



South African Telecommunications Sentiment Index

**The path to
customer experience
transformation**



Table of contents

About this report	03
Methodology	04
Introduction	05
Index ranking highlights	06
Key report findings	07
Industry sentiment overview	08
Subsector sentiment comparison	11
Customer experience drivers	15
Reimagining contact centre performance for telcos	18
Signal strain: How network quality is driving customer churn	19
What drives customers to join—or leave?	20
Digital experience is a weak link—and a fast fix	21
How we help telcos transform digital experiences	21
MVNOs: A lesson for legacy operators?	22
Turning sentiment into action	23
Building the blueprint for better	23
Contacts	24



About this report

Data. Direction. Execution.

PwC's South Africa Telecommunications Sentiment Index—developed in partnership with DataEQ—is the country's most robust analysis of telecom customer experience. Built on over 1.3mn public, non-enterprise social media mentions from 1 January to 31 December 2024, it offers a data-rich view of what customers really think.

This index is specifically designed for the telecoms industry, with metrics that reflect both network performance and the key drivers of customer experience. For the first time, it goes beyond traditional Network Providers (NPs) to include Fibre Network Operators (FNOs), Internet Service Providers (ISPs) and Mobile Virtual Network Operators (MVNOs)—delivering actionable insights across the entire telecom ecosystem.

Leveraging these insights, we enable telecom leaders to uncover the root causes of customer dissatisfaction, benchmark performance across the broader industry spectrum and take targeted action to enhance customer experience—delivering measurable impact at every touchpoint.

Methodology

The index analyses public online conversations across major telecom brands to gauge sentiment and uncover key perceptions. Posts are categorised as either operational (e.g. seeking support or giving feedback on service, products or networks) or reputational (e.g. brand perception, reaction to campaigns). Net Sentiment scores reflect the balance of positive and negative conversation.

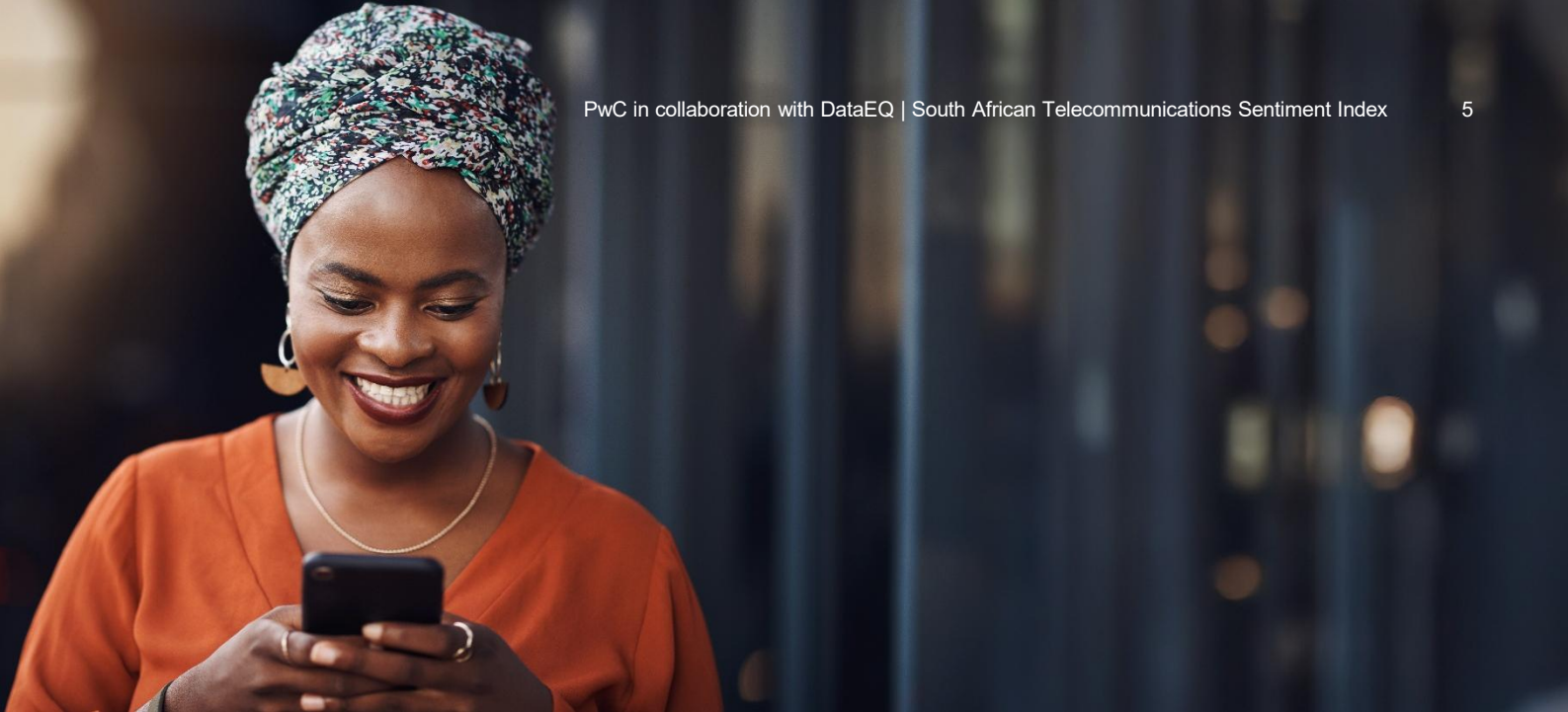
Operational posts are especially important as they represent real customer needs and often signal purchase intent or cancellation threats.

Data sources analysed

- X (excludes DM conversations)
- Websites
- Hellopeter
- Facebook (only for Network Providers)

Subsector breakdown

Network Providers (NPs)	Licensed operators that own spectrum and/or mobile infrastructure. They deliver mobile voice and data services directly to consumers..	<ul style="list-style-type: none"> • Cell C • MTN • rain • Telkom • Vodacom
Fibre Network Operators (FNOs)	Providers that build and manage fixed-line infrastructure (specifically fibre networks) used to deliver high-speed internet.	<ul style="list-style-type: none"> • Frogfoot • Openserve • Vumatel
Internet Service Providers (ISPs)	Brands that offer internet access to customers, typically by leasing infrastructure from FNOs. They manage the customer relationship and service delivery.	<ul style="list-style-type: none"> • Afrihost • Axxess • Cool Ideas • Metrofibre Networkx • Mweb • RSAWEB • Supersonic • Telkom Fibre • Vox Telecom • WebAfrica
Mobile Virtual Network Operators (MVNOs)	Brands that lease mobile network capacity from NPs to offer mobile services under their own name. They don't own infrastructure but compete on pricing, service and innovation.	<ul style="list-style-type: none"> • Capitec Connect • FNB Connect • Melon Mobile • Standard Bank Connect



Introduction



In a connected, converging world, improving customer service is a springboard for telecoms into new markets, new business models and untapped growth.

Nana Madikane, PwC Africa
Technology, Media and
Telecommunications Industry
Leader

Telecom's moment of reinvention

Telecoms are no longer just infrastructure providers. They're at the heart of a world being reshaped by AI, digital disruption and cross-sector collaboration. As industries converge, the global landscape is becoming more complex and more connected—with telecoms enjoying an enviable position at the centre of new stores of value.

The opportunity? To unlock unprecedented opportunities for growth.¹

But growth demands a solid foundation—and customer experience and satisfaction are among its most critical pillars.

Complexity is rising. And so are customer expectations.

Telecoms are diversifying into sectors like agriculture, healthcare and fintech to unlock new avenues for growth. Intelligent, interconnected offerings are raising the bar for customer experience. Telecoms now need to compete against nimble disruptors as well as trusted incumbents from other industries. Hyper-personalisation and digital-first offerings continue to lower customer switching barriers.

In a world that's changing faster than ever, customers are looking for certainty. They want a telecom provider they can count on. One that shows up when it matters, delivers consistently and earns their trust. They want customer support that's clear, responsive and informed.

In a hyper-connected future, frictionless customer service becomes a strategic lever. Get it right, and you unlock the full value of what's next.

¹ PwC Value in Motion – Connect and Compute

Index ranking highlights

rain retains its position at the top of the network provider category, while Cell C shows real momentum with a sharp year-on-year sentiment lift. Telkom Fibre was the only ISP to achieve a positive public Net Sentiment, with praise for reliable connectivity and innovative prepaid fibre products. FNO Openserve earned solid sentiment for its reliable infrastructure and efficient service delivery. MVNOs are gaining ground—led by Capitec Connect with an impressive +88% Net Sentiment—driven by simplified offerings and agile digital experiences.



Key report findings

Operational issues are costing telecoms their customer loyalty

Customers are hitting roadblocks when trying to cancel, query bills or activate SIMs. Traditional service lines—call centres, branches and email—are underperforming. Long wait times and unreliable service channels are pushing customers to look elsewhere.

Campaigns spark interest—but service seals the deal

Industry-wide reputational sentiment stood at +25%, driven by campaign-led engagement. Marketing activations are clearly driving reputational wins. But without operational follow-through, these sentiment gains are short-lived.

ISPs and FNOs must close the accountability gap

ISPs recorded the most negative sentiment, with complaints about outages, billing and poor digital support. FNOs faced similar issues, compounded by unclear handoffs and blame shifting between ISPs and FNOs. Openserve stood out with positive sentiment, thanks to reliable infrastructure and efficient service delivery.

When the network drops, so does trust

Connectivity complaints are some of the top drivers of negative sentiment, with a -87% industry-wide Net Sentiment for network quality. Customers are frustrated by unstable signals and unusable data. The fix is clear: proactive communication and smarter outage resolution.

Digital support cuts costs, complaints and churn

With a -89% overall industry Net Sentiment, poor digital experiences are driving customer frustration and cancellation intent. Improving digital support is the most cost-effective way for telcos to cut complaints, ease contact centre pressure and unlock smarter services.

MVNOs are winning hearts—and market share

MVNOs are winning on sentiment, thanks to simplified offerings, agile digital experiences and influencer-led campaigns. But sustaining momentum will require consistent service delivery, not just marketing flair.



In a saturated and ever-evolving telecoms market, service and personalisation speak loudest—it's a strategic advantage. With standout players now showing what's possible, there's real momentum to build on. Let's make it count.”

Basheena Bhoola, Director: Telecommunications, PwC South Africa

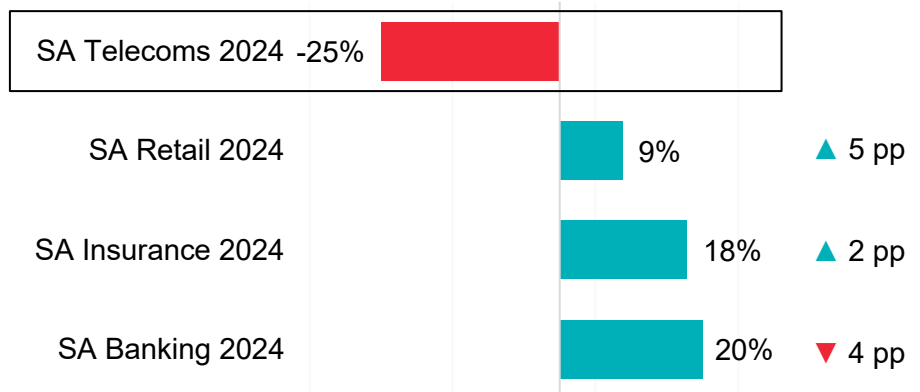


Industry sentiment overview

South Africa's telecoms industry faced notably more negative discussion than any other industry

South Africa's telecoms sector is under pressure, recording an overall Net Sentiment of -25%. Telecoms was the only industry where negative sentiment outweighed the positive: this was apparent across network providers, ISPs and FNOs.

South African industry benchmark: Net Sentiment breakdown

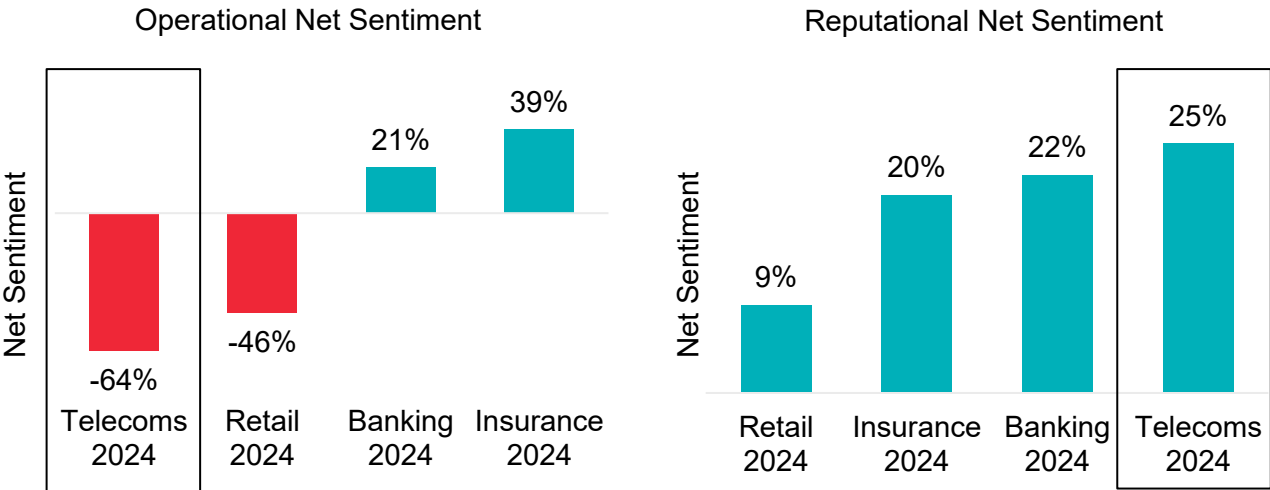


Source: DataEQ and PwC analysis

Campaigns cushion customer complaints

Telecoms scored highest on reputational Net Sentiment, thanks to high-impact campaigns and brand partnerships. But these wins are masking deeper service issues. Operational Net Sentiment is the lowest across all industries and was impacted by complaints linked to poor network quality and customer service.

South African cross-industry view

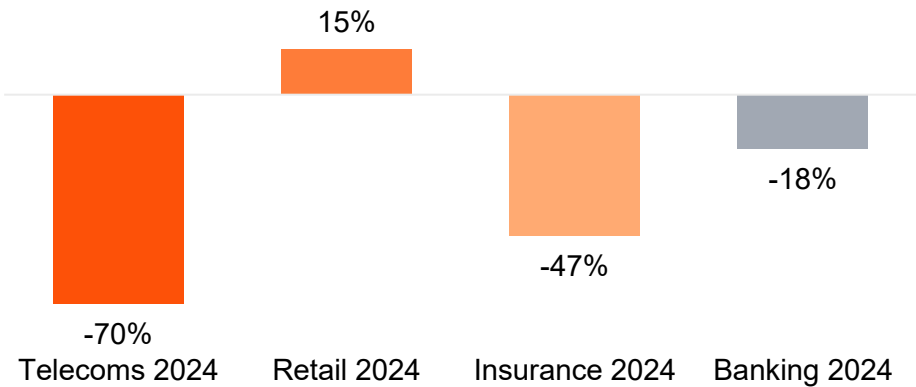


Source: DataEQ and PwC analysis

Service sentiment reveals the gap

Across industries, serviceable posts² are a clear barometer of customer experience. Telecoms recorded the lowest Net Sentiment in this space, with widespread frustration over billing errors, outages and poor responsiveness. Retail was an outlier, achieving a positive score by turning service interactions into opportunities—leveraging promotions and offers to drive positive operational conversation.

Net Sentiment for serviceable posts: Cross-industry view



² Serviceable posts are operational in nature and require attention from brand agents. They identify where customers seek assistance or give feedback and includes purchase or cancellation intent.

Lessons from leading industries

South African banks are setting the benchmark with emotionally resonant campaigns and strategic partnerships that drive both reputational and operational uplift. Insurers are converting service excellence into industry-leading operational sentiment. Retailers, despite operational challenges, are maintaining reputational strength through loyalty programmes and brand collaborations.

Campaigns can drive operational positivity

Banks and insurers didn't just rely on reputational campaigns—they used targeted, product-focused content to improve operational sentiment.

Lesson for telecoms:

Don't limit campaigns to brand awareness. Use them to spotlight service wins, educate customers on processes (like billing or cancellations) and invite feedback on improvements.

Visible responsiveness builds trust

Insurers earned positive sentiment by visibly closing the loop on customer feedback—especially on platforms like Hellopeter. Public resolution signals not only reassure existing customers—but also influence potential ones who now use these platforms to compare service quality and responsiveness.

Lesson for telecoms:

Encourage satisfied customers to share their experiences on public platforms. Show up in the conversation. When telcos respond directly to feedback—especially after resolution—they signal accountability and care. That's what builds credibility.

Digital experience is a shared weakness and a shared opportunity

Retail and telecoms both struggled with digital service channels. However, where retail is now investing in delivery tracking, app UX and real-time support, most telecoms still lag.

Lesson for telecoms:

Digital is the fastest fix. Prioritise app stability, chatbot responsiveness and proactive notifications to reduce pressure on call centres and improve customer satisfaction

Subsector sentiment comparison

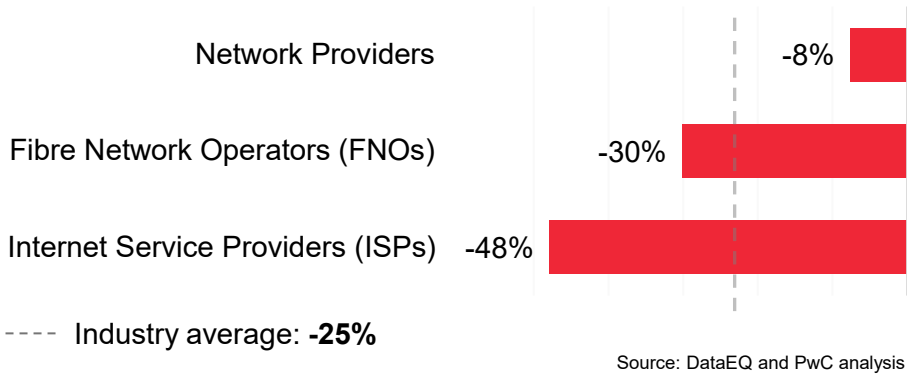
-8%

Net Sentiment for network providers: a five-year high. (2023: -19%)

-25%

Industry-wide Net Sentiment

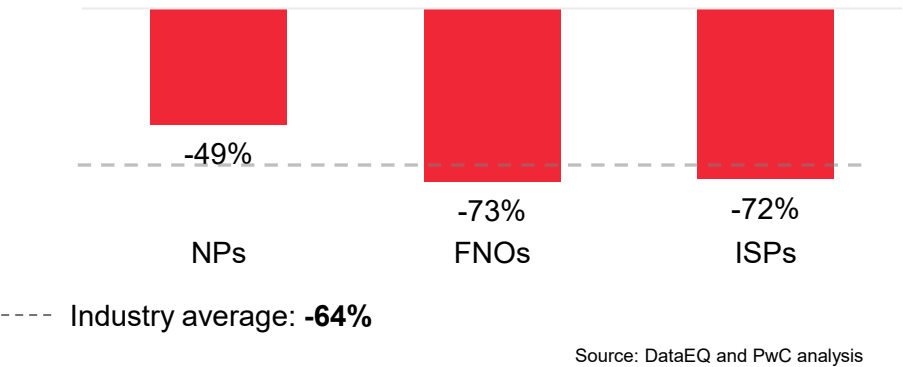
Net Sentiment by telecom subsector



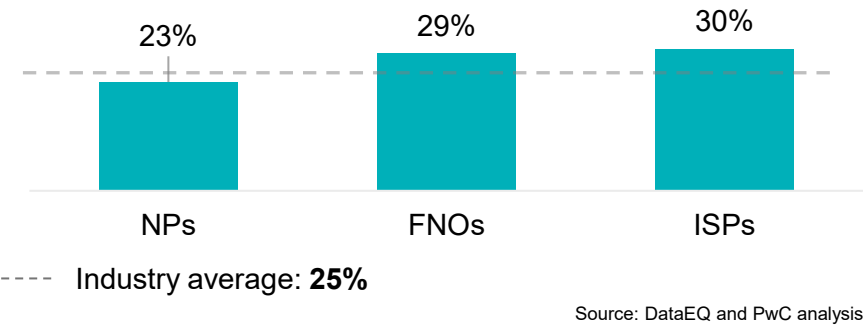
Network providers, FNOs and ISPs all faced heavy criticism for poor connectivity, slow issue resolution and weak support. Serviceable interactions were overwhelmingly negative, with ISPs recording the worst public Net Sentiment due to long wait times and poor communication. Network providers fared better, but reputational praise masked persistent operational complaints. Fibre operators were caught in the middle, often blamed alongside ISPs for outages and delays.

Telecoms provider Net Sentiment by category: Operational vs. Reputational Net Sentiment

Operational Net Sentiment

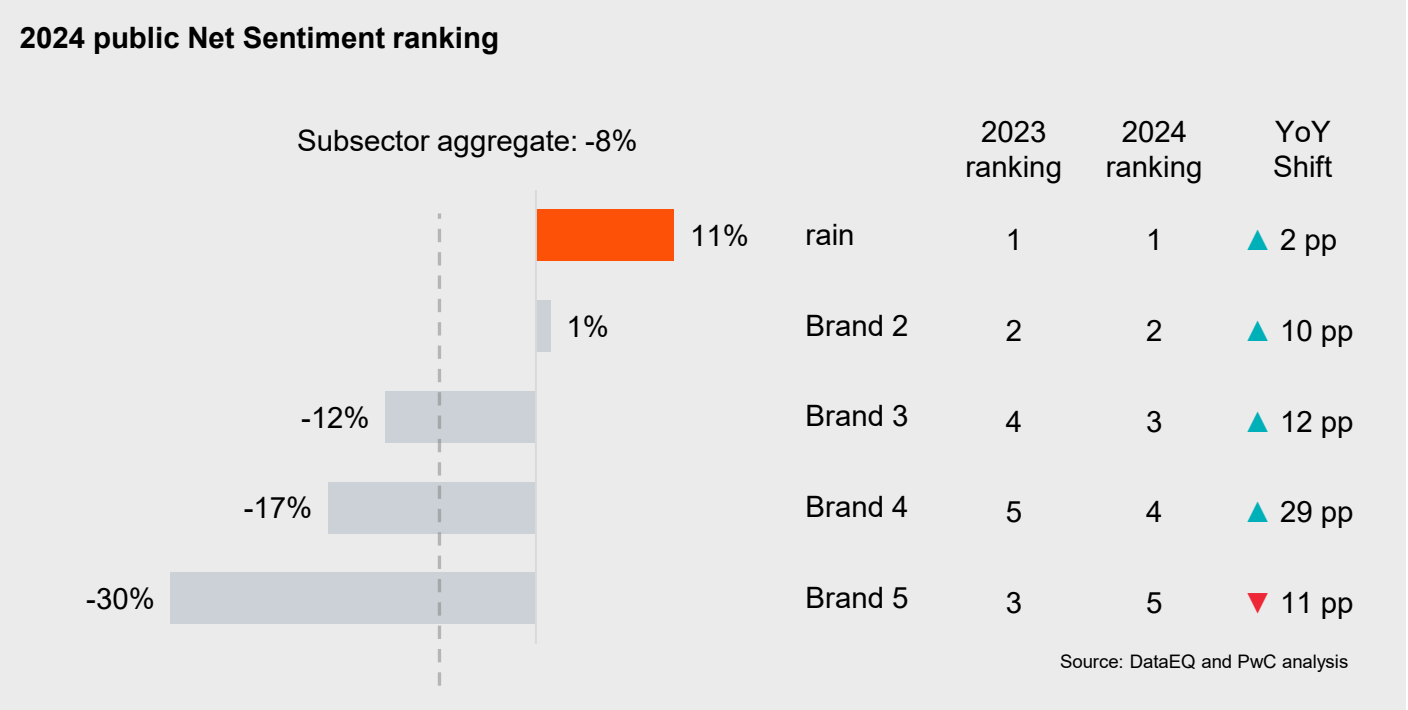


Reputational Net Sentiment



Network providers

Network Providers recorded public Net Sentiment of **-8%**, with rain and MTN achieving positive scores. Operational sentiment sat at **-49%** (above the telecoms industry aggregate of -64%), while reputational sentiment reached **23%**.



rain

Top ranked network provider

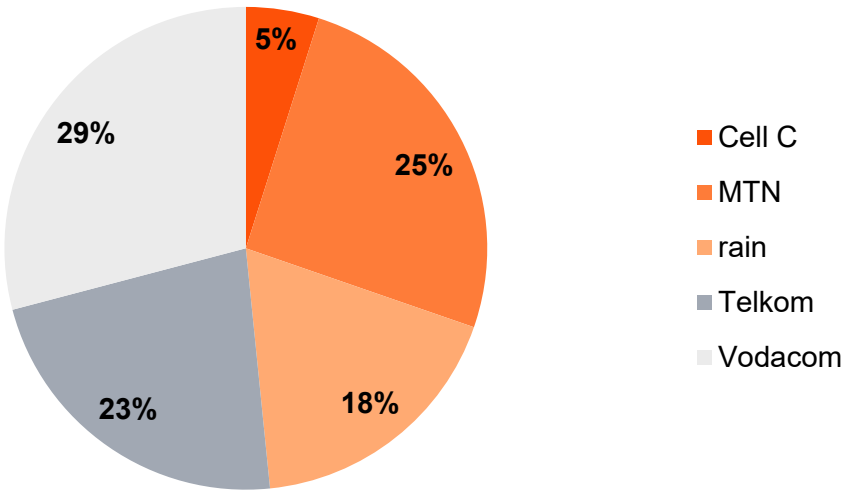
29%

Cell C year-on-year improvement in Public Net Sentiment

rain kept hold of the top spot with a Net Sentiment of **11%** and led both reputational and operational categories. MTN saw reputational gains through its #MTNSummer campaign. Telkom and Cell C also generated positive reputational sentiment through creative activations. Despite improvements, contract-related complaints and poor support from brand agents remain key challenges across the subsector.

The network providers subsector reached a five-year sentiment high, driven mainly by a reduction in complaint volumes and a rise in campaign-led positivity. Despite the overall negative score for the subsector, all but one network provider showed improvement from the previous year. Cell C had the largest year-on-year Net Sentiment improvement, up by 29 percentage points.

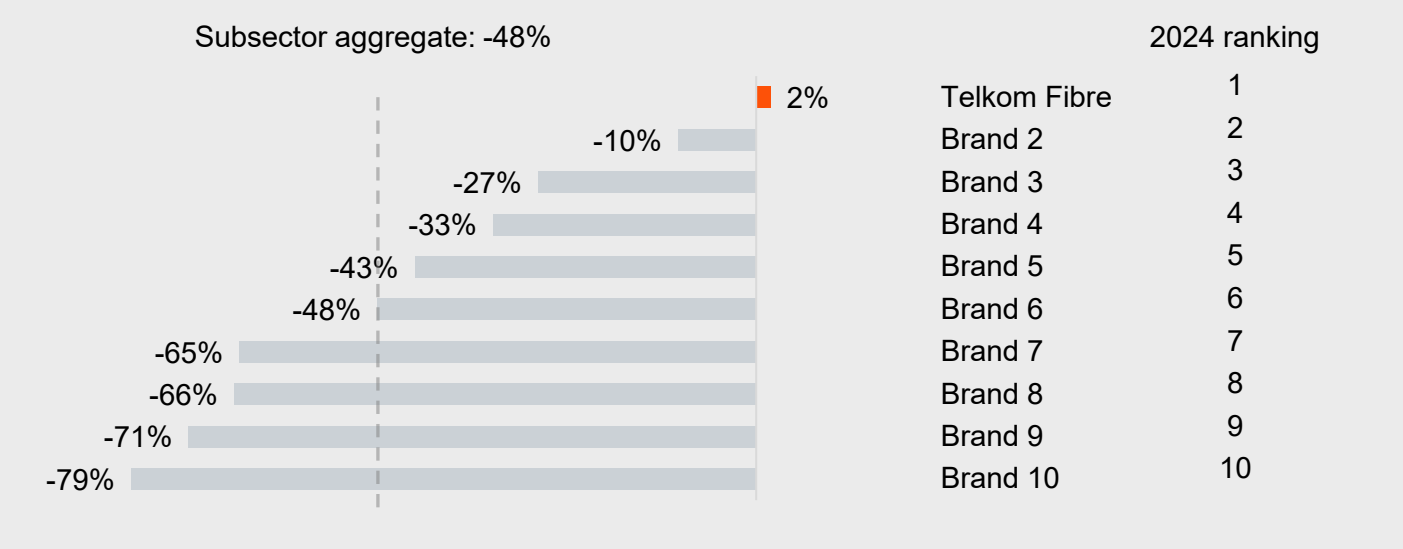
2024 share of voice per brand



ISPs

ISPs faced the most negative sentiment across the industry, with public Net Sentiment at **-48%** and operational scores at **-72%**. Reputational sentiment was however the highest in the industry at **30%**.

2024 public Net Sentiment ranking



Telkom Fibre

Top ranked ISP

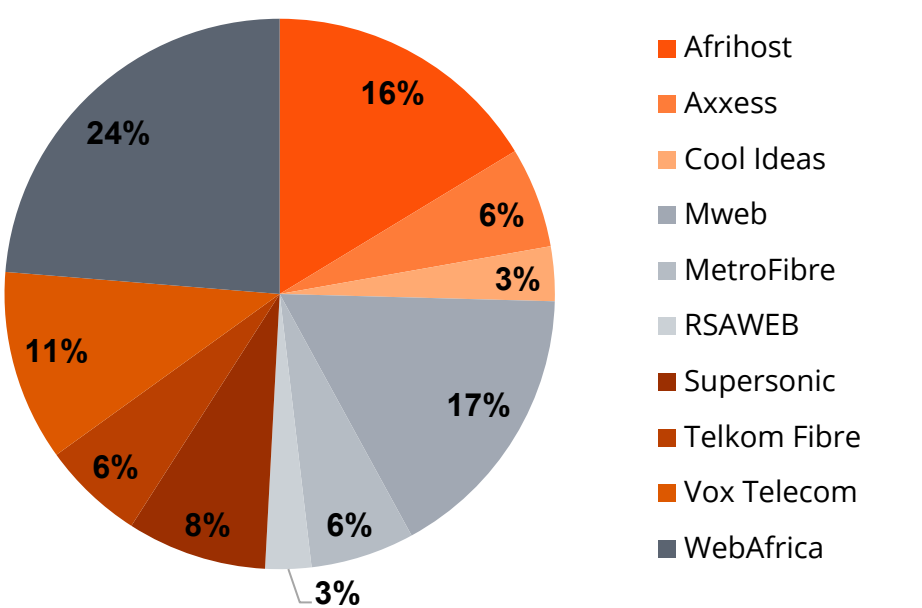
24%

RSABWeb outperformed the ISP operational aggregate by 24 percentage points, with a top scoring Operational Net Sentiment of -48%.

Complaints focused on outages, installation delays, pricing dissatisfaction and poor digital experience. The strong reputational performance was driven by isolated well-executed competition campaigns and reshares of promotional posts.

Telkom Fibre was the only ISP to achieve a positive public Net Sentiment (**2%** — significantly higher than the subsector aggregate of -48%). Telkom Fibre was praised for reliable connectivity and its R99-per-week prepaid fibre product.

2024 share of voice per brand



FNOs

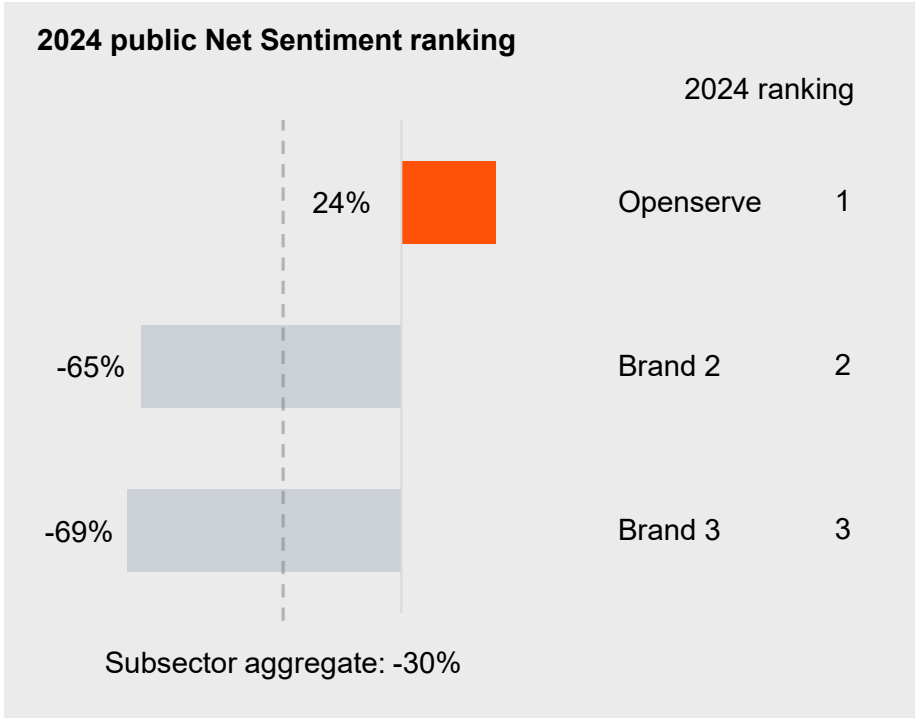
Openserve

Top ranked FNO

43%

Openserve outperformed the next best FNO by 43 percentage points on Reputational Net Sentiment.

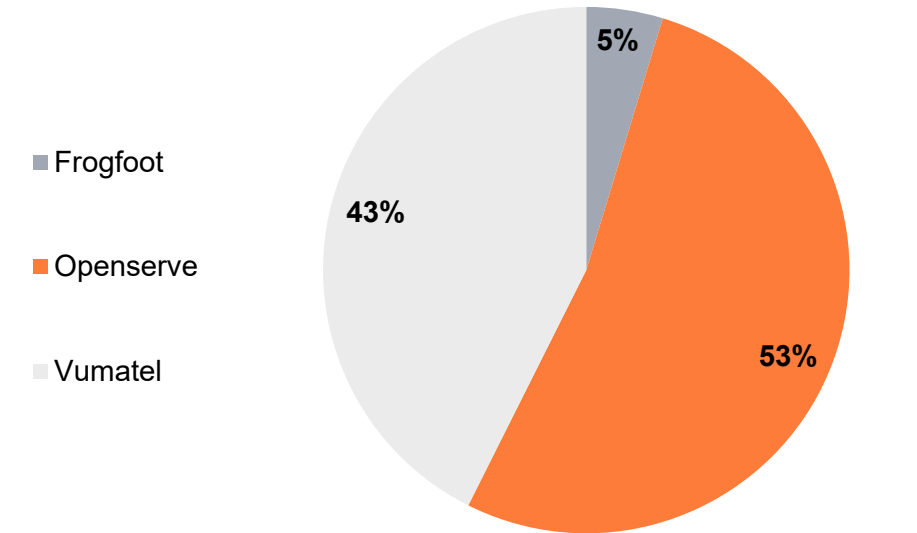
FNOs recorded public Net Sentiment of **-30%** and reputational sentiment of **29%**. Operational sentiment was the worst in the industry at **-73%**.



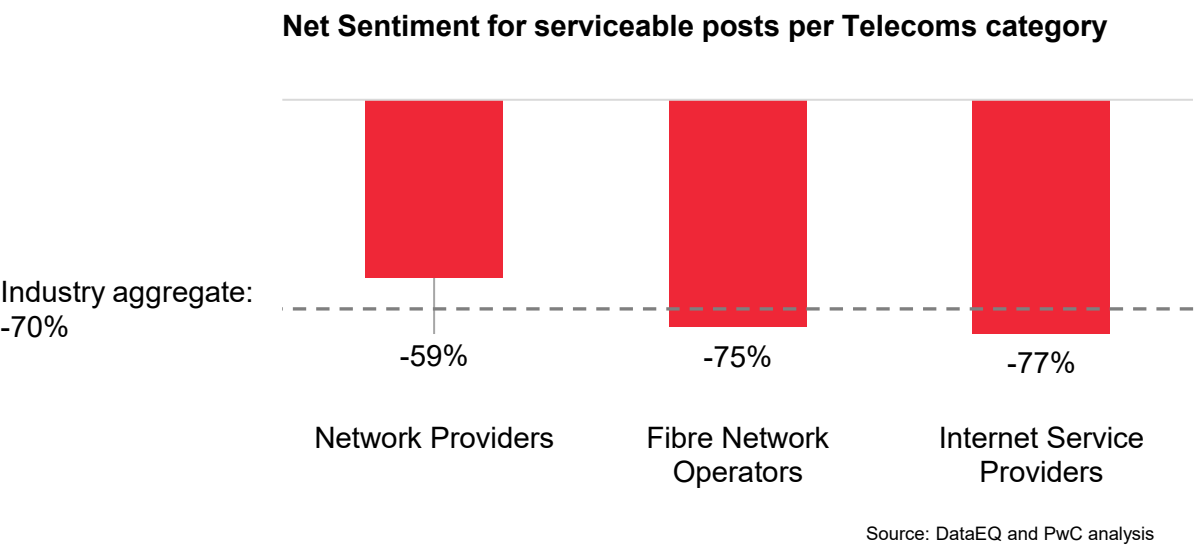
FNO customers struggled with outages, poor connectivity and unclear accountability. Customers often blamed both ISPs and FNOs for service failures, pointing to a shared responsibility gap.

Openserve was the only FNO to achieve positive sentiment, leading both operational and reputational scores. Its Net Sentiment score of **24%** is significantly higher than those of its FNO peers and the subsector average of **-30%**. Its affordable fibre products, community outreach and efficient service delivery helped it stand apart.

2024 public Volume per brand (FNOs)



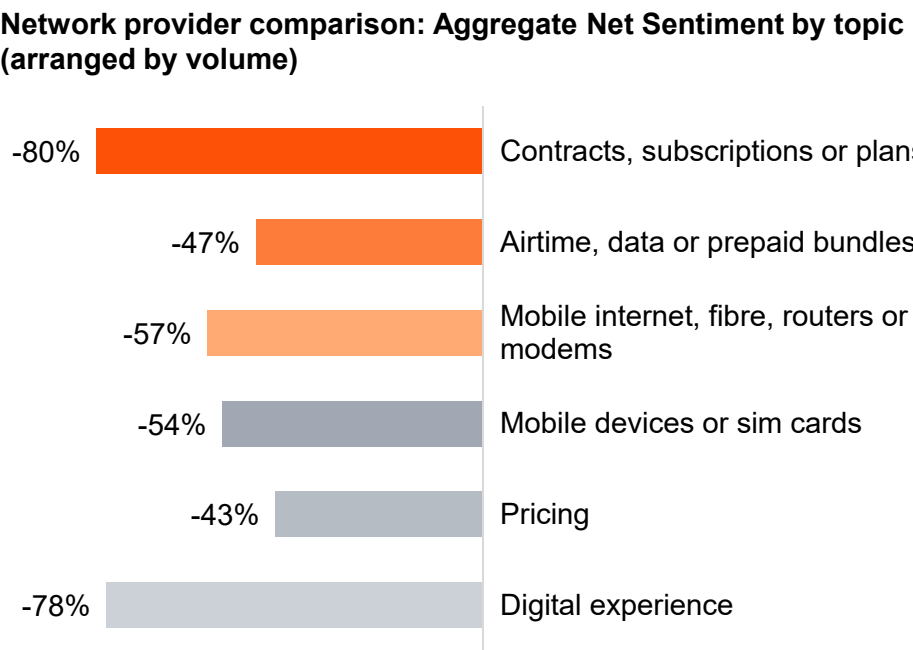
Customer experience drivers



Network providers

Contract-related issues were the biggest driver of dissatisfaction (–80% sentiment). Customers struggled with cancellations, billing disputes and SIM activations. Some felt misled by staff, citing inadequate explanation of contract terms and conditions before signing.

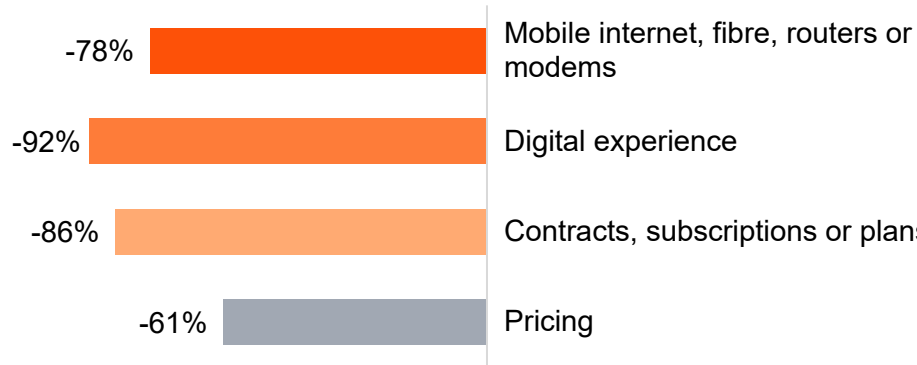
Customers frequently flagged issues where poor connectivity made it difficult to use their airtime and data bundles as intended. Unresponsive digital channels, log-in issues and unsuccessful online airtime transactions came in for criticism.



ISPs

The ISP sector recorded the lowest Net Sentiment for serviceable posts across all telecom categories. Customers reported long installation/activation delays, issues with faulty or missing hardware equipment and setup challenges. Pricing remained a major driver of negative sentiment, particularly where users experienced billing discrepancies, slower-than-advertised internet speeds, and misleading advertising around delivery or setup fees. ISPs had the lowest Net Sentiment in the index for Digital Experience, at -92%. Inefficient digital channels and glitchy self-service indicates a broader need for investment in digital responsiveness.

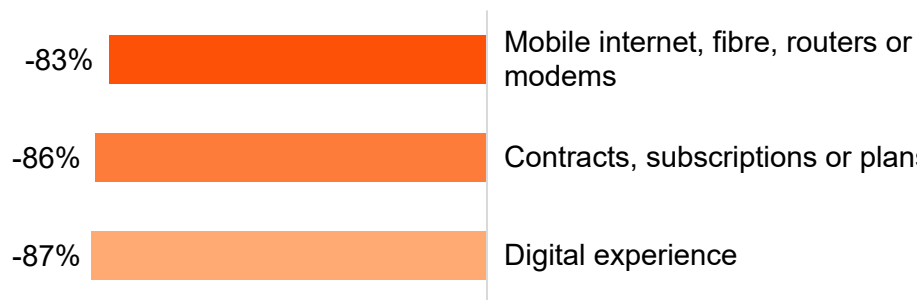
ISP comparison: Aggregate Net Sentiment by topic
(arranged by volume)



FNOs

Despite being the most responsive category in terms of ‘reply’ rates, FNOs still recorded highly negative service sentiment due to connectivity failures, unresolved outages and poor communication. Customers cited ticket closures without resolution, extended delays in installation or activation and general unresponsiveness. In some cases, users said they had paid for services that never became operational leading to heightened frustration, particularly when outages disrupted work or business activity. Confusion during fibre transitions and unclear handoffs between providers led to service gaps.

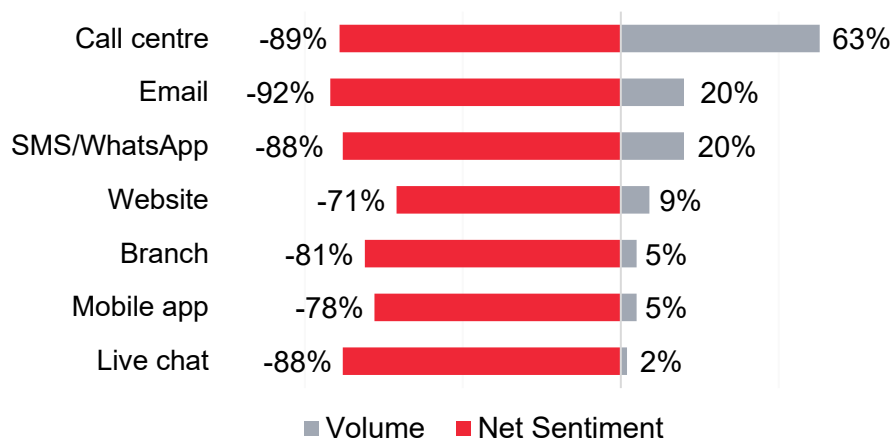
FNO comparison: Aggregate Net Sentiment by topic
(arranged by volume)





Traditional service channels fall short in the eyes of customers

Industry channels volume and Net Sentiment



Source: DataEQ and PwC analysis

Traditional support channels: Stuck. Slow. Struggling

Traditional service channels—call centres, branches and email—are driving dissatisfaction across telecoms. Customers cite no responses, slow responses, inaccurate information and unhelpful agents—especially when reporting technical issues.

Digital platforms aren't delivering either

Digital platforms like WhatsApp and mobile apps had lower volumes but were also negatively perceived. Websites and mobile apps are under fire for login failures, password reset issues and unreliable OTPs. In-app data or airtime purchases often fail, and users also report difficulty cancelling services. Live chat and WhatsApp support were criticised for bot-like interactions, long response times or no replies at all.

Reimagining contact centre performance for telcos

Traditional service channels are falling short. We're here to change that.

At PwC, we help telecom leaders transform underperforming contact centres into high-impact, future-ready service hubs. Long wait times and fragmented experiences don't have to be the norm. Our approach energises teams, streamlines operations and keeps customers loyal.

Performance with purpose

We align incentives with outcomes, using gamified metrics and variable pay to boost accountability and reward excellence.

Culture that connects

Coaching-led programmes build a culture of ownership and continuous improvement, keeping teams engaged and focussed.

Talent that stays

We equip team leaders to coach, inspire and grow their teams—reducing churn and building long-term capability.

Smarter cost control

We drive savings through targeted learning, structural enablement and process excellence. With analytics and automation built in, our holistic approach delivers measurable economic value.

Powered by Perform Plus³

Our solution blends coaching, behavioural science and smart tech to build connected, capable teams. Perform Plus turns contact centre chaos into clarity, linking everyday behaviours to real business outcomes. The result? A contact centre that performs, retains talent and delivers seamless service—without the wait.

³ <https://www.pwc.co.za/en/products/perform-plus.html>

Signal strain: How network quality is driving customer churn

Cell C

Top performer: Industry-wide Network Quality Sentiment

Across South Africa's telecom landscape, network quality has emerged as a main source of customer dissatisfaction, mentioned in 16% of serviceable conversation. Whether through dropped connections, unsatisfactory issue resolution or vague outage communication, consumers are losing patience and providers are losing trust. A handful of providers showed signs of progress, but the broader industry continues to fall short of customer expectations, with an overall network quality Net Sentiment at **-87%**.

The sentiment gap between subsectors was narrow, with all scoring close to the average.

Network Providers: Cell C defies the odds

Network provider customers reported unstable signal, persistent connectivity failures and unusable data despite active bundles. Cell C (at -68%) outperformed the subsector Net Sentiment of **-84%** by 16 percentage points. Customers noted improved stability and coverage, suggesting targeted investments are starting to pay off.

ISPs: Cool Ideas cushion a poor ISP average sentiment

With a Net Sentiment of **-87%**, ISPs faced backlash over prolonged outages, long technician wait times and poor communication. Cool Ideas (-78% network Net Sentiment) outperformed the ISP average by 9% lifting the ISP average sentiment slightly.

FNOs: Fibre frustrations fuel cancellations

FNOs recorded the lowest subsector Net Sentiment at **-89%**, driven by multi-day outages and generic support responses. Customers want root-cause resolution, not scripted, generic troubleshooting. FNOs were also tagged in 20% of ISP network complaints, illustrating the importance of ISP/FNO collaboration in communicating and resolving outages.

What drives customers to join—or leave?

Across the industry, poor network quality and contract issues were widely cited cancellation drivers. Contract cancellations were often described as intentionally difficult and obstructive, with unhelpful agents, delayed responses, branch-level restrictions, early cancellation fees and continued billing after cancellations. Network performance issues directly motivated requests to switch providers.

Network Providers won acquisition interest through mobile device hardware promotions and data SIM deals. Vodacom's R249 4G cloud smartphone drove a lot of interest. rain led the charge in mobile internet and router interest with its smart router offering.

MTN led in contract-driven acquisition conversation, driven by Gold Plan and home fibre offers.

ISPs' poor digital experience sentiment was reflected in cancellation threats over issues such as failed WhatsApp support. Telkom Fibre enjoyed more purchase conversation than any other provider, with potential customers enquiring about pricing and area coverage. Afrihost sparked the interest of consumers looking for a more reliable ISP.

FNOs were associated with ISPs when users faced prolonged uncommunicated outages and unresolved router issues leading to cancellation requests.





Digital experience is a weak link— and a fast fix

-92%

Digital Experience Net Sentiment
for ISPs

Digital customer support didn't just show up as a weak spot—it cut across multiple pain points. It was flagged as a service channel issue, with lower usage but consistently poor sentiment. It was the most negatively rated customer experience driver across the industry, at **-89%**. And for ISPs, it formed part of cancellation intent conversation.

Yet, this is also where the biggest opportunity lies. When implemented well, digital channels can ease pressure on underperforming contact centres and branches, offering faster, more scalable support. Improving digital service reduces operational costs, thanks to automation and self-service. Digital channels also generate rich data on behaviours, pain points and preferences that can be used to continuously improve customer experience.

How we help telcos transform digital experiences

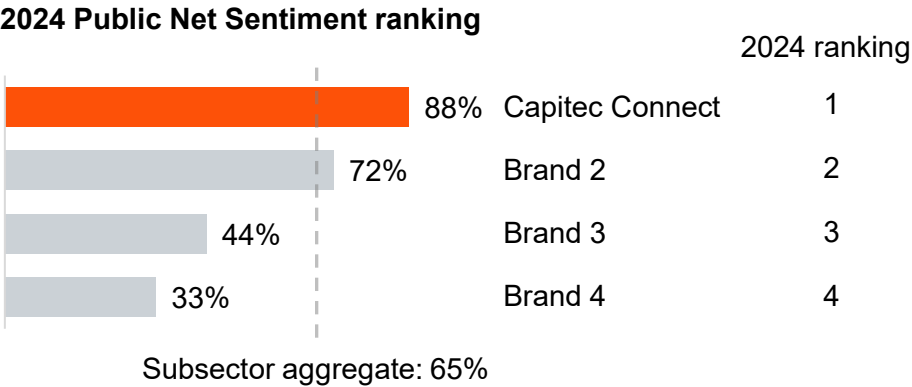
Customers expect fast, intuitive support across digital channels. We bring together human-centred design and cutting-edge tech to help you build a service model that's predictive, adaptive and ready for the future of connectivity.

- **AI-driven support channels** that are fast, context-aware and sentiment-smart.
- **Predictive issue management** that spots and solves issues before customers are impacted.
- **Automation and integration** of back-office tasks for frictionless billing queries, order updates and SIM activations.

Digital can be your differentiator. Invest in intuitive platforms and real-time support to cut complaints, speed up resolutions and earn back trust.

MVNOs: A lesson for legacy operators?

MVNOs offer a glimpse of what good can look like. Their rapid growth and strong sentiment scores show what’s possible when marketing meets digital agility. But sustaining that momentum means moving beyond campaigns to consistent customer experience.



Capitec Connect (South Africa’s largest MVNO) led both in volume and overall Net Sentiment at **88%**. A well-executed campaign encouraged users to tag friends and share reasons to switch. Capitec Connect’s quick subscriber growth was also widely praised.

MVNOs are also winning on digital experience. Their smoother onboarding and personalised features (like eSIMs and flexible month-to-month plans) contributed to positive sentiment.

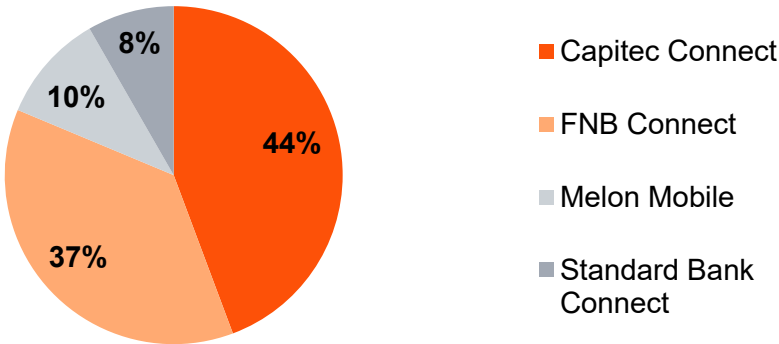
The MVNO sector’s success in driving both operational and reputational positivity, especially through targeted campaigns and influencer engagement, sets a marketing benchmark for the broader industry. However, when campaign-driven conversation was removed, Operational Net Sentiment dropped by 104 points, shifting from

strongly positive to negative (-39%, 10% above the operational Net Sentiment for network providers).

Customer complaints focused on SIM and network-related issues, including failed activations, poor coverage and porting delays. Many users also raised concerns about slow response times, poor communication and unresponsive support. While some organic praise remained especially around affordability, friendly agents and the fresh appeal of new entrants, maintaining long-term sentiment will depend on the ability to deliver consistent service beyond campaign spikes.

MVNOs must now match their marketing efforts with consistent service delivery.

2024 Share of voice per brand



From signal to strategy

Turning sentiment into action

Customer sentiment remains a critical performance signal

The data is clear. Service failures are costing trust, loyalty and growth. From cumbersome cancellations to digital dead ends, South Africa's telecoms sector is facing challenges that can't be ignored. We've pinpointed the pain points. Now it's time for action.

Digital is the fastest fix—and the smartest investment

AI-driven support, self-service apps and real-time support channels are outperforming traditional service lines. They're cheaper to run, easier to scale and better at solving problems. But it needs to be done right. That means predictive support, intuitive platforms and real-time responsiveness. The opportunity is clear: scale digital before sentiment slips.

Agile players drive momentum

Agile players are already showing what's possible: simplified offerings, smarter support and campaigns that connect. They're not just adapting—they're accelerating—and reinventing.

The path forward is pragmatic—and urgent

Telcos must move from reactive fixes to proactive system design. That means embedding sentiment metrics into performance dashboards, scaling proven digital channels and aligning network reliability with customer-facing transparency.

Let's turn sentiment into action—and action into growth.

Building the blueprint for better



We help Telcos transform with purpose: using data-driven insight to design customer experiences that connect, scale and deliver real impact.”

Elmo Hildebrand, PwC Africa Technology, Media and Telecommunications Consulting Leader

For telecoms pursuing growth in an increasingly connected (but also saturated) market, the path to telecom customer experience (CX) transformation is becoming clear. By bridging fragmented journeys, addressing identified service gaps and aligning internal teams, you can unlock the seamless service customers are ready for.

Here is how we do it:

Insight that unlocks action

Our Telecom Sentiment Index reveals what's really frustrating your customers—grounded in data, not guesswork. We combine this with global CX benchmarks from our PwC network to help you prioritise with confidence.

CX that fits your business

We assess your customer function's maturity, then design a tailored operating model and business case to close gaps, embed CX into delivery and drive measurable change.

Results that speak for themselves

We link CX improvements directly to revenue growth and/or cost reduction—so you can invest with impact and prove the value of every CX initiative.

PwC delivers data-driven CX transformation—so you can elevate your customer experience.

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