

VODAFONE NEW ZEALAND

NZBCSD



SHAPENZ POLL:

**THE IMPACT OF
TELECOMMUNICATIONS SERVICES
ON NEW ZEALANDERS AND NEW
ZEALAND BUSINESSES**

PRELIMINARY RESULTS

OCTOBER 2008

INTRODUCTION

The purpose of this report is to outline the preliminary results of research conducted in conjunction with the New Zealand Business Council for Sustainable Development (NZBCSD) and Covec. The results included in this report will form the basis of a more detailed body of research.

PURPOSE

The research aims to explore a range of potential economic, social and environmental impacts of telecommunications services including texting and calling from mobile phones, video conferencing, and broadband internet. Specifically, the research aims to examine the impact of telecommunications services on:

- Personal and business related need to travel
- Flexibility of work arrangements
- Workplace productivity
- Workplace costs
- Work / life balance

METHODOLOGY

The ShapeNZ nationwide survey was conducted by the NZBCSD between October 9 and October 20 2008. The survey was administered online to a sample made up of more than 3,500 people who were representative of the New Zealand population and weighted by age, gender, ethnicity, highest level of education, employment level and income.

For a more detailed account the ShapeNZ methodology please contact the NZBCSD.

SUMMARY OF KEY FINDINGS

Need to travel

39% of respondents believe their need to travel has reduced because of calling / texting from their mobile phone.

One in four believe their need to travel has reduced because of using the internet or email from their mobile phone.

Nearly half of all respondents (46%) believe their need to travel has reduced because of their home broadband connection.

Personal opinions of working arrangements / conditions

37% of all respondents believe that their productivity while working has increased because of services such as mobile phones and broadband internet.

35% believe the flexibility of their working arrangements has increased because of services such as mobile phones and broadband internet.

51% say they spend between 1 and 15 hours per week working from home using their broadband connection.

Business opinions of work related need to travel

Just under **one in three** (32%) business decision makers believe calling and texting from mobile phones has reduced their employees' need to travel.

28% of business decision makers believe using internet and email from mobile phones has reduced their employees' need to travel.

35% of business decision makers believe broadband connection at their employees' homes has reduced their employees' need to travel.

32% of business decision makers believe video/teleconferencing has reduced their employees' need to travel.

Business opinions of working arrangements / conditions

Nearly half (47%) of business decision makers think their employees' productivity has increased because of services such as mobile phones and broadband internet.

Half (50%) of business decision makers think the flexibility of their employees' working arrangements has increased because of services such as mobile phones and broadband internet.

65% of business decision makers believe the ease at which they can communicate with their employees has increased because of services such as mobile phones and broadband internet.

34% of business decision makers think that their employees' work / life balance has increased because of services such as mobile phones and broadband internet.

Performance and business costs

62% of business decision makers believe customer service levels have increased because of services such as mobile phones and broadband internet.

35% of business decision makers believe their employee travel costs have decreased because of services such as mobile phones and broadband internet.

56% of business decision makers believe their IT/communications costs have increased because of services such as mobile phones and broadband internet.

One in four business decision makers believe their logistics / transport costs have been reduced because of services such as mobile phones and broadband internet.

Full Results

Theme one: The impact of telecommunications on quality of life and need to travel.

Please think about the way in which you use telecommunication services such as mobile phones and broadband internet, and the impact these services have on your lifestyle.

1. What impact have the following services had on your need to travel (for example by car, plane, for both work and personal reasons)?

Calling / texting from your mobile phone

All respondents

Greatly reduced the need to travel		15%
Slightly reduced the need to travel		24%
I travel the same, no impact		45%
Slightly increased the need to travel		2%
Greatly increased the need to travel		1%
Don't know/ Not Applicable		13%

Using the internet and & email from your mobile phone

All respondents

Greatly reduced the need to travel		11%
Slightly reduced the need to travel		14%
I travel the same, no impact		25%
Slightly increased the need to travel		1%
Greatly increased the need to travel		0%
Don't know/ Not Applicable		49%

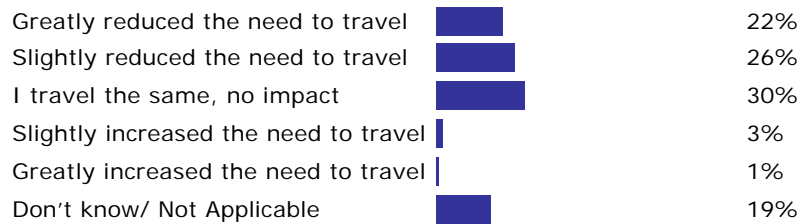
Video calling from your mobile phone

All respondents

Greatly reduced the need to travel		4%
Slightly reduced the need to travel		3%
I travel the same, no impact		16%
Slightly increased the need to travel		0%
Greatly increased the need to travel		0%
Don't know/ Not Applicable		77%

Home broadband connection

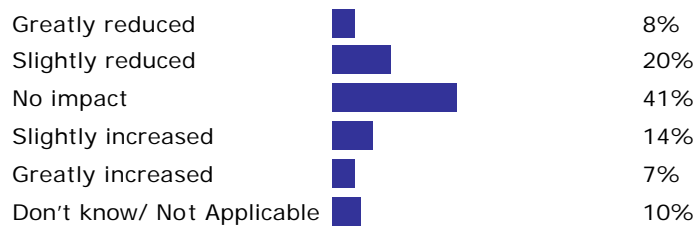
All respondents



2. Overall, what impact telecommunication services such as mobile phones and broadband internet had on the following aspects of your daily life?

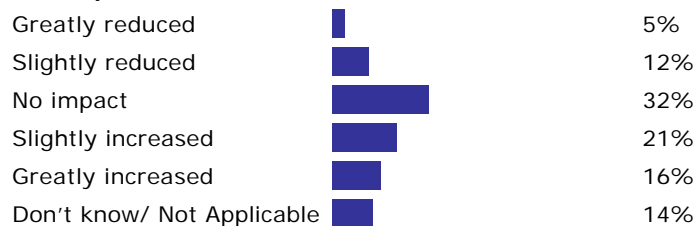
The time you spend working

All respondents



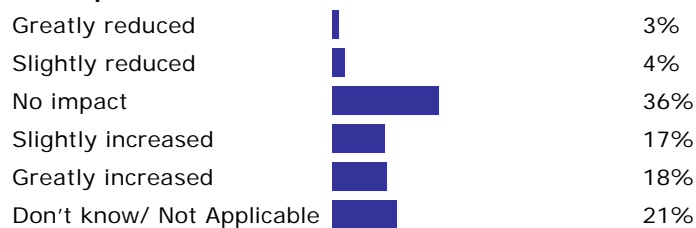
Your productivity while working

All respondents



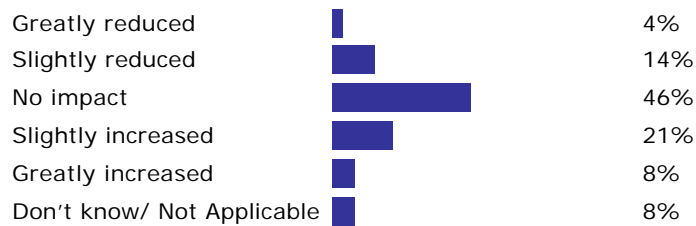
The flexibility of your working arrangements (such as working from home)

All respondents



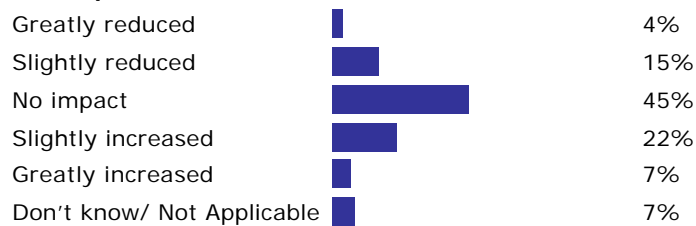
The time you have available to spend with friends / family

All respondents



The time you have available for leisure and hobbies

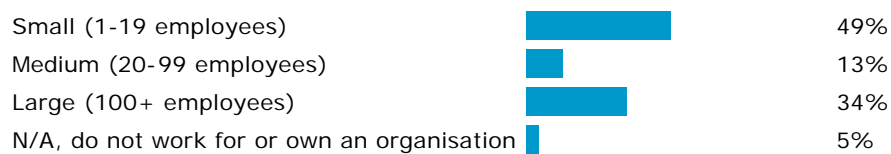
All respondents



Theme two: The impact of telecommunications on an organisation's employees need to travel, productivity, flexibility and working arrangements.

3. What is the size of the organisation you own or work for?

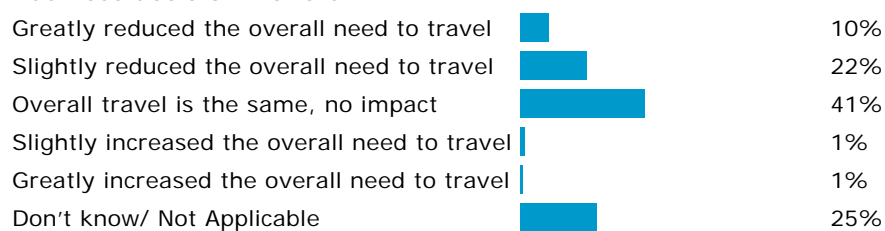
Business decision makers



4. In your organisation, what impact have the following services had on the need for employees to travel (for example by car or plane)?

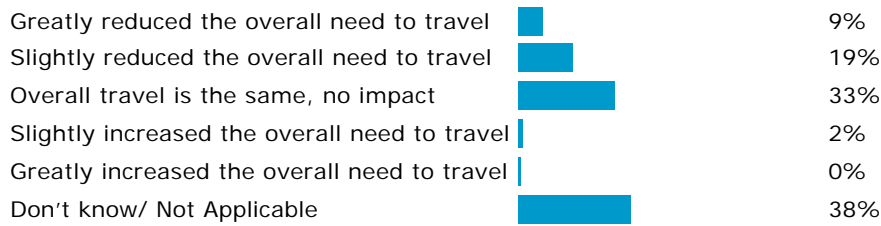
Calling and texting from mobile phones

Business decision makers



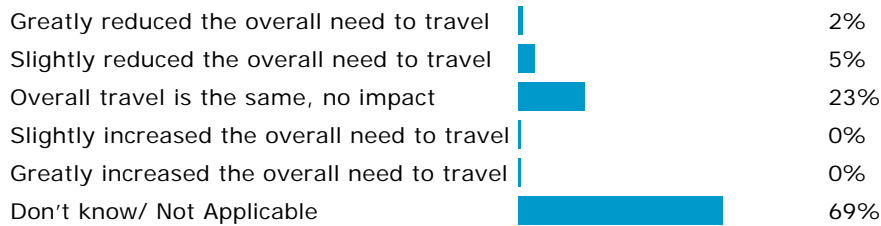
Using internet and email from mobile phones

Business decision makers



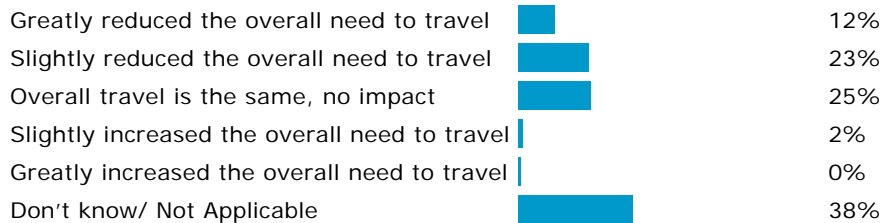
Video calling from mobile phones

Business decision makers



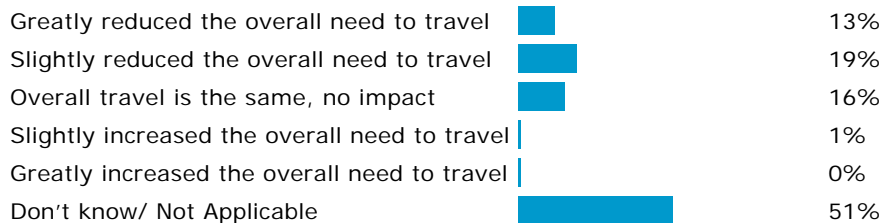
Broadband connection at employees' homes

Business decision makers



Video/teleconferencing

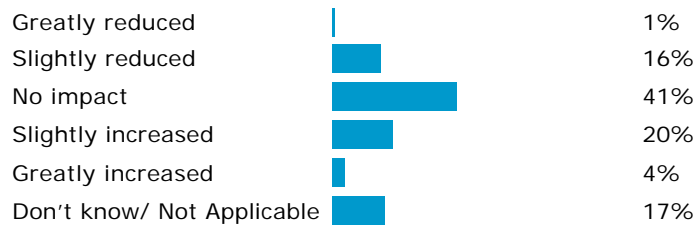
Business decision makers



5. What impact have telecommunication services such as mobile phones and broadband internet had on the following aspects of your organisation?

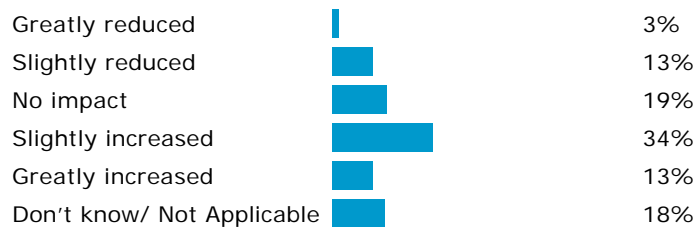
Employees working hours

Business decision makers



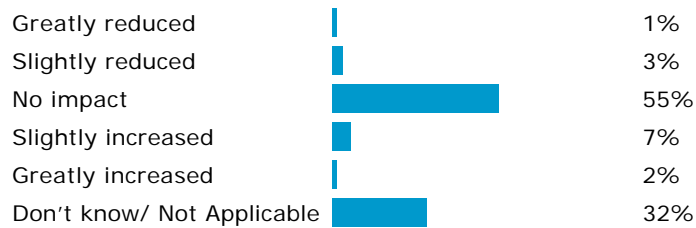
Employees' productivity while working

Business decision makers



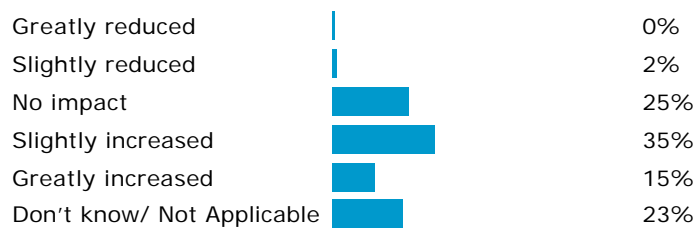
Employee turnover

Business decision makers



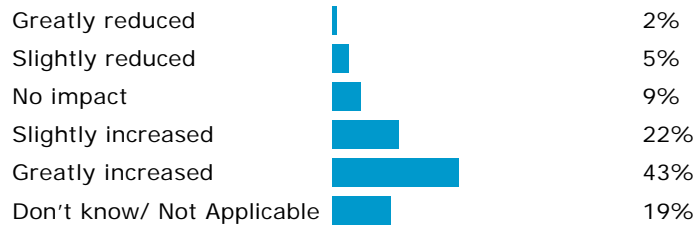
Flexibility of working arrangements (such as employees working from home)

Business decision makers



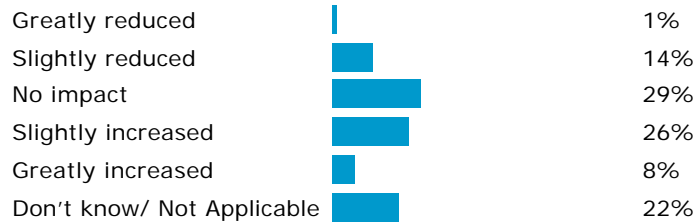
The ease with which you can communicate them employees (for example, when they are not in the same physical location)

Business decision makers



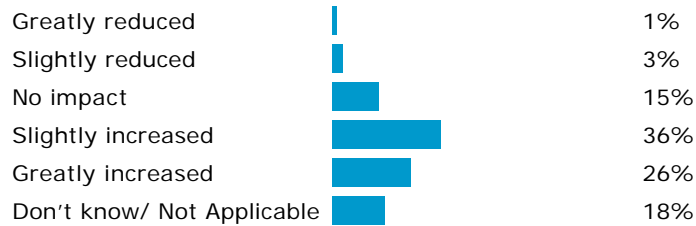
Employees' work / life balance

Business decision makers



Customer service levels

Business decision makers



6. Thinking about costs for your business, what impact have telecommunications services such as mobile phones and the internet had on the following?

Employee travel costs







Business decision makers



Greatly increased		2%
Don't know/ Not Applicable		24%







Office facilities costs

Business decision makers

Greatly reduced		5%
Slightly reduced		15%
No impact		25%
Slightly increased		28%
Greatly increased		6%
Don't know/ Not Applicable		21%







IT/Communications costs

Business decision makers

Greatly reduced		3%
Slightly reduced		11%
No impact		10%
Slightly increased		36%
Greatly increased		20%
Don't know/ Not Applicable		20%







Inventory level costs

Business decision makers

Greatly reduced		2%
Slightly reduced		11%
No impact		38%
Slightly increased		11%
Greatly increased		3%
Don't know/ Not Applicable		34%

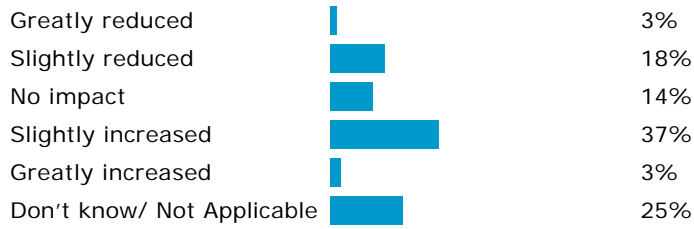
Logistics / transport costs

Business decision makers

Greatly reduced		4%
Slightly reduced		21%
No impact		36%
Slightly increased		8%
Greatly increased		1%
Don't know/ Not Applicable		30%

Total business costs

Business decision makers



Theme three: Home broadband internet access

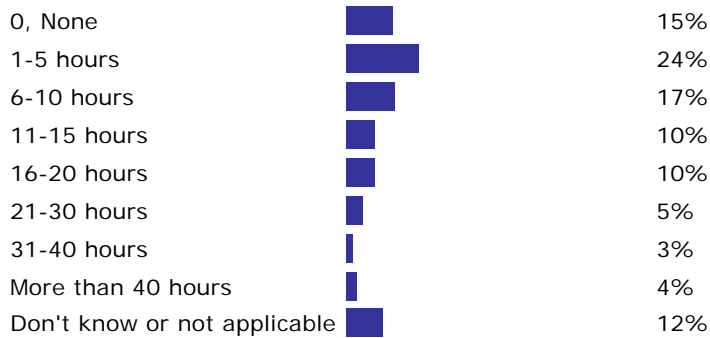
Do you have broadband access at home?

All respondents



On average, how many hours per week would you spend working from home, using your broadband internet connection?

Respondents with broadband at home



What are the main reasons why you don't have broadband at home?









Respondents without broadband at home



Don't know enough about it		6%
Happy with current situation		27%
Other (specify)		11%

If the speed of your household or business broadband service was improved significantly, what things would you use it for that you don't now?

All respondents

Shopping on line		28%
Teleworking / working from home		27%
Entertainment		41%
Gaming		21%
Running a business		18%
None of these, my internet speed is fast enough as it is		28%
N/A, broadband is not relevant to me		9%
Other (please specify)		5%
