 – Focused on mobile services.
3. Group 3 – Focused on landline communications.

In all cases, respondents were consumers who had recently switched providers or plans and had also been experiencing problems with their services/providers. Soft quotas were placed on age and gender to ensure the sample was reasonably representative in terms of demographics.

Interviewing was completed on a face-to-face basis, with each focus group lasting approximately 90 minutes.

A separate report was prepared based on the results of this work stream.

### 2.3.2 Cognitive testing

The questionnaire for the survey was developed in collaboration with the Commerce Commission, taking into account the results of the qualitative research and other information made available by the Commission (e.g. as a result of consumer workshops that it had held).

When the questionnaire was in a suitable draft form, it was cognitively tested; the purpose of which was to ensure that:

1. The questions were worded appropriately and would be easily understood.
2. The questions flowed in a logical order.
3. The answer categories for pre-coded questions were as complete as possible.

The cognitive testing essentially simulated a real-life survey situation. Test respondents initially completed the draft questionnaire online, submitted their completed questionnaire and then took part in a 30 to 45-minute interview, during which a member of the Research Team doubled-back, question-by-question to ensure they understood the questions, understand the question instructions and could provide the answer they wished to give.

A total of n=10 respondents were interviewed in this way between 12 and 19 May 2021:

1. n=5 respondents tested the draft questionnaire in relation to their broadband (internet) provider, answering one of the following sections:
  - a. To cancel a service plan (n=2).
  - b. To arrange a new connection/installation.
  - c. To switch to a new provider.
  - d. To switch to a new plan.
2. n=5 respondents tested the draft questionnaire in relation to their mobile provider, answering one of the following sections:
  - a. To switch to a new provider.
  - b. To switch to a new plan.
  - c. To report a fault.
  - d. To discuss a contract issue.

- e. To get information

Soft quotas were placed on age and gender to ensure the sample was reasonably representative in terms of demographics.

A separate report was prepared based on the results of this work stream.

### 2.3.3 Survey research

Final changes were made to the draft survey questionnaire based on the results of the cognitive testing and as a final step the questionnaire was tested for its technical integrity (i.e. to ensure its internal routing functioned correctly and respondents were taken to relevant questions depending on their answers). A copy of the final approved survey questionnaire is included in this report as Appendix A.

A nationally representative sample of New Zealanders 18+ was purchased from our panel provider, Dynata, and the survey was initially 'soft' launched on 6 June 2021 and interviews completed with approximately n=50 respondents. The data for these respondents was extracted and examined to ensure, again, the internal integrity of the survey. The survey was then fully launched.

Using a routing system, quotas were set so that equal numbers of respondents completed the survey research in relation to their broadband (internet) service and their mobile service. In addition, a similar system was used in order to prioritise the number completing the research with the 'smaller' service providers.

A total sample of n=2,126 completed the survey research before it was 'closed off' on 28 June 2021. Post-interviewing, the dataset was checked and then weighted by age and gender to ensure it is representative of the New Zealand population 18+. The weighting parameters were sourced from the most recent Census of Population & Dwellings (2018).

Results based on the total weighted sample are subject to a maximum margin of error (MoE) of +/- 2.2% (at the 95% confidence level). This means that had we found that 50% of respondents were satisfied overall with their service provider, we can be 95% sure that we would have got the same result had we interviewed everyone in the population, give or take 2.2%.

Higher margins of error apply in the case of sub-samples, as shown in Table 6 (overleaf).

**Table 6: Margins of error**

	Total	MoE*
Unweighted base =	2126	2126
	n=	+/-%
Total sample	2126	2.2
Respondents who completed Sections 6-14 the survey in relation to their:		
<b>Internet</b> provider	1062	3.1
<b>Mobile</b> provider	1064	3.1
Respondents who completed Sections 6-14 of the survey in relation to:		
Spark	622	4.1
Vodafone	616	4.1
2degrees	385	5.1
Skinny	146	8.3
Slingshot	104	9.9
Trustpower	74	11.7
Orcon	43	15.1
MyRepublic	18	23.5
Warehouse mobile	18	23.6
Kogan mobile	6	41.1
Flip	4	49.9
Other	90	10.7

\* Maximum margin of error at the 95% confidence level.

### 2.3.4 Sample profile

A profile of the total sample of n=2,126 respondents is as follows, based on the sample's key telecommunication characteristics (Table 7). It is important to remember that a routing system was used to ensure equal numbers of respondents completed the survey in relation to a broadband (internet) service and a mobile service. Therefore, the sample is not necessarily representative of the overall penetration of these services.

Table 8 provides a demographic profile of the sample.

**Table 7: Sample profile – Telecommunication characteristics**

	Unweighted base =	Total 2126 %
<b>Service used:</b>		
Broadband (internet)		96
Mobile		98
<b>Based on bundle:</b>		
Yes		61
No		31
Don't know		8
Total		100
<b>Household internet service type:</b>		
A copper broadband connection		12
A fibre broadband connection		68
4G- or 5G-based home broadband		13
Other		2
Don't know		5
Total		100
<b>Mobile service based on ...</b>		
Pay-as-you-go (or prepaid)		47
On-account (pay monthly)		52
Don't know		1
Total		100
<b>Data cap on ...</b>		
Internet service		27
Mobile service		61

\*\* Total may exceed 100% because of multiple responses.

**Table 8: Sample profile – Demographic characteristics**

	Total Unweighted base = 2126 %
<b>Gender:</b>	
Male	48
Female	51
Non-binary	1
Not listed	0
Total	100
<b>Age:</b>	
18-24	18
25-34	13
35-44	16
45-54	17
55-64	16
65-74	13
75 and over	7
Total	100
<b>Location:</b>	
Northland	3
Auckland	36
Waikato	9
Bay of Plenty	6
Gisborne	1
Hawkes Bay	4
Taranaki	2
Manawatu-Whanganui	5
Wellington-Wairarapa	11
Tasman-Nelson-Marlborough	3
West Coast	1
Canterbury	14
Otago	4
Southland	2
Total	100

Total may not sum to 100% due to rounding.

### 2.3.5 Organisation of this report

This report is organised into 13 sections as follows:

1. The use of telecommunications products and services, including by provider.
2. Overall satisfaction with the service provided by providers.
3. (Broadband) Internet service issues experienced.
4. Mobile service issues experienced.
5. Use of and interest in bills.
6. Provider-related contact.
7. Contact relating to product disclosure.
8. Contact relating to switching plans.
9. Contact relating to a new connection/installation.
10. Contact relating to service performance, including reporting a fault.
11. Contact relating to a contract issue.
12. Contact relating to switching to a new provider.
13. Looking for information to make a decision.



### 3.0 The use of telecommunications services

At the beginning of the survey, respondents were asked to identify the services they used, as well as the providers they used for these services. Table 9 profiles the sample in terms of provider and service. This shows that 96% of respondents used a broadband (internet) service and 98% a mobile service. As to be expected, most of these respondents had a relationship with Spark, Vodafone and/or 2degrees.

**Table 9: Sample profile – Provider by technology**

	Internet	Mobile
Unweighted base =	2126	2126
	%	%
Spark	31	30
Vodafone	24	35
2degrees	10	25
Skinny	4	9
Slingshot	9	1
Trustpower	6	1
Orcon	3	1
MyRepublic	2	0
Warehouse mobile	0	2
Flip	1	0
Kogan mobile	0	1
Other	8	0
<u>Do not have this technology</u>	<u>4</u>	<u>2</u>

Total may not sum to 100% due to multiple responses.

## 4.0 Overall satisfaction with the service provided by providers

Having identified which providers they used for which services, respondents were asked to indicate their overall satisfaction, taking into account 'their products and services, as well as (their) experience of dealing with them'.

This was then explored in greater depth, in relation to specific aspects of providers' service (e.g. coverage and availability, performance, pricing, etc.), before respondents were asked about their willingness to recommend them.

### 4.1 Overall satisfaction

Respondents were asked to use an 11-point satisfaction scale to indicate their overall satisfaction with their provider(s), where 0 = 'very dissatisfied' and 10 = 'very satisfied'.

Table 10 shows that:

1. In general, over three-quarters were satisfied with their provider(s) (78%). This is based on the percentage rating their provider with a 7-10 on the scale.
2. In comparison, 4% were dissatisfied (0-3 on the scale), with the remainder giving a neutral response (4-6), being neither satisfied nor dissatisfied (17%), or they didn't know (1%).
3. The satisfaction scores range between 87% for Skinny and 66% for Trustpower.
4. Compared with the satisfaction result for the total sample, the results for Skinny and Trustpower are statistically significant.

**Table 10: Overall satisfaction by provider**

	Total	Spark	Vodafone	2degrees	Skinny	Slingshot	Trustpower	Orcon	MyRepublic	Warehouse Mobile	Other
Unweighted base =	2126	963	946	657	244	191	153	79	46	39	186
	%	%	%	%	%	%	%	%	%	%	%
Dissatisfied/Very dissatisfied	4	5	5	2	2	3	7	6	4	9	3
Neutral	17	16	19	14	10	19	26	22	18	11	15
Satisfied/Very satisfied	78	78	75	83	87	78	66	72	78	80	80
Don't know	1	1	1	1	1	0	1	0	0	0	2
Total	100	100	100	100	100	100	100	100	100	100	100

Total may not sum to 100% due to multiple responses.

## 4.2 Provider performance

Using the same satisfaction scale, respondents were asked how satisfied they were with specific aspects of the service provided by their provider(s).

Table 11 (overleaf) shows:

1. Satisfaction levels ranging between 67% for 'the support (the provider) provides when you need help, including technical support' and 80% for 'coverage and availability'.
2. Less than 10% of respondents were overtly dissatisfied with any of the specific aspects of their provider's service.
3. However, relatively high neutral responses (i.e. neither satisfied nor dissatisfied) are recorded for many of the aspects and particularly for their provider's 'pricing' (23%), 'the quality of their customer service' (20%), the 'clarity of their communications' (19%) and 'how easy it is to contact them' (19%).
4. Notwithstanding the above, the results vary by provider on some aspects. For example, in terms of 'the performance of their service (speed and stability)', the difference in the satisfaction levels between Skinny (85%) and Slingshot (70%) is statistically significant. Similarly, in terms of their 'pricing'; 86% for Skinny and 67% for Slingshot.

**Table 11: Satisfaction with specific service aspects**

	Total	Spark	Vodafone	2degrees	Skinny	Slingshot	Trustpower	Orcon	MyRepublic	Warehouse Mobile	Other
Unweighted base =	2126	963	946	657	244	191	153	79	46	39	186
	%	%	%	%	%	%	%	%	%	%	%
<b>a. The coverage and availability of their service</b>											
Dissatisfied/Very dissatisfied	4	3	5	4	3	5	4	3	6	2	2
Neutral	15	13	17	17	11	14	19	7	10	22	13
Satisfied/Very satisfied	80	83	78	77	85	79	75	90	84	73	80
Don't know	1	1	0	1	1	1	1	0	0	0	2
Not applicable	1	0	0	0	0	1	1	0	0	3	2
Total	100	100	100	100	100	100	100	100	100	100	100
<b>b. The performance of their service (speed and stability)</b>											
Dissatisfied/Very dissatisfied	4	3	5	3	2	6	6	6	4	3	5
Neutral	16	15	18	15	12	24	23	12	16	15	13
Satisfied/Very satisfied	78	80	77	80	85	70	69	83	78	82	79
Don't know	1	1	0	1	1	0	1	0	2	0	1
Not applicable	0	0	0	0	0	0	1	0	0	0	2
Total	100	100	100	100	100	100	100	100	100	100	100
<b>c. Their pricing</b>											
Dissatisfied/Very dissatisfied	6	8	8	5	1	7	8	9	6	0	4
Neutral	23	27	25	18	11	26	27	24	22	5	14
Satisfied/Very satisfied	70	64	66	77	86	67	62	66	72	95	77
Don't know	1	1	1	1	1	0	3	0	0	0	3
Not applicable	0	1	0	0	0	0	1	0	0	0	3
Total	100	100	100	100	100	100	100	100	100	100	100
<b>d. The quality of their customer service</b>											
Dissatisfied/Very dissatisfied	7	7	8	5	4	7	8	11	7	9	5
Neutral	20	21	25	15	13	19	20	21	16	19	9
Satisfied/Very satisfied	68	67	62	73	70	70	69	69	71	50	74
Don't know	4	4	4	5	8	4	2	0	2	17	7
Not applicable	1	1	1	2	4	1	1	0	3	5	5
Total	100	100	100	100	100	100	100	100	100	100	100
<b>e. The clarity of their communications with you</b>											
Dissatisfied/Very dissatisfied	6	6	7	5	4	7	6	11	4	6	4
Neutral	19	20	22	16	12	17	24	23	18	19	13
Satisfied/Very satisfied	70	69	67	74	77	72	68	64	68	61	73
Don't know	3	2	2	3	3	1	1	1	7	11	7
Not applicable	2	2	2	2	4	3	1	0	3	2	4
Total	100	100	100	100	100	100	100	100	100	100	100

Continued

**Table 11: Satisfaction with specific service aspects (continued)**

	Total	Spark	Vodafone	2degrees	Skinny	Slingshot	Trustpower	Orcon	MyRepublic	Warehouse Mobile	Other
Unweighted base =	2126	963	946	657	244	191	153	79	46	39	186
	%	%	%	%	%	%	%	%	%	%	%
<b>f. How easy it is to contact them</b>											
Dissatisfied/Very dissatisfied	8	9	10	5	4	6	4	10	15	7	4
Neutral	19	21	22	15	12	15	21	20	13	20	15
Satisfied/Very satisfied	68	66	64	74	71	72	72	70	65	58	70
Don't know	4	3	3	5	8	7	1	0	4	13	8
Not applicable	1	1	1	2	4	1	1	0	3	2	4
Total	100	100	100	100	100	100	100	100	100	100	100
<b>g. The support they provide you when you need help, including their technical support</b>											
Dissatisfied/Very dissatisfied	7	8	8	4	6	5	5	10	12	10	5
Neutral	17	17	21	15	12	13	23	17	18	15	9
Satisfied/Very satisfied	67	68	64	71	66	71	71	73	62	57	72
Don't know	6	5	5	6	9	9	1	0	4	8	10
Not applicable	3	2	2	5	8	3	1	0	3	10	5
Total	100	100	100	100	100	100	100	100	100	100	100

Totals may not sum to 100% due to rounding.

## 4.3 Recommendation

Table 12 shows the extent to which respondents would recommend their provider(s). Respondents were asked to use an 11-point recommendation scale when answering, where 0 = 'would not recommend them at all' and 10 = 'would definitely recommend them'. This shows:

1. Overall, 72% of respondents said they would recommend their provider to a friend or family member. This is based on the percentage of respondents answering 7-10 inclusive of the response scale.
2. In comparison, 7% stated they would not recommend their provider. This is based on the percentage of respondents answering 0-3 inclusive of the response scale.
3. The remainder (18%) gave either a neutral response (4-6 on the response scale) or didn't know (3%).
4. The likelihood to recommend varies by provider, from 69% for Orcon to 85% for Skinny.
5. Based on these results and using the conventional formula, it is possible to calculate an average Net Promoter Score (NPS) for all providers, as well as one for each provider. The NPS is an indication of customer loyalty, and the average is +13. This is based on the 25% of respondents rating the likelihood to recommend their provider with a 0 to 6 (i.e. equivalent to 'Detractors'), subtracted from the 38% rating the likelihood with a 9 or 10 (i.e. equivalent to 'Promoters'). The 34% of respondents rating their likelihood to recommend with a 7 to 8 are equivalent to being 'Passives'.

**Table 12: Likelihood to recommend – Internet provider**

*Q11. To what extent would you recommend your Internet provider(s) to a friend or family member?*

	Total	Spark	Vodafone	2degrees	Skinny	Slingshot	Trustpower	Orcon	MyRepublic	Warehouse Mobile	Other
Unweighted base =	2126	963	946	657	244	191	153	79	46	39	186
	%	%	%	%	%	%	%	%	%	%	%
Would not recommend	25	26	31	18	14	29	32	29	22	13	20
Neutral	34	35	36	34	30	32	28	38	39	45	31
Would recommend	38	37	32	45	55	36	36	31	35	43	43
Don't know	3	3	2	3	1	3	4	1	3	0	7
Total	100	100	100	100	100	100	100	100	100	100	100
NPS	13	11	1	27	41	7	4	2	13	30	23

Totals may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who had an internet provider.

## 4.4 'Drivers' of satisfaction and recommendation

In this section, we outline the results of a specific analytical technique (viz. regression analysis) that has helped us identify the main 'drivers' of both consumers' satisfaction and recommendation with regard to their service provider(s).

The way to read this analysis is as follows. The larger the number in Table 13, the more important the 'driver'. Therefore, 'pricing' and to a lesser degree, the 'coverage and availability' and the 'quality of customer service', are the three **most important** 'drivers' of satisfaction. At 0.21, a unit improvement in a service provider's 'pricing' would have **twice the impact on satisfaction** compared with a unit improvement in the 'clarity of their communications' (0.12), for example.

To an extent this is also the case with recommendation, although the 'level of support, including the technical support' is also an important 'driver'.

These results confirm that consumers' relationships with their service provider(s) are first and foremost based on practical considerations and, therefore, their relationships are transactional.

**Table 13: Drivers of Retail Service Quality**

	Driver of satisfaction $\beta$ -value	Driver of recommendation $\beta$ -value
Pricing	0.21	0.22
Coverage and availability	0.17	0.14
Quality of customer service	0.16	0.14
Speed and stability	0.13	0.10
Level of support, including technical support	0.13	0.23
Clarity of communications	0.12	0.10
Ease of contact	0.01	0.06

NB: In both cases, this regression has accounted for at least 60% of the variance in the data.

## 5.0 (Broadband) Internet service issues experienced

All respondents were asked to consider the last 2 years and identify whether they had experienced any of a number of listed issues with their broadband (internet) provider.

If had experienced more than one of the issues, they were asked to identify the issue that had the 'biggest impact on their experience' of the service. A series of questions was then asked about the resolution of this issue, including whether they had contacted their provider about this matter, how much effort was required on their part and were they satisfied or dissatisfied with their provider's response. Respondents who did not contact their provider were asked the reasons for this.

### 5.1 Issues experienced

Table 14 (overleaf) shows that over one-half of respondents had experienced at least one of the listed issues in the last 2 years (56%):

1. Almost one-third (31%) stated that they had experienced a 'service performance' issue (i.e. an issue with the speed or stability of their internet service, or a fault).
2. Other frequently mentioned issues included an issue with 'service availability' (18%), an issue with 'a bill' they had received (13%) and an issue with the quality of the 'customer service' they had received (13%).
3. The extent to which respondents stated they had experienced any of the listed issues varies by provider; 66% of respondents whose provider is Vodafone stated they had experienced at least one of the issues compared with 40% of those whose provider is Skinny.
4. Similarly, there is variation in terms of particular issues. For example, 23% of respondents whose provider is Skinny stated they had experienced a 'service performance' issue compared with 41% of those whose provider is MyRepublic. Care should be taken when considering this comparison because of the relatively small number of MyRepublic customers responding (n=40).



**Table 14: Issues experienced in last 2 years – Internet service**

*Q12. In the last 2 years, have you experienced any of the following issues with your internet service?*

	Total	Spark	Vodafone	2degrees	Slingshot	Trustpower	Skinny	Orcon	MyRepublic	Other (incl. Flip)
Unweighted base =	2032*	648	513	221	179	134	95	67	40	188
	%	%	%	%	%	%	%	%	%	%
An issue with service performance (speed, stability, fault)	31	31	33	27	36	33	23	32	41	33
An issue with service availability	18	18	21	14	19	16	15	19	15	15
An issue with a bill you had received	13	12	19	15	12	11	6	7	16	10
An issue with customer service	13	13	20	10	8	5	9	11	13	9
An issue with equipment supplied/rented/purchased/installed	10	10	12	11	10	3	4	10	5	8
An issue with a new connection/installation (including the work of a technician)	10	8	12	15	11	8	8	13	9	8
An issue with the terms and conditions of a contract/plan	6	6	8	9	5	6	2	3	5	3
An issue with the disconnection of a service (including switching to a new company)	3	3	4	4	4	2	1	0	0	2
Another issue	1	1	1	0	4	0	0	1	0	1
No issues experienced in the last 2 years	42	39	33	47	43	47	57	43	41	53
Don't know	2	2	1	1	2	1	3	0	0	1

Total may exceed 100% because of multiple responses.

\*Sub-sample based on those respondents who indicated they had at least one internet provider

## 5.2 Issue having the 'biggest impact'

Respondents who had experienced at least one of the listed issues in the last 2 years were asked to identify the issue that had the 'biggest impact on their experience' of their broadband (internet) service.

Table 15 shows that 41% of these respondents stated the 'service performance' issue (i.e. an issue with the speed or stability of their internet service, or a fault) had the 'biggest impact'. All other issues experienced were less likely to be identified.

The extent to which 'service performance' was identified as having the 'biggest impact' varies by provider. For example, 51% of respondents whose provider is Slingshot stated this had the 'biggest impact' compared with 32% of those whose provider is Vodafone.

**Table 15: Biggest issues experienced in last 2 years – Internet service**

*Q13. Which one of these was the one that had the biggest impact on your experience?*

	Total	Spark	Vodafone	2degrees	Slingshot	Trustpower	Orcon	Skinny	MyRepublic	Other (Incl. Flip)
Unweighted base =	1079*	387	337	118	101	70	39	37	23**	88
	%	%	%	%	%	%	%	%	%	%
An issue with service performance (speed, stability, fault)	41	41	32	37	51	53	40	45	60	51
An issue with service availability	14	14	14	14	10	14	18	26	10	15
An issue with a bill you had received	10	9	11	14	11	14	8	0	12	10
An issue with a new connection/ installation (including the work of a technician)	9	7	10	13	4	7	15	12	0	8
An issue with customer service	9	10	16	4	4	1	6	11	7	1
An issue with equipment supplied/rented/purchased/installed	8	8	9	11	9	4	8	2	0	5
An issue with the terms and conditions of a contract/plan	4	5	4	5	3	4	0	0	4	5
An issue with the disconnection of a service (including switching to a new company)	2	2	2	1	2	0	0	0	0	3
Other	2	2	2	0	6	1	2	0	8	1
Don't know	1	1	0	0	0	0	3	3	0	1
Total	100	100	100	100	100	100	100	100	100	100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who indicated they had an issue with their internet provider.

\*\*Caution: low base number of respondents - results are indicative only.

## 5.3 Resolution

Seventy-seven percent of respondents who had experienced at least one of the listed issues in the last 2 years stated they had contacted their provider about the issue that had the 'biggest impact on their experience' of their broadband (internet) service.

Table 16 shows that, on average, 54% of these respondents stated that it required effort on their part to resolve this matter. This is based on the percentage who gave a 7-10 response on an 11-point effort scale, where 0 = 'no/very little effort' and 10 = 'a lot of effort'. In comparison, 17% stated that it required no effort (they rated the amount of effort 0-3) and 28% gave a neutral response (4-6).

The table also shows that the effort required varies by issue. For example, respondents who reported having an issue with 'customer service' felt it took a lot more effort to deal with their provider than respondents who had an issue with 'service performance' or 'availability' (72% compared with 49% and 51%, respectively).

**Table 16: Effort required from respondents to deal with their Provider about a particular issue**  
*Q15. How much effort was required on your part to deal with [Provider] about this issue?*

	Total	An issue with service performance	An issue with service availability	An issue with a bill you had received	An issue with equipment supplied/rented/purchased/installed	An issue with a new connection/installation	An issue with customer service	An issue with the terms and conditions of a contract/plan	An issue with the disconnection of a service	Other	Don't know
Unweighted base =	899*	328	126	116	83	95	98	42	18**	13**	3**
	%	%	%	%	%	%	%	%	%	%	%
No/very little effort	17	20	20	20	28	11	5	10	9	17	31
Neutral	28	31	29	30	22	25	23	40	43	6	30
A lot of effort	54	49	50	51	50	64	72	47	48	77	39
Don't know	0	1	1	0	0	0	0	2	0	0	0
Total	100	100	100	100	100	100	100	100	100	100	100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who had an issue with their internet provider and made contact about it.

\*\*Caution: low base number of respondents - results are indicative only.

Given these effort results, Table 17 shows that, on average, 57% of respondents were satisfied with the outcome of their contact with their provider. This is based on the percentage who gave a 7-10 response on an 11-point satisfaction scale, where 0 = 'very dissatisfied' and 10 = 'very satisfied'. In comparison, 16% stated that were dissatisfied (they rated their satisfaction 0-3) and 27% gave a neutral response (4-6).

Like effort, this table also shows that satisfaction with providers responses varies by issue. As was seen with effort, respondents who reported having an issue with 'customer service' reported being less satisfied with the response from their provider than those dealing with 'service performance' or 'availability' issues (39% compared with 67% and 58%, respectively).

**Table 17: Satisfaction with how the Provider dealt with a particular issue**  
*Q16. Overall, how satisfied or dissatisfied were you with their response?*

	Total	An issue with service performance	An issue with service availability	An issue with a bill you had received	An issue with equipment supplied/rented/purchased/installed	An issue with a new connection/installation	An issue with customer service	An issue with the terms and conditions of a contract/plan	An issue with the disconnection of a service	Other	Don't know
Unweighted base =	899*	328	126	116	83	95	98	42	18**	13**	3**
	%	%	%	%	%	%	%	%	%	%	%
Dissatisfied/Very dissatisfied	16	13	9	14	9	19	33	8	22	55	0
Neutral	27	29	23	29	26	20	28	32	29	23	39
Satisfied/Very satisfied	57	58	67	57	65	61	39	60	49	22	61
Don't know	0	1	0	0	0	0	0	0	0	0	0
Total	100	100	100	100	100	100	100	100	100	100	100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who had an issue with their internet provider and made contact about it.

\*\*Caution: low base number of respondents - results are indicative only.

Table 18 shows that there is a positive correlation between effort and satisfaction. That is, 74% of respondents who stated that the contact they had had with their provider had required no/very little effort on their part were satisfied with the outcome of that contact, compared with 54% of those who said the contact had required some/a lot of effort.

**Table 18: Correlation between effort and satisfaction with internet services**

	Total	No/very little effort	Neutral	Some/a lot of effort	Don't know
Unweighted base =	899*	162	263	493	4**
	%	%	%	%	%
Dissatisfied/Very dissatisfied	16	13	4	23	0
Neutral	27	13	42	23	75
Satisfied/Very satisfied	57	74	53	54	25
Don't know	0	0	1	0	0
Total	100	100	100	100	100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who had an issue with their internet provider and made contact about it.

\*\*Caution: low base number of respondents - results are indicative only.

### 5.3.1 Reasons for not contacting providers

Twenty-one percent of respondents who had experienced at least one of the listed issues in the last 2 years stated they did not contact their provider about the issue that had the 'biggest impact on their experience' of their broadband (internet) service.

Table 15 (previously) shows that this was most frequently in relation to an issue with service performance, whether that be due to speed, stability or a fault.

Table 19 below shows that the most frequently mentioned reasons for respondents not having contact with their provider were because the issue 'resolved itself' (32%) and/or it was 'not that a major issue' (29%). However, 29% also stated that it 'would not have made a difference', while smaller percentages said, 'it would take too long to establish contact' (3%) and/or they were concerned about 'the likely technician fees' (1%).

**Table 19: Reasons respondents did not make contact with their Provider even though they had an issue**  
*Q17. For which of the following reasons did you not make contact with ... [Provider]?*

	Total
Unweighted base =	243*
	%
Issue resolved itself	32
Not a major issue	29
Wouldn't have made a difference	29
No time	20
Afraid I would be charged a technician's fee	1
Takes too long to get in contact with them	3
Another reason	7
Don't know	1

Total may exceed 100% because of multiple responses.

\*Sub-sample based on those respondents who had an issue with their Internet provider and did not make contact about it.

## 6.0 Mobile service issues experienced

As was the case in relation to their broadband (internet) service, all respondents were asked to consider the last 2 years and identify whether they had experienced any of a number of listed issues with their mobile provider.

### 6.1 Issues experienced

Table 20 (overleaf) shows that over one-third of respondents had experienced at least one of the listed issues in the last 2 years (38%):

1. Four particular issues were mentioned to more or less the same extent:
  - a. Twelve percent stated they had experienced an issue with 'service availability'.
  - b. Eleven percent stated that they had experienced a 'service performance' issue (i.e. an issue with the speed or stability of their internet service, or a fault).
  - c. Ten percent stated they had experienced an issue with 'a bill'.
  - d. Nine percent stated they had experienced an issue the quality of the 'customer service' they had received.
2. The extent to which respondents stated they had experienced any of the listed issues varies by provider; 50% of respondents whose provider is Warehouse Mobile stated they had experienced at least one of the issues compared with 21% of those whose provider is Skinny. Care should be taken when considering this comparison because of the relatively small number of Warehouse Mobile customers responding (n=39).
3. Similarly, there is variation in terms of particular issues. For example, 5% of respondents whose provider is Skinny stated they had experienced a 'service availability' issue compared with 17% of those whose provider is Warehouse Mobile. Again, care should be taken when considering this comparison.

**Table 20: Issues experienced in last 2 years – Mobile service**

*Q18. In the last 2 years, have you experienced any of the following issues with your mobile service?*

	Total	Spark	Vodafone	2degrees	Skinny	Warehouse mobile	Other (incl. Kogan, Orcon, Slingshot & Trustpower)
Unweighted base =	2091*	626	736	539	185	39**	67
	%	%	%	%	%	%	%
An issue with service availability	12	12	15	12	5	17	5
An issue with service performance (speed, stability, fault)	11	10	14	9	7	8	13
An issue with a bill you had received	10	11	12	8	3	5	13
An issue with customer service	9	9	10	5	8	11	14
An issue with the terms and conditions of a contract/plan	6	5	6	6	5	10	5
An issue with equipment supplied/rented/purchased/installed	5	5	6	4	3	3	6
An issue with a new connection/installation (including the work of a technician)	5	3	6	5	3	13	8
An issue with the disconnection of a service (including switching to a new company)	2	1	3	1	1	3	9
Another issue	1	1	1	1	0	2	1
No issues experienced in the last 2 years	61	63	55	65	77	47	54
Don't know	1	1	1	2	2	3	1

Total may exceed 100% because of multiple responses.

\*Sub-sample based on those respondents who indicated they had at least one mobile provider.

\*\*Caution: low base number of respondents - results are indicative only.



## 6.2 Issue having the 'biggest impact'

Respondents who had experienced at least one of the listed issues in the last 2 years were asked to identify the issue that had the 'biggest impact on their experience' of their mobile service.

Table 21 shows that 25% of these respondents stated that 'service availability' had the 'biggest impact', followed by the issue with 'a bill' (17%), 'service performance' (16%) and the quality of the 'customer service' they had received (13%).

The extent to which 'service availability' was identified as having the 'biggest impact' varies by provider. For example, 32% of respondents whose provider is 2degrees stated this had the 'biggest impact' compared with 15% of those whose provider is Skinny. Care should be taken when considering this comparison because of the relatively small number of Skinny customers responding (n=38).

**Table 21: Biggest issues experienced in last 2 years – Mobile service**

*Q19. Which one of these was the one that had the biggest impact on your experience?*

	Total	Spark	Vodafone	2 degrees	Skinny	Ware house mobile	Other (incl. Kogan, Orcon, Slingshot & Trustpower)
Unweighted base =	770*	229	327	178	38	19**	31
	%	%	%	%	%	%	%
An issue with service availability/coverage	25	24	26	32	15	23	9
An issue with a bill you had received	17	20	18	14	5	6	26
An issue with service performance (speed, stability, fault)	16	14	16	17	24	16	13
An issue with customer service	13	16	11	10	19	16	12
An issue with the terms and conditions of a contract/plan	9	9	8	7	18	15	0
An issue with equipment supplied/rented/purchased/installed	8	9	8	6	10	0	10
An issue with a new connection	7	5	7	7	7	15	10
An issue with the disconnection of a service (including switching to a new company)	3	1	3	2	0	6	17
Other	3	2	3	3	2	4	2
Don't know	0	0	0	1	0	0	0
Total	100	100	100	100	100	100	100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who indicated they had at least one mobile provider and had an issue in the last 2 years.

\*\*Caution: low base number of respondents - results are indicative only.

## 6.3 Resolution

Seventy percent of respondents who had experienced at least one of the listed issues in the last 2 years stated they had contacted their provider about the issue that had the 'biggest impact on their experience' of their mobile service.

Table 22 shows that, on average, 60% of these respondents stated that it required effort on their part to resolve this matter. This is based on the percentage who gave a 7-10 response on an 11-point effort scale, where 0 = 'no/very little effort' and 10 = 'a lot of effort'. In comparison, 13% stated that it required no effort (they rated the amount of effort 0-3) and 27% gave a neutral response (4-6).

There are no statistically significant differences by issue.

**Table 22: Effort required by respondents to deal with their Provider about a particular issue**

*Q21. How much effort was required on your part to deal with [Provider] about this issue?*

	Total	An issue with a bill you had received	An issue with service performance	An issue with customer service	An issue with service availability/coverage	An issue with equipment supplied/rented/purchased/installed	An issue with a new connection	An issue with the terms and conditions of a contract/plan	An issue with the disconnection of a service	Other	Don't know
Unweighted base =	545*	130	86	85	80	51	49	49	18**	20**	1**
	%	%	%	%	%	%	%	%	%	%	%
No/very little effort	13	17	17	8	16	3	13	19	5	4	0
Neutral	27	28	29	25	27	29	34	28	19	4	0
A lot of effort	60	55	53	68	57	67	53	53	75	92	100
Don't know	0	0	1	0	0	0	0	0	0	0	0
Total	100	100	100	100	100	100	100	100	100	100	100

Given these effort results, Table 23 shows that, on average, 58% of respondents were satisfied with the outcome of their contact with their provider. This is based on the percentage who gave a 7-10 response on an 11-point satisfaction scale, where 0 = 'very dissatisfied' and 10 = 'very satisfied'. In comparison, 16% stated that were dissatisfied (they rated their satisfaction 0-3) and 26% gave a neutral response (4-6).

The table also shows that the satisfaction with a providers' response varies by issue. Again, respondents were less satisfied in relation to 'customer service'. Just 42% of respondents were satisfied with the response they received from their provider in relation to an issue with 'customer service'. This result is significantly lower than the percentages of respondents who were satisfied when dealing with their provider about 'contract issues' (74%), 'equipment' (70%) and 'service performance' (69%).

**Table 23: Satisfaction with Providers response to a particular issue**

*Q22. Overall, how satisfied or dissatisfied were you with their response?*

	Total	An issue with a bill you had received	An issue with service performance	An issue with customer service	An issue with service availability/coverage	An issue with equipment supplied/rented/purchased/installed	An issue with a new connection	An issue with the terms and conditions of a contract/plan	An issue with the disconnection of a service	Other	Don't know
Unweighted base =	545*	130	86	85	80	51	49	49	18**	20**	1**
	%	%	%	%	%	%	%	%	%	%	%
Dissatisfied/Very dissatisfied	16	12	10	29	20	5	13	6	12	64	0
Neutral	26	33	20	29	27	25	29	20	25	4	100
Satisfied/Very satisfied	58	55	69	42	53	70	58	74	63	31	0
Don't know	0	0	0	0	0	0	0	0	0	0	0
Total	100	100	100	100	100	100	100	100	100	100	100

Total may not sum to 100% due to rounding.

\*Sub-sample based on respondents who had at least one mobile provider and contacted them about an issue in the last 2 years.

\*\*Caution: low base number of respondents - results are indicative only.

As for respondents' broadband (internet) service, Table 24 shows that there is a positive correlation between effort and satisfaction for mobile services. However, the correlation appears to be relatively weaker than for internet. While 63% of mobile users experiencing little/no effort were satisfied, this was 74% for the equivalent sub-sample of internet users.

**Table 24: Correlation between effort and satisfaction with mobile services**

	Total	No/very little effort	Neutral	A lot of effort	Don't know
Unweighted base =	545*	74	157	337	1**
	%	%	%	%	%
Dissatisfied/Very dissatisfied	16	32	5	18	0
Neutral	26	6	44	23	0
Satisfied/Very satisfied	58	63	51	60	100
Don't know	0	0	0	0	0
Total	100	100	100	100	100

### 6.3.1 Reasons for not contacting providers

Twenty-nine percent of respondents who had experienced at least one of the listed issues in the last 2 years stated they did not contact their provider about the issue that had the 'biggest impact on their experience' of their mobile service.

Table 21 (previously) shows that this was for a number of possible issues, including with service availability or coverage, service performance or a bill.

Table 25 below shows that the most frequently mentioned reasons for respondents not having contact with their provider was because it 'would not have made a difference' (44%). Smaller percentages also said they were concerned about 'the likely technician fees' (2%) and/or 'it would take too long to establish contact' (1%).

Other respondents said that they did not contact their provider because the issue was 'not that a major issue' (26%) and/or it had 'resolved itself' (21%).

**Table 25: Reasons why respondents did not contact their Provider about a particular issue**

*Q23. For which of the following reasons did you not make contact with ... [Provider]?*

	Total
Unweighted base =	238*
	%
Wouldn't have made a difference	44
Not a major issue	26
Issue resolved itself	21
Afraid I would be charged a technician's fee	2
Takes too long to get in contact with them	1
Another reason	5
Don't know	2

## 7.0 The use of and interest in bills

As indicated in the two previous sections of this report (i.e. issues experienced in relation to broadband (internet) and mobile services in the last 2 years), the bills received from providers have been a matter of concern for some respondents.

All respondents were specifically asked about the bills they received, including how they viewed them on receipt and whether they examined them in general or in detail.

### 7.1 Receiving and examining bills

Twenty-eight percent of respondents stated they are pre-paid customers. These customers have been removed from Table 26.

This shows, that of the remaining customers, most viewed their bills as 'email attachments' (71%) and that this is especially the case for internet users compared with mobile users (75% compared with 66% respectively). However, this is largely because many mobile users are pre-paid customers (28%).

Mobile users, on the other hand, were more likely to view their bills via an app (31% compared with 19% of internet users).

Note that 5% of respondents stated they 'did not usually view their bills'.

**Table 26: Receiving bills**

*Q24. Which one of the following best describes how you usually view these bills?*

	Total Unweighted base = 1828* %	Internet 1061 %	Mobile 767 %
As an email attachment	71	75	66
Through an app	24	19	31
On paper as they come in the post	9	9	8
By text	1	0	1
Online/on the provider's website	0	1	0
I don't usually view my bills	5	4	5
I don't receive a bill, it's paid automatically	0	1	0
Don't know	3	2	3

Total may exceed 100% because of multiple responses.

\* Pre-paid customers have been removed from this table.

### 7.1.1 Examining bills

Table 27 is based on those respondents who indicated they viewed their bill, at least sometimes. This shows that 56% of these respondents stated they 'always ... open their bills when they arrive' and 61% 'always ... look at the amount owing'.

However, fewer stated they 'always ... check what the amount owing is made up of'. In fact, 15% said they 'never' or 'infrequently' did this.

There are no statistically significant differences between (broadband) internet and mobile users.

**Table 27: Examining bills**

*Q25. And about how often would you say you ...?*

	Total %	Internet %	Mobile %
Unweighted base =	1736*	1014	722
<b>Look at the amount owing</b>			
Never	4	4	4
Infrequently	7	7	7
Often	11	10	13
Most times	15	15	16
Always	61	63	58
Don't know	2	1	2
Total	100	100	100
<b>Open the bills when they arrive</b>			
Never	3	3	4
Infrequently	9	9	9
Often	12	12	12
Most times	17	16	19
Always	56	58	53
Don't know	2	2	3
Total	100	100	100
<b>Check what the amount owing is made up of</b>			
Never	5	5	5
Infrequently	10	11	10
Often	13	13	13
Most times	20	21	19
Always	49	48	50
Don't know	2	2	2
Total	100	100	100

Total may not sum to 100% due to rounding.

### 7.1.2 Issues experienced with bills

Respondents who viewed their bills, at least sometimes, were asked how often, if at all, they had experienced a number of listed issues. Table 28 (overleaf) shows that about one-half of respondents stated they never experience any of the issues; meaning that the other half do, at least, 'infrequently'.

Focusing on the percentage who state they 'most times' or 'always' experience the listed issues, it should be noted that they are experienced more or less to the same extent:

1. 'Difficulties understanding how your bill is calculated' (14%).
2. 'Confusion around the cost of your service because it is bundled with other services or utilities' (14%).
3. 'Difficulties understanding the language and terms they use in their billing' (13%).
4. 'Unexpected charges (e.g. data coverage charges, roaming charges) (12%).'.
5. 'Unexpected fees (e.g. late fees/penalties, reconnection fees due to non-payment) (12%).
6. 'Errors in your bill' (10%).

There are no statistically significant differences between (broadband) internet and mobile users.



**Table 28: Issues experienced with bills**

*Q26. Please use the table below to tell us how often, if at all, you experience the following issues with your ... [technology] bills from ... [provider].*

	Total %	Internet %	Mobile %
Unweighted base =	1661*	973	688
<b>a. Difficulties understanding the language and terms they use in their billing</b>			
Never	52	56	48
Infrequently	21	21	20
Often	8	7	10
Most times	8	7	8
Always	5	4	7
Don't know	2	1	2
Not applicable	4	3	5
Total	100	100	100
<b>b. Difficulties understanding how your bill is calculated</b>			
Never	49	51	45
Infrequently	24	24	24
Often	8	8	9
Most times	8	7	9
Always	6	6	7
Don't know	2	1	2
Not applicable	3	3	4
Total	100	100	100
<b>c. Errors in your bill</b>			
Never	52	53	51
Infrequently	25	27	22
Often	6	5	7
Most times	6	5	7
Always	4	5	4
Don't know	3	2	5
Not applicable	4	3	4
Total	100	100	100
<b>d. Unexpected charges (e.g. data coverage charges, roaming charges)</b>			
Never	46	49	42
Infrequently	27	26	27
Often	7	7	8
Most times	7	6	8
Always	5	5	6
Don't know	3	3	3
Not applicable	4	4	5
Total	100	100	100

Continued ...

**Table 27 (Continued): Issues experienced with bills**

*Q26. Please use the table below to tell us how often, if at all, you experience the following issues with your ... [technology] bills from ... [provider].*

	Total %	Internet %	Mobile %
Unweighted base =	1661*	973	688
<b>e. Unexpected fees (e.g. late fees/penalties, reconnection fees due to non-payment)</b>			
Never	53	57	48
Infrequently	21	21	21
Often	8	7	10
Most times	6	5	7
Always	6	5	7
Don't know	2	2	3
Not applicable	4	4	5
Total	100	100	100
<b>f. Confusion around the cost of your [technology] service because it is bundled with other services or utilities</b>			
Never	52	55	49
Infrequently	19	19	19
Often	6	6	6
Most times	8	7	10
Always	6	6	6
Don't know	3	3	3
Not applicable	6	5	8
Total	100	100	100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who indicated at Q24 that they viewed their bill.

## 7.2 Overall satisfaction with bills

Seventy-five percent of respondents stated they were satisfied with their provider's billing, giving a rating of 7-10 on an 11-point satisfaction scale, where 0 = 'very dissatisfied' and 10 = 'very satisfied' (Table 29). This compares with 4% who were dissatisfied (0-3). The balance gave a neutral response of 4-6 (17%) and 4% didn't know.

Both internet users and mobile users stated they were satisfied, with the former slightly more satisfied (78% and 72% respectively).

**Table 29: Overall satisfaction with bills**

*Q27. Overall, how satisfied or dissatisfied are you with their billing? (collapsed)*

	Unweighted base =	Total	Internet	Mobile
		2126	1061	1064
		%	%	%
Dissatisfied/Very dissatisfied		4	4	4
Neutral		17	17	18
Satisfied/Very satisfied		75	78	72
Don't know		4	2	6
Total		100	100	100

Total may not sum to 100% due to rounding.

\*\*Caution: low base number of respondents - results are indicative only.

## 8.0 Provider-related contact

In order to examine potential ‘pain points’ in greater detail, respondents were asked a series of questions about one of a listed number of reasons why they might have had contact with their service provider. These reasons relate to RSQ as defined by the Act; namely, contact in relation to:

1. Product disclosure (i.e. to get information about the service they are currently or thinking of using such as information about pricing, performance or specifications).
2. Discuss a contract issue (e.g. unexpected or unfair contract terms and conditions).
3. Switch to a new plan with the same provider.
4. Arrange a new connection or installation.
5. Report a fault.
6. Switch to a new provider.

The selected reason was selected at random, based on all the reasons they had had contact with their service provider in the last 2 years.

Table 30 (overleaf) shows that a little over one-third of respondents had had no contact in the last 2 years (38%) and this was more frequently the case with mobile compared with internet users (46% and 30% respectively).

Overall, most contact was in relation to ‘product disclosure’ and ‘switching to a new plan with the same provider’ (both 21%).

**Table 30: Provider contact in last 2 years**

*Q28. Thinking about the last 2 years again, for which of the following reasons, if any, have you had contact with [Provider] in relation to their [Technology] service?*

	Total	Internet	Mobile
Unweighted base =	2125*	1061	1064
	%	%	%
To get information about a service you currently use, or you were thinking of using (e.g. information about pricing, performance/specifications)	21	22	19
To switch to a new plan with the same provider	21	22	20
To arrange a new connection/installation	14	19	9
To report a fault	13	18	7
To discuss a contract issue (e.g. unexpected or unfair terms and conditions with your contract)	11	11	10
To switch to a new provider	3	3	2
Another reason	3	3	3
No contact in the last 2 years	38	30	46
Don't know	4	5	4

\*Sub-sample based on those respondents who indicated they had at least one mobile or one internet provider.  
Total may exceed 100% because of multiple responses.

## 9.0 Contact relating to product disclosure

As stated in the previous section of this report, contact in relation to product disclosure was one of the two most frequently mentioned reasons why respondents had contact with their provider in the last 2 years. The other was in relation to switching plans with the same provider.

### 9.1 Reason for contact

Table 31 shows that, on the most recent occasion respondents had contact with their service provider about obtaining information about their product or service, this contact was most frequently in order to obtain 'information about what is included in a plan and the price' (35%).

This was more frequently the case with internet compared with mobile users (41% and 30% respectively). Mobile users, on the other hand, were more likely to have contact in order to establish if the plan would 'meet their needs' (30% compared with 20% of internet users).

**Table 31: Reason for contact – Product disclosure**

*Q29a. The last time you had contact with [Provider] to get information about their [Technology] service, what information in particular were you looking for?*

	Total	Internet	Mobile
Unweighted base =	198*	95	103
	%	%	%
Information about what's included in a plan and price	35	41	30
Determining if a plan meets my needs	25	20	30
The performance of a service	12	13	11
Information about a bundled package	11	9	12
Coverage or availability of a service	9	12	6
Other	6	6	6
Don't know	3	0	5
Total	100	100	100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who indicated they had contact with their provider to get information.

## 9.2 Method of contact

Table 32 shows that the contact on this occasion was most mostly made by 'telephone' (49%) and this was more frequently the case with internet compared with mobile users (65% and 35% respectively).

Mobile users, on the other hand, were more likely to have contact in-person, in-store (29% compared with 4% of internet users).

When questioned about these methods of contact, 90% of respondents stated this was their 'preferred method' of contact.

**Table 32: Method of contact – Product disclosure**

*Q30a. And how did you mainly have this contact? Was it...?*

	Total	Internet	Mobile
Unweighted base =	196*	94	102
	%	%	%
By telephone	49	65	35
In person/in store	17	4	29
By email	13	13	13
Via a chat box on their website	9	11	7
Via their website with an actual person	8	5	10
Social media	1	1	2
Via their website (in general)	1	1	2
Via app	0	0	1
Don't know	1	0	1
Total	100	100	100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who indicated they had contact with their provider to get information.

## 9.3 Effort

Respondents were asked about the level of effort required on their part to affect this contact on this most recent occasion. Table 33 shows that 33% stated it required some to a lot of effort to get the information they required. Measured on an 11-point effort scale, where 0 = 'no/very little effort' and 10 = 'a lot of effort', this is based on the percentage of respondents rating the effort required 7-10.

This compares with 46% who stated no to very little effort was required (rating of 0-3). The balance gave a neutral response (20%) (4-6) and 1% didn't know.

There are no statistically significant differences between internet and mobile users.

**Table 33: Effort – Product disclosure**

*Q32a. How much effort did it take on your part to deal with [Provider] to get information about their [Technology] service?*

	Total	Internet	Mobile
Unweighted base =	196*	94	102
	%	%	%
No/very little effort	46	43	48
Neutral	20	22	19
Some/a lot of effort	33	36	31
Don't know	1	0	2
Total	100	100	100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who indicated they had contact with their provider to get information.

### 9.3.1 Reasons for effort

Respondents who stated that getting the information they required had necessitated some to a lot of effort on their part were asked to identify the extent to which a number of possible reasons had contributed to this situation. The contribution made by each reason was measured against an 11-point contribution scale, where 0 = 'none/very little' and 10 = 'a lot'.

Three particular reasons were frequently mentioned as contributing, with about 50% or more of these respondents rating each reason 7-10 as a factor contributing to their effort (Table 34):

1. 'You had to wait for a long time before you got to speak/communicate with someone' (59%).
2. 'You were transferred to and needed to repeat yourself to multiple people' (54%).
3. 'The staff you dealt with didn't have the knowledge/authority to make decisions/take action' (48%).



**Table 34: Reasons for effort – Product disclosure**

*Q33a. How much did each of the following contribute to the effort of dealing with [provider] to get information about their [technology] service?*

	Total %
<b>a. The staff you dealt with didn't have the knowledge/authority to make decisions/take action</b>	
Unweighted base =	67*
No/very little	27
Neutral	23
Some/a lot	48
Don't know	3
Total	100
<b>b. The staff didn't get back to you (e.g. if you left a message) or you were disconnected from customer service</b>	
Unweighted base =	55*
No/very little	43
Neutral	19
Some/a lot	35
Don't know	3
Total	100
<b>c. Customer service was not available when required</b>	
Unweighted base =	55*
No/very little	36
Neutral	31
Some/a lot	29
Don't know	5
Total	100
<b>d. You had to wait for a long time before you got to speak/communicate with someone</b>	
Unweighted base =	67*
No/very little	26
Neutral	13
Some/a lot	59
Don't know	3
Total	100
<b>e. You were transferred to, and needed to repeat yourself to multiple people</b>	
Unweighted base =	67*
No/very little	29
Neutral	17
Some/a lot	54
Don't know	0
Total	100

Continued

**Table 34 (Continued): Reasons for effort – Product disclosure**

*Q33a. How much did each of the following contribute to the effort of dealing with [provider] to get information about their [technology] service?*

	Total %
<b>f. You had difficulties finding the contact details for customer service</b>	
Unweighted base =	67*
No/very little	40
Neutral	18
Some/a lot	42
Don't know	0
Total	100
<b>g. You had difficulties understanding the staff (e.g. accent or speaking too quickly)</b>	
Unweighted base =	43*
No/very little	36
Neutral	18
Some/a lot	42
Don't know	4
Total	100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who stated their contact had required effort.

## 9.4 Satisfaction

Although 33% stated it required some to a lot of effort to get the information they required and 20% provided a neutral response in this regard, most respondents stated they were satisfied with the contact they had with their service provider on this most recent occasion (70%) (Table 35). This could be because 89% stated the reason for their contact had been resolved.

Satisfaction was measured on a 11-point satisfaction scale, where 0 = 'very dissatisfied' and 10 = 'very satisfied'. The percentage satisfied reflects the percentage of respondents who gave a 7-10 rating. In comparison, 8% were dissatisfied (based on a rating of 0-3) and 20% gave a neutral response (4-6).

There are no statistically significant differences between internet and mobile users.

**Table 35: Satisfaction with contact – Product disclosure**

*Q35a. Overall, how satisfied or dissatisfied were you with the contact you had with ... [Provider] about getting information about their [Technology] service?*

	Total 196* %	Internet 94 %	Mobile 102 %
Unweighted base =			
Dissatisfied	8	9	7
Neutral	20	23	18
Satisfied	72	69	75
Don't know	0	0	0
Total	100	100	100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who indicated they had contact with their provider to get information.

## 9.5 Improving contact in relation to product disclosure

Respondents were invited to identify which of a possible list of improvements could improve the contact customers have with their service provider in relation to product disclosure; thereby improving the contact and minimising the potential for this to be a pain point.

Table 36 shows that the three most frequently identified were:

1. 'Improve how easy it is to get through to (the service provider)' (28%).
2. 'Improve their staff's authority to resolve issues' (23%).
3. 'Improve their staff's product/service knowledge' (19%).

There are no statistically significant differences between internet and mobile users.

**Table 36: Suggestions to improve contact – Product disclosure**

*Q36a. If you were to improve the way [Provider] deals with its customers about getting information about their [Technology] service, which of these improvements would you recommend they make?*

	Total	Internet	Mobile
Unweighted base =	196*	94	102
	%	%	%
Improve how easy it is to get through to them	28	32	25
Improve their staff's authority to resolve issues	23	23	23
Improve their staff's product/service knowledge	19	20	17
Improve the clarity of the information they provide	16	17	15
Improve how easy it is to compare their information with the same information for other services/products they offer	16	17	16
Improve how easy it is to compare their information with the same information for similar services/products offered by other companies	15	16	15
Improve the clarity of their terms and conditions for their services and products (e.g. fees/pricing, specifications, performance, coverage and availability)	13	14	12
Improve their staff's communication skills	13	18	9
Other	3	3	2
None of the above	20	18	22
Don't know	5	3	7

Total may exceed 100% because of multiple responses.

\*Sub-sample based on those respondents who indicated they had contact with their provider to get information.

### 9.5.1 The most impactful improvement

Respondents typically provided more than one suggestion when invited to identify which of a number of listed improvements could improve the contact customers have with their service provider in relation to product disclosure. Therefore, they were invited to identify the one they would prioritise first. Table 37 shows that most respondents identified this as being, improving 'how easy it is to get through to (the service provider)' (21%).

**Table 37: Prioritised suggestion to improve contact – Product disclosure**

*Q36a. If you were to improve the way [Provider] deals with its customers about getting information about their [internet/mobile] service, which of these improvements would you recommend they make?*

*37a. And which one of these would you prioritise as the one they do first?*

	Total	Internet	Mobile
Unweighted base =	196*	94	102
	%	%	%
Improve how easy it is to get through to them	21	25	17
Improve their staff's authority to resolve issues	11	11	11
Improve their staff's product/service knowledge	10	8	11
Improve the clarity of the information they provide	7	9	6
Improve the clarity of their terms and conditions for their services and products (e.g. fees/pricing, specifications)	7	6	7
Improve how easy it is to compare their information with the same information for similar services/products offered	7	5	8
Improve their staff's communication skills	5	5	5
Improve how easy it is to compare their information with the same information for other services/products they offer	4	4	4
Other	4	5	3
None of the above	20	18	22
Don't know	5	3	7
Total	100	100	100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who indicated they had contact with their provider to get information.

## 10.0 Contact relating to switching plans

### 10.1 Method of contact

Table 38 shows that, on the most recent occasion respondents had contact with their provider in relation to switching plans, the contact was mainly by 'telephone' (51%). In comparison, relatively few contacted their provider 'in-person, in-store' (15%) or digitally by email (13%) or via their website (8%).

When questioned about these methods of contact, 85% of respondents stated this was their 'preferred method' of contact.

**Table 38: Method of contact – Switching plans**

*Q29c. The last time you had contact with [Provider] to switch to a new plan for your [Technology] service, how did you mainly have this contact? Was it...?*

	Total	Internet	Mobile
Unweighted base =	358*	185	173
	%	%	%
By telephone	51	55	47
In person/in store	15	13	18
By email	13	13	14
Via their website with an actual person	8	9	7
Via a chat box on their website	8	7	9
Social media	1	1	1
Via their website (in general)	1	1	2
Via app	1	0	2
Other	0	1	0
Don't know	0	0	1
Total	100	100	100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who indicated they had contact with their provider to switch plans.

## 10.2 Effort

Respondents were asked about the level of effort required on their part to affect the contact on this occasion. Table 39 shows that 33% stated it required some to a lot of effort to switch their plan. Measured on an 11-point effort scale, where 0 = 'no/very little effort' and 10 = 'a lot of effort', this is based on the percentage of respondents rating the effort required 7-10.

This compares with 46% who stated no to very little effort was required (rating of 0-3). The balance gave a neutral response (21%) (4-6) and 1% didn't know.

There are no statistically significant differences between internet and mobile users.

**Table 39: Effort – Switching plans**

*Q32c. How much effort did it take on your part to deal with [Provider] to switch plans?*

	Total	Internet	Mobile
Unweighted base =	358*	185	173
	%	%	%
No/very little effort	46	43	48
Neutral	21	23	19
Some/a lot of effort	33	33	32
Don't know	0	0	0
Total	100	100	100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who indicated they had contact with their provider to switch plans.

### 10.2.1 Reasons for effort

Respondents who stated that getting the information they required had necessitated some-a lot of effort on their part were asked to identify the extent to which a number of possible reasons had contributed to this situation. The contribution made by each reason was measured against an 11-point contribution scale, where 0 = 'none/very little' and 10 = 'a lot'.

All the listed reasons were frequently mentioned as contributing, with about 50% or more of these respondents rating each reason 7-10 as a factor contributing to their effort (Table 40 overleaf):

1. 'You were transferred to and needed to repeat yourself to multiple people' (60%).
2. 'You had to wait for a long time before you got to speak/communicate with someone' (59%).
3. 'The staff you dealt with didn't have the knowledge/authority to make decisions/take action' (59%).

4. 'Ability to compare plans' (59%).
5. 'Customer service was not available when required' (55%).
6. 'You had difficulties finding the contact details for customer service' (51%).
7. 'The staff didn't get back to you (e.g. if you left a message) or you were disconnected from customer service' (47%).

**Table 40: Reasons for effort – Switching plans**

*Q33c. How much did each of the following contribute to the effort of dealing with them about switching plans?*

	Total %	Internet %	Mobile %
<b>a. The staff you dealt with didn't have the knowledge/authority to make decisions/take action</b>			
Unweighted base =	117*	62	55
No/very little	16	10	23
Neutral	23	22	25
Some/a lot	59	66	52
Don't know	1	3	0
Total	100	100	100
<b>b. The staff didn't get back to you (e.g. if you left a message) or you were disconnected from customer service</b>			
Unweighted base =	99*	50	49
No/very little	23	17	29
Neutral	28	31	24
Some/a lot	47	48	45
Don't know	3	4	2
Total	100	100	100
<b>c. Customer service was not available when required</b>			
Unweighted base =	117*	62	55
No/very little	24	21	27
Neutral	21	23	19
Some/a lot	55	55	55
Don't know	1	1	0
Total	100	100	100
<b>d. You had to wait for a long time before you got to speak/communicate with someone</b>			
Unweighted base =	117*	62	55
No/very little	12	9	15
Neutral	27	28	27
Some/a lot	59	60	58
Don't know	2	3	0
Total	100	100	100

Continued



**Table 40: Reasons for effort – Switching plans (continued)**

*Q33c. How much did each of the following contribute to the effort of dealing with them about switching plans?*

	Total %	Internet %	Mobile %
<b>e. You were transferred to, and needed to repeat yourself to multiple people</b>			
Unweighted base =	117*	62	55
No/very little	15	12	19
Neutral	23	14	33
Some/a lot	60	71	48
Don't know	2	3	0
Total	100	100	100
<b>f. You had difficulties finding the contact details for customer service</b>			
Unweighted base =	117*	62	55
No/very little	23	19	27
Neutral	25	23	26
Some/a lot	51	56	47
Don't know	2	3	0
Total	100	100	100
<b>h. Ability to compare plans</b>			
Unweighted base =	117*	62	55
No/very little	15	14	17
Neutral	22	23	20
Some/a lot	59	58	61
Don't know	4	6	2
Total	100	100	100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who stated their contact had required effort.

## 10.3 Satisfaction

Although 33% stated it required some to a lot of effort to switch plans and 21% provided a neutral response in this regard, over three-quarters of respondents stated they were satisfied with the contact they had with their service provider on this most recent occasion (77%) (Table 41). This could be because 88% stated the reason for their contact had been resolved.

Satisfaction was measured on a 11-point satisfaction scale, where 0 = 'very dissatisfied' and 10 = 'very satisfied'. The percentage satisfied reflects the percentage of respondents who gave a 7-10 rating. In comparison, 5% were dissatisfied (based on a rating of 0-3) and 18% gave a neutral response (4-6).

There are no statistically significant differences between internet and mobile users.

**Table 41: Satisfaction with contact – Switching plans**

*Q35c. Overall, how satisfied or dissatisfied were you with the contact you had with ... [Provider] to switch to a new plan?*

	Total	Internet	Mobile
Unweighted base =	358*	185	173
	%	%	%
Dissatisfied	5	6	4
Neutral	18	19	17
Satisfied	77	75	79
Don't know	0	0	0
Total	100	100	100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who indicated they had contact with their provider to switch plans.

## 10.4 Improving contact in relation to switching plans

Respondents were invited to identify which of a possible list of improvements could improve the contact customers have with their service provider in relation to switching plans; thereby improving the contact and minimising the potential for this to be a pain point.

Table 42 shows that the three most frequently identified were:

1. 'Improve how easy it is to get through to them' (the service provider) (27%).
2. 'Improve their staff's communication skills' (26%).
3. 'Improve the clarity of the information they provide so you choose/switch to a plan that meets your needs' (26%).

**Table 42: Suggestions to improve contact – Switching plans**

*Q36c. If you were to improve the way [Provider] deals with its customers about switching plans, which of these improvements would you recommend they make?*

	Total	Internet	Mobile
Unweighted base =	358*	185	173
	%	%	%
Improve how easy it is to get through to them to arrange to switch plans	27	24	30
Improve their staff's communication skills	26	26	26
Improve the clarity of the information they provide so you choose/switch to a plan that meets your needs	26	27	25
Improve their staff's authority to resolve issues	20	22	18
Improve their staff's product/service knowledge	18	18	17
Minimise the time it takes to switch plans	17	17	16
Improve the clarity of their communication during the switching process	15	14	15
Improve how the switch over is reflected in their billing	12	13	10
Other	4	5	2
None of the above	23	24	22
Don't know	3	3	4

Total may exceed 100% because of multiple responses.

\*Sub-sample based on those respondents who indicated they had contact with their provider to switch plans.

### 10.4.1 The most impactful improvement

Respondents typically provided more than one suggestion when invited to identify which of a number of listed improvements could improve the contact customers have with their service provider in relation to switching plans. Therefore, they were invited to identify the one they would prioritise first. Table 43 shows that the same three improvements that were identified earlier were mentioned more or less to the same extent:

1. 'Improve how easy it is to get through to them (the service provider)' (13%).
2. 'Improve the clarity of the information they provide so you choose/switch to a plan that meets your needs' (13%).
3. 'Improve their staff's communication skills' (12%).

**Table 43: Prioritised suggestion to improve contact – Switching plan**

*Q36c. If you were to improve the way [Provider] deals with its customers about switching plans, which of these improvements would you recommend they make?*

*Q37c. And which one of these would you prioritise as the one they do first?*

	Total	Internet	Mobile
Unweighted base =	358*	185	173
	%	%	%
Improve how easy it is to get through to them to arrange to switch plans	13	9	17
Improve the clarity of the information they provide so you choose/switch to a plan that meets your needs	13	15	12
Improve their staff's communication skills	12	11	14
Improve their staff's authority to resolve issues	8	8	8
Improve their staff's product/service knowledge	7	8	6
Minimise the time it takes to switch plans	7	9	5
Improve how the switch over is reflected in their billing	5	6	4
Improve the clarity of their communication during the switching process	4	1	6
Other	4	5	2
None of the above	23	24	22
Don't know	4	4	4
Total	100	100	100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who indicated they had contact with their provider to switch plans.

## 11.0 Contact relating to a new connection/ installation

### 11.1 Reason for contact

Table 44 shows that, on the most recent occasion respondents contacted their service provider about a new connection/installation, it was mainly in relation to 'setting up a new service or equipment' (48%). This was especially the case with internet rather than mobile users (56% and 31% respectively).

On the other hand, mobile users were more likely to be contacting their provider because of a 'lack of communication' (31% compared with 10% for internet users).

Both internet and mobile users also said they were contacting their service provider because their 'installation had taken longer than expected' (20% and 26% respectively).

**Table 44: Reason for contact – New connection/installation**

*Q29d. The last time you had contact with [Provider] to arrange a new connection/installation with their [Technology] service, what in particular was this contact about?*

	Total	Internet	Mobile
Unweighted base =	218*	148	70
	%	%	%
Setting up a new service or equipment	48	56	31
The installation took longer than expected	22	20	26
Lack of communication with your provider	17	10	31
Damage to your property or an untidy installation	7	5	11
An unexpected cost	2	2	2
Other	3	4	0
Don't know	2	2	0
Total	100	100	100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who indicated they had contact with their provider to arrange a new connection.

## 11.2 Method of contact

Table 45 shows that the contact on this occasion was mainly by 'telephone' (48%). In comparison, relatively few contacted their provider digitally by email (16%) or via their website (13%), or visited them 'in-person, in-store' (8%).

However, the contact method varies by service, with internet users more likely to have contacted their provider by 'telephone' (56% compared with 30% of mobile users). On the other hand, mobile users were more likely to have contacted their provider via their website (22% compared with 9% of internet users).

When questioned about these methods of contact, 84% of respondents stated this was their 'preferred method' of contact.

**Table 45: Method of contact – New connection/installation**  
*Q30d. And how did you mainly have this contact? Was it...?*

	Total	Internet	Mobile
Unweighted base =	218*	148	70
	%	%	%
By telephone	48	56	30
By email	16	16	18
Via their website with an actual person	13	9	22
Via a chat box on their website	9	8	11
In person/in store	8	5	14
Social media	3	3	5
Via their website (in general)	1	1	0
Other	1	1	0
Don't know	1	1	0
Total	100	100	100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who indicated they had contact with their provider to arrange a new connection.

## 11.3 Effort

Respondents were asked about the level of effort required on their part to affect the contact on this occasion. Table 46 shows that 40% stated it required some to a lot of effort to switch their plan. Measured on an 11-point effort scale, where 0 = 'no/very little effort' and 10 = 'a lot of effort', this is based on the percentage of respondents rating the effort required 7-10.

This compares with 28% who stated no to very little effort was required (rating of 0-3). The balance gave a neutral response (32%) (4-6).

Mobile users were more likely than internet users to state that the contact with their service provider had required effort (50% and 36% respectively).

**Table 46: Effort – New connection/installation**

*Q32d. How much effort did it take on your part to deal with [Provider] about arranging a new connection/installation?*

	Unweighted base =	Total 218* %	Internet 148 %	Mobile 70 %
No/very little effort		28	33	18
Neutral		32	32	32
Some/a lot of effort		40	36	50
Don't know		0	0	0
Total		100	100	100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who indicated they had contact with their provider to arrange a new connection.

### 11.3.1 Reasons for effort

Respondents who stated that the contact they had with their service provider required some-a lot of effort on their part were asked to identify the extent to which a number of possible reasons had contributed to this situation. The contribution made by each reason was measured against an 11-point contribution scale, where 0 = 'none/very little' and 10 = 'a lot'.

All the listed reasons were frequently mentioned as contributing, with about 50% or more of these respondents rating each reason 7-10 as a factor contributing to their effort (Table 47 overleaf):

1. 'You had to wait for a long time before you got to speak/communicate with someone' (64%).
2. 'You were transferred to and needed to repeat yourself to multiple people' (63%).

3. 'The staff didn't get back to you (e.g. if you left a message) or you were disconnected from customer service' (61%).
4. 'You had difficulties understanding the staff' (60%).
5. 'The staff you dealt with didn't have the knowledge/authority to make decisions/take action' (59%).
6. 'Customer service was not available when required' (57%).
7. 'You had difficulties finding the contact details for customer service' (49%).

**Table 47: Reasons for effort – New connection/installation**

*33d. How much did each of the following contribute to the effort of dealing with them about arranging a new connection/installation?*

	Total %	Internet %	Mobile %
<b>a. The staff you dealt with didn't have the knowledge/authority to make decisions/take action</b>			
Unweighted base =	87*	52	35
No/very little	15	19	8
Neutral	23	20	28
Some/a lot	59	56	63
Don't know	3	5	0
Total	100	100	100
<b>b. The staff didn't get back to you (e.g. if you left a message) or you were disconnected from customer service</b>			
Unweighted base =	78*	46	32
No/very little	22	32	9
Neutral	15	12	18
Some/a lot	61	54	70
Don't know	2	2	3
Total	100	100	100
<b>c. Customer service was not available when required</b>			
Unweighted base =	87*	52	35
No/very little	19	25	11
Neutral	23	19	28
Some/a lot	57	54	61
Don't know	1	2	0
Total	100	100	100
<b>d. You had to wait for a long time before you got to speak/communicate with someone</b>			
Unweighted base =	87*	52	35
No/very little	12	15	8
Neutral	24	29	17
Some/a lot	64	57	75
Don't know	0	0	0
Total	100	100	100

Continued



**Table 47: Reasons for effort – New connection/installation (continued)**

*33d. How much did each of the following contribute to the effort of dealing with them about arranging a new connection/installation?*

	Total %	Internet %	Mobile %
<b>e. You were transferred to, and needed to repeat yourself to multiple people</b>			
Unweighted base =	87*	52	35
No/very little	17	23	8
Neutral	19	18	20
Some/a lot	63	57	72
Don't know	1	2	0
Total	100	100	100
<b>f. You had difficulties finding the contact details for customer service</b>			
Unweighted base =	87*	52	35
No/very little	24	36	5
Neutral	27	22	34
Some/a lot	49	42	60
Don't know	0	0	0
Total	100	100	100
<b>g. You had difficulties understanding the staff (e.g. accent or speaking too quickly)</b>			
Unweighted base =	43*	27**	16**
No/very little	22	32	5
Neutral	18	25	7
Some/a lot	60	43	88
Don't know	0	0	0
Total	100	100	100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who stated their contact had required effort.

## 11.4 Satisfaction

Although 40% stated it required some to a lot of effort to switch plans and 32% provided a neutral response in this regard, over three-quarters of respondents stated they were satisfied with the contact they had with their service provider on this most recent occasion (76%) (Table 48). This could be because 86% stated the reason for their contact had been resolved.

Satisfaction was measured on a 11-point satisfaction scale, where 0 = 'very dissatisfied' and 10 = 'very satisfied'. The percentage satisfied reflects the percentage of respondents who gave a 7-10 rating. In comparison, 10% were dissatisfied (based on a rating of 0-3) and 14% gave a neutral response (4-6).

There are no statistically significant differences between internet and mobile users.

**Table 48: Satisfaction with contact – New connection/installation**

*Q35d. Overall, how satisfied or dissatisfied were you with the contact you had with ... [Provider] to arrange a new connection/installation?*

	Total	Internet	Mobile
Unweighted base =	218*	148	70
	%	%	%
Dissatisfied	10	11	7
Neutral	14	14	14
Satisfied	76	75	79
Don't know	0	0	0
Total	100	100	100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who indicated they had contact with their provider to arrange a new connection.

## 11.5 Improving contact in relation to new connections/installations

Respondents were invited to identify which of a possible list of improvements could improve the contact customers have with their service provider in relation to new connections/installations; thereby improving the contact and minimising the potential for this to be a pain point.

Table 49 shows that the two most frequently identified were:

1. 'Improve their staff's communication skills' (25%).
2. 'Improve the clarity of the information they provide about the installation process' (24%).

**Table 49: Suggestions to improve contact – New connection/installation**

*Q36d. If you were to improve the way [Provider] deals with its customers about arranging a new connection/installation, which of these improvements would you recommend they make?*

	Total	Internet	Mobile
Unweighted base =	218*	148	70
	%	%	%
Improve the clarity of the information they provide about the installation process	25	25	26
Improve their staff's communication skills	24	23	26
Improve how easy it is to get through to them to arrange an installation	20	18	25
Improve their promptness with respect to installation	20	20	20
Improve the clarity of their communication during the installation process	19	16	23
Improve the clarity of the information they provide about the terms and conditions of the installation	17	13	25
Improve their staff's authority to resolve issues	17	15	21
Improve their staff's product/service knowledge	15	13	18
Improve the care taken by technicians responsible for the installation	12	9	17
Improve the support provided with any supplied/rented/purchased equipment	7	8	6
Other	0	1	0
None of the above	20	24	9
Don't know	3	4	2

Total may exceed 100% because of multiple responses.

\*Sub-sample based on those respondents who indicated they had contact with their provider to arrange a new connection.

### 11.5.1 The most impactful improvement

Respondents typically provided more than one suggestion when invited to identify which of a number of listed improvements could improve the contact customers have with their service provider in relation to new connections/installations. Therefore, they were invited to identify the one they would prioritise first. Table 50 shows that the same two improvements that were identified earlier were mentioned more or less to the same extent:

1. 'Improve the clarity of the information they provide about the installation process' (14%).
2. 'Improve their staff's communication skills' (12%).

**Table 50: Prioritised suggestion to improve contact – New connection/installation**

*Q37d. And which one of these would you prioritise as the one they do first?*

	Total	Internet	Mobile
Unweighted base =	218*	148	70
	%	%	%
Improve the clarity of the information they provide about the installation process	14	15	13
Improve their staff's communication skills	12	12	12
Improve how easy it is to get through to them to arrange an installation	10	10	11
Improve the clarity of the information they provide about the terms and conditions of the installation	8	6	14
Improve their promptness with respect to installation	8	8	7
Improve the clarity of their communication during the installation process	6	6	7
Improve their staff's product/service knowledge	5	4	6
Improve their staff's authority to resolve issues	5	2	11
Improve the care taken by technicians responsible for the installation	3	3	5
Improve the support provided with any supplied/rented/purchased equipment	3	4	1
Other	1	2	0
None of the above	20	24	9
Don't know	3	4	2
Total	100	100	100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who indicated they had contact with their provider to arrange a new connection.

## 12.0 Contact relating to service performance, including reporting a fault

### 12.1 Reason for contact

Table 51 shows that, on the most recent occasion respondents contacted their service provider about a service performance issue, it was mainly in relation to 'reporting a fault' (33%). This was the case for both internet and mobile users (32% and 35% respectively).

Contact was also made in relation to the 'stability or reliability of the service' (19%) and 'an issue with in-home Wi-Fi coverage' (19%).

**Table 51: Reason for contact – Service performance, including reporting a fault**

*Q29e. The last time you had contact with [Provider] to report a fault with their [Technology] service, what in particular was this contact about?*

	Total	Internet	Mobile
Unweighted base =	205*	148	57
	%	%	%
To report a fault	33	32	35
Stability or reliability of the service	19	20	16
An issue with your in-home Wi-Fi___33 coverage	19	21	15
The service was performing slower than expected	12	13	9
An unexpected cost	11	8	18
The time taken to resolve an issue	1	2	0
Other	3	3	2
Don't know	2	1	7
Total	100	100	100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who indicated they had contact with their provider to report a fault, etc.

## 12.2 Method of contact

Table 52 shows that the contact on this occasion was mainly by 'telephone' (67%) and this was especially the case for internet users (72% compared with 51% for mobile users). In comparison, relatively few contacted their provider digitally via a chat box on their website (11%) or by email (10%), or visited them 'in-person, in-store' (4%).

When questioned about these methods of contact, 84% of respondents stated this was their 'preferred method' of contact.

**Table 52: Method of contact – Service performance, including reporting a fault**  
*Q30e. And how did you mainly have this contact? Was it...?*

Unweighted base =	Total 205* %	Internet 148 %	Mobile 57 %
By telephone	67	72	51
Via a chat box on their website	11	10	12
By email	10	7	18
In person/in store	4	4	6
Via their website with an actual person	4	3	7
In person/in store	4	4	6
Social media	2	1	5
Other	2	3	0
Don't know	0	0	1
Total	100	100	100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who indicated they had contact with their Provider to report a fault, etc.

## 12.3 Effort

Respondents were asked about the level of effort required on their part to affect the contact on this occasion. Table 53 shows that 43% stated it required some to a lot of effort to contact their service provider about their service performance issue. Measured on an 11-point effort scale, where 0 = 'no/very little effort' and 10 = 'a lot of effort', this is based on the percentage of respondents rating the effort required 7-10.

This compares with 29% who stated no to very little effort was required (rating of 0-3). The balance gave a neutral response (27%) (4-6) and 1% didn't know.

There are no statistically significant differences between internet and mobile users.

**Table 53: Effort – Service performance, including reporting a fault**

*Q32e. How much effort did it take on your part to deal with [Provider] about ... (e.g. reporting a fault)?*

	Total	Internet	Mobile
Unweighted base =	205*	148	57
	%	%	%
No/very little effort	29	32	21
Neutral	27	25	32
Some/a lot of effort	43	42	47
Don't know	1	1	0
Total	100	100	100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who indicated they had contact with their provider to report a fault, etc.

### 12.3.1 Reasons for effort

Respondents who stated that the contact they had with their service provider required some to a lot of effort on their part were asked to identify the extent to which a number of possible reasons had contributed to this situation. The contribution made by each reason was measured against an 11-point contribution scale, where 0 = 'none/very little' and 10 = 'a lot'.

The listed reasons were frequently mentioned as contributing, with more than 45% of these respondents rating each of the following reasons 7-10 as a factor contributing to their effort (Table 54):

1. 'You had to wait for a long time before you got to speak/communicate with someone' (71%).
2. 'You were transferred to, and needed to repeat yourself to, multiple people' (57%).
3. 'The staff you dealt with didn't have the knowledge/authority to make decisions/take action' (50%).
4. 'You had difficulties understanding the staff' (49%).
5. 'You had difficulties finding the fault/issue' (48%).
6. 'Customer service was not available when required' (47%).
7. 'The staff didn't get back to you (e.g. if you left a message) or you were disconnected from customer service' (46%).



**Table 54: Reasons for effort – Service performance, including reporting a fault**

*Q33e. How much did each of the following contribute to the effort of dealing with them to ... (e.g. report a fault)?*

	Total %	Internet %	Mobile %
<b>a. The staff you dealt with didn't have the knowledge/authority to make decisions/take action</b>			
Unweighted base =	91*	65	26**
No/very little	22	21	23
Neutral	27	34	10
Some/a lot	50	45	62
Don't know	1	0	4
Total	100	100	100
<b>b. The staff didn't get back to you (e.g. if you left a message) or you were disconnected from customer service</b>			
Unweighted base =	80*	60	20**
No/very little	31	30	35
Neutral	18	20	14
Some/a lot	46	48	40
Don't know	4	1	11
Total	100	100	100
<b>c. Customer service was not available when required</b>			
Unweighted base =	91*	65	26**
No/very little	30	31	27
Neutral	23	22	27
Some/a lot	47	47	46
Don't know	0	0	0
Total	100	100	100
<b>d. You had to wait for a long time before you got to speak/communicate with someone</b>			
Unweighted base =	91*	65	26**
No/very little	14	11	22
Neutral	15	13	19
Some/a lot	71	76	59
Don't know	0	0	0
Total	100	100	100

Continued

**Table 54: Reasons for effort – Service performance, including reporting a fault (continued)**

*Q33e. How much did each of the following contribute to the effort of dealing with them to ... (e.g. report a fault)?*

	Total %	Internet %	Mobile %
<b>e. You were transferred to, and needed to repeat yourself to multiple people</b>			
Unweighted base =	91*	65	26**
No/very little	26	26	28
Neutral	17	21	6
Some/a lot	57	53	66
Don't know	0	0	0
Total	100	100	100
<b>f. You had difficulties finding the contact details for customer service</b>			
Unweighted base =	91*	65	26**
No/very little	38	39	38
Neutral	24	23	25
Some/a lot	38	38	37
Don't know	0	0	0
Total	100	100	100
<b>g. You had difficulties understanding the staff (e.g. accent or speaking too quickly)</b>			
Unweighted base =	60*	46	14**
No/very little	28	22	45
Neutral	23	27	12
Some/a lot	49	51	43
Don't know	0	0	0
Total	100	100	100
<b>h. Difficulty finding the cause of the fault/issue</b>			
Unweighted base =	91*	65	26**
No/very little	26	24	31
Neutral	25	30	13
Some/a lot	48	46	51
Don't know	1	0	4
Total	100	100	100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who stated their contact had required effort.

## 12.4 Satisfaction

Reflecting the fact that 43% stated it required some to a lot of effort to report a fault, etc. and 27% provided a neutral response, a little over one-half of respondents stated they were satisfied with the contact they had with their service provider on this most recent occasion (54%) (Table 55). Satisfaction was measured on a 11-point satisfaction scale, where 0 = 'very dissatisfied' and 10 = 'very satisfied', with the percentage satisfied reflecting the percentage of respondents who gave a 7-10 rating.

This result is despite 81% stating the reason for their contact had been resolved. However, 18% said they were dissatisfied (based on a rating of 0-3) and 28% gave a neutral response (4-6).

There are no statistically significant differences between internet and mobile users.

**Table 55: Suggestions to improve contact – Service performance, including reporting a fault**

*Q35e. Overall, how satisfied or dissatisfied were you with the contact you had with ... [Provider] to ... (e.g. report a fault)?*

	Total	Internet	Mobile
Unweighted base =	205*	148	57
	%	%	%
Dissatisfied	18	18	17
Neutral	28	30	24
Satisfied	54	52	59
Don't know	0	0	0
Total	100	100	100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who indicated they had contact with their provider to report a fault, etc.

## 12.5 Improving contact in relation to contact about service performance

Respondents were invited to identify which of a possible list of improvements could improve the contact customers have with their service provider in relation to service performance; thereby improving the contact and minimising the potential for this to be a pain point.

Table 56 shows that five suggestions were frequently identified:

1. 'Improve how easy it is to get through to them to report a fault/issue' (38%).
2. 'Improve the speed with which faults/issues are resolved' (33%).
3. 'Improve their staff's communication skills' (31%).
4. 'Improve their communication during the process of remedying the fault/issue' (30%).
5. 'Improve how easy it is to find the cause of faults/issues' (30%).

**Table 56: Suggestions to improve contact – Service performance, including reporting a fault**

*Q35e. Overall, how satisfied or dissatisfied were you with the contact you had with ... [Provider] to ... (e.g. report a fault)?*

	Total	Internet	Mobile
Unweighted base =	205*	148	57
	%	%	%
Improve how easy it is to get through to them to report a fault/issue	38	39	37
Improve the speed with which faults/issues are resolved	33	35	28
Improve their staff's communication skills	31	35	22
Improve their communication during the process of remedying the fault/issue	30	27	38
Improve how easy it is to find the cause of the faults/issues	30	29	32
Improve their staff's authority to resolve issues	27	28	25
Improve their staff's product/service knowledge	23	20	30
Other	7	8	5
None of the above	18	20	12
Don't know	4	5	2

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who indicated they had contact with their provider to report a fault, etc.

### 12.5.1 The most impactful improvement

Respondents typically provided more than one suggestion when invited to identify which of a number of listed improvements could improve the contact customers have with their service provider in relation to new connections/installations. Therefore, they were invited to identify the one they would prioritise first.

Table 57 shows that, most frequently, respondents identified the most important improvement as being, to 'improve how easy it is to get through to their service provider to report a fault/issue' (20%).

There are no significant differences between internet and mobile users.

**Table 57: Prioritised suggestion to improve contact – Service performance, including reporting a fault**  
*Q37e. And which one of these would you prioritise as the one they do first?*

	Unweighted base =	Total 196* %	Internet 141 %	Mobile 55 %
Improve how easy it is to get through to them to report a fault/issue		20	22	16
Improve the speed with which faults/issues are resolved		11	10	11
Improve their staff's authority to resolve issues		10	10	9
Improve their staff's product/service knowledge		9	7	15
Improve their staff's communication skills		9	9	9
Improve their communication during the process of remedying the fault/issue		9	8	10
Improve how easy it is to find the cause of the faults/issues		7	5	12
Other		3	3	4
None of the above		17	19	12
Don't know		6	7	2
Total		100	100	100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who indicated they had contact with their provider to report a fault, etc.

## 13.0 Contact relating to a contract issue

### 13.1 Reason for contact

Table 58 shows that, on the most recent occasion respondents contacted their service provider in relation to their contract, it was for one of a range of different reasons, including to 'clarify a contract term they did not understand' (25%), to discuss 'a contract term that they felt was unfair' (22%) and to discuss 'changes that their provider had made to their contract (including pricing) that they were unhappy about' (21%).

There are no statistically significant differences between internet and mobile users.

**Table 58: Reason for contact – Contract issues**

*Q29b. The last time you had contact with [Provider] about an issue with your [Technology] contract, what was this about in particular?*

	Total	Internet	Mobile
Unweighted base =	153*	72	81
	%	%	%
A contract term you didn't understand	25	21	28
A contract term you felt was unfair	22	17	25
Your provider made changes to your contract (including price) you were unhappy with	21	20	21
A contract term you were not aware of	18	21	15
An issue with ending your contract	7	9	5
Other	3	5	1
Don't know	5	6	3
Total	100	100	100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who indicated they had contact with their provider to discuss a contract issue.

## 13.2 Method of contact

Table 59 shows that the contact on this occasion was mainly by 'telephone' (47%). In comparison, relatively few contacted their provider digitally by email (14%) or via their website (11%), or visited them 'in-person/in-store' (12%).

When questioned about these methods of contact, 85% of respondents stated this was their 'preferred method' of contact.

**Table 59: Method of contact – Contract issues**  
*Q30b. And how did you mainly have this contact? Was it...?*

	Total	Internet	Mobile
Unweighted base =	153*	72	81
	%	%	%
By telephone	47	48	46
By email	14	13	14
In person/in store	12	14	10
Via their website with an actual person	11	8	13
Via a chat box on their website	10	8	12
Social media	3	2	3
Other	1	2	0
Don't know	3	3	3
Total	100	100	100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who indicated they had contact with their provider to discuss a contract issue.

## 13.3 Effort

Respondents were asked about the level of effort required on their part to affect the contact on this occasion. Table 60 shows that 53% stated it required some to a lot of effort to contact their service provider about their service performance issue. Measured on an 11-point effort scale, where 0 = 'no/very little effort' and 10 = 'a lot of effort', this is based on the percentage of respondents rating the effort required 7-10.

This compares with 15% who stated no to very little effort was required (rating of 0-3). The balance gave a neutral response (31%) (4-6) and 1% didn't know.

There are no statistically significant differences between internet and mobile users.

**Table 60: Effort – Contract issues**

*Q32b. How much effort did it take on your part to deal with [Provider] about discussing your contract issue?*

	Total	Internet	Mobile
Unweighted base =	153*	72	81
	%	%	%
No/very little effort	15	21	10
Neutral	31	32	31
Some/a lot of effort	53	46	59
Don't know	1	2	0
Total	100	100	100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who indicated they had contact with their provider to discuss a contract issue.

### 13.3.1 Reasons for effort

Respondents who stated that the contact they had with their service provider required some to a lot of effort on their part were asked to identify the extent to which a number of possible reasons had contributed to this situation. The contribution made by each reason was measured against an 11-point contribution scale, where 0 = 'none/very little' and 10 = 'a lot'.

With the exception of one of the listed reasons, all reasons were frequently mentioned as contributing by 50% or more of these respondents (based on them rating each 7-10 as a factor contributing to their effort) (Table 61):

1. 'You were transferred to, and needed to repeat yourself to, multiple people' (70%).
2. 'The staff you dealt with didn't have the knowledge/authority to make decisions/take action' (67%).
3. 'You had to wait for a long time before you got to speak/communicate with someone' (60%).



4. 'You had difficulties finding the contact details for customer service' (55%).
5. 'Customer service was not available when required' (53%).
6. 'The staff didn't get back to you (e.g. if you left a message) or you were disconnected from customer service' (53%).

**Table 61: Reasons for effort – Contract issues**

*Q33b. How much have each of the following contributed to the effort of dealing with [provider] about discussing your contract issue?*

	Total %	Internet %	Mobile %
<b>a. The staff you dealt with didn't have the knowledge/authority to make decisions/take action</b>			
Unweighted base =	82*	34	48
No/very little	18	17	18
Neutral	15	8	19
Some/a lot	67	75	61
Don't know	1	0	2
Total	100	100	100
<b>b. The staff didn't get back to you (e.g. if you left a message) or you were disconnected from customer service</b>			
Unweighted base =	66*	26**	40
No/very little	26	28	25
Neutral	20	14	23
Some/a lot	53	54	52
Don't know	1	3	0
Total	100	100	100
<b>c. Customer service was not available when required</b>			
Unweighted base =	82*	34	48
No/very little	17	24	13
Neutral	25	12	34
Some/a lot	53	60	48
Don't know	4	3	5
Total	100	100	100
<b>d. You had to wait for a long time before you got to speak/communicate with someone</b>			
Unweighted base =	82*	34	48
No/very little	14	14	15
Neutral	25	18	29
Some/a lot	60	68	54
Don't know	1	0	2
Total	100	100	100

Continued

**Table 61: Reasons for effort – Contract issues (continued)**

*Q33b. How much have each of the following contributed to the effort of dealing with [provider] about discussing your contract issue?*

	Total %	Internet %	Mobile %
<b>e. You were transferred to, and needed to repeat yourself to multiple people</b>			
Unweighted base =	82*	34	48
No/very little	15	15	16
Neutral	12	12	11
Some/a lot	70	73	68
Don't know	3	0	5
Total	100	100	100
<b>f. You had difficulties finding the contact details for customer service</b>			
Unweighted base =	82*	34	48
No/very little	23	21	24
Neutral	21	5	32
Some/a lot	55	74	42
Don't know	1	0	2
Total	100	100	100
<b>g. You had difficulties understanding the staff (e.g. accent or speaking too quickly)</b>			
Unweighted base =	46*	20**	26**
No/very little	24	33	18
Neutral	31	6	51
Some/a lot	44	61	31
Don't know	0	0	0
Total	100	100	100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who stated their contact had required effort.

## 13.4 Satisfaction

Reflecting the fact that 53% stated it required some to a lot of effort to contact their service provider about a contract issue and 31% provided a neutral response, a little over one-half of respondents stated they were satisfied with the contact they had with their service provider on this most recent occasion (53%) (Table 62). This is despite 75% stating the reason for their contact had been resolved.

Satisfaction was measured on a 11-point satisfaction scale, where 0 = 'very dissatisfied' and 10 = 'very satisfied'. The percentage satisfied reflects the percentage of respondents who gave a 7-10 rating. In comparison, 14% were dissatisfied (based on a rating of 0-3) and 32% gave a neutral response (4-6).

There are no statistically significant differences between internet and mobile users.

**Table 62: Satisfaction with contact – Contract issues**

*Q35b. Overall, how satisfied or dissatisfied were you with the contact you had with ... [Provider] about your contract issue?*

	Total	Internet	Mobile
Unweighted base =	153*	72	81
	%	%	%
Dissatisfied	14	13	14
Neutral	32	30	33
Satisfied	53	53	52
Don't know	2	4	0
Total	100	100	100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who indicated they had contact with their provider to discuss a contract issue.

## 13.5 Improving contact in relation to contract issues

Respondents were invited to identify which of a possible list of improvements could improve the contact customers have with their service provider in relation to contract issues; thereby improving the contact and minimising the potential for this to be a pain point.

Table 63 shows that seven suggestions were frequently identified:

1. 'Improve their staff's communication skills' (36%).
2. 'Improve how easy it is to get through to them' (35%).
3. 'Improve the clarity of their terms and conditions for their services and products (e.g. fees/pricing, specifications, performance, coverage and availability)' (34%).
4. 'Improve their staff's authority to resolve issues' (31%).
5. 'Improve the clarity of the information they provide' (29%).
6. 'Improve how easy it is to compare their information with the same information for other services/products they offer' (27%).
7. 'Improve their staff's product/service knowledge' (26%).

**Table 63: Suggestions to improve contact – Contract issues**

*Q36b. If you were to improve the way [Provider] deals with its customers about discussing contract issues, which of these improvements would you recommend they make?*

	Total Unweighted base = 153* %	Internet 72 %	Mobile 81 %
Improve their staff's communication skills	36	34	37
Improve how easy it is to get through to them	35	32	39
Improve the clarity of their terms and conditions for their services and products (e.g. fees/pricing, specifications, performance, coverage and availability)	34	30	38
Improve their staff's authority to resolve issues	31	32	31
Improve the clarity of the information they provide	29	23	35
Improve how easy it is to compare their information with the same information for other services/products they offer	27	29	25
Improve their staff's product/service knowledge	26	30	22
Improve the flexibility of their contract terms and conditions	18	17	19
Improve how easy it is to compare their information with the same information for similar services/products offered by other companies	16	12	20
Other	1	2	0
None of the above	6	7	5
Don't know	5	9	1

Total may exceed 100% because of multiple responses.

\*Sub-sample based on those respondents who indicated they had contact with their provider to discuss a contract issue.

### 13.5.1 The most impactful improvement

Respondents typically provided more than one suggestion when invited to identify which of a number of listed improvements could improve the contact customers have with their service provider in relation to contract issues. Therefore, they were invited to identify the one they would prioritise first. Table 64 shows that, most frequently, respondents identified the most important improvements as being, to 'improve how easy it is to get through to them' (17%) and improve their 'staff's communication skills' (15%).

There was only one significant difference between internet and mobile users; internet users were more likely to prioritise, 'Improve their staff's product/service knowledge' (15% compared with 3% for mobile users).

**Table 64: Prioritised suggestion to improve contact – Contract issues**  
*Q37b. And which one of these would you prioritise as the one they do first?*

	Total	Internet	Mobile
Unweighted base =	153*	72	81
	%	%	%
Improve how easy it is to get through to them	17	13	21
Improve their staff's communication skills	15	16	14
Improve the clarity of their terms and conditions for their services and products (e.g. fees/pricing, specifications)	13	10	15
Improve their staff's authority to resolve issues	12	11	12
Improve the clarity of the information they provide	10	4	15
Improve their staff's product/service knowledge	9	15	3
Improve the flexibility of their contract terms and conditions	5	5	5
Improve how easy it is to compare their information with the same information for other services/products they offer	5	6	5
Improve how easy it is to compare their information with the same information for similar services/products offered	3	3	3
Other	1	2	0
None of the above	6	7	5
Don't know	5	9	1
Total	100	100	100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who indicated they had contact with their provider to discuss a contract issue.

## 14.0 Contact about switching to a new provider

A relatively small number of respondents completed the survey in relation to switching to a new service provider (n=42); n=27 in relation to their internet service and n=15 their mobile service. Because of these small sub-sample sizes, the results are not presented here by service/technology.

### 14.1 Switching – push or pull?

Table 65 shows that, overall, most of these respondents stated that the reason for switching had to do with **both** the provider they were switching from, as well as the provider they were switching to (41%).

However, when the percentage stating it had **more** to do with the provider they were switching **from** (30%) or the percentage stating it had **more** to do with the provider they were switching **to** (18%) are factored in, the overall conclusion is that more respondents switched because of the provider they were switching **from** (71% compared with 59% for the provider they were switching to).

**Table 65: Push or pull?**

*Q39. Were the reasons you switched more to do with...*

	Unweighted base =	Total 42* %
The company you were switching from		30
Or with the company you were switching to		18
Both equally		41
Don't know		11
Total		100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who indicated they had contact with their provider to switch to a new provider.

Table 66 (overleaf) shows that, most frequently, these respondents were switching from their service provider because of cost (40%). In addition, a range of other reasons were provided, including 'poor customer service' (24%), the fact that they didn't offer 'deals or benefits to their loyal customers' (23%), 'billing issues' (20%) and service performance issues such as 'disconnections and dropouts' (20%). The fact that cost was the predominant reason confirms our general conclusion that many consumers have a transactional relationship with their service provider(s).

**Table 66: Reasons for switching from a service provider***Q40. For which of the following reasons did you decide to switch from [Old provider]?*

	Unweighted base =	Total 29* ** %
They were too expensive		41
They had poor customer service		24
They didn't offer any deals or benefits to loyal customers		23
There were billing problems		20
There were too many disconnections/dropouts		20
They had a bad reputation		10
They had limited coverage		9
Unused data/minutes were not rolled over		6
They didn't offer any discounts, credits or freebies		3
They had too many hidden terms and conditions		3
Other		7
Don't know		7

Total may exceed 100% because of multiple responses.

\*Sub-sample based on those respondents who indicated that a reason for switching related to the provider they were switching from.

\*\*Caution: low base number of respondents - results are indicative only.

In contrast, Table 67 shows that the reasons these respondents were switching to a new provider were also often cost or price-related; for example, 'more competitive pricing' (24%), 'the new plan was a better overall deal' (19%), 'they had no hidden fees and charges' (15%), 'they offered discounts, credits or freebies' (12%). In addition, note that 25% of respondents stated that they switched to a new provider to have 'better customer service'.

**Table 67: Reasons for switching to a service provider***Q41. For which of the following reasons did you decide to switch to [New provider]?*

	Unweighted base =	Total 25* ** %
They have better customer service		25
Have more competitive pricing		24
The new plan was a better overall deal		19
A friend/family member/colleague recommended them		18
They have no hidden fees and charges		15
They offer discounts, credits or freebies		12
They have better coverage		10
They have better/technical service		10
There have more reliable connections		8
They reward their loyal customers		7
They have a better reputation		4
A sales representative pressured me		4
Other		12
Don't know		4

Total may exceed 100% because of multiple responses.

\*Sub-sample based on those respondents who indicated that a reason for switching related to the provider they were switching to.

\*\*Caution: low base number of respondents - results are indicative only.

Table 68 shows which service provider respondents who switched were shifting from.

**Table 68: Provider switching from**

*Q38. Just to confirm, who did you switch from?*

	Unweighted base =	Total 42* ** %
Vodafone		21
Spark		16
Slingshot		12
Orcon		9
2degrees		8
Trustpower		7
MyRepublic		5
Kogan mobile		3
Skinny		2
Flip		2
Warehouse mobile		0
Other		7
Don't know		9
Total		100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who indicated they had contact with their provider to switch to a new provider.



## 14.2 Method of contact

Table 69 shows that respondents stated they mainly had contact with their new provider by 'telephone' (48%). In comparison, relatively few contacted their provider digitally by email (14%) or via their website (9%) or visited them 'in-person/in-store' (15%).

When questioned about these methods of contact, 71% of respondents stated this was their 'preferred method' of contact.

**Table 69: Method of contact – Switching providers**

*Q42. How did you mainly have contact with [New provider]?*

	Unweighted base =	Total 42* %
By telephone		48
In person/in store		15
By email		14
Via their website with an actual person		9
Via a chat box on their website		9
Social media		0
Other		0
Don't know		5
Total		100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who indicated they had contact with their provider to switch to a new provider.

## 14.3 Effort

Respondents were asked about the level of effort required on their part to affect the switch to a new provider. Table 70 shows that 31% stated it required some to a lot of effort. Measured on an 11-point effort scale, where 0 = 'no/very little effort' and 10 = 'a lot of effort', this is based on the percentage of respondents rating the effort required 7-10.

This compares with 35% who stated no to very little effort was required (rating of 0-3). The balance gave a neutral response (35%) (4-6).

**Table 70: Effort – Switching providers**

*Q44. How much effort did it take on your part to switch providers?*

	Total
Unweighted base =	42*
	%
No/very little effort	35
Neutral	35
Some/a lot of effort	31
Don't know	0
Total	100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who indicated they had contact with their provider to switch to a new provider.

Respondents who stated that it required effort were asked the source of the effort and 76% of these respondents stated it was **equally** as a result of their contact with their old and new providers.

### 14.3.1 Reasons for effort

Respondents who stated that the effort had required some to a lot of effort **and** that this had to do with **both** the provider they were switching from as well as the provider they were switching to, were asked to identify the extent to which a number of possible reasons had contributed to this situation. The contribution made by each reason was measured against an 11-point scale, where 0 = 'none/very little' and 10 = 'a lot'.

Please note that the sub-sample size is very small and, therefore, caution should be exercised when interpreting these results. At best, the results are **indicative**.

Three reasons were frequently mentioned as contributing by 50% or more of these respondents (based on them rating each 7-10 as a factor contributing to their effort) (Table 71 overleaf):

1. 'You had to wait for a long time before you got to speak/communicate with someone' (66%).
2. 'You were transferred to and needed to repeat yourself to multiple people' (59%).
3. 'You had difficulties finding the contact details for customer service' (57%).

**Table 71: Reasons for effort – Switching providers**

*Q45. Did this effort have more to do with...*

	Total %
<b>a. The staff you dealt with didn't have the knowledge/authority to make decisions/take action</b>	
Unweighted base =	10* **
No/very little	0
Neutral	60
Some/a lot	32
Don't know	7
Total	100
<b>b. The staff didn't get back to you (e.g. if you left a message) or you were disconnected from customer service</b>	
Unweighted base =	10* **
No/very little	17
Neutral	55
Some/a lot	20
Don't know	9
Total	100
<b>c. Customer service was not available when required</b>	
Unweighted base =	10* **
No/very little	6
Neutral	46
Some/a lot	40
Don't know	7
Total	100
<b>d. You had to wait for a long time before you got to speak/communicate with someone</b>	
Unweighted base =	10* **
No/very little	0
Neutral	27
Some/a lot	66
Don't know	7
Total	100
<b>e. You were transferred to, and needed to repeat yourself to multiple people</b>	
Unweighted base =	10* **
No/very little	6
Neutral	28
Some/a lot	59
Don't know	7
Total	100

Continued

**Table 71: Reasons for effort – Switching providers (continued)**

*Q45. Did this effort have more to do with...*

	Total %
<b>f. You had difficulties finding the contact details for customer service</b>	
Unweighted base =	10* **
No/very little	15
Neutral	20
Some/a lot	57
Don't know	7
Total	100
<b>g. You had difficulties understanding the staff (e.g. accent or speaking too quickly)</b>	
Unweighted base =	10* **
No/very little	16
Neutral	25
Some/a lot	50
Don't know	9
Total	100
<b>h. Ability to compare plans</b>	
Unweighted base =	10* **
No/very little	7
Neutral	52
Some/a lot	34
Don't know	7
Total	100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who indicated that switching had required effort on their part, and this was because of both the provider being switched from, as well as the provider being switched to.

\*\*Caution: low base number of respondents - results are indicative only.

## 14.4 Switching from a service provider

Respondents were asked to rate a series of statements about the service provider they had switched **from**, to indicate their level of satisfaction with their contact with this provider during the switching process.

They were asked to rate their satisfaction using an 11-point satisfaction scale, where 0 = 'very dissatisfied' and 10 = 'very satisfied'. Respondents who provided a rating of 7-10 were considered satisfied, those who rated 0-3 were considered dissatisfied and respondents who provided a rating of 4-6 were considered to have provided a neutral response.

Table 72 shows around 50% of respondents were satisfied with the contact they had with the provider they were switching from in relation to the 'accuracy of their final bill' (51%) and the clarity of the information they provided about 'early termination fees' (46%), 'when their service would be cancelled' (45%) and 'notification periods' (42%).

**Table 72: Dealing with provider switched from**

*Q47. Please rate your level of satisfaction with [Old provider] for switching your [Technology] service from them, in terms of each of the following:*

	Unweighted base =	Total 42* %
<b>a. The clarity of the information they provided in relation to notification periods</b>		
Dissatisfied		16
Neutral		36
Satisfied		42
Don't know		7
Total		100
<b>b. The clarity of the information they provided in terms of early termination fees</b>		
Dissatisfied		11
Neutral		34
Satisfied		46
Don't know		9
Total		100
<b>c. The clarity of the information they provided about when their service would be cancelled</b>		
Dissatisfied		22
Neutral		27
Satisfied		45
Don't know		7
Total		100
<b>d. The accuracy of their final bill</b>		
Dissatisfied		12
Neutral		26
Satisfied		51
Don't know		11
Total		100

Total may not sum to 100% due to rounding.

## 14.5 Switching to a service provider

Respondents were also asked to rate a series of statements about the service provider they had switched **to**, to indicate their level of satisfaction with their contact with this provider during the switching process.

They were asked to rate their satisfaction using the same 11-point satisfaction scale.

Table 73 (overleaf) shows that, in comparison to the satisfaction rating for the statements relating to the provider they were switching from, respondents rated their satisfaction much higher on all statements.

This, in turn, is reflected in more (55%) stating they were satisfied overall, compared with 9% stating they were dissatisfied. However, 32% gave a neutral response.

**Table 73: Dealing with provider switched to**

*Q49. Please rate your level of satisfaction with [New provider] to switching your [Technology] service to them, in terms of each of the following:*

	Unweighted base =	Total 42* %
<b>a. The overall clarity of your new plan</b>		
Dissatisfied		2
Neutral		24
Satisfied		66
Don't know		7
Total		100
<b>b. The clarity of your new plan's terms and conditions</b>		
Dissatisfied		7
Neutral		24
Satisfied		60
Don't know		9
Total		100
<b>c. Your new plan's total cost</b>		
Dissatisfied		5
Neutral		26
Satisfied		65
Don't know		4
Total		100
<b>d. The communication around when your new plan would start</b>		
Dissatisfied		9
Neutral		30
Satisfied		56
Don't know		4
Total		100
<b>e. The support you received to set up your new connection</b>		
Dissatisfied		7
Neutral		20
Satisfied		65
Don't know		9
Total		100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who indicated they had contact with their provider to switch to a new provider.



## 14.6 Improving contact in relation to switching providers

Respondents were invited to identify which of a possible list of improvements could improve the contact customers have with a new service provider during the switching process; thereby improving the contact and minimising the potential for this to be a pain point.

Table 74 shows that these respondents provided a range of suggestions, with the three most frequently mentioned being:

1. 'Improve their staff's authority to resolve issues' (33%).
2. 'Improve their staff's communication skills' (30%).
3. 'Improve their staff's product/service knowledge' (27%).

**Table 74: Suggestions to improve contact – Switching providers**

*Q51. If you were to improve the way companies deal with their customers who are switching to them, which of these improvements would you recommend they make?*

	Unweighted base =	Total 42* %
Improve their staff's authority to resolve issues		33
Improve their staff's communication skills		30
Improve their staff's product/service knowledge		27
Improve the support they provide during the switching process		24
Improve how quickly the switch is made		24
Improve their follow-up to check that the switch has been successful		24
Improve the level of technical support they provide		23
Improve how easy it is to get through to them to arrange a switch		21
Other		5
None of the above		11
Don't know		2

Total may exceed 100% because of multiple responses.

\*Sub-sample based on those respondents who indicated they had contact with their provider to switch to a new provider.

### 14.6.1 The most impactful improvement

Respondents typically provided more than one suggestion when invited to identify which of a number of listed improvements could improve the contact customers have with their service providers during the switching process. Therefore, they were invited to identify the one they would prioritise first.

Table 75 shows that opinion differed, with the most frequently mentioned being, 'Improve how quickly the switch is made' (17%).

**Table 75: Prioritised suggestion to improve contact – Switching providers**  
*Q52. And which one of these would you prioritise as the one they do first?*

	Unweighted base =	Total 42* %
Improve how quickly the switch is made		17
Improve their staff's authority to resolve issues		13
Improve their staff's communication skills		11
Improve the support they provide during the switching process		11
Improve the level of technical support they provide		11
Improve their staff's product/service knowledge		6
Improve their follow-up to check that the switch has been successful		6
Improve how easy it is to get through to them to arrange a switch		4
Other		5
None of the above		11
Don't know		5
Total		100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who indicated they had contact with their provider to switch to a new provider.

## 15.0 Looking for information to make a decision

Forty-one percent of respondents stated they had looked for information to help them make decision about the telecommunication services they used. These respondents were asked to identify the type of information they searched for and where they found the most credible source of this information.

### 15.1 Information types searched for

Table 76 shows that respondents most frequently stated they looked for information relating to 'fees and pricing' (67%), followed by information about 'product/service specifications' (41%).

Thirty percent stated they looked for information which would enable them to make comparisons between service providers.

**Table 76: Type of information searched for in last 12 months**

*Q54. Which of the following best describes the information you have looked for?*

	Unweighted base =	Total 877* %
Information about fees and pricing		67
Information about product/service specifications		41
Information to help you compare competitive companies' offers		30
Information about terms and conditions		23
Information about coverage and availability		22
Other		1
Don't know		2

Total may exceed 100% because of multiple responses.

\*Sub-sample based on those respondents who had looked for information in the last 12 months.

## 15.2 The credibility of information sources

Respondents were asked to rate the 'credibility and helpfulness' of a number of listed information sources using a 11-point satisfaction scale, where 0 = 'no help/credibility' and 10 = 'a lot of help/very credible'. The percentage for helpful/credible reflects the percentage of respondents who gave a 7-10 rating for each source, the percentage for unhelpful/not credible reflects the percentage who gave a 0-3 and those with a neutral response, the percentage who gave a 4-6 response.

Table 77 shows that the information sources recording the highest helpful/credible rating were 'telecommunication websites' (64%) and 'friends and family' (61%).

In comparison, the information source with the lowest helpful/credible rating was 'government departments' (43%). Consumer New Zealand's rating was 56%.

**Table 77: Credibility of information sources**

*Q55. Please rate the following in terms of their credibility and helpfulness in searching for information about telecommunications products and services:*

Unweighted base =		Total 877* %
<b>a. Your friends and family</b>		
No help/credibility		7
Neutral		24
A lot of help/very credible		61
Don't know		3
Not applicable		5
Total		100
<b>b. Work colleagues</b>		
No help/credibility		10
Neutral		23
A lot of help/very credible		47
Don't know		4
Not applicable		17
Total		100
<b>c. Telecommunication websites</b>		
No help/credibility		7
Neutral		24
A lot of help/very credible		64
Don't know		3
Not applicable		2
Total		100

Continued

**Table 77: Credibility of information sources (continued)**

*Q55. Please rate the following in terms of their credibility and helpfulness in searching for information about telecommunications products and services:*

	Unweighted base =	Total 877* %
<b>d. Consumer New Zealand</b>		
No help/credibility		8
Neutral		19
A lot of help/very credible		56
Don't know		9
Not applicable		8
Total		100
<b>e. Retailers</b>		
No help/credibility		12
Neutral		25
A lot of help/very credible		48
Don't know		7
Not applicable		8
Total		100
<b>f. Government departments</b>		
No help/credibility		13
Neutral		22
A lot of help/very credible		43
Don't know		12
Not applicable		10
Total		100

Total may not sum to 100% due to rounding.

\*Sub-sample based on those respondents who had looked for information in the last 12 months.

# Appendix A: Questionnaire

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The questionnaire consists of 15 sections, in 3 parts, as follows:

**Part A – Will provide the ‘performance’ statistics – overall satisfaction, NPS, etc. by technology and by provider.**

1. Section 1: Confirms a respondent’s eligibility to complete the survey.
2. Section 2: Confirms the telecommunication products and services used by the respondent, and with which providers.
3. Section 3:
  - a. Establishes the respondent’s overall satisfaction with the providers used; overall and in relation to particular aspects (e.g. service performance, value for money, customer orientation).
  - b. Confirms the extent to which the respondent would recommend the providers (NPS).
4. Section 4 (asked of respondents who indicate they have an **internet service** in Section 2):
  - a. Confirms the extent of internet issues experienced with their provider in the last 2 years.
  - b. Satisfaction with the resolution of these issues.
  - c. [And if no contact in relation to these issues] The reasons for no contact.
5. Section 5 (asked of respondents who indicate they have a **mobile service** in Section 2):
  - a. Confirms the extent of mobile issues experienced with provider in the last 2 years.
  - b. Satisfaction with the resolution of these issues.
  - c. [And if no contact in relation to these issues] The reasons for no contact.

**Part B – Will focus on the pain points relating to specific service events (e.g. product disclosure, renewing a contract, switching to a new plan).**

To do this, we will prioritise an internet/mobile service to try to achieve a 50/50 mixture of responses across these services. If a respondent only has one service, then that service is chosen. If the respondent has more than one provider for that service, then priority will be given to the smaller providers (see below).

Provider	Priority
Kogan Mobile	1
Flip	2
Warehouse Mobile	3
MyRepublic	4
Trustpower	5
Orcon	6
Slingshot	7
Skinny	8
2degrees	9
Vodafone	10
Spark	11
Other	12

6. Section 6:

As billing is a common touch-point, every respondent will be asked about billing in relation to the selected technology. If the respondent only has a landline connection, they will still be asked this section.

7. Section 7:

Identifies the reasons the respondent has had contact with the provider of the given technology (in the last 2 years), in order to select a service event to ask about the quality of the service received in relation to that event.

8. Sections 8-13:

Because of time constraints, the respondent will complete only one of these sections. The sections establish the quality of the service in relation to a selected service event.

**Part C – Will focus on the information searching in general and final demographics.**

9. Section 14:

Every respondent will this section about information searching in general.

10. Section 15:

Demographics.

## Telecommunications Survey

Thank you for agreeing to complete this important survey. This survey asks questions about the telecommunication (internet/mobile/landline) companies you use and your experiences of dealing with them in the past 2 years.

It should take up to 15 minutes to complete, depending on your answers. Most questions can be completed by simply ticking the box that best represents the answer that you wish to give.

The answers you provide are completely **confidential** and **anonymous** and at no stage will we collect any personally identifiable information from you. We wish to understand about **your** experiences and opinions of telecommunication companies, so please be as **open and honest** as possible in your answers.

It is important to note that your participation in this survey is completely **voluntary** and at any time you can choose to exit the survey.

START SURVEY



## Section 1: Eligibility and basic demographics

1. Are you **personally** responsible for **paying and making decisions** about the telecommunication (internet/mobile/landline) products and services you use? We are only interested in products and services such as the internet and mobile telephone services that you pay for **personally**. For example, if your employer pays for your mobile phone service from Vodafone, please do **not** count this.

- 1 ....Yes
- 2 ....No [TERMINATE]

Termination statement: Sorry, but we need to hear from those who are responsible for paying and making decisions about their telecommunications products and services. Thank you for your time.

- 1a. Which **one** of the following age groups do you come into?

- 1 ....18-24
- 2 ....25-34
- 3 ....35-44
- 4 ....45-54
- 5 ....55-64
- 6 ....65-74
- 7 ....75 and over
- 99 Prefer not to say

- 1b. Do you live in ...

- 1 Northland
- 2 Auckland
- 3 Waikato
- 4 Bay of Plenty
- 5 Gisborne
- 6 Hawke's Bay
- 7 Taranaki
- 8 Manawatu-Wanganui
- 9 Wellington-Wairarapa
- 10 Tasman
- 11 Nelson
- 12 Marlborough
- 13 West Coast
- 14 Canterbury
- 15 Otago
- 16 Southland
- 98 Don't know
- 99 Prefer not to say

1c. Which one of the following best describes the part of the country that you currently live in?

- 1 ....A main city (e.g. Auckland, Hamilton, Wellington, Christchurch, Dunedin)
- 2 ....A provincial centre (e.g. Whanganui, Invercargill, Gisborne, Masterton)
- 3 ....A rural area
- 98 ..Don't know
- 99 Prefer not to say

1d. What is your postal code?

1 **Free text**

- 98 Don't know
- 99 Prefer not to say

1e. Which ethnic group(s) do you belong to?

*Please select as many options as apply*

- 1 New Zealand European/Pakeha
- 2 Maori
- 3 Pacific
- 4 Asian
- 5 Middle Eastern/Latin American/African
- 96 Other - **Please specify:**
- 98 Don't know
- 99 Prefer not to say

1f. What is your gender?

- 1 ....Male
- 2 ....Female
- 3... Nonbinary (i.e. I do not identify as either male or female, but both, neither, or a combination)
- 96... Not listed - **Please specify:**
- 99 ..Prefer not to say

## Section 2: The telecommunication services you use and who provides you with these services

2. Please use the table below to tell us which telecommunication products and services you **currently** pay for and make decisions about, and with which telecommunication companies.

	Household Internet	Mobile	Household landline
Use this product/service with ...			
a. Spark	<input type="checkbox"/> _1	<input type="checkbox"/> _1	<input type="checkbox"/> _1
b. Vodafone	<input type="checkbox"/> _2	<input type="checkbox"/> _2	<input type="checkbox"/> _2
c. 2degrees	<input type="checkbox"/> _3	<input type="checkbox"/> _3	<input type="checkbox"/> _3
d. Flip	<input type="checkbox"/> _4	///	///
e. Kogan mobile	///	<input type="checkbox"/> _5	///
f. MyRepublic	<input type="checkbox"/> _6	///	<input type="checkbox"/> _6
g. Orcon	<input type="checkbox"/> _7	<input type="checkbox"/> _7	<input type="checkbox"/> _7
h. Skinny	<input type="checkbox"/> _8	<input type="checkbox"/> _8	<input type="checkbox"/> _8
i. Slingshot	<input type="checkbox"/> _9	<input type="checkbox"/> _9	<input type="checkbox"/> _9
j. Trustpower	<input type="checkbox"/> _10	<input type="checkbox"/> _10	<input type="checkbox"/> _10
k. Warehouse mobile	///	<input type="checkbox"/> _11	///
l. Other – Please specify:	<input type="checkbox"/> _96	<input type="checkbox"/> _96	<input type="checkbox"/> _96
Do not use/have this product/service	<input type="checkbox"/> _97	<input type="checkbox"/> _97	<input type="checkbox"/> _97

3. **If Q2 (Internet) coded ask, else skip:**

Is your household internet service with [provider]...

- 1 ....A copper broadband connection
- 2 ....A fibre broadband connection
- 3 ....4G- or 5G-based home broadband
- 96 Other – Please specify:
- 98 ..Don't know

4. **If Q2 (Internet) coded ask, else skip:**

And do you have a data cap (i.e. a limit on the amount of data you can use each month) on your household internet service with [provider]?

- 1 ....Yes, my internet service has a data cap
- 2 ....No
- 98 ..Don't know

5. **If Q2 (mobile) coded ask, else skip:**

Is your mobile service with [provider] based on ...

- 1 ....Pay-as-you-go (or prepaid)
- 2 ....On-account (pay monthly)
- 98 ..Don't know

6. **If Q2 (mobile) coded ask, else skip:**

And do you have a data cap (i.e. a limit on the amount of data you can use each month) on your mobile service with [provider]?

- 1 ....Yes, my mobile service has a data cap
- 2 ....No
- 98 ..Don't know

7. **If technologies are with same provider ask, else skip:**

Are your telecommunication services with ... [provider] part of a package or 'bundle'?

- 1 ....Yes
- 2 ....No
- 98 ..Don't know

### Section 3: Your overall opinions about the telecommunication companies you use

8. About how long have you been a customer of ... [provider] [or, the telecommunication companies you use]?

	Spark	Vodafone	Etc.
Up to 12 months	<input type="checkbox"/> _1	<input type="checkbox"/> _1	<input type="checkbox"/> _1
1-2 years	<input type="checkbox"/> _2	<input type="checkbox"/> _2	<input type="checkbox"/> _2
3-5 years	<input type="checkbox"/> _3	<input type="checkbox"/> _3	<input type="checkbox"/> _3
More than 5 years	<input type="checkbox"/> _4	<input type="checkbox"/> _4	<input type="checkbox"/> _4
Don't know	<input type="checkbox"/> _98	<input type="checkbox"/> _98	<input type="checkbox"/> _98

9. Overall, how satisfied or dissatisfied are you with ... [provider] [or, the telecommunication companies you use]? Please take into account their products and services, as well as your experience of dealing with them.

	0 Very dissatisfied	1	2	3	4	5	6	7	8	9	10 Very satisfied	Don't know
Spark	0	1	2	3	4	5	6	7	8	9	10	98
Vodafone	0	1	2	3	4	5	6	7	8	9	10	98
Etc.	0	1	2	3	4	5	6	7	8	9	10	98

10. Thinking now about ... [provider in relation to your [technology] service], please use the table below to show us how **satisfied or dissatisfied** you are with them in relation to the following aspects: **Repeat for each provider used. If more than one technology with provider, then technology is randomised]** ROTATE

	Very dissatisfied											Very satisfied	Don't know	Not applic able
a. The coverage and availability of their service	<input type="checkbox"/> _0	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _6	<input type="checkbox"/> _7	<input type="checkbox"/> _8	<input type="checkbox"/> _9	<input type="checkbox"/> _10	<input type="checkbox"/> _98	<input type="checkbox"/> _99	
b. The performance of their service <b>[If technology=internet or mobile add (speed and stability)]</b>	<input type="checkbox"/> _0	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _6	<input type="checkbox"/> _7	<input type="checkbox"/> _8	<input type="checkbox"/> _9	<input type="checkbox"/> _10	<input type="checkbox"/> _98	<input type="checkbox"/> _99	
c. Their pricing	<input type="checkbox"/> _0	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _6	<input type="checkbox"/> _7	<input type="checkbox"/> _8	<input type="checkbox"/> _9	<input type="checkbox"/> _10	<input type="checkbox"/> _98	<input type="checkbox"/> _99	
d. The quality of their customer service	<input type="checkbox"/> _0	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _6	<input type="checkbox"/> _7	<input type="checkbox"/> _8	<input type="checkbox"/> _9	<input type="checkbox"/> _10	<input type="checkbox"/> _98	<input type="checkbox"/> _99	
e. The clarity of their communications with you	<input type="checkbox"/> _0	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _6	<input type="checkbox"/> _7	<input type="checkbox"/> _8	<input type="checkbox"/> _9	<input type="checkbox"/> _10	<input type="checkbox"/> _98	<input type="checkbox"/> _99	
f. How easy it is to contact them	<input type="checkbox"/> _0	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _6	<input type="checkbox"/> _7	<input type="checkbox"/> _8	<input type="checkbox"/> _9	<input type="checkbox"/> _10	<input type="checkbox"/> _98	<input type="checkbox"/> _99	
g. The support they provide you when you need help, including their technical support	<input type="checkbox"/> _0	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _6	<input type="checkbox"/> _7	<input type="checkbox"/> _8	<input type="checkbox"/> _9	<input type="checkbox"/> _10	<input type="checkbox"/> _98	<input type="checkbox"/> _99	

11. To what extent would you **recommend** them to a friend or family member?

	0 would not recommend them at all	1	2	3	4	5	6	7	8	9	10 Would definitely recommend them	Don't know
Spark	0	1	2	3	4	5	6	7	8	9	10	98
Vodafone	0	1	2	3	4	5	6	7	8	9	10	98
Etc.	0	1	2	3	4	5	6	7	8	9	10	98

## Section 4: Issues with your household internet service

If the respondent selects a household internet service in Section 2 (Q2), then ask this section, else skip.

This section is about the household internet service(s) you receive from ... [provider].

12. In the **last 2 years**, have you experienced any of the following issues with your internet service?

*Please select as many answers as apply*

- 1 ....An issue with service availability
- 2 ....An issue with service performance (speed, stability, fault)
- 3 ....An issue with a bill you had received
- 4 ....An issue with equipment supplied/rented/purchased/installed
- 5 ....An issue with a new connection/installation (including the work of a technician)
- 6 ....An issue with customer service
- 7 ....An issue with the terms and conditions of a contract/plan
- 8 ....An issue with the disconnection of a service (including switching to a new company)
- 96 Another type of issue - **Please specify:**
- 97 **No** issues experienced in the last 2 years
- 98 Don't know

**IF NO ISSUES EXPERIENCED SKIP TO SECTION 5 IF THE RESPONDENT HAS A MOBILE SERVICE, ELSE GO TO SECTION 6.**

13. **If respondent has more than one issue ask, else skip** Which **one** of these was the one that had the **biggest impact** on your experience?

- 1 ....An issue with service availability
- 2 ....An issue with service performance (speed, stability)
- 3 ....An issue with a bill you had received
- 4 ....An issue with equipment supplied/rented/purchased/ installed
- 5 ....An issue with a new connection/installation (including the work of a technician)
- 6 ....An issue with the quality of the service received from one of their representatives
- 7 ....An issue with the terms and conditions of a contract/plan
- 8 ....An issue with the disconnection of a service (including switching to a new company)
- 96 **[Insert respondent answer from Q12 here]**
- 98 ..Don't know

14. Did **you make contact** with ... [provider] about this issue? By 'contact', we mean contact by telephone, email, via their website, an app. or in person?

- 1 ....Yes
- 2 ....No
- 98 Don't know

15. **If Q14=1 ask, else skip:** How much **effort** was required on your part to deal with ... [provider] about this issue?

0 ....No/very little effort  
1 ....  
2 ....  
3 ....  
4 ....  
5 ....  
6 ....  
7 ....  
8 ....  
9 ....  
10 ..A lot of effort  
98 ..Don't know

16. **If Q14=1 ask, else skip:** Overall, how **satisfied or dissatisfied** were you with their response?

0 ....Very dissatisfied  
1 ....  
2 ....  
3 ....  
4 ....  
5 ....  
6 ....  
7 ....  
8 ....  
9 ....  
10 ..Very satisfied  
98 ..Don't know

17. **If Q14=2 ask, else skip:** For which of the following reasons did you **not** make contact with ... [provider]?

*Please select as many answers as apply*

1 ....Not a major issue  
2 ....No time  
3 ....Wouldn't have made a difference  
4 ....**[If Q13=4, 5, 8, show]** Afraid I would be charged a technician's fee  
5 ....The issue resolved itself  
6 ....Takes too long to get in contact with them  
96 Other - **Please specify:**  
98 ..Don't know



## Section 5: Issues with your mobile service

If the respondent selects a mobile service in Section 2 (Q2), ask this section, else skip.

This section is about the mobile service(s) you receive from ... [provider].

18. In the **last 2 years**, have you experienced any of the following issues with your mobile service?

*Please select as many answers as apply*

- 1 ....An issue with service availability/coverage
- 2 ....An issue with service performance (speed, stability, fault)
- 3 ....An issue with a bill you had received
- 4 ....An issue with equipment supplied/rented/purchased/installed
- 5 ....An issue with a new connection
- 6 ....An issue with customer service
- 7 ....An issue with the terms and conditions of a contract/plan
- 8 ....An issue with the disconnection of a service (including switching to a new company)
- 96 Another type of issue - **Please specify:**
- 97 **No** issues experienced in the last 2 years
- 98 Don't know

### IF NO ISSUES EXPERIENCED, SKIP TO SECTION 6

19. **If respondent has more than one issue ask, else skip** Which **one** of these was the one that had the **biggest impact** on your experience?

- 1 ....An issue with service availability/coverage
- 2 ....An issue with service performance (speed, stability)
- 3 ....An issue with a bill you had received
- 4 ....An issue with equipment supplied/rented/purchased/ installed
- 5 ....An issue with a new connection
- 6 ....An issue with the quality of the service received from one of their representatives
- 7 ....An issue with the terms and conditions of a contract/plan
- 8 ....An issue with the disconnection of a service (including switching to a new company)
- 9 ....[**Insert respondent answer from Q18 here**]
- 98 ..Don't know

20. Did **you make contact** with ... [provider] about this issue? By 'contact', we mean contact by telephone, email, via their website, an app. or in person?

- 1 ....Yes
- 2 ....No
- 98 ..Don't know

21. **If Q20=1 ask, else skip:** How much **effort** was required on your part to deal with ... [provider] about this issue?

0 ....No/very little effort  
1 ....  
2 ....  
3 ....  
4 ....  
5 ....  
6 ....  
7 ....  
8 ....  
9 ....  
10 ..A lot of effort  
98 ..Don't know

22. **If Q20=1 ask, else skip:** Overall, how **satisfied or dissatisfied** were you with their response?

0 ....Very dissatisfied  
1 ....  
2 ....  
3 ....  
4 ....  
5 ....  
6 ....  
7 ....  
8 ....  
9 ....  
10 ..Very satisfied  
98 ..Don't know

23. **If Q20=2 ask, else skip:** For which of the following reasons did you **not** make contact with ... [provider]?

*Please select as many answers as apply*

1 ....Not a major issue  
2 ....No time  
3 ....Wouldn't have made a difference  
4 ....**[If Q19=4, 5, 8, show]** Afraid I would be charged a technician's fee  
5 ....The issue resolved itself  
6 ....Takes too long to get in contact with them  
96 Other - **Please specify:**  
98 ..Don't know

## Section 6: Your opinions about the bills you receive for your ... [technology] service

Please answer the questions in Sections 6 to 15 in terms of the [technology] service you receive from [provider].

24. Which one of the following best describes how you usually view these bills?

*Please select as many answers as apply*

- 1 ....On paper as they come in the post
- 2 ....As an email attachment
- 3 ....Through an app
- 4 ....I don't usually view my bills ;E (skip to Q27)
- 5 ....I don't receive a bill since I'm on pre-pay ;E [If technology=mobile and Q5=1, ask] (skip to Q27)
- 6 ....Text
- 7 ....Online/provider's website
- 8 ....I don't receive a bill, it's paid automatically
- 96 In another way - **Please specify:**
- 98 ..Don't know

25. **If Q24=1-3,96,98 ask, else skip** And about **how often** would you say you ...

	Never	Infrequently	Often	Most times	Always	Don't know
a. Open the bills when they arrive	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _98
b. Look at the amount owing	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _98
c. Check what the amount owing is made up of	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _98

26. If Q24=1-3, 96, 98 and Q25a-c=2-5 ask, else skip:

Please use the table below to tell us **how often**, if at all, you experience the following issues with your ... [technology] bills from ... [provider].

RANDOMISE	Never	Infrequently	Often	Most times	Always	Don't know	Not applicable
a. Difficulties understanding the language and terms they use in their billing	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _98	<input type="checkbox"/> _99
b. Difficulties understanding how your bill is calculated	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _98	<input type="checkbox"/> _99
c. Errors in your bill	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _98	<input type="checkbox"/> _99
d. Unexpected charges (e.g. data coverage charges, roaming charges)	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _98	<input type="checkbox"/> _99
e. Unexpected fees (e.g. late fees/penalties, reconnection fees due to non-payment)	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _98	<input type="checkbox"/> _99
f. Confusion around the cost of your [technology] service because it is bundled with other services or utilities	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _98	<input type="checkbox"/> _99

27. Overall, how **satisfied or dissatisfied** are you with their billing?

- 0 ....Very dissatisfied
- 1 ....
- 2 ....
- 3 ....
- 4 ....
- 5 ....
- 6 ....
- 7 ....
- 8 ....
- 9 ....
- 10 ..Very satisfied
- 98 ..Don't know

## Section 7: The contact you have had with [provider] about your [technology] service in the past 2 years

28. Thinking about the **last 2 years** again, for which of the following reasons, if any, have you had contact with **[provider]** in relation to their ... **[technology]** service? By 'contact', we mean contact by telephone, email, via their website, an app. or in person.

*Please select as many answers as apply*

- 1 ....To get information about a service you currently use or you were thinking of using (e.g. information about pricing, performance/specifications)
- 2 ....To discuss a contract issue (e.g. unexpected or unfair terms and conditions with your contract)
- 3 ....To switch to a new plan with the same provider
- 4 ....To arrange a new connection/installation
- 5 ....To report a fault
- 6 ....To switch to a new provider
- 96 ..Other - **Please specify: (Skip to Section 15)**
- 97 ..No contact in the last 2 years ;**E (Skip to Section 15)**
- 98 ..Don't know ;**E (Skip to Section 15)**

### IMPORTANT NOTE

One of Section 8 to Section 13 will be asked because of time constraints.

Which one is selected will be randomised if they have more than one contact.

If the respondent selects 96-99 for Q28, they skip to Section 15.

## Section 8: Product disclosure

29. The **last time** you had contact with ... [provider] to **get information** about their ... [technology] service, what information in particular were you looking for?

- 1 ....Coverage or availability of a service
- 2 ....Information about what's included in a plan and price
- 3 ....Determining if a plan meets my needs
- 4 ....The performance of a service
- 5 ....Information about a bundled package
- 96 ..Other - **Please specify:**
- 98 ..Don't know

30. And how did you **mainly** have this contact? Was it ...?

- 1 ....In person/in store
- 2 ....By telephone
- 3 ....By email
- 4 ....Via their website with an actual person
- 5 ....Via a chat box on their website
- 6 ....Social media
- 7 ....Website in general
- 8 ....Via app
- 96 Other - **Please specify:**
- 98 ...Don't know

30a. Was ... [method at Q30] your **preferred** way of contact?

- 1 Yes
- 2 No
- 98 Don't know

31. **If Q30a=2 ask, else skip; exclude contact method used** Which method of contact would you have preferred to use to get information about their [technology] service?

- 1 ....In person/in store
- 2 ....By telephone
- 3 ....By email
- 4 ....Via their website with an actual person
- 5 ....Via a chat box on their website
- 6 ....Social media
- 96 Other - **Please specify:**
- 98 ..Don't know

[technology] service?

- 1 ....
- 2 ....
- 3 ....
- 4 ....
- 5 ....
- 6 ....
- 7 ....
- 8 ....
- 9 ....

dealing with [provider] to get information about their [technology] service?

ROTATE

None/  
very little

A lot      Don't know

- a. The staff you dealt with didn't have the knowledge/authority to make decisions/take action

☐ <sub>0</sub> ☐ <sub>1</sub> ☐ <sub>2</sub> ☐ <sub>3</sub> ☐ <sub>4</sub> ☐ <sub>5</sub> ☐ <sub>6</sub> ☐ <sub>7</sub> ☐ <sub>8</sub> ☐ <sub>9</sub> ☐ <sub>10</sub> ☐ <sub>98</sub>

- b. The staff didn't get back to you (e.g. if you left a message) or you were disconnected from customer service **If contact method=2-5 ask, else skip**

☐ <sub>0</sub> ☐ <sub>1</sub> ☐ <sub>2</sub> ☐ <sub>3</sub> ☐ <sub>4</sub> ☐ <sub>5</sub> ☐ <sub>6</sub> ☐ <sub>7</sub> ☐ <sub>8</sub> ☐ <sub>9</sub> ☐ <sub>10</sub> ☐ <sub>98</sub>

- c. Customer service was not available when required

☐<sub>0</sub> ☐<sub>1</sub> ☐<sub>2</sub> ☐<sub>3</sub> ☐<sub>4</sub> ☐<sub>5</sub> ☐<sub>6</sub> ☐<sub>7</sub> ☐<sub>8</sub> ☐<sub>9</sub> ☐<sub>10</sub> ☐<sub>98</sub>

- d. You had to wait for a long time before you got to speak  
[communicate if contact method=3-6] with someone

☐<sub>0</sub> ☐ ☐<sub>1</sub> ☐<sub>2</sub> ☐<sub>3</sub> ☐<sub>4</sub> ☐<sub>5</sub> ☐<sub>6</sub> ☐<sub>7</sub> ☐<sub>8</sub> ☐<sub>9</sub> ☐<sub>10</sub> ☐<sub>98</sub>

- e. You were transferred to, and needed to repeat yourself to multiple people

☐ <sub>0</sub> ☐ <sub>1</sub> ☐ <sub>2</sub> ☐ <sub>3</sub> ☐ <sub>4</sub> ☐ <sub>5</sub> ☐ <sub>6</sub> ☐ <sub>7</sub> ☐ <sub>8</sub> ☐ <sub>9</sub> ☐ <sub>10</sub> ☐ <sub>98</sub>

- f. You had difficulties finding the contact details for customer service

☐ <sub>0</sub> ☐ <sub>1</sub> ☐ <sub>2</sub> ☐ <sub>3</sub> ☐ <sub>4</sub> ☐ <sub>5</sub> ☐ <sub>6</sub> ☐ <sub>7</sub> ☐ <sub>8</sub> ☐ <sub>9</sub> ☐ <sub>10</sub> ☐ <sub>98</sub>

- g. You had difficulties understanding the staff (e.g. accent or speaking too quickly) **If contact method=1-2 ask, else skip**

☐ <sub>0</sub> ☐ <sub>1</sub> ☐ <sub>2</sub> ☐ <sub>3</sub> ☐ <sub>4</sub> ☐ <sub>5</sub> ☐ <sub>6</sub> ☐ <sub>7</sub> ☐ <sub>8</sub> ☐ <sub>9</sub> ☐ <sub>10</sub> ☐ <sub>98</sub>

34. Has this matter been resolved yet or is it still ongoing?

- 1 ....It has been resolved
- 2 ....It is still ongoing
- 98 ..Don't know

35. Overall, how **satisfied or dissatisfied** were you with the contact you had with ... [provider] about getting information about their [technology] service?

- 0 ....Very dissatisfied
- 1 ....
- 2 ....
- 3 ....
- 4 ....
- 5 ....
- 6 ....
- 7 ....
- 8 ....
- 9 ....
- 10 ..Very satisfied
- 98 ..Don't know

36. If you were to improve the way ... [provider] deals with its customers about getting information about their [technology] service, which of these improvements would you recommend they make?

*Please select as many answers as apply*

- 1 Improve their staff's product/service knowledge
- 2 Improve their staff's authority to resolve issues
- 3 Improve their staff's communication skills
- 4 Improve how easy it is to get through to them
- 5 Improve the clarity of the information they provide
- 6 Improve the clarity of their terms and conditions for their services and products (e.g. fees/pricing, specifications, performance, coverage and availability)
- 7 Improve how easy it is to compare their information with the same information for other services/products they offer
- 8 Improve how easy it is to compare their information with the same information for similar services/products offered by other companies
- 96 ...Other - **Please specify:**
- 97 ...None of the above
- 98 ...Don't know



37. **If more than one coded 1-8/96 coded in Q36 ask, else skip**

And which **one** of these would you prioritise as the one they do first?

- 1 Improve their staff's product/service knowledge
  - 2 Improve their staff's authority to resolve issues
  - 3 Improve their staff's communication skills
  - 4 Improve how easy it is to get through to them
  - 5 Improve the clarity of the information they provide
  - 6 Improve the clarity of their terms and conditions for their services and products  
(e.g. fees/pricing, specifications, performance, coverage and availability)
  - 7 Improve how easy it is to compare their information with the same information for  
other services/products they offer
  - 8 Improve how easy it is to compare their information with the same information for  
similar services/products offered by other companies
- 96 ...**[Insert respondent 96 comment from Q36 here]**
- 98 ...Don't know

## Section 9: Contract issues

29b. The last time you had contact with ... [provider] about an issue with your ... [technology] contract, what was this about in particular?

- 1 ....A contract term you were not aware of
- 2 ....A contract term you didn't understand
- 3 ....A contract term you felt was unfair
- 4 ....Your provider made changes to your contract (including price) you were unhappy with
- 5 ....An issue with ending your contract
- 96 Other - **Please specify:**
- 97 Don't know

30b. And how did you **mainly** have this contact? Was it ...?

- 1 ....In person/in store
- 2 ....By telephone
- 3 ....By email
- 4 ....Via their website with an actual person
- 5 ....Via a chat box on their website
- 6 ....Social media
- 96 ..Other - **Please specify:**
- 98 Don't know

30ab. Was ... [method at Q30b] your **preferred** way of contact?

- 1 Yes
- 2 No
- 98 Don't know

31b. **If Q30ab = 2 ask, else skip; exclude contact method used** Which method of contact would you have preferred to use to discuss your contract issue with their [technology] service?

- 1 ....In person/in store
- 2 ....By telephone
- 3 ....By email
- 4 ....Via their website with an actual person
- 5 ....Via a chat box on their website
- 6 ....Social media
- 96 ..Other - **Please specify:**
- 99 Don't know

0 ....No/very little effort

1 ....

2 ....

3 ....

4 ....

5 ....

6 ....

7 ....

8 ....

9 ....

10 ..A lot of effort

97 Don't know

ROTATE

A lot Don't know

a. The staff you dealt with didn't have the knowledge/authority to make decisions/take action

☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10 ☐ 98

b. The staff didn't get back to you (e.g. if you left a message) or you were disconnected from customer service **If contact method=2-5 ask, else skip**

0 1 2 3 4 5 6 7 8 9 10 08

c. Customer service was not available when required

☐ 0   
 ☐ 1   
 ☐ 2   
 ☐ 3   
 ☐ 4   
 ☐ 5   
 ☐ 6   
 ☐ 7   
 ☐ 8   
 ☐ 9   
 ☐ 10   
 ☐ 08

d. You had to wait for a long time before you got to speak  
[communicate if contact method=3-6] with someone

☐ <sub>0</sub>   ☐ <sub>1</sub>   ☐ <sub>2</sub>   ☐ <sub>3</sub>   ☐ <sub>4</sub>   ☐ <sub>5</sub>   ☐ <sub>6</sub>   ☐ <sub>7</sub>   ☐ <sub>8</sub>   ☐ <sub>9</sub>   ☐ <sub>10</sub>   ☐ <sub>98</sub>

e. You were transferred to, and needed to repeat yourself to multiple people

☐ <sub>0</sub>   ☐ <sub>1</sub>   ☐ <sub>2</sub>   ☐ <sub>3</sub>   ☐ <sub>4</sub>   ☐ <sub>5</sub>   ☐ <sub>6</sub>   ☐ <sub>7</sub>   ☐ <sub>8</sub>   ☐ <sub>9</sub>   ☐ <sub>10</sub>   ☐ <sub>98</sub>

f. You had difficulties finding the contact details for customer service

☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10 ☐ 98

g. You had difficulties understanding the staff (e.g. accent or speaking too quickly) **If contact method=1-2 ask, else skip**

☐ <sub>0</sub>   ☐ <sub>1</sub>   ☐ <sub>2</sub>   ☐ <sub>3</sub>   ☐ <sub>4</sub>   ☐ <sub>5</sub>   ☐ <sub>6</sub>   ☐ <sub>7</sub>   ☐ <sub>8</sub>   ☐ <sub>9</sub>   ☐ <sub>10</sub>   ☐ <sub>98</sub>

34b. Has this matter been resolved yet or is it still ongoing?

- 1 ....It has been resolved
- 2 ....It is still ongoing
- 98 Don't know

35b. Overall, how **satisfied or dissatisfied** were you with the contact you had with ... [provider] about your contract issue?

- 0 ....Very dissatisfied
- 1 ....
- 2 ....
- 3 ....
- 4 ....
- 5 ....
- 6 ....
- 7 ....
- 8 ....
- 9 ....
- 10 ..Very satisfied
- 97 Don't know

36b. If you were to improve the way ... [provider] deals with its customers about discussing contract issues, which of these improvements would you recommend they make?

*Please select as many answers as apply*

- 1 Improve their staff's product/service knowledge
- 2 Improve their staff's authority to resolve issues
- 3 Improve their staff's communication skills
- 4 Improve how easy it is to get through to them
- 5 Improve the clarity of the information they provide
- 6 Improve the clarity of their terms and conditions for their services and products (e.g. fees/pricing, specifications, performance, coverage and availability)
- 7 Improve how easy it is to compare their information with the same information for other services/products they offer
- 8 Improve how easy it is to compare their information with the same information for similar services/products offered by other companies
- 9 Improve the flexibility of their contract terms and conditions
- 96 ...Other - **Please specify:**
- 97 ...None of the above
- 98 Don't know

37b. **If more than one coded 1-8/96 coded in Q36b ask, else skip**

And which **one** of these would you prioritise as the one they do first?

- 1 Improve their staff's product/service knowledge
- 2 Improve their staff's authority to resolve issues
- 3 Improve their staff's communication skills
- 4 Improve how easy it is to get through to them
- 5 Improve the clarity of the information they provide
- 6 Improve the clarity of their terms and conditions for their services and products (e.g. fees/pricing, specifications, performance, coverage and availability)
- 7 Improve how easy it is to compare their information with the same information for other services/products they offer
- 8 Improve how easy it is to compare their information with the same information for similar services/products offered by other companies
- 9 Improve the flexibility of their contract terms and conditions
- 96 ...**[Insert respondent answer to Q36b here]**
- 98 ...Don't know

## Section 10: Switching plans

29c. The **last time** you had contact with ... [provider] to **switch to a new plan** for your ... [technology] service, how did you **mainly** have this contact? Was it ...?

- 1 ....In person/in store
- 2 ....By telephone
- 3 ....By email
- 4 ....Via their website with an actual person
- 5 ....Via a chat box on their website
- 6 ....Social media
- 7 ....Website in general
- 8 ....Via app
- 96 ..Other - **Please specify:**
- 97 Don't know

30ac. Was ... [method at Q29c] your **preferred** way of contact?

- 1 Yes
- 2 No
- 98 Don't know

31c. **If Q30ac = 2 ask, else skip; exclude contact method used** Which method of contact would you have preferred to use to discuss switching to a new plan for your [technology] service?

- 1 ....In person/in store
- 2 ....By telephone
- 3 ....By email
- 4 ....Via their website with an actual person
- 5 ....Via a chat box on their website
- 6 ....Social media
- 96 ..Other - **Please specify:**
- 99 Don't know

32c. How much **effort** did it take on your part to deal with ... [provider] to switch plans?

- 0 ....No/very little effort
- 1 ....
- 2 ....
- 3 ....
- 4 ....
- 5 ....
- 6 ....
- 7 ....
- 8 ....
- 9 ....
- 10 ..A lot of effort
- 99 Don't know

33c. **If Q32c = 7-10 ask, else skip** How much did each of the following contribute to the effort of dealing with them about switching plans? ROTATE

	None/ very little		A lot	Don't know
a. The staff you dealt with didn't have the knowledge/authority to make decisions/take action	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. The staff didn't get back to you (e.g. if you left a message) or you were disconnected from customer service <b>If contact method=2-5 ask, else skip</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Customer service was not available when required	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. You had to wait for a long time before you got to speak <b>[communicate if contact method=3-6]</b> with someone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e. You were transferred to, and needed to repeat yourself to multiple people	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f. You had difficulties finding the contact details for customer service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g. You had difficulties understanding the staff (e.g. accent or speaking too quickly) <b>If contact method=1-2 ask, else skip</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
h. Ability to compare plans	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

34c. Has this matter been resolved yet or is it still ongoing?

- 1 ....It has been resolved
- 2 ....It is still ongoing
- 98 ...Don't know

35c. Overall, how **satisfied or dissatisfied** were you with the contact you had with ... [provider] to switch to a new plan?

- 0 ....Very dissatisfied
- 1 ....
- 2 ....
- 3 ....
- 4 ....
- 5 ....
- 6 ....
- 7 ....
- 8 ....
- 9 ....
- 10 ..Very satisfied
- 98 ...Don't know

36c. If you were to improve the way ... [provider] deals with its customers about switching plans, which of these improvements would you recommend they make?

*Please select as many answers as apply*

- 1 .....Improve their staff's product/service knowledge
- 2 .....Improve their staff's authority to resolve issues
- 3 .....Improve their staff's communication skills
- 4 .....Improve how easy it is to get through to them to arrange to switch plans
- 5 .....Improve the clarity of the information they provide so you choose/switch to a plan that meets your needs
- 6 .....Improve the clarity of their communication during the switching process
- 7 .....Minimise the time it takes to switch plans
- 8 .....Improve how the switch over is reflected in their billing
- 96 ...Other - **Please specify:**
- 97 ...None of the above
- 99 Don't know



37c. **If more than one coded 1-8/96 coded in Q36c ask, else skip**

And which **one** of these would you prioritise as the one they do first?

- 1 .....Improve their staff's product/service knowledge
- 2 .....Improve their staff's authority to resolve issues
- 3 .....Improve their staff's communication skills
- 4 .....Improve how easy it is to get through to them to arrange to switch plans
- 5 .....Improve the clarity of the information they provide so you choose/switch to a plan that meets your needs)
- 6 .....Improve the clarity of their communication during the switching process
- 7 .....Minimise the time it takes to switch plans
- 8 .....Improve how the switch over is reflected in their billing
- 96 ...**[Insert respondent answer to Q36c here]**
- 98 ...Don't know

## Section 11: New connections/installations

29d. The **last time** you had contact with ... [provider] to **arrange a new connection/installation** with their ... [technology] service, what in particular was this contact about?

- 1 ....Setting up a new service or equipment (e.g. at a new address)
- 2 ....The installation took longer than expected
- 3 ....Lack of communication with your provider
- 4 ....Damage to your property or an untidy installation
- 5 ....An unexpected cost
- 96 ..Other - **Please specify:**
- 97 Don't know

30d. And how did you **mainly** have this contact? Was it ...?

- 1 ....In person/in store
- 2 ....By telephone
- 3 ....By email
- 4 ....Via their website with an actual person
- 5 ....Via a chat box on their website
- 6 ....Social media
- 7 ....Website in general
- 96 ..Other - **Please specify:**
- 98 Don't know

30ad. Was ... [method at Q30d] your **preferred** way of contact?

- 1 Yes
- 2 No
- 99 Don't know

31d. **If Q30ad = 2 ask, else skip; exclude contact method used** Which method of contact would you have preferred to use to arrange a new [technology] connection/installation with them?

- 1 ....In person/in store
- 2 ....By telephone
- 3 ....By email
- 4 ....Via their website with an actual person
- 5 ....Via a chat box on their website
- 6 ....Social media
- 96 ..Other - **Please specify:**
- 97 Don't know

0 ....No/very little effort  
1 ....  
2 ....  
3 ....  
4 ....  
5 ....  
6 ....  
7 ....  
8 ....  
9 ....  
10 ..A lot of effort  
98 Don't know

	None/ very little	A lot	Don't know									
a. The staff you dealt with didn't have the knowledge/authority to make decisions/take action	<input type="checkbox"/> _0	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _6	<input type="checkbox"/> _7	<input type="checkbox"/> _8	<input type="checkbox"/> _9	<input type="checkbox"/> _10	<input type="checkbox"/> _98
b. The staff didn't get back to you (e.g. if you left a message) or you were disconnected from customer service <b>If contact method=2-5 ask, else skip</b>	<input type="checkbox"/> _0	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _6	<input type="checkbox"/> _7	<input type="checkbox"/> _8	<input type="checkbox"/> _9	<input type="checkbox"/> _10	<input type="checkbox"/> _98
c. Customer service was not available when required	<input type="checkbox"/> _0	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _6	<input type="checkbox"/> _7	<input type="checkbox"/> _8	<input type="checkbox"/> _9	<input type="checkbox"/> _10	<input type="checkbox"/> _98
d. You had to wait for a long time before you got to speak <b>[communicate if contact method=3-6] with someone</b>	<input type="checkbox"/> _0	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _6	<input type="checkbox"/> _7	<input type="checkbox"/> _8	<input type="checkbox"/> _9	<input type="checkbox"/> _10	<input type="checkbox"/> _98
e. You were transferred to, and needed to repeat yourself to multiple people	<input type="checkbox"/> _0	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _6	<input type="checkbox"/> _7	<input type="checkbox"/> _8	<input type="checkbox"/> _9	<input type="checkbox"/> _10	<input type="checkbox"/> _98
f. You had difficulties finding the contact details for customer service	<input type="checkbox"/> _0	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _6	<input type="checkbox"/> _7	<input type="checkbox"/> _8	<input type="checkbox"/> _9	<input type="checkbox"/> _10	<input type="checkbox"/> _98
g. You had difficulties understanding the staff (e.g. accent or speaking too quickly) <b>If contact method=1-2 ask, else skip</b>	<input type="checkbox"/> _0	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _6	<input type="checkbox"/> _7	<input type="checkbox"/> _8	<input type="checkbox"/> _9	<input type="checkbox"/> _10	<input type="checkbox"/> _98

34d Has this matter been resolved yet or is it still ongoing?

- 1 ....It has been resolved
- 2 ....It is still ongoing
- 99 Don't know

35d. Overall, how **satisfied or dissatisfied** were you with the contact you had with ... [provider] to arrange a new connection/installation?

- 0 ....Very dissatisfied
- 1 ....
- 2 ....
- 3 ....
- 4 ....
- 5 ....
- 6 ....
- 7 ....
- 8 ....
- 9 ....
- 10 ..Very satisfied
- 97 Don't know

36d. If you were to improve the way ... [provider] deals with its customers about arranging a new connection/installation, which of these improvements would you recommend they make?

*Please select as many answers as apply*

- 1 .....Improve their staff's product/service knowledge
- 2 .....Improve their staff's authority to resolve issues
- 3 .....Improve their staff's communication skills
- 4 .....Improve how easy it is to get through to them to arrange an installation
- 5 .....Improve the clarity of the information they provide about the installation process
- 6 .....Improve the clarity of the information they provide about the terms and conditions of the installation
- 7 .....Improve the clarity of their communication during the installation process
- 8 .....Improve their promptness with respect to installation
- 9 .....Improve the care taken by technicians responsible for the installation
- 10 ...Improve the support provided with any supplied/rented/purchased equipment
- 96 ...Other - **Please specify:**
- 98 Don't know
- 99 None of the above

37d **If more than one coded 1-8/96 coded in Q36d ask, else skip**

And which **one** of these would you prioritise as the one they do first?

- 1 .....Improve their staff's product/service knowledge
- 2 .....Improve their staff's authority to resolve issues
- 3 .....Improve their staff's communication skills
- 4 .....Improve how easy it is to get through to them to arrange an installation
- 5 .....Improve the clarity of the information they provide about the installation process
- 6 .....Improve the clarity of the information they provide about the terms and conditions of the installation
- 7 .....Improve the clarity of their communication during the installation process
- 8 .....Improve their promptness with respect to installation
- 9 .....Improve the care taken by technicians responsible for the installation
- 10 ...Improve the support provided with any supplied/rented/purchased equipment
- 96 ...**[Insert respondent answer to Q36d here]**
- 98 ...Don't know
- 99 None of the above

## Section 12: Service performance, stability, and faults

29e The **last time** you had contact ... [provider] them to **report a fault** with their ... [technology] service, what in particular was this contact about?

- 1 ....The service was performing slower than expected
- 2 ....Stability or reliability of the service
- 3 ....An issue with your in-home wifi coverage
- 4 ....To report a fault
- 5 ....An unexpected cost
- 6 ....The time taken to resolve an issue
- 96 Other - **Please specify:**
- 97 Don't know

30e And how did you **mainly** have this contact? Was it ... ?

- 1 ....In person/in store
- 2 ....By telephone
- 3 ....By email
- 4 ....Via their website with an actual person
- 5 ....Via a chat box on their website
- 6 ....Social media
- 96 ..Other - **Please specify:**
- 98 Don't know

30ae Was ... [method at Q30e] your **preferred** way of contact?

- 1 Yes
- 2 No
- 98 Don't know

31e **If Q30ae = 2 ask, else skip; exclude contact method used** Which method of contact would you have preferred to use to report a fault to them?

- 1 ....In person/in store
- 2 ....By telephone
- 3 ....By email
- 4 ....Via their website with an actual person
- 5 ....Via a chat box on their website
- 6 ....Social media
- 96 ..Other - **Please specify:**
- 99 Don't know

0 ....No/very little effort  
1 ....  
2 ....  
3 ....  
4 ....  
5 ....  
6 ....  
7 ....  
8 ....  
9 ....  
10 ..A lot of effort  
11 ....Don't know

	None/ very little	A lot	Don't know									
a. The staff you dealt with didn't have the knowledge/authority to make decisions/take action	<input type="checkbox"/> _0	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _6	<input type="checkbox"/> _7	<input type="checkbox"/> _8	<input type="checkbox"/> _9	<input type="checkbox"/> _10	<input type="checkbox"/> _98
b. The staff didn't get back to you (e.g. if you left a message) or you were disconnected from customer service <b>If contact method=2-5 ask, else skip</b>	<input type="checkbox"/> _0	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _6	<input type="checkbox"/> _7	<input type="checkbox"/> _8	<input type="checkbox"/> _9	<input type="checkbox"/> _10	<input type="checkbox"/> _98
c. Customer service was not available when required	<input type="checkbox"/> _0	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _6	<input type="checkbox"/> _7	<input type="checkbox"/> _8	<input type="checkbox"/> _9	<input type="checkbox"/> _10	<input type="checkbox"/> _98
d. You had to wait for a long time before you got to speak <b>[communicate if contact method=3-6] with someone</b>	<input type="checkbox"/> _0	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _6	<input type="checkbox"/> _7	<input type="checkbox"/> _8	<input type="checkbox"/> _9	<input type="checkbox"/> _10	<input type="checkbox"/> _98
e. You were transferred to, and needed to repeat yourself to multiple people	<input type="checkbox"/> _0	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _6	<input type="checkbox"/> _7	<input type="checkbox"/> _8	<input type="checkbox"/> _9	<input type="checkbox"/> _10	<input type="checkbox"/> _98
f. You had difficulties finding the contact details for customer service	<input type="checkbox"/> _0	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _6	<input type="checkbox"/> _7	<input type="checkbox"/> _8	<input type="checkbox"/> _9	<input type="checkbox"/> _10	<input type="checkbox"/> _98
g. You had difficulties understanding the staff (e.g. accent or speaking too quickly) <b>If contact method=1-2 ask, else skip</b>	<input type="checkbox"/> _0	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _6	<input type="checkbox"/> _7	<input type="checkbox"/> _8	<input type="checkbox"/> _9	<input type="checkbox"/> _10	<input type="checkbox"/> _98
h. Difficulty finding the cause of the fault/issue	<input type="checkbox"/> _0	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _6	<input type="checkbox"/> _7	<input type="checkbox"/> _8	<input type="checkbox"/> _9	<input type="checkbox"/> _10	<input type="checkbox"/> _98

34e Has this matter been resolved yet or is it still ongoing?

- 1 ....It has been resolved
- 2 ....It is still ongoing
- 98 Don't know

35e Overall, how **satisfied or dissatisfied** were you with the contact you had with ... [provider] to report a fault?

- 0 ....Very dissatisfied
- 1 ....
- 2 ....
- 3 ....
- 4 ....
- 5 ....
- 6 ....
- 7 ....
- 8 ....
- 9 ....
- 10 ..Very satisfied
- 98 Don't know

36e If you were to improve the way ... [provider] deals with its customers about reporting a fault, which of these improvements would you recommend they make?

*Please select as many answers as apply*

- 1 Improve their staff's product/service knowledge
- 2 Improve their staff's authority to resolve issues
- 3 Improve their staff's communication skills
- 4 .....Improve how easy it is to get through to them to report a fault/issue
- 5 .....Improve the speed with which faults/issues are resolved
- 6 .....Improve their communication during the process of remedying the fault/issue
- 7 .....Improve how easy it is to find the cause of the faults/issues
- 96 ...Other - **Please specify:**
- 98 ...Don't know
- 99 None of the above



37e **If more than one coded 1-8/96 coded in Q36e ask, else skip**

And which **one** of these would you prioritise as the one they do first?

- 1 .....Improve their staff's product/service knowledge
- 2 .....Improve their staff's authority to resolve issues
- 3 .....Improve their staff's communication skills
- 4 .....Improve how easy it is to get through to them to report a fault/issue
- 5 .....Improve the speed with which faults/issues are resolved
- 6 .....Improve their communication during the process of remedying the fault/issue
- 7 .....Improve how easy it is to find the cause of the faults/issues
- 96 ...**[Insert respondent answer to previous Q36e here]**
- 98 ...Don't know

## Section 13: Switching to a new provider

- 38 **Only show options that provide a [technology] service** Still thinking about ... [provider] and their ... [technology] service, you said you had contact with them to switch from a telecommunications company that was previously providing you with the same service. Just to confirm, who did you switch **from**?

- 1 ....Spark
- 2 ....Vodafone
- 3 ....2degrees
- 4 ....Flip
- 5 ....Kogan Mobile
- 6 ....MyRepublic
- 7 ....Orcon
- 8 ....Skinny
- 9 ....Slingshot
- 10 ..Trustpower
- 11 ..Warehouse mobile
- 96 ..Other - **Please specify:**
- 98 ..Don't know

- 39 Were the reasons you switched **more to do** with ...

- 1 ....The company you were switching from
- 2 ....Or with the company you were switching to
- 3 ....Both equally
- 98 ..Don't know

- 40 **If Q39=1/3 ask, else skip** For which of the following reasons did you decide to switch **from** ... [provider switched from]?

*Please select as many answers as apply*

- 1 ....They were too expensive
- 2 ....They didn't offer any discounts, credits or freebies
- 3 ....They didn't offer any deals or benefits to loyal customers
- 4 ....There were billing problems
- 5 ....They had too many hidden terms and conditions
- 6 ....Unused data/minutes were not rolled over
- 7 ....They had poor customer service
- 8 ....They had a bad reputation
- 9 ....There were too many disconnections/drop-outs
- 10 ..They had limited coverage
- 96 Other - **Please specify:**
- 98 Don't know

41 **If Q40 = 2/3 ask, else skip** For which of the following reasons did you decide to switch to ... [provider switched to]?

*Please select as many answers as apply*

- 1 ....Have more competitive pricing
- 2 ....They offer discounts, credits or freebies
- 3 ....They have no hidden fees and charges
- 4 ....They reward their loyal customers
- 5 ....They have better customer service
- 6 ....They have better/technical service
- 7 ....A friend/family member/colleague recommended them
- 8 ....They have a better reputation
- 9 ....The new plan was a better overall deal
- 10 ..They have no hidden terms and conditions
- 11 ..There have more reliable connections
- 12 ..They have better coverage
- 13 ..A sales representative pressured me
- 96 Other - **Please specify:**
- 98 Don't know

42 How did you **mainly** have contact with ... [provider switched to]?

- 1 ....In person/in store
- 2 ....By telephone
- 3 ....By email
- 4 ....Via their website with an actual person
- 5 ....Via a chat box on their website
- 6 ....Social media
- 96 ..Other - **Please specify:**
- 97 Don't know

42a Was ... [method at Q42] your **preferred** way of contact?

- 1 Yes
- 2 No
- 98 Don't know

43 **If Q42a = 2 ask, else skip; exclude contact method used** Which method of contact would you have preferred to use to switch to a new [technology] service with [provider]?

- 1 ....In person/in store
- 2 ....By telephone
- 3 ....By email
- 4 ....Via their website with an actual person
- 5 ....Via a chat box on their website
- 6 ....Social media
- 96 ..Other - **Please specify:**
- 99 Don't know

44 How much effort did it take on your part to switch providers?

- 0 ....No/very little effort
- 1 ....
- 2 ....
- 3 ....
- 4 ....
- 5 ....
- 6 ....
- 7 ....
- 8 ....
- 9 ....
- 10 ..A lot of effort
- 97 Don't know

45 **If Q44 = 7-10 ask, else skip** Did this effort have **more to do** with ...

- 1 ....The provider you were switching from
- 2 ....Or with the provider you were switching to
- 3 ....Both equally
- 98 Don't know

46 **Ask this question in relation to answer given in Q45. If Q44=1-6, skip.** How much have [did] each of the following contribute[d] to the effort of dealing with ... [selected provider]? ROTATE

	None/ very little	A lot Don't know
a. The staff you dealt with didn't have the knowledge/authority to make decisions/take action	<input type="checkbox"/> _0 <input type="checkbox"/> _1 <input type="checkbox"/> _2 <input type="checkbox"/> _3 <input type="checkbox"/> _4 <input type="checkbox"/> _5 <input type="checkbox"/> _6 <input type="checkbox"/> _7 <input type="checkbox"/> _8 <input type="checkbox"/> _9 <input type="checkbox"/> _10 <input type="checkbox"/> _98	
b. The staff didn't get back to you (e.g. if you left a message) or you were disconnected from customer service <b>If contact method=2-5 ask, else skip</b>	<input type="checkbox"/> _0 <input type="checkbox"/> _1 <input type="checkbox"/> _2 <input type="checkbox"/> _3 <input type="checkbox"/> _4 <input type="checkbox"/> _5 <input type="checkbox"/> _6 <input type="checkbox"/> _7 <input type="checkbox"/> _8 <input type="checkbox"/> _9 <input type="checkbox"/> _10 <input type="checkbox"/> _98	
c. Customer service was not available when required	<input type="checkbox"/> _0 <input type="checkbox"/> _1 <input type="checkbox"/> _2 <input type="checkbox"/> _3 <input type="checkbox"/> _4 <input type="checkbox"/> _5 <input type="checkbox"/> _6 <input type="checkbox"/> _7 <input type="checkbox"/> _8 <input type="checkbox"/> _9 <input type="checkbox"/> _10 <input type="checkbox"/> _98	
d. You had to wait for a long time before you got to speak <b>[communicate if contact method=3-6] with someone</b>	<input type="checkbox"/> _0 <input type="checkbox"/> _1 <input type="checkbox"/> _2 <input type="checkbox"/> _3 <input type="checkbox"/> _4 <input type="checkbox"/> _5 <input type="checkbox"/> _6 <input type="checkbox"/> _7 <input type="checkbox"/> _8 <input type="checkbox"/> _9 <input type="checkbox"/> _10 <input type="checkbox"/> _98	
e. You were transferred to, and needed to repeat yourself to multiple people	<input type="checkbox"/> _0 <input type="checkbox"/> _1 <input type="checkbox"/> _2 <input type="checkbox"/> _3 <input type="checkbox"/> _4 <input type="checkbox"/> _5 <input type="checkbox"/> _6 <input type="checkbox"/> _7 <input type="checkbox"/> _8 <input type="checkbox"/> _9 <input type="checkbox"/> _10 <input type="checkbox"/> _98	
f. You had difficulties finding the contact details for customer service	<input type="checkbox"/> _0 <input type="checkbox"/> _1 <input type="checkbox"/> _2 <input type="checkbox"/> _3 <input type="checkbox"/> _4 <input type="checkbox"/> _5 <input type="checkbox"/> _6 <input type="checkbox"/> _7 <input type="checkbox"/> _8 <input type="checkbox"/> _9 <input type="checkbox"/> _10 <input type="checkbox"/> _98	
g. You had difficulties understanding the staff (e.g. accent or speaking too quickly) <b>If contact method=1-2 ask, else skip</b>	<input type="checkbox"/> _0 <input type="checkbox"/> _1 <input type="checkbox"/> _2 <input type="checkbox"/> _3 <input type="checkbox"/> _4 <input type="checkbox"/> _5 <input type="checkbox"/> _6 <input type="checkbox"/> _7 <input type="checkbox"/> _8 <input type="checkbox"/> _9 <input type="checkbox"/> _10 <input type="checkbox"/> _98	
h. Ability to compare plans	<input type="checkbox"/> _0 <input type="checkbox"/> _1 <input type="checkbox"/> _2 <input type="checkbox"/> _3 <input type="checkbox"/> _4 <input type="checkbox"/> _5 <input type="checkbox"/> _6 <input type="checkbox"/> _7 <input type="checkbox"/> _8 <input type="checkbox"/> _9 <input type="checkbox"/> _10 <input type="checkbox"/> _98	

47 Please rate your level of satisfaction with **[provider switched from]** for switching your **[technology]** service **from** them, in terms of each of the following: ROTATE

	Very dissatisfied		Very satisfied	Don't know								
a. The clarity of the information they provided in relation to notification periods	<input type="checkbox"/> _0	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _6	<input type="checkbox"/> _7	<input type="checkbox"/> _8	<input type="checkbox"/> _9	<input type="checkbox"/> _10	<input type="checkbox"/> _98
b. The clarity of the information they provided in terms of early termination fees	<input type="checkbox"/> _0	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _6	<input type="checkbox"/> _7	<input type="checkbox"/> _8	<input type="checkbox"/> _9	<input type="checkbox"/> _10	<input type="checkbox"/> _98
c. The clarity of the information they provided about when their service would be cancelled	<input type="checkbox"/> _0	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _6	<input type="checkbox"/> _7	<input type="checkbox"/> _8	<input type="checkbox"/> _9	<input type="checkbox"/> _10	<input type="checkbox"/> _98
d. The accuracy of their final bill	<input type="checkbox"/> _0	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _6	<input type="checkbox"/> _7	<input type="checkbox"/> _8	<input type="checkbox"/> _9	<input type="checkbox"/> _10	<input type="checkbox"/> _98

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48 Overall, how satisfied or dissatisfied were you with the contact you had with ... [provider switched from]?

- 0 ....Very dissatisfied
- 1 ....
- 2 ....
- 3 ....
- 4 ....
- 5 ....
- 6 ....
- 7 ....
- 8 ....
- 9 ....
- 10 ..Very satisfied
- 98 ..Don't know

49 Please rate your level of satisfaction with **[provider switched to]** for switching your **[technology]** service to them, in terms of each of the following: ROTATE

	Very dissatisfied									Very satisfied	Don't know	
a. The overall clarity of your new plan	<input type="checkbox"/> _0	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _6	<input type="checkbox"/> _7	<input type="checkbox"/> _8	<input type="checkbox"/> _9	<input type="checkbox"/> _10	<input type="checkbox"/> _98
b. The clarity of your new plan's terms and conditions	<input type="checkbox"/> _0	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _6	<input type="checkbox"/> _7	<input type="checkbox"/> _8	<input type="checkbox"/> _9	<input type="checkbox"/> _10	<input type="checkbox"/> _98
c. Your new plan's total cost	<input type="checkbox"/> _0	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _6	<input type="checkbox"/> _7	<input type="checkbox"/> _8	<input type="checkbox"/> _9	<input type="checkbox"/> _10	<input type="checkbox"/> _98
d. The communication around when your new plan would start	<input type="checkbox"/> _0	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _6	<input type="checkbox"/> _7	<input type="checkbox"/> _8	<input type="checkbox"/> _9	<input type="checkbox"/> _10	<input type="checkbox"/> _98
e. The support you received to set up your new connection	<input type="checkbox"/> _0	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _6	<input type="checkbox"/> _7	<input type="checkbox"/> _8	<input type="checkbox"/> _9	<input type="checkbox"/> _10	<input type="checkbox"/> _98

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50 Overall, how satisfied or dissatisfied were you with the contact you had with ... [provider switched to]?

- 0 ....Very dissatisfied
- 1 ....
- 2 ....
- 3 ....
- 4 ....
- 5 ....
- 6 ....
- 7 ....
- 8 ....
- 9 ....
- 10 ..Very satisfied
- 98 ...Don't know

- 51 If you were to improve the way companies deal with their customers who are **switching to them**, which of these improvements would you recommend they make?

*Please select as many answers as apply*

- 1 .....Improve their staff's product/service knowledge
- 2 .....Improve their staff's authority to make issues
- 3 .....Improve their staff's communication skills
- 4 .....Improve how easy it is to get through to them to arrange a switch
- 5 .....Improve the support they provide during the switching process
- 6 .....Improve how quickly the switch is made
- 7 .....Improve the level of technical support they provide
- 8 .....Improve their follow-up to check that the switch has been successful
- 96 Other - **Please specify:**
- 98 ...Don't know
- 11 ...None of the above

- 52 **If more than one coded 1-8/96 coded in Q51 ask, else skip**

And which **one** of these would you prioritise as the one they do first?

- 1 .....Improve their staff's product/service knowledge
- 2 .....Improve their staff's authority to resolve issues
- 3 .....Improve their staff's communication skills
- 4 .....Improve how easy it is to get through to them to report a fault/issue
- 5 .....Improve the speed with which faults/issues are resolved
- 6 .....Improve their communication during the process of remedying the fault/issue
- 7 .....Improve how easy it is to find the cause of the faults/issues
- 96 ...**[Insert respondent answer to Q51 here]**
- 98 ...Don't know



## Section 14: Looking for information about telecommunication companies

53 In the **last 12 months**, have you looked for information to help you make decisions about your mobile and/or internet service and who provides them?

- 1 ....Yes  
2 ....No

54 **If Q53=1 ask, else skip** Which of the following best describes the information you have looked for?

*Please select as many answers as apply*

- 1 ....Information about coverage and availability  
2 ....Information about fees and pricing  
3 ....Information about product/service specifications  
4 ....Information about terms and conditions  
5 ....Information to help you compare competitive companies' offers  
96 ..Other - **Please specify:**  
98 ..Don't know

55 **If Q53=1 ask, else skip** Please rate the following in terms of their credibility and helpfulness in searching for information about telecommunications products and services. ROTATE

	No help/ credibility							A lot of help/ very credible			Don't know	N/A	
a. Your friends and family	<input type="checkbox"/> _0	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _6	<input type="checkbox"/> _7	<input type="checkbox"/> _8	<input type="checkbox"/> _9	<input type="checkbox"/> _10	<input type="checkbox"/> _98	<input type="checkbox"/> _99
b. Work colleagues	<input type="checkbox"/> _0	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _6	<input type="checkbox"/> _7	<input type="checkbox"/> _8	<input type="checkbox"/> _9	<input type="checkbox"/> _10	<input type="checkbox"/> _98	<input type="checkbox"/> _99
c. Telecommunication websites	<input type="checkbox"/> _0	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _6	<input type="checkbox"/> _7	<input type="checkbox"/> _8	<input type="checkbox"/> _9	<input type="checkbox"/> _10	<input type="checkbox"/> _98	<input type="checkbox"/> _99
d. Consumer New Zealand (a private organisation that helps consumers make informed decisions around purchasing products/services)	<input type="checkbox"/> _0	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _6	<input type="checkbox"/> _7	<input type="checkbox"/> _8	<input type="checkbox"/> _9	<input type="checkbox"/> _10	<input type="checkbox"/> _98	<input type="checkbox"/> _99
e. Retailers (e.g. Noel Leeming, Harvey Norman, etc.)	<input type="checkbox"/> _0	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _6	<input type="checkbox"/> _7	<input type="checkbox"/> _8	<input type="checkbox"/> _9	<input type="checkbox"/> _10	<input type="checkbox"/> _98	<input type="checkbox"/> _99
f. Government departments (e.g. Commerce Commission)	<input type="checkbox"/> _0	<input type="checkbox"/> _1	<input type="checkbox"/> _2	<input type="checkbox"/> _3	<input type="checkbox"/> _4	<input type="checkbox"/> _5	<input type="checkbox"/> _6	<input type="checkbox"/> _7	<input type="checkbox"/> _8	<input type="checkbox"/> _9	<input type="checkbox"/> _10	<input type="checkbox"/> _98	<input type="checkbox"/> _99

## Section 15: Final questions about you

56 What is your first language? That is, the language mainly spoken by you at home.

- 1.... English
- 2 ....Samoan
- 3 ....Punjabi
- 4 ....Chinese/Mandarin
- 5 ....Maori
- 6 ....Korean
- 7 ....Hindi
- 8 ....Filipino
- 9 ....Cantonese
- 96...Other - **Please specify:**
- 99 ...Prefer not to say

57 Which one of the following is your highest educational qualification?

- 1 ....NCEA, School Certificate, UE or other secondary school qualification
- 2 ....Polytechnic qualification or trade certificate
- 3 ....Bachelors degree or higher
- 96 ..Other - **Please specify:**
- 97 ..No qualification
- 98 ..Don't know
- 99 ..Prefer not to say

58 Which of these best describes your **combined household income** from all sources, before tax for the last year? Please include any child support, benefits or other income support you may receive.

- 1 ....Under \$40,000
- 2 ....At least \$40,000 but less than \$80,000
- 3 ....\$80,000 but less than \$100,000
- 4 ....\$100,000 but less than \$120,000
- 5 ....\$120,000 but less than \$150,000
- 6 ....\$150,000 but less than \$200,000
- 7 ....\$200,000 or more
- 98 ..Don't know
- 99 ..Prefer not to say

Thank you. The Commerce Commission will use the information from this survey to help consumers make informed choices about selecting a telecommunications provider, and to address issues the survey identifies.

You may now submit your survey and close your browser.

SUBMIT SURVEY