South African Telecommunications Sentiment Index

2023

pwc

Foreword

The global telecommunications industry finds itself in an age of reconfiguration. Fundamental shifts in business models and technological advancement create new drivers of value for the industry, but also give rise to new challenges.

We are entering an era in which revenue growth and opportunities for optimisation may be muted, in which the cost of capital is increasing, and in which providers appear to have little pricing power on increasingly commoditised connectivity and data services.[1]

Customer experience is the fundamental and necessary condition for pricing power. Companies must rethink the entire customer experience: the network, the device, sales and service, and the potential to provide value-added products and services.[2]

As telecom leaders attempt to make sense of this continuous reconfiguration and reinvention, addressing a multitude of areas vying for their focus, it is key to remember who is at the heart of their future business successes – the customer.
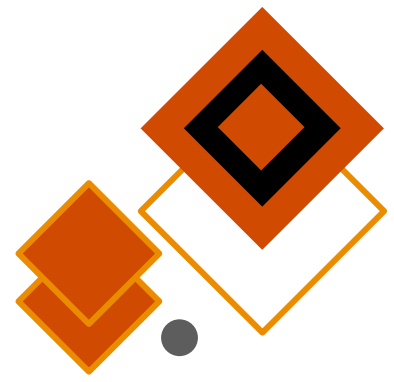
[1] PwC Global Telecom Outlook 2023–2027

[2] PwC's seven urgent innovation priorities for telecom CEOs

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Introduction

We are proud to partner with DataEQ to benchmark consumer sentiment on social media among South Africa's major telecom operators and to provide data-driven insights on how to improve customer experience.

PwC's *2023 South African Telecommunications Sentiment Index* tracked over 1,617,345 public mentions about Cell C, MTN, rain, Telkom and Vodacom from 1 January 2023 to 31 Dec 2023.

This year's index found that, once again, customer sentiment in the telecommunications industry appears to be significantly more negative than other industries such as retail, banking or insurance.

A pattern of basic customer service failures
Telecom customers continue to grapple with the service providers not meeting their basic service needs. Customer service accounted for 27.7% of all industry conversation, with an overwhelming negative sentiment of -87.7 % (2022: -90.6%). Customers are left dissatisfied by a lack of efficient feedback and issue resolution, particularly when contacting call centres. The industry made little progress from the prior year to address this key customer pain point.

External pressures compound
2023 saw the highest levels of load shedding experienced in South Africa to date. There was a direct correlation between the average load shedding stage and the volume of network quality complaints received by the industry. Negative sentiment around network quality was further exacerbated by subsea cable failures causing internet connectivity issues.

Clear opportunities for improvement
Telecommunication companies should leverage artificial intelligence (AI) to enhance customer service. AI-driven tools are designed to efficiently handle basic or routine customer inquiries, provide instant assistance and streamline support processes, thus improving overall customer satisfaction.

Additionally, telecom companies should capitalise on the strength of their social impact initiatives. By measuring and showcasing these initiatives, telecoms can cultivate positive reputational sentiment among customers, fostering trust and loyalty in their brand.

> "
> This year's index found that, once again, customer sentiment in the telecommunications industry is significantly more negative than other industries.

Key findings

While **customer experience showed little improvement**, the industry thrived on reputational campaigns and promotional content from influential authors. As such, telecoms should continue leveraging marketing strategies to drive reputational positivity and focus on improving customer experience.

———————

The majority of customer complaints were directed at call centres. This suggests that, despite the growing availability of digital channels, telecoms continue to rely heavily on telephonic support.

———————

Telecoms looking to differentiate their contact experience should consider investing more in mobile application support in order to build a more seamless customer experience. **Mobile app was the fourth most popular channel** and the least negative channel.

———————

Network coverage complaints remained prevalent across all telecoms. With 335 days of load shedding, consumer perceptions of network quality did not improve and drove operational risk.

———————

Telecoms should prioritise addressing key pain points highlighted in product discussions, focusing on improving mobile data reliability, simplifying SIM card processes, and enhancing contract management systems.

———————

Financial services on offer from telecoms had varying performances, with mobile money driving interest, but insurance driving risk and complaints. **Financial services are an area for growth and future focus**. Telecoms should leverage interest in mobile money and explore ways to reduce dissatisfaction with insurance.

———————

A significant number of consumers don't feel that telecoms are treating them fairly, specifically due to products that aren't fit for purpose and shortfalls in customer service. As a result, there was a doubling of risk linked to downtime, with consumers being forced to rely on multiple networks to ensure connectivity.

01

Net Sentiment Overview

-18.8%

Overall Net Sentiment for the Telecommunications industry.

Telecoms lag in terms of customer sentiment

Dropping 4.8 percentage points from last year, South African network providers continued to achieve a considerably lower average Net Sentiment score than local banks, insurers and retailers[1]. The only industry that ranked behind telecoms in Net Sentiment was that of Internet Service Providers (ISPs). Interestingly, both telecoms and ISPs are prone to network interruptions – something that is explored in more detail later.

Cross-industry* view: Public Net Sentiment

ISPs	Telecommunications	Retail	Insurance	Banking
-41,2%	-18,8%	8,8%	16,1%	23,5%
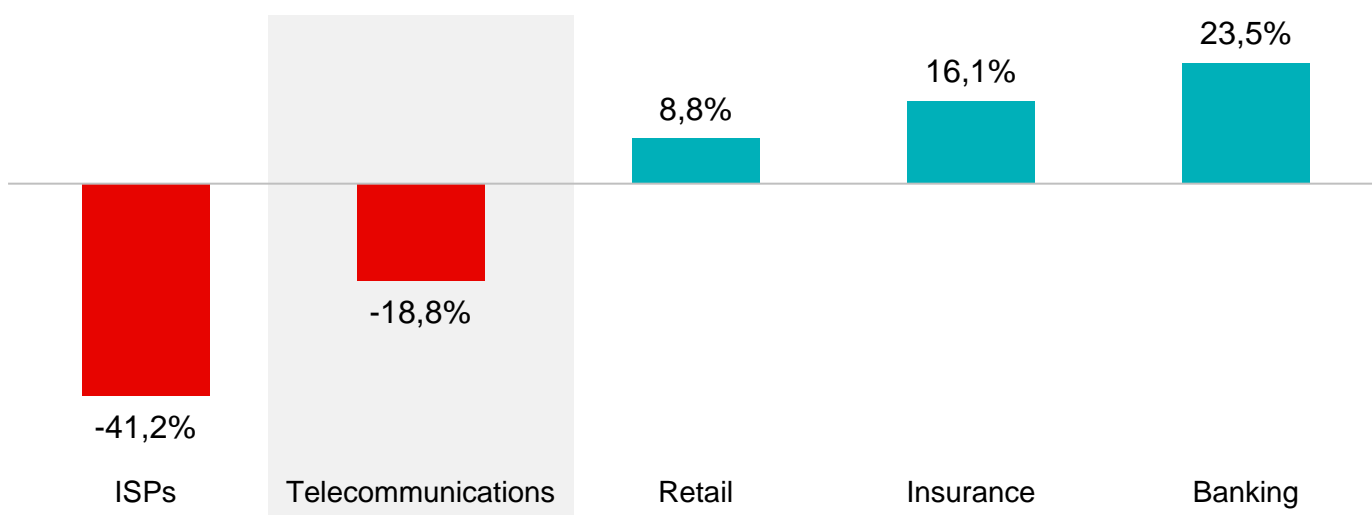
Net Sentiment for each industry relates to most recently published index

- South African **ISPs'** low sentiment was largely driven by service issues and network quality complaints.
- South African **retailers** saw increased interest in quality, convenience and supporting local.
- Local **insurers** owed their second-place ranking to the growing use and positivity seen on Hellopeter, and the beneficial impact of value-added services.
- **Banks** outperformed by leveraging campaigns and positive feedback about staff, products and loyalty schemes to offset negative operational feedback.

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[1] *Average public Net Sentiment for the banking industry references results reported on the 2023 South African Banking Sentiment Index, which analysed conversation about eight banks over the 1 August 2022 - 30 September 2023 period.*

Average public Net Sentiment for the insurance industry references results reported on the 2022 South African Insurance Sentiment Index, which analysed conversation about fifteen insurers over the 1 April 2022 – 30 March 2023 period.

Average public Net Sentiment for the food retail industry looks at conversation about South Africa's four largest food retailers over the 1 January 2022 – 31 December 2022 period.
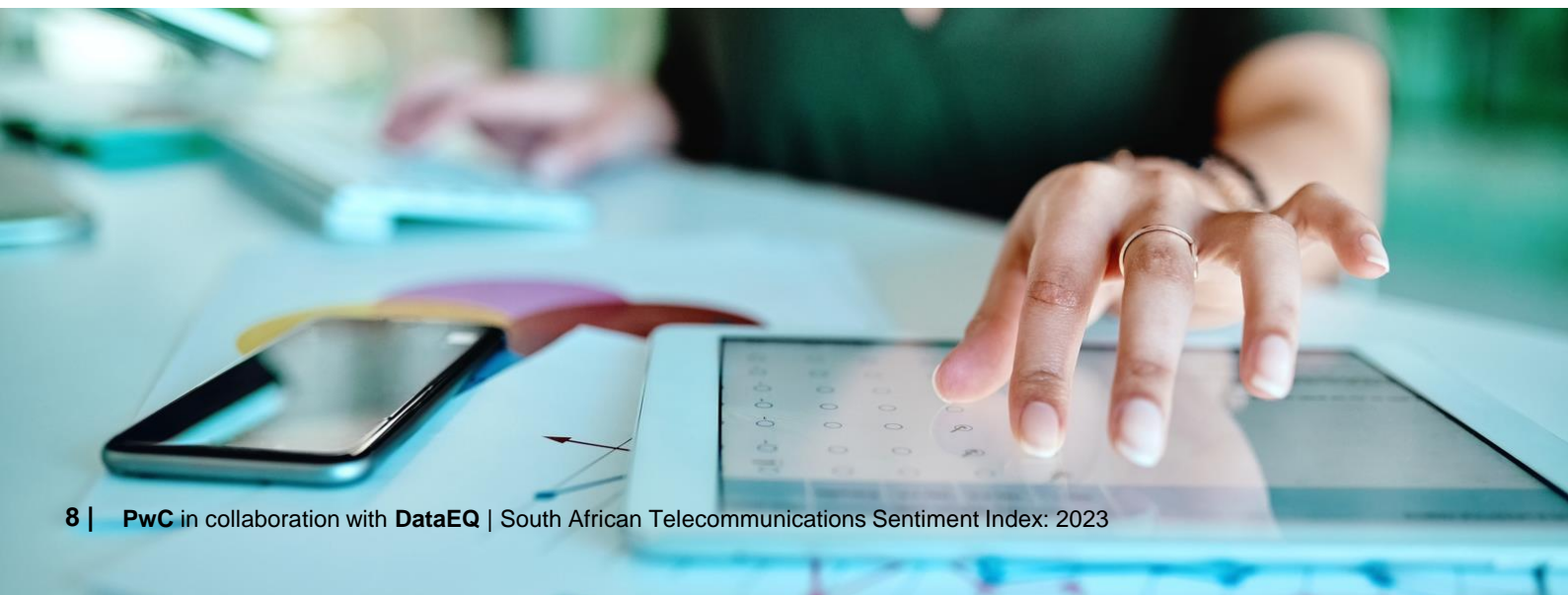
PwC Future Watch:

The South African Banking industry achieved the highest Net Sentiment in South Africa. This was predominantly driven by reputational positivity, however the industry also received the lowest complaint ratio among the markets in review. There has been significant progress in the industry's digital experience as the capabilities of self-service functionalities continue to enhance customer experience, but the shortcomings are still driven by customer service. This is not isolated to banking and is a trend we're seeing across most of the major industries globally. However, when compared to other banking markets such as the UAE, Kenya and the UK, SA banks still generated the most positive interactions with customers.
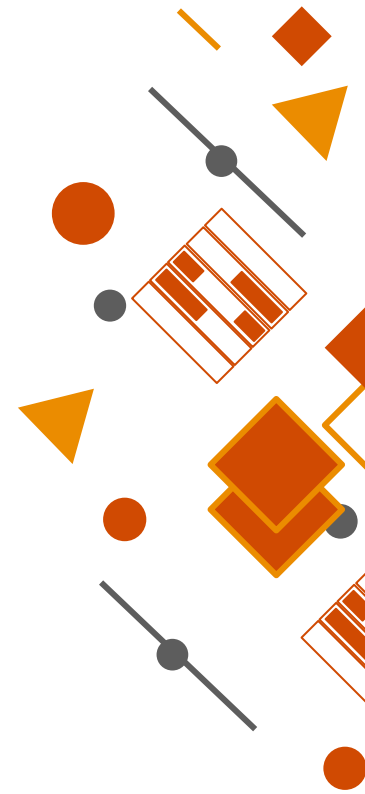
Due to the increased competition across all sectors in the country, customer service is a key differentiating factor and one that consumers are constantly questioning in terms of overall value.

80%
of customers say that speed, convenience, knowledgeable help and friendly service are the most important elements of a positive customer experience[2].
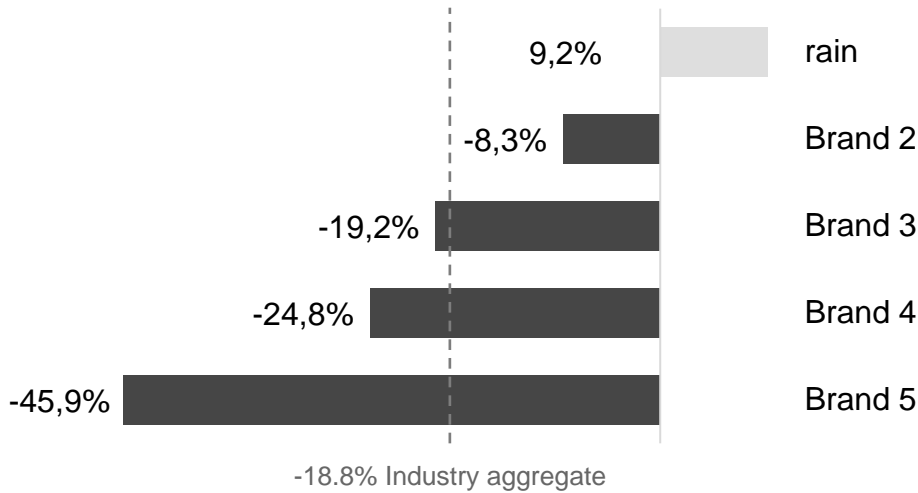
[2] *https://www.pwc.com/us/en/services/consulting/library/consumer-intelligence-series/future-of-customer-experience.html*

rain claims first place

In addition to being the only telecom to see a year-on-year Net Sentiment improvement, rain stood out as the only provider to achieve a net positive score. The network provider has seen consistent improvement year-on-year with a marked 67.5 percentage point jump in public Net Sentiment since 2020.

2023 public Net Sentiment ranking

Brand	Net Sentiment
rain	9,2%
Brand 2	-8,3%
Brand 3	-19,2%
Brand 4	-24,8%
Brand 5	-45,9%

-18.8% Industry aggregate

rain takes top spot for operational and reputational sentiment

rain exhibited major improvement, jumping four places to rank first in operational Net Sentiment this year. This was driven by the effective use of interactive competitions that helped elicit positive feedback towards products and offerings. 33.8% of rain's operational positivity was driven by Hellopeter reviews, with many of rain's customers praising staff performance.

When looking at **Operational Net Sentiment**, rain was

20pp

ahead of the rest of the industry

rain retained its first-place lead in reputational Net Sentiment, having registered the greatest improvement and scoring 32.5 percentage points more than industry peers.

rain	Rest of Industry
48.1%	**15.6%**
Net Sentiment	Net Sentiment

Reputational conversation bolsters public perception for top performers

The industry thrived on reputational campaigns and promotional content from influential authors, boosting public Net Sentiment by 13.7 percentage points.

Net Sentiment comparison

-18,8%

-32,5%

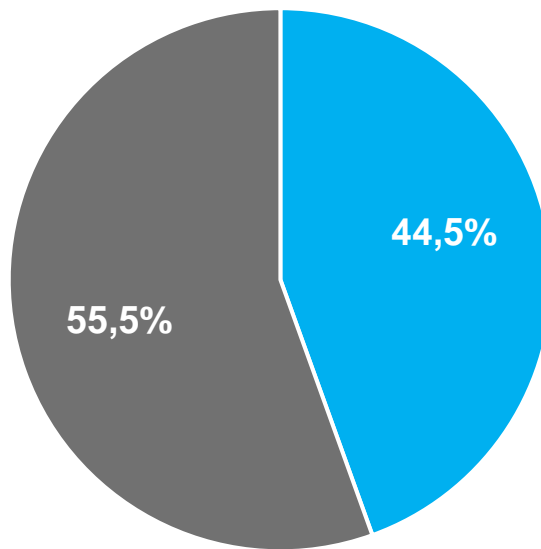■ Net Sentiment   ■ Excluding campaigns
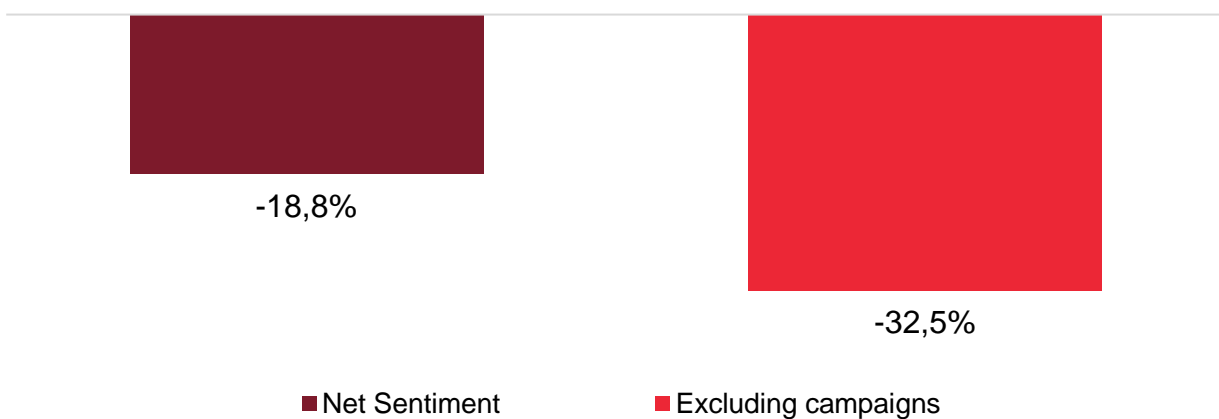
This was particularly impactful for the top performers, where the proportion of conversation from customers pertaining to reputational issues outweighed those pertaining to operational matters. This, along with the positive nature of reputational mentions, bolstered public perception.

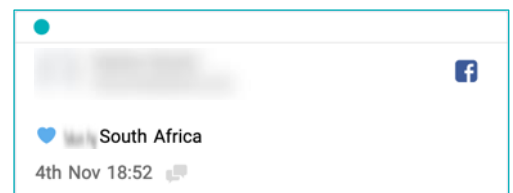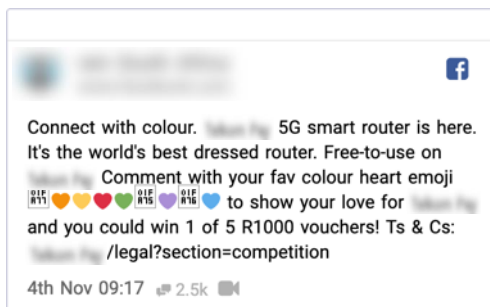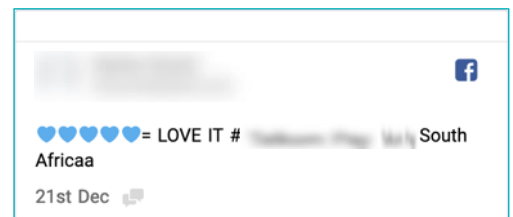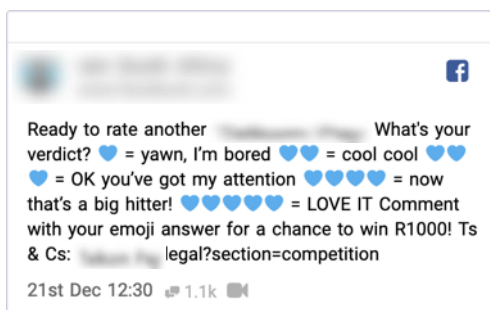## Well-orchestrated and engaging campaigns drove positivity

rain cleverly launched competitions that required participants to use positive emojis for entry, effectively engaging consumers. These interactive contests ranged from rating cricket videos with emojis and expressing colour preferences for 5G Smart routers to sharing weekend plans with rainOne. Such initiatives not only boosted rain's reputation positively but also educated consumers about their products and deals.

Particularly, rain's association with the blue heart emoji stood out. The company frequently encouraged the use of this emoji in competition entries, leading to a unique trend where consumers began adding blue hearts to their entries, even when not specifically asked. This trend was notable, with nearly half of all positive reputational mentions featuring a blue heart emoji, highlighting its impact on enhancing rain's brand public perception.

Contribution of blue heart emojis to reputational positivity

44,5%

55,5%

■ Positive blue heart emojis   ■ Other reputational positivity

Ready to rate another ▬▬▬▬▬ What's your verdict? 💙 = yawn, I'm bored 💙💙 = cool cool 💙💙 💙 = OK you've got my attention 💙💙💙💙 = now that's a big hitter! 💙💙💙💙 = LOVE IT Comment with your emoji answer for a chance to win R1000! Ts & Cs: ▬▬▬ legal?section=competition

21st Dec 12:30 1.1k

💙💙💙💙💙= LOVE IT # ▬▬▬▬ ▬▬ South Africaa

21st Dec

Connect with colour. ▬▬▬ 5G smart router is here. It's the world's best dressed router. Free-to-use on ▬▬▬ Comment with your fav colour heart emoji 🏁💙💙💚🏁💜🏁💙 to show your love for ▬▬▬ and you could win 1 of 5 R1000 vouchers! Ts & Cs: ▬▬▬ /legal?section=competition

4th Nov 09:17 2.5k

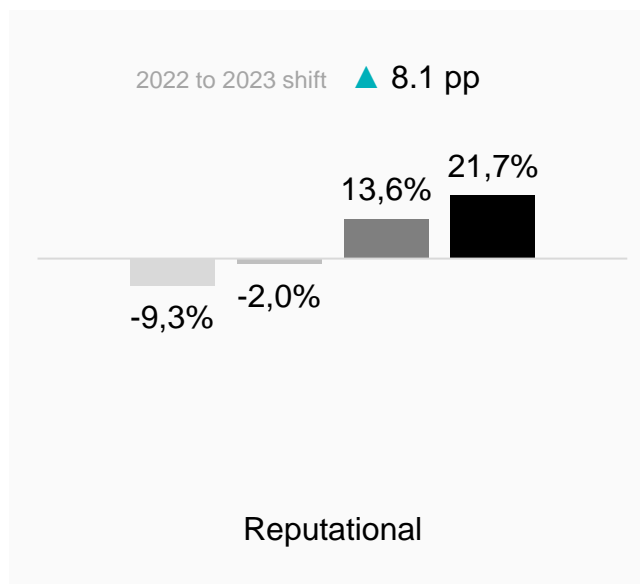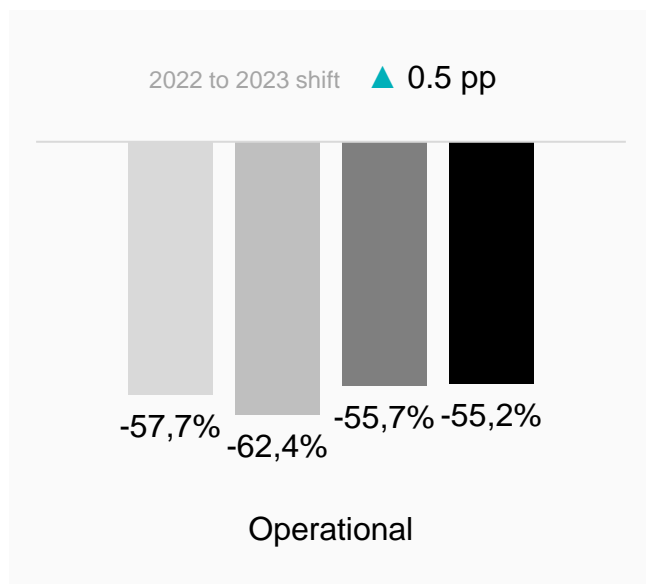💙 ▬▬ South Africa

4th Nov 18:52

Operational plateau hinders customer satisfaction

Despite telecoms' strides in reputational sentiment, any potential for overall Net Sentiment improvement was stunted by the industry's plateau in operational sentiment. A record-breaking 332 days of load shedding in 2023, which negatively impacts operators' abilities to keep networks running, likely hindered customer experience significantly.

Industry view: Year-on-year Net Sentiment breakdown
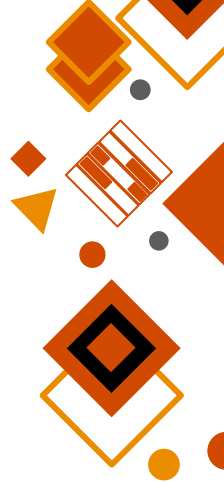
-18.8% Net Sentiment

Operational
2022 to 2023 shift ▲ 0.5 pp

-57,7%
-62,4%
-55,7% -55,2%

Operational

Reputational
2022 to 2023 shift ▲ 8.1 pp

-9,3% -2,0%
13,6% 21,7%

Reputational

▪ 2020 ▪ 2021 ▪ 2022 ▪ 2023

02

Customer Service

# Customer service remains a key industry pain point

South African telecoms suffered the lowest customer service Net Sentiment when compared to other industries.

27.7%

Proportion of conversation related to customer service	**Customer service** accounted for **27.7%** of industry conversation and carried a Net Sentiment of **-87.7%.**

Cross industry view: Customer service Net Sentiment

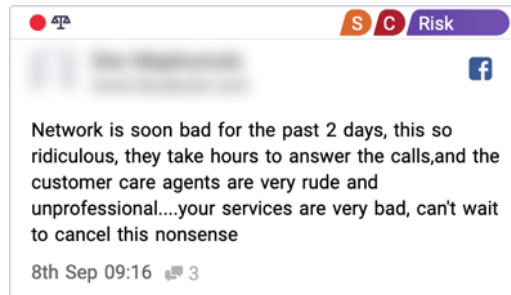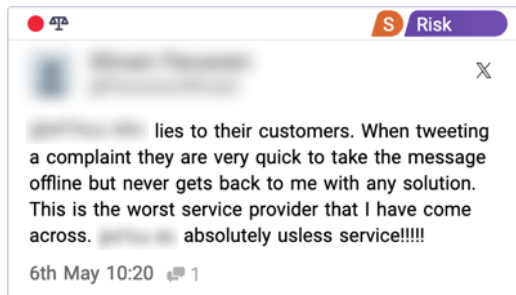| Telecommunications	Banking	Insurance
-87,7%	-19,3%	25,3%
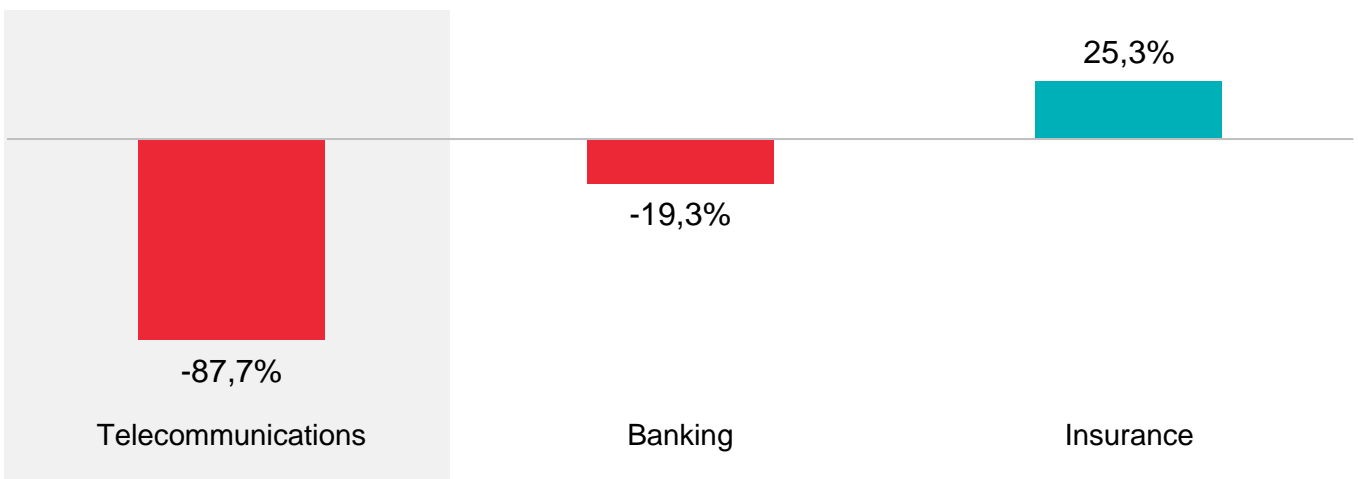
Telecoms' operational scores were negative across the board, signalling industry-wide challenges relating to customer service. This was largely driven by a lack of efficient feedback from business representatives, with staff competency a major driver of customer service complaints.

Industry view: Drivers of customer service conversation

	Industry volume	Industry Net Sentiment
Staff competency	38.9%	-81.8%
Feedback given by a brand representative	27.8%	-93.2%
No response received	25.2%	-99.7%
Staff conduct	21.6%	-79.7%
Multiple contacts	16.0%	-99.5%

38.9%

of customer service complaints related to **staff competency**

lies to their customers. When tweeting a complaint they are very quick to take the message offline but never gets back to me with any solution. This is the worst service provider that I have come across. _____ absolutely usless service!!!!!

6th May 10:20 1

Network is soon bad for the past 2 days, this so ridiculous, they take hours to answer the calls,and the customer care agents are very rude and unprofessional....your services are very bad, can't wait to cancel this nonsense

8th Sep 09:16 3

PwC Future Watch:

PwC's global telecom trends indicate the increased investment and prioritisation of key growth agendas, which are maturing in the African market:

- Well executed hyper-personalisation driven by the digital-native service providers like Spotify and Netflix
- Digital technologies like eSIMS and eKYC that are allowing telecoms to move faster, improve reliability and scale, and provide better offerings for customers
- Advanced analytics to break into new market segments and uncover insights to accelerate innovation
- Predictive care to proactively mitigate queries and complaints, reducing churn risk
- Transformation journeys toward true customer-centricity

Interestingly, what the Index data suggests is that the majority of customer pain points are related to the fundamental service delivered through human interaction. In many instances the staff are not empowered with the right visibility, and the customer journey may be broken as it's organised around internal processes and systems as opposed to the customers' needs. A key first step is to really evaluate the journey end-to-end and to prioritise the parts of the journey that can be redesigned to deliver a better employee and customer experience outcome.

Through our Customer Service Assessment, a rapid discovery exercise, we identify the possible areas of intervention in the service operating model across people, process and technology – providing targeted initiatives that will improve the service experience and the capabilities required to execute them.
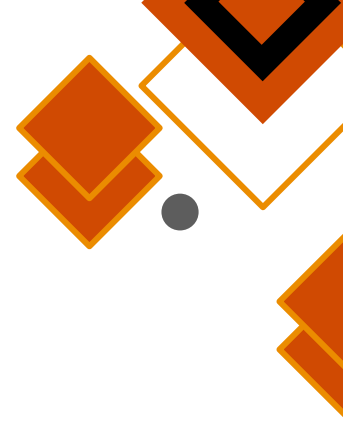
Market Insights

When experience isn't considered, there is a high cost to pay

Ignoring user experience can derail even the most innovative projects, leading to underperformance and wasted resources.

Lost Market Opportunity

70% of online businesses fail due to bad useability. Projects that neglect user experience can fail to meet market needs, leading to poor adoption and revenue loss.

Uxeria

Reduced Customer Loyalty

55% of respondents would stop buying from a brand after several bad experiences. Without a focus on experience, customers are less likely to remain loyal, affecting long-term profitability.

PwC

Increased Development Costs

Companies that lead in UX outperform the S&P 500 index by **228%**. Late feasibility checks and not designing with user needs in mind increase revisions and bug fixes, raising overall project costs.

Design Management Institute

Call centres are cause for concern

Cited in over half of the industry's references to channels, call centres received the second lowest Net Sentiment score. This suggests that the call centre is often the first channel customers attempt to reach out to when experiencing issues. However, the low Net Sentiment towards this channel signifies that customers are often left dissatisfied.
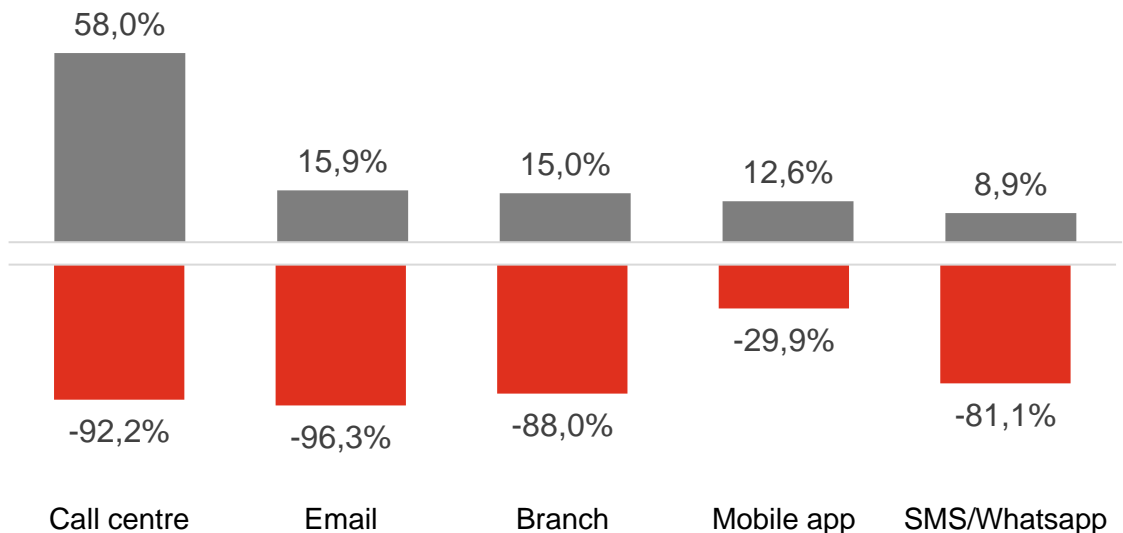
Call centre accounts for **58%** of channel conversation with NS of **-92.2%**

Mobile App was the most positively spoken about at **-29.9%**

Industry view: Top 5 - Channel Volume and Net Sentiment

	Call centre	Email	Branch	Mobile app	SMS/Whatsapp
Volume	58,0%	15,9%	15,0%	12,6%	8,9%
Net Sentiment	-92,2%	-96,3%	-88,0%	-29,9%	-81,1%

Despite still receiving a net negative score, the mobile app was the best performing channel. Telecoms looking to differentiate their contact experience should consider investing more heavily into mobile app support to build a more seamless customer experience.

PwC Future Watch:

The channel analysis indicates a "key channel dependency" on the traditional service model, evident in consumers trying to resolve queries and issues through the call centre and email. There is opportunity to reduce the strain on these channels through:

– The implementation of AI-powered service for efficient resolution of large volumes of low-touch queries, and

– Streamlining the back-office operations, such as billing, through hyper-automation to reduce manual intervention and rework.

Both interventions should free up service agents to focus on inquiries and complaints that require a human touch, leading to more efficient and effective customer service.

Finally, becoming more intentional about the mobile app experience and self-service capabilities is another great use case to create efficiencies within service delivery, improve customer satisfaction and create a personalised journey toward self-sufficiency.
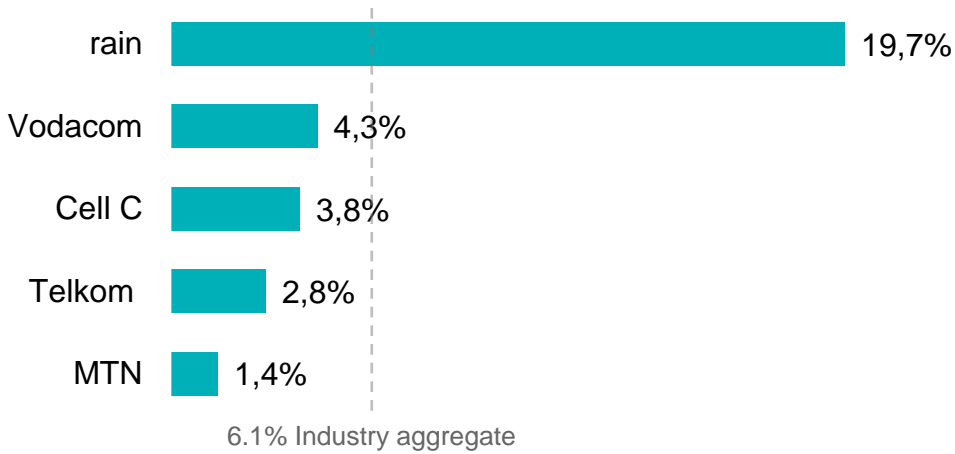
Our Experience Consulting practice has a dedicated design studio to assist clients in designing and implementing UI/UX initiatives that are desirable, viable and feasible in order to drive the long-term growth of digital interaction and adoption.
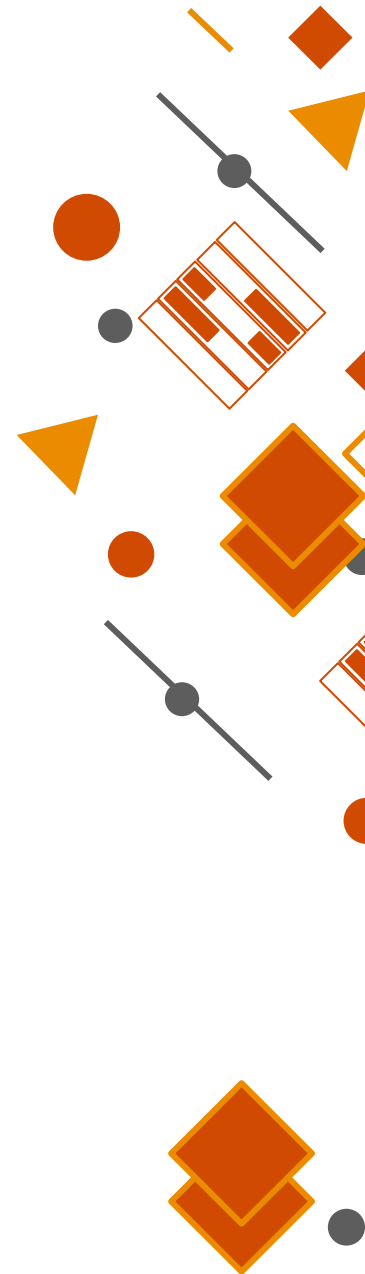
rain rises above the fray

Rain's customer service outperformed the industry, resulting in a customer service Net Sentiment score of 30 percentage points higher than competitors.

Competitor comparison: Positive customer service sentiment in operational conversation

Operator	Positive sentiment
rain	19,7%
Vodacom	4,3%
Cell C	3,8%
Telkom	2,8%
MTN	1,4%

6.1% Industry aggregate

> **Service**
>
> We received very good customer service by ▓▓▓▓ excellent service really couldn't be any happier (5 star)
>
> 23rd Apr 16:59 💬 1

> **Service**
>
> Great service n the guy was helping me was patient I understand everything in my language (5 star)
>
> 25th Apr 💬 1
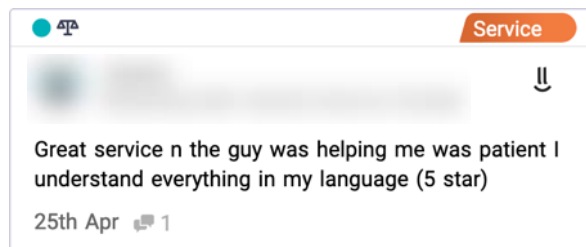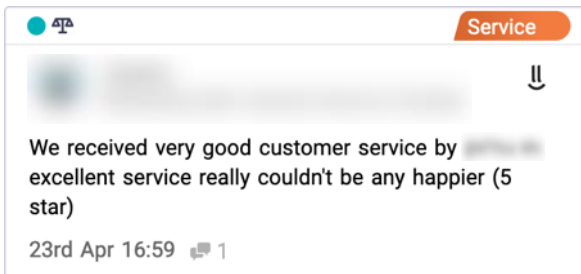
Over a third of rain's operational positivity consisted of positive Hellopeter reviews. This overshadowed the operator's turnaround time and network quality complaints.
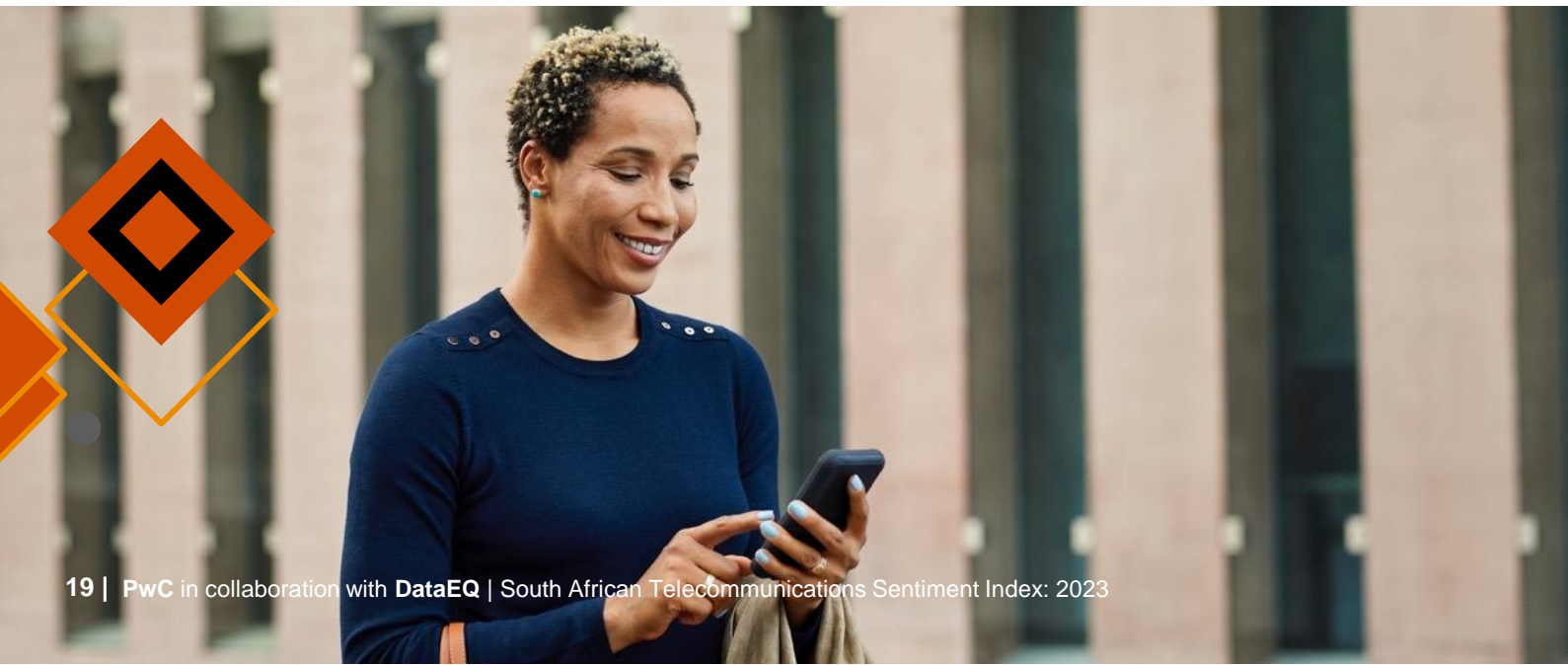
When excluding Hellopeter reviews, **Net Sentiment** towards rain's customer service declines by just over

30pp

rain: Distribution of positive customer service conversation

- Hellopeter: 85,7%
- Facebook: 10,4%
- X: 3,8%
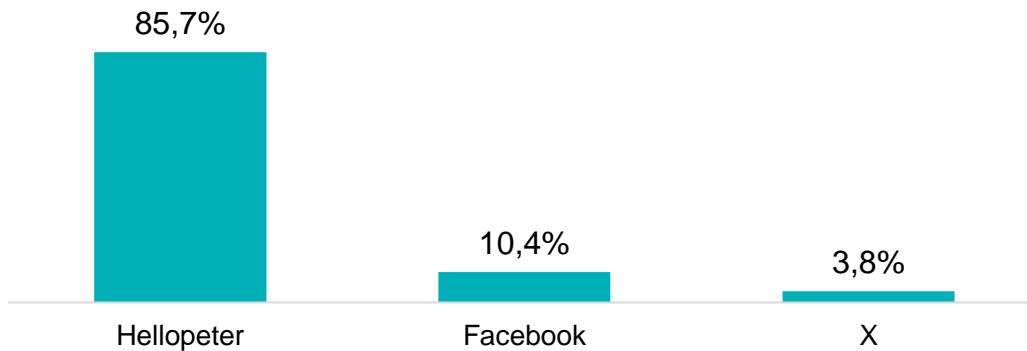
When excluding Hellopeter reviews, Net Sentiment towards rain's customer service dropped significantly, placing it in line with the rest of the industry. The lack of impact (0.1%) of Hellopeter on customer service Net Sentiment for the rest of the industry highlights a potential missed opportunity for other operators to garner positive reviews on the platform.

Product conversation is reflected negatively

Product-related conversation scored poorly in Net Sentiment and contributed just over 40% of overall telecoms conversation. Data (mobile or bundles) was a popular point of discussion, but scored negatively for the most part. Consumers raised issues such as data not being loaded despite payment, difficulties in purchasing data via mobile apps, missing data, data expiry or depletion, and data bundles that did not work.
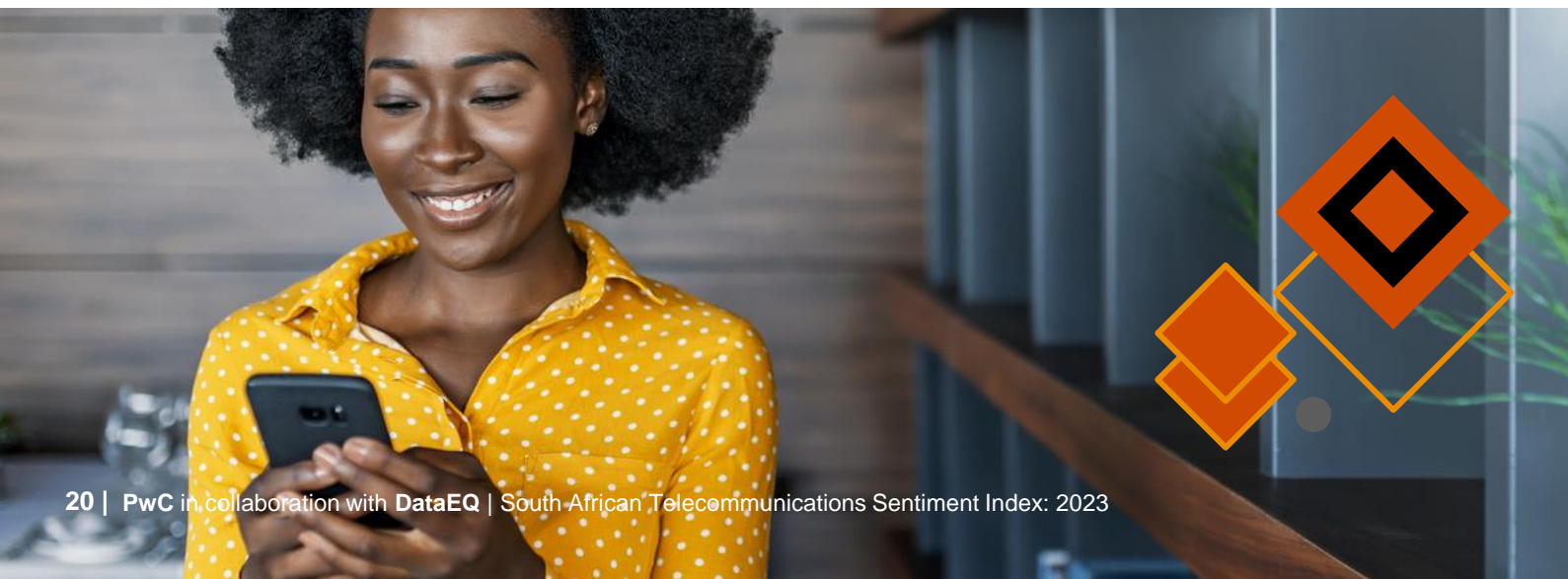
Industry view: Drivers of products conversation

	Industry volume		Industry Net Sentiment	
Data (mobile or bundles)	35.6%	▬	▬	-28.2%
Contracts subscriptions or plans	30.3%	▬	▬	-38.3%
Mobile internet (e.g. LTE)	14.9%	▪	▪	-8.9%
SIM card	13.4%	▪	▬▬▬	-61.46%
Mobile devices	11.6%	▪	▬	-29.34%

rain was the only brand to see a positive Net Sentiment regarding mobile data. This was a result of responses to various brand posts expressing interest and asking questions about getting a rain package as well as expressing appreciation for their new data package. Furthermore, positivity was elicited by competitions that encouraged consumers to share variations of a heart with the hopes of winning a cash prize.

PwC Future Watch:

Operational improvements that can drive increased positive sentiment and reduce the product pain points experienced by consumers include simplifying SIM card processes, creating a seamless KYC and upgrade journey, and enhancing contract management and billing systems.

Contract and billing complaints can be addressed by ensuring Customer Relationship Management systems integrate properly into the overall telecom IT infrastructure, especially where legacy systems are involved.

03

Network

## 33% of customer complaints speak to network quality

Network quality complaints remained prevalent across all telecoms. These complaints included reports of extended periods with no connection, lack of communication from the brand, unclear estimated time of resolution, unfulfilled promises, and frustration with data expiration without use. Customers purchasing voice or data bundles, or subscribing to packages, faced the risk of forfeiting their bundles due to poor network quality, leading to dissatisfaction with paying for unused services.

Is load shedding to blame?

Analysis of network quality complaints in relation to load shedding reveals a direct correlation: as the average load shedding stage increased, so did the percentage of network quality issues throughout the year. Interestingly, despite a decrease in average load shedding stages, there was a surge in network quality complaints between August and October. Reports emerged in August of subsea cable failures, which likely contributed to the overall decline in network quality and an increase in complaints.

Industry view: Load shedding stages overlayed with network quality complaints
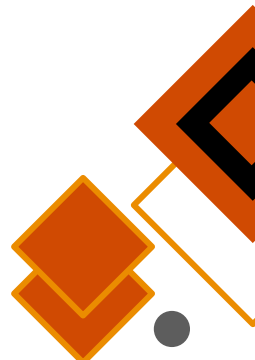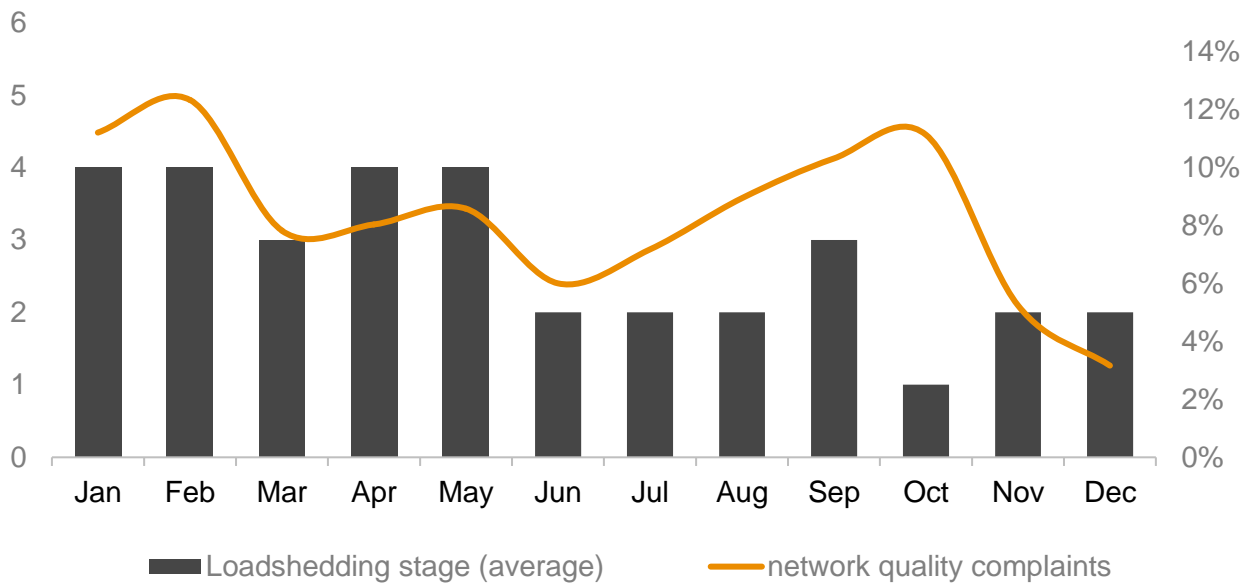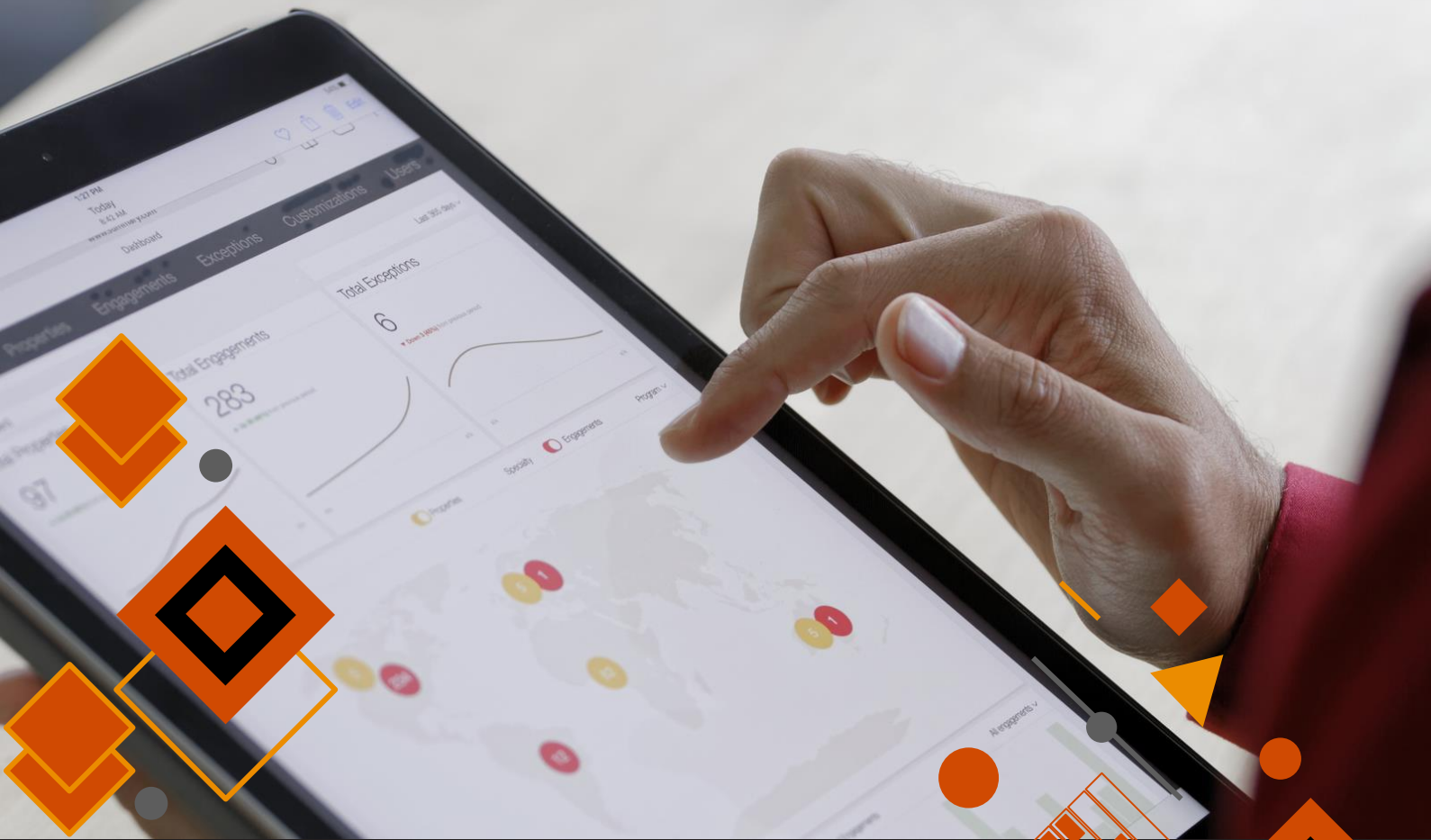
04

Industry response benchmark

Actionable social conversation is on the rise

As part of the analysis, the DataEQ Crowd identified the most valuable customer interactions via priority tags assigned to the data. These interactions should be considered for action by social customer care teams as they could warrant a response. The four priority tags relate to: Reputational or operational risk (Risk); Acquisition opportunities (Purchase); Retention improvement or churn risk reduction (Cancel); and Customer service feedback and requests (Service).

45.3% of social conversation was actionable

Across the industry, actionable social conversation is increasing – largely driven by increasing risk conversation. This year, almost half of consumers' conversation was actionable, which is approximately 14 percentage points more than last year. This means that more conversation warranted the action of a service agent this year than seen last year.

While rain was the most responsive, Cell C was the quickest to address customer queries
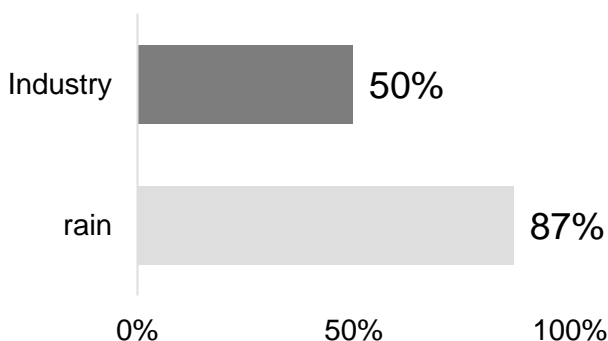
rain replied to over **87%** of actionable conversation, well above the **49.9% average**
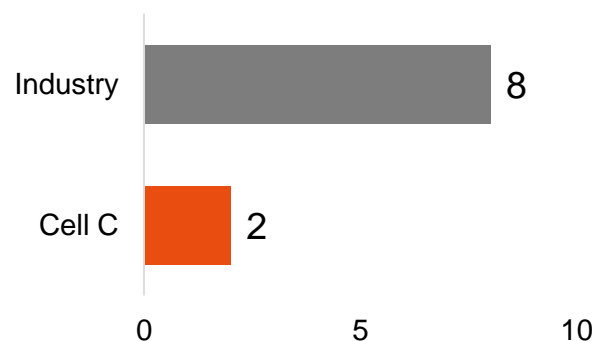
Cell C replied to actionable conversation **4 times faster** than the industry average
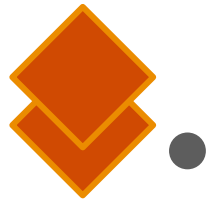
Response rate

Industry	50%
rain	87%

0%   50%   100%

Response time (hrs)

|	
Industry	8
Cell C	2

0   5   10

05

Governance

Good corporate governance extends beyond mere compliance; it's a commitment to ethical leadership and sustainable business practices that consider environmental, social, and governance (ESG) principles. It involves proactive risk management, focusing on operational and reputational integrity, and maintaining high standards of market conduct. This approach ensures alignment with stakeholder values and builds trust, fostering transparency and accountability.

Social media offers the unique standpoint of the consumer, not just in terms of complaints, but also positive outcomes. As telecoms continue to breach the financial services space, it is crucial to have the systems in place to ensure compliance with frameworks like the Financial Sector Conduct Authority's (FSCA) Treating Customers Fairly (TCF).

## 8 out of 10 complaints about telecoms are relevant to TCF

Just over a third of all conversation referenced one of the Treating Customers Fairly (TCF) outcomes. A large majority of this TCF conversation was negative as 79.5% of the complaints were about a TCF outcome, pointing to possible regulatory risk in the industry.

Industry view: Ratio of TCF conversation

34,1%
65,9%
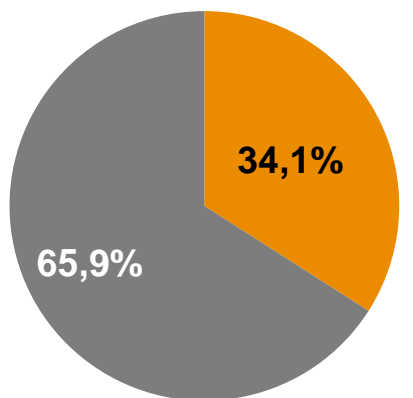
■ TCF ■ Other conversation

Industry view: Proportion of TCF mentions in complaints

	2022	2023
TCF complaints	80,7%	79,5%
Other complaints	19,3%	20,5%
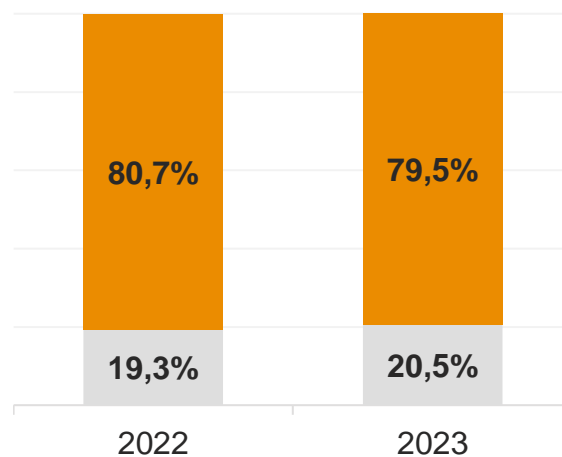
■ TCF complaints ■ Other complaints

Most of these TCF complaints spoke about outcome 5: performance and service. This reiterates the customer service frustrations that the industry continues to grapple with.

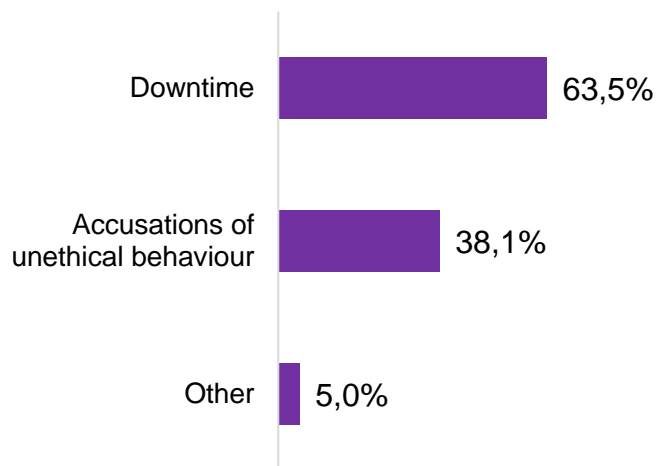## Risk conversation grows, with downtime remaining a key driver

Across the industry, risk conversation has increased significantly. Similar to past years, conversation about downtime dominated overall risk conversation, driven predominantly by complaints relating to network coverage.

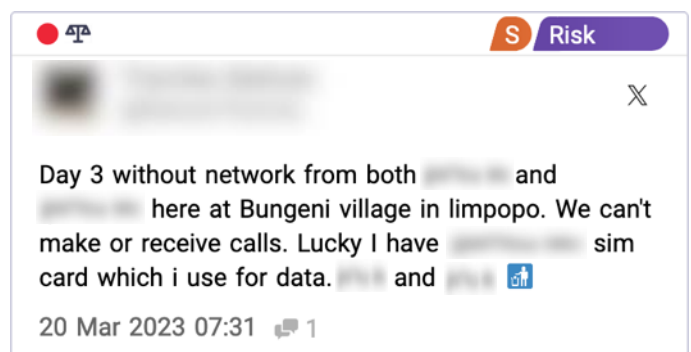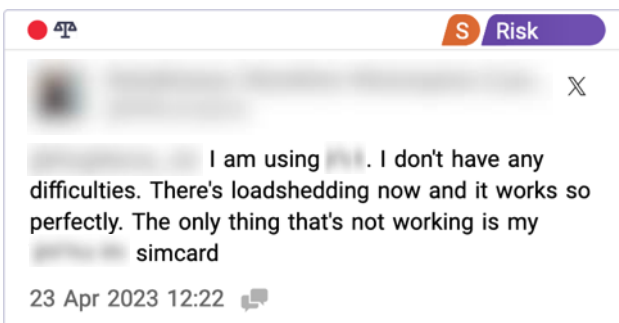### Industry view: Year-on-year contribution of risk to overall conversation

Year	Value
2021	10,4%
2022	11,1%
2023	20,6%

Industry

■ 2021 ■ 2022 ■ 2023
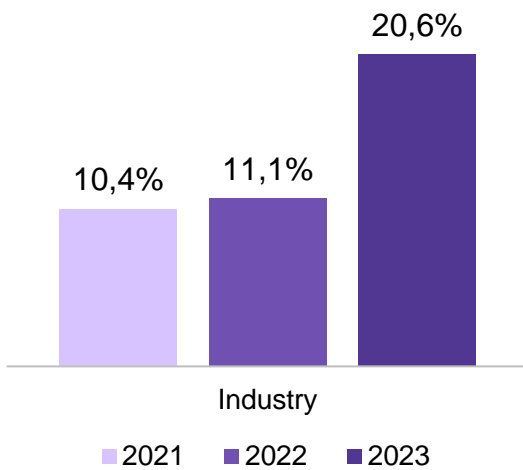
Top drivers of risk conversation

Driver	Value
Downtime	63,5%
Accusations of unethical behaviour	38,1%
Other	5,0%

Key unethical behaviour complaints:

- **Products and services being unavailable**
- **Debits post contract expiry**
- **Unauthorised contract changes and upgrades**
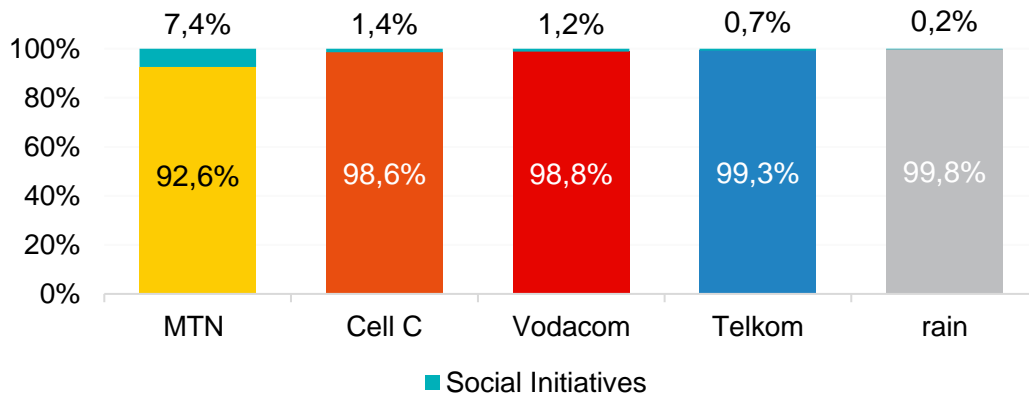- **Missing airtime**

This unreliable network coverage developed a sense of mistrust among consumers whose livelihoods depend on stable internet connectivity. As a result, many consumers enlisted the services of multiple providers to ensure that they would have connectivity from one when the other was down.

S Risk

X

I am using ▓▓. I don't have any difficulties. There's loadshedding now and it works so perfectly. The only thing that's not working is my ▓▓ simcard

23 Apr 2023 12:22

S Risk

X

Day 3 without network from both ▓▓ and ▓▓ here at Bungeni village in limpopo. We can't make or receive calls. Lucky I have ▓▓ sim card which i use for data. ▓▓ and ▓▓

20 Mar 2023 07:31   1

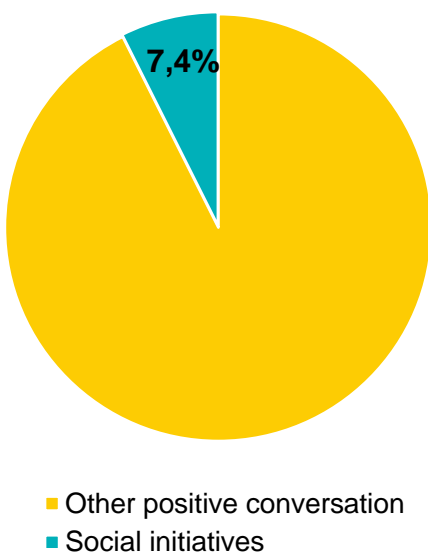## Leveraging sustainability initiatives to create brand value

When looking at the industry's corporate social investment (CSI) projects compared to other praise, the majority of CSI initiatives had minimal impact on praise.

Telcos social initiatives, compared to other praise

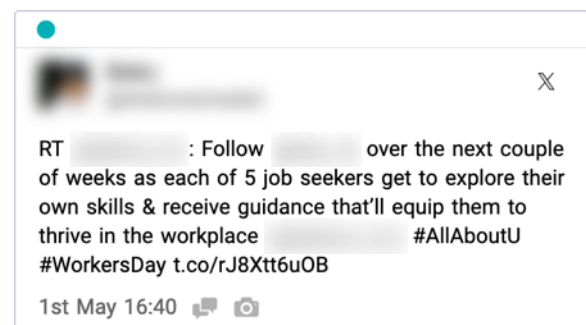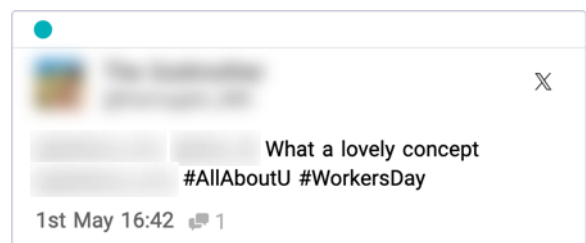| Brand	Social Initiatives	Other
MTN	7,4%	92,6%
Cell C	1,4%	98,6%
Vodacom	1,2%	98,8%
Telkom	0,7%	99,3%
rain	0,2%	99,8%

■ Social Initiatives

One brand that stood out here was MTN, whose CSI initiative drove 7% of positive conversation. Most of this conversation happened in May, during the workers day period, when MTN offered youth with tools and resources in order to help them in their job-hunting journey. Using the #Made4U hashtag, MTN went on a journey with five job seekers and equipped them with necessary skills for the job market. The role that MTN played in mentoring youth and facilitating employment is aligned with the social element of ESG.

Social initiatives, compared to other praise

7,4%

■ Other positive conversation
■ Social initiatives

Social initiatives example mentions

What a lovely concept #AllAboutU #WorkersDay
1st May 16:42 💬 1

RT ____ : Follow ____ over the next couple of weeks as each of 5 job seekers get to explore their own skills & receive guidance that'll equip them to thrive in the workplace ____ #AllAboutU #WorkersDay t.co/rJ8Xtt6uOB
1st May 16:40 💬 📷

PwC Future Watch:

Telecoms need to demonstrate how they create value – for customers and for society – through insightful, balanced and trusted disclosure of their environmental, social and governance (ESG) performance. Managing customer experience and sustainability in an integrated way can create business value.

At the most basic level, telecoms should address and manage risk-related conversation, such as complaints around unethical behaviour. These complaints impact governance and should be fed back to the risk and compliance functions.

However, the integration between customer experience and sustainability goes beyond compliance. Telecoms who leverage their sustainability initiatives to drive positive reputational sentiment will see brand enhancement and value creation over the longer term. It is key to accurately measure social initiative impacts and successes and then effectively communicate these via targeted campaigns that resonate with customers.

"

Our South African telecoms have market-leading social impact initiatives in place, but these should be better communicated to customers to generate positive brand sentiment and drive value."

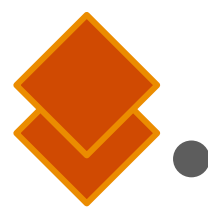*Julie Rosa, PwC South Africa Purpose Led Growth Director*
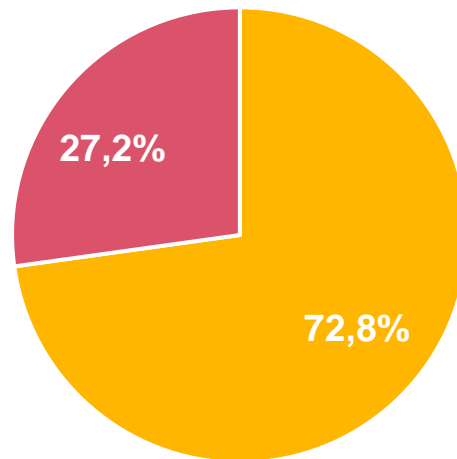
06

Adjacent Services

Financial services set to be a growth area within telecommunications

When compared to the rest of the main industries in South Africa, financial services was the best performer. The industry was flooded with campaigns which contributed to the positivity.

Telcos and financial services* volume split
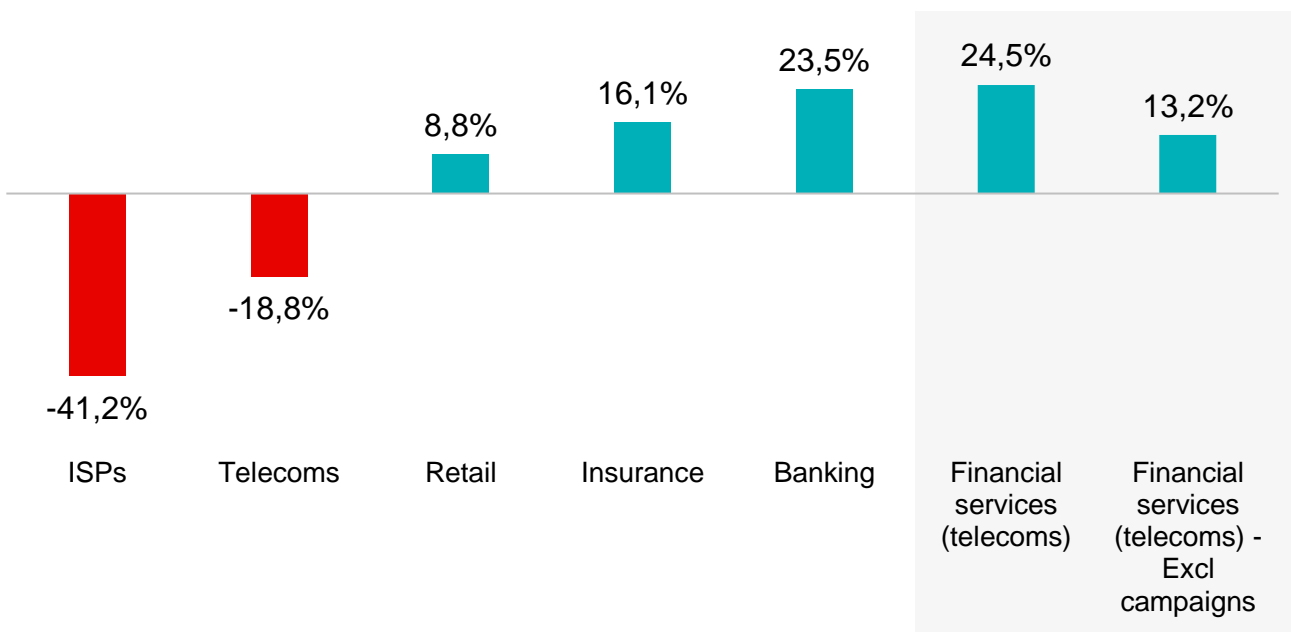
27,2%

72,8%

*Financial services exclude rain and Cell C*

- Telecoms
- Financial services*

Almost **70%** of this financial services praise came as a result of campaigns.

Cross-industry view: Public Net Sentiment

-41,2%	-18,8%	8,8%	16,1%	23,5%	24,5%	13,2%
ISPs	Telecoms	Retail	Insurance	Banking	Financial services (telecoms)	Financial services (telecoms) - Excl campaigns

Campaigns such as #JustMoMoIt, #DoMore and #AllYouNeedIsMoMo from MTN MoMo were particularly popular. The remaining 30% of mentions that were not due to campaigns stemmed from promotional content from influential authors and consumers who engaged with this content.

Reasons for financial services positivity
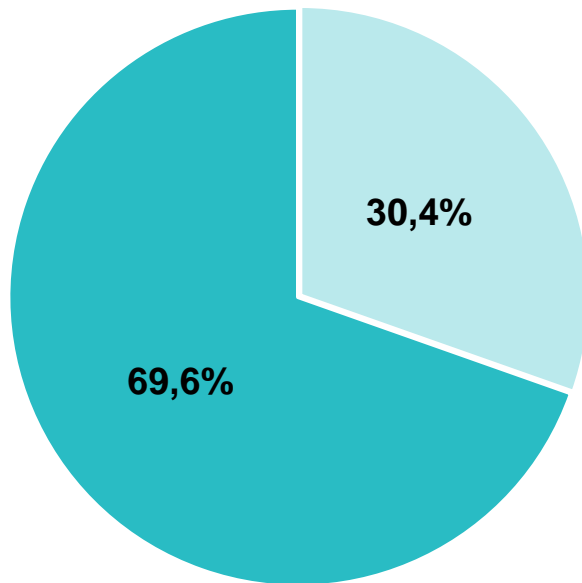
- Other positive conversation
- Positive due to campaigns
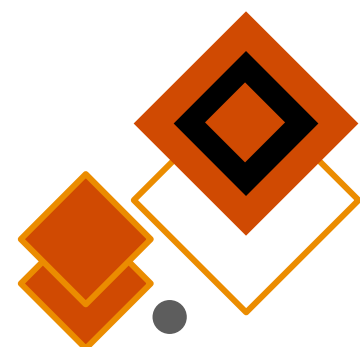
Other financial services praise: Example mentions

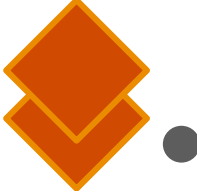_____ is the app that brings you monate solutions to Connect and unlimit kalula nje ezweni
18th Aug 08:28 3

I have been insured with _____ since 2020. I have no regrets nor complaints. Recently took my screen damage iphone 12 pro for repairs and they instead replaced it with a brand new iPhone 14 Pro .... I'm happy!!!
7th Jul 12:32 1

MTN's MoMo a firm favourite financial services offering

In the financial services sector, consumer conversation predominantly revolved around Vodapay and MTN MoMo, with Vodapay leading but receiving mostly neutral feedback. MTN MoMo garnered the most positivity, largely driven by promotional campaigns.

Public share of voice per brand

MoMo topped the public Net Sentiment ranking with a score of:

82.8%

- 1,0%
- 2,5%
- 4,0%
- 11,7%
- 80,8%

Legend:
- ■ MoMo
- ■ Vodalend
- ■ Telkom pay
- ■ Vodasure
- ■ Vodapay
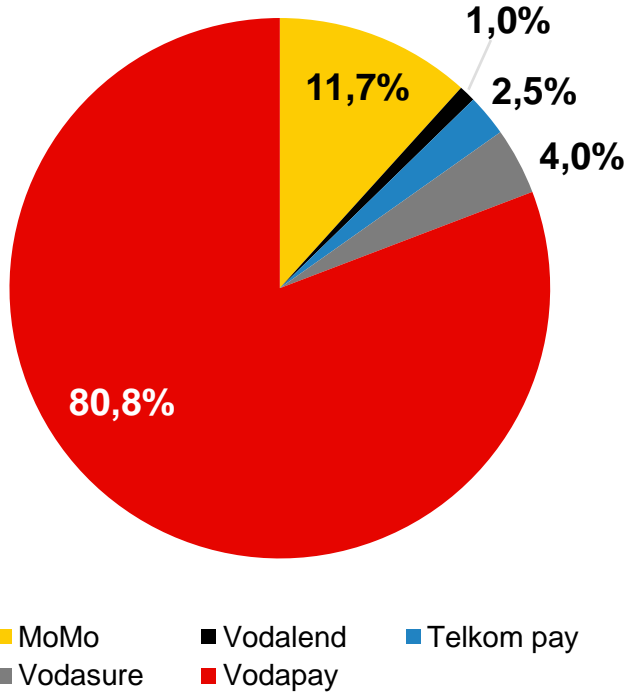
While campaigns drove positivity around financial services, issues around insurance remained an area of discontent. For one brand in particular, consumers raised concerns about insurance claims, billing problems, incorrect insurance cover activation, lack of assistance or communication in response to queries, and related issues.

> "
> **Telecoms are doing their bit to solve digital and financial inclusion – and it is clear that customers respond well when their most pressing problems are solved. These positive results also demonstrate the benefit of having a more agile operating model that can quickly innovate and respond to changing customer demands and preferences."**
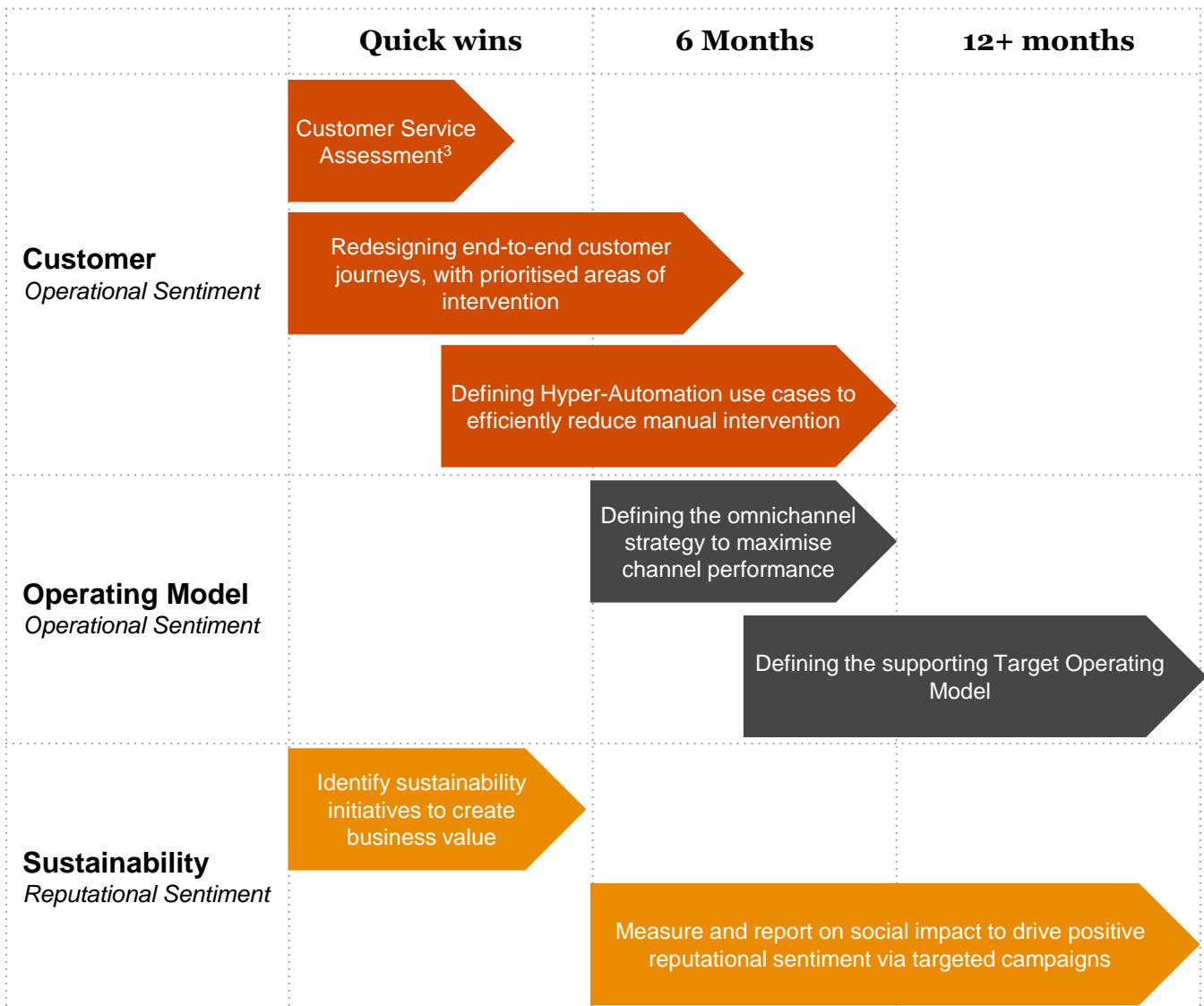>
> *Elmo Hildebrand, PwC South Africa Telecommunications Leader*

PwC's way forward
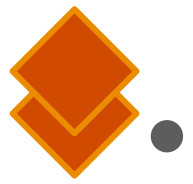
Industry intervention is needed

The 2023 index highlights the need to remain competitive and respond to the rapidly evolving needs and preferences of consumers, with the following key interventions that can encourage successes in the short to medium term:

	Quick wins	6 Months	12+ months
Customer *Operational Sentiment*	Customer Service Assessment[3]		
	Redesigning end-to-end customer journeys, with prioritised areas of intervention		
	Defining Hyper-Automation use cases to efficiently reduce manual intervention		
Operating Model *Operational Sentiment*		Defining the omnichannel strategy to maximise channel performance	
		Defining the supporting Target Operating Model	
Sustainability *Reputational Sentiment*	Identify sustainability initiatives to create business value		
		Measure and report on social impact to drive positive reputational sentiment via targeted campaigns	

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[3] Our Customer Service Assessment is a rapid discovery exercise that identifies possible areas of intervention in the service operating model across people, process and technology - providing targeted initiatives that will improve the service experience and the capabilities required to execute them.

PwC's way forward

Closing the telecom customer sentiment gap

As telecoms form the backbone of our modern connected world, telecommunications providers wield substantial influence over individuals, businesses and societies at large. Yet, despite the indispensable nature of their services, a disparity exists between customer expectations and the actual delivery of service quality and support.

While customer complaints over network quality are often impacted by factors outside the telecom's control (such as load shedding) and require capital-intensive solutions, our data underscores that a significant share of negative customer sentiment is actually driven by telecoms not being able to meet basic customer service needs. There are clear opportunities for telecommunications providers to adopt AI solutions to meet new customer demands, empower employees, reduce total cost to serve and grow revenue.

Closing the telecom customer sentiment gap should be seen as a critical imperative for the industry: to elevate customer satisfaction to levels commensurate with the vital role telecommunications play in daily life.

> "
> **Telecommunications companies must not overlook the foundational cornerstone of their businesses: meeting basic customer service needs. The time for telecoms to prioritise improving customer satisfaction is now."**
>
> *Nana Madikane, PwC TMT Africa Industry Leader*
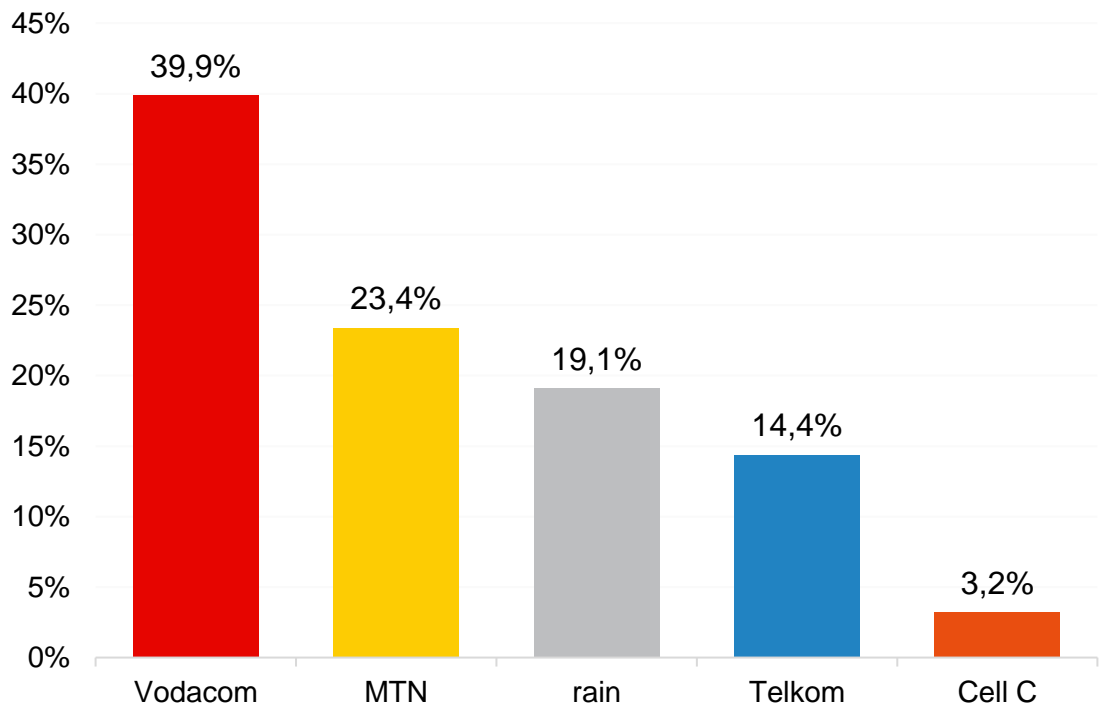
07

Methodology

Methodology

1,617,345 public mentions about Cell C, MTN, rain, Telkom and Vodacom from **1 January 2023 to 31 December 2023**

The DataEQ Crowd verification process involved the following stages:

Sentiment verification | Customer journey | Channel analysis | Topic allocation | Customer experience | Risk | TCF

2023 public Volume per brand

Brand	Percentage
Vodacom	39,9%
MTN	23,4%
rain	19,1%
Telkom	14,4%
Cell C	3,2%

Contact us

Nana Madikane
Industry Leader: Africa Technology, Media and Telecommunications
PwC
nana.madikane@pwc.com

Elmo Hildebrand
Leader: Telecommunications
PwC
elmo.hildebrand@pwc.com

Jaco Kotze
Senior Manager: Africa Technology, Media and Telecommunications
PwC
jaco.kotze@pwc.com

Courtney Milne
Manager: Experience, Data Insights & Technology
PwC
courtney.milne@pwc.com

Liska Kloppers
Head of Client Strategy
DataEQ
liska.kloppers@dataeq.com

Kate Daley
Head of Partnerships - Africa
DataEQ
kate.daley@dataeq.com

Edzani Dongola
Lead Analyst
DataEQ
edzani.dongola@dataeq.com

Nishaat Sadien
Insights analyst
DataEQ
nishaat.sadien@dataeq.com