



New Zealand: consumer survey



Tom Rebbeck

About this report

This report provides key findings from consumer survey data from New Zealand and gives an analysis at the operator level. It covers fixed broadband, mobile and pay-TV services.

The survey was conducted in association with Dynata between July and August 2022. The survey group was chosen to be representative of the mobile-internet-using population in New Zealand. We set quotas on age, gender and geographical spread to that effect. There were at least 1000 respondents.



GEOGRAPHICAL COVERAGE

- New Zealand

KEY QUESTIONS ANSWERED IN THIS REPORT

- What are the most significant factors that affect Net Promoter Scores (NPSs) for fixed broadband and mobile operators? Which operators score highly and why?
- What are the most significant drivers of fixed broadband and mobile churn and how can operators approach customer retention?
- What are the mobile and fixed broadband data usage patterns among respondents?
- What are the most popular pay-TV and streaming video services? Which services lead to high satisfaction scores and why?



WHO SHOULD READ THIS REPORT

- Strategy, marketing intelligence and planning teams within telecoms operators.
- Other parties interested in the relative performance of telecoms operators in New Zealand (for example, regulators and vendors).

Executive summary

2degrees has the highest fixed Net Promoter Score (NPS) and also performs well in the mobile market. Vodafone has the lowest NPS in both markets.

Customer service satisfaction and price satisfaction are the main influencers of NPS for both fixed and mobile operators. Speed satisfaction is also a significant factor in NPS for fixed operators.

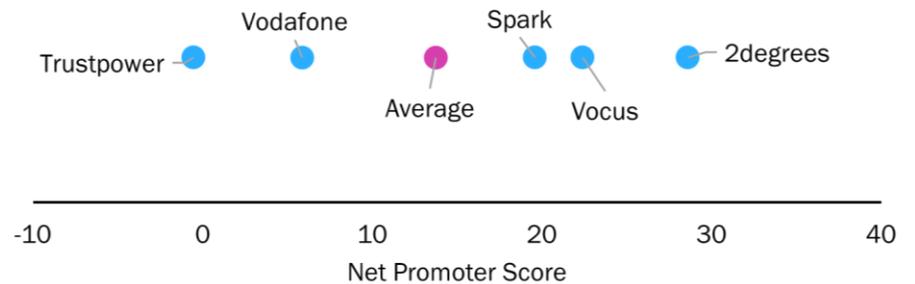
The penetration rates for both fast fixed connections and fixed-mobile convergence (FMC) are low in New Zealand, which means that there are clear opportunities for operators. Mobile operators should also be looking to upgrade, and potentially upsell, customers onto plans with larger data allowances.



KEY FINDINGS

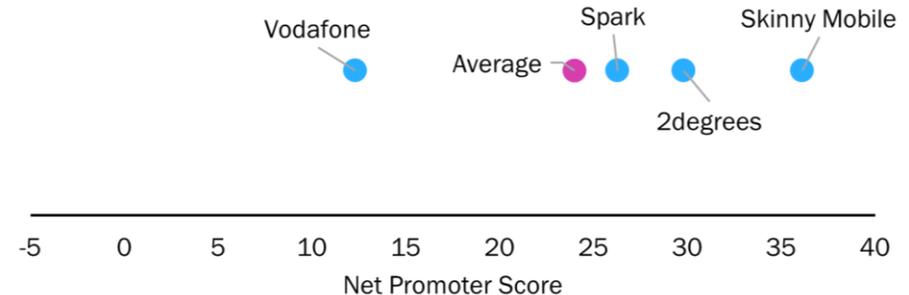
- The take-up of service bundles in New Zealand is generally low. Fixed operators could do more to promote video and mobile services to existing customers.
- Mobile data allowances in New Zealand are small. Operators have a clear path for upgrading customers to larger plans; this will ideally involve a simultaneous increase in ARPU.
- Streaming video providers need to improve their services to increase their market share.

Figure 1: Net Promoter Scores for fixed broadband operators, New Zealand, 2022¹



Source: Analysys Mason

Figure 2: Net Promoter Scores for mobile operators, New Zealand, 2022¹



Source: Analysys Mason

¹ Net Promoter Score (NPS) is calculated by subtracting the percentage of subscribers that rated the operator 6 or below from the percentage that rated it 9 or 10. Please refer to the methodology and panel information section for the sample size and relevant survey questions.



Contents



Executive summary

Analysis and key findings

Appendix

Methodology and panel information

About the author and Analysys Mason

About the author



Tom Rebbeck (Partner) leads Analysys Mason's *Operator Business Services and IoT* research practice drawing on more than 20 years of experience in the telecoms sector. He is based in our London office, but works for clients worldwide. Tom is a specialist on the Internet of Things (IoT) and other enterprise services and has written widely on the role for operators as telecoms markets develop. As well as published research, he has worked on projects for a range of clients – including operators, regulators, industry bodies and vendors. Many of these projects have been supported by original research, such as expert interviews and customer surveys.

Global leaders in TMT management consulting



analysismason.com/what-we-do

Analysys Mason is the world's leading management consultancy focused on TMT, a critical enabler of economic, environmental and social transformation.

We bring together unparalleled commercial and technical understanding to deliver bespoke consultancy on strategy, transaction support, transformation, regulation and policy, further strengthened by globally respected research.

Our clients value our advice which combines deep domain knowledge with global reach and local insight into markets to help them achieve meaningful business results.

We are committed to our clients, employees and communities – contributing to a world where technology delivers for all.

Our research services



Consumer Services

- Fixed Broadband Services
- Mobile Services
- Fixed-Mobile Convergence
- Smart Devices
- Future Comms
- Video, Gaming and Entertainment
- Digital Services



Networks

- Next-Generation Wireless Networks
- Wireless Infrastructure Strategies
- Fibre Infrastructure Strategies
- Operator Investment Strategies
- Telecoms Strategy and Forecast
- Transport Network Strategies



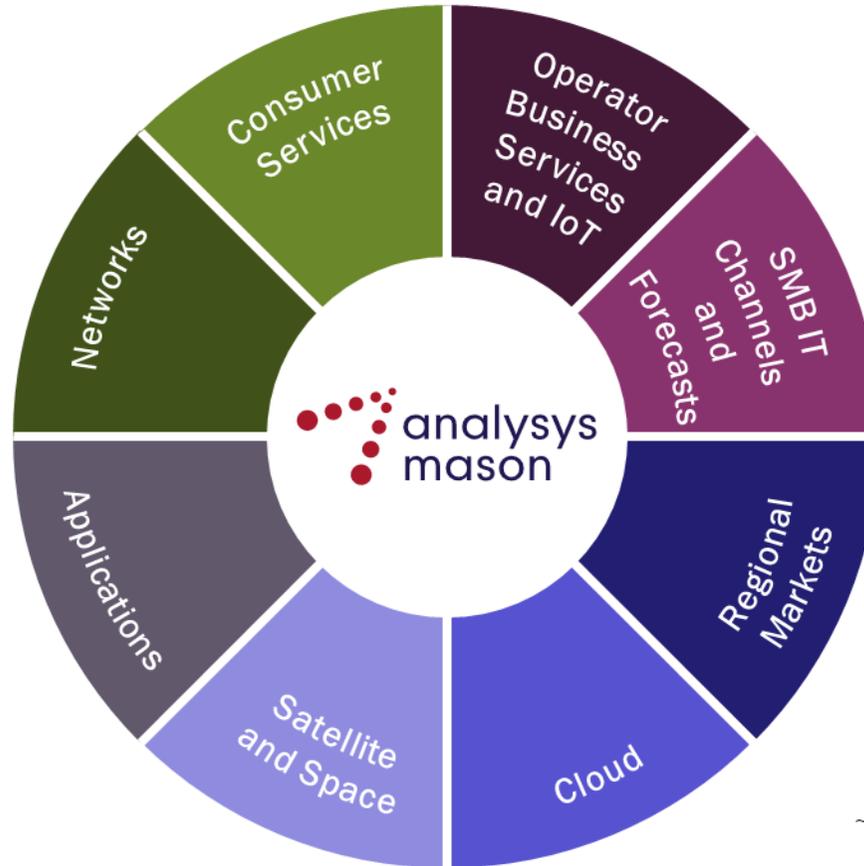
Applications

- Network Automation and Orchestration
- Customer Engagement
- Monetisation Platforms
- Digital Experience
- Automated Assurance
- Service Design and Orchestration
- Telecoms Software Market Shares



Satellite and Space

- Satellite Communications
- Space Applications and Infrastructure



Operator Business Services and IoT

- Enterprise Services
- SME Services
- IoT Services
- Private Networks



SMB IT Channels and Forecasts

- Cyber Security
- SMB Technology Forecaster



Regional Markets

- Global Telecoms Data and Financial KPIs
- Americas
- Asia-Pacific
- Middle East and Africa
- European Core Forecasts
- European Telecoms Market Matrix
- European Country Reports



Cloud

- Cloud Infrastructure Strategies
- Data, AI and Development Platforms
- Edge and Media Platforms
- Multi-Cloud Networking



DataHub

- ~2800 forecast and 280+ historical metrics
- Regional results and worldwide totals
- Operator historical data



analysismason.com/what-we-do/practices/research

Our areas of expertise



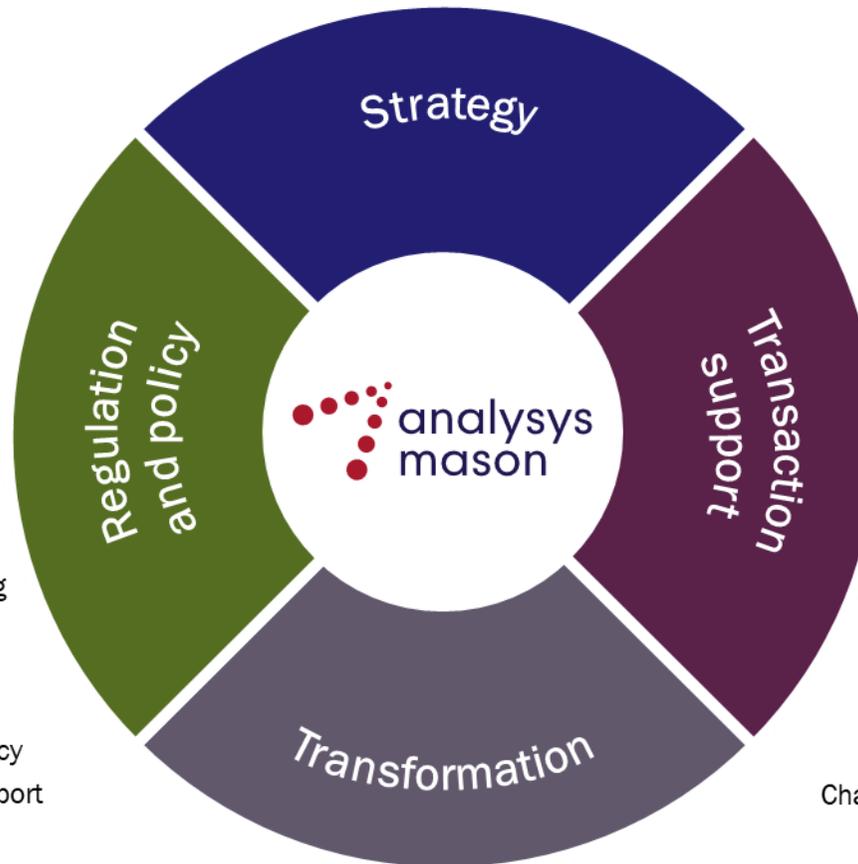
Strategy

- Corporate growth strategy
- Business unit strategy
- Infrastructure strategy



Regulation and policy

- Network and platform
- Public sector broadband intervention
- Accelerating digital transformation of society
- Price controls and cost modelling
- Regulatory accounting
- Regulatory benchmarking and analysis
- Spectrum management and policy
- Expert witness and litigation support
- Postal regulation and policy



Transaction support

- Commercial due diligence and market review
- Technical due diligence
- Post-merger integration
- Periodical business monitoring and loan technical advisory
- Opportunity scouting and pre-deal support



Transformation

- Business transformation
- Digitalisation
- Operational excellence
- Data, BI, steering and insights
- Change and programme management
- Sustainability



analysismason.com/what-we-do/practices

PUBLISHED BY ANALYSYS MASON LIMITED IN **JANUARY 2023**

Analysys Mason Limited. Registered in England and Wales with company number 05177472. Registered office: North West Wing Bush House, Aldwych, London, England, WC2B 4PJ.

We have used reasonable care and skill to prepare this publication and are not responsible for any errors or omissions, or for the results obtained from the use of this publication. The opinions expressed are those of the authors only. All information is provided “as is”, with no guarantee of completeness or accuracy, and without warranty of any kind, express or implied, including, but not limited to warranties of performance, merchantability and fitness for a particular purpose. In no event will we be liable to you or any third party for any decision made or action taken in reliance on the information, including but not limited to investment decisions, or for any loss (including consequential, special or similar losses), even if advised of the possibility of such losses.

We reserve the rights to all intellectual property in this publication. This publication, or any part of it, may not be reproduced, redistributed or republished without our prior written consent, nor may any reference be made to Analysys Mason in a regulatory statement or prospectus on the basis of this publication without our prior written consent.

© Analysys Mason Limited and/or its group companies 2023.