

# South African Telecommunications Sentiment Index 2020

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*The data presented in this report has been subject to quality assurance on 18 February 2021.  
Possible subsequent changes in figures are in line with data suppliers' terms and conditions.*

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# Key insights

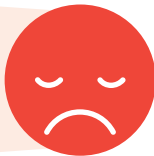
2 091 904 social media posts about telcos

303 475 mentions analysed for sentiment by BrandsEye's Crowd

157 580 mentions evaluated for topics

40 151 mentions verified for market conduct

Telecoms is SA's most negative industry  
-34.6%



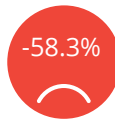
Insurance is SA's most positive industry  
4%

Highest Net Sentiment



MTN

Lowest Net Sentiment



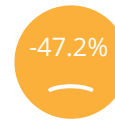
rain

Best reputation



MTN

Best operational sentiment



Cell C



1/3 online mentions require a response  
65.3% purchase-related conversation missed

Best response rate

64.7%

Cell C

Worst response rate

25%

Telkom

Most positive network

-71.4%

MTN

Most negative network

-88.2%

Telkom

Most positive for network speed

-29.8%

MTN



30-50% data price reduction for MTN & Vodacom as a result of Competition Commission inquiry

Most positive pricing

-19.2%

Cell C

Most negative pricing

-60.8%

Vodacom

Highest proportion of TCF complaints

92.5%

rain

9/10 complaints requiring response were relevant to TCF



# Foreword

In a tumultuous year for the South African telecommunications sector, 2020 saw network providers grapple with the ongoing pressure of decreasing margins in the face of a disproportionately higher demand for connectivity and customer interactions. Connectivity, for many people, moved from a normal category of service into the same essential service type category as water and electricity.

For context, the year began off the back of the Competition Commission's conclusion of a two-year inquiry into data services, which found prices charged by the country's top two operators, MTN and Vodacom, to be higher than in other African markets they operate in.

While responding to calls by the Competition Commission to reduce their data pricing, however, local network providers were faced with their second and arguably most significant hurdle of 2020 – an unprecedented spike in data traffic caused by the national lockdown instated on 26 March. With many South Africans relying on some form of connectivity to earn a living and remain informed, some operators reported almost 50% growth in mobile data traffic and more than 200% growth in fixed data traffic over this period.

As a result of this exponential rise in data traffic, investment was triggered to implement network upgrades and shift capacity towards the newly created hotspots in residential areas. This sudden need for investment, however, came about amid very tough economic conditions and put immense pressure on telco margins and cashflows, especially considering their recent efforts to bring down data prices.

Acknowledging this, South Africa's telecoms regulator – the Independent Communications Authority of South Africa (ICASA) – temporarily released additional spectrum to assist telcos in dealing with the surge. Despite extending this temporary spectrum to March 2021, ICASA insisted that all licensees which had been assigned temporary spectrum and wished to continue using it for the extended period would be required to pay prescribed spectrum licence fees.

What all this means is that the South African telecoms sector has faced – and continues to face – multiple challenges. While the immediate focus will be to survive, there is a need to lift heads from the woods, think beyond the crisis and use it to position for success beyond it.

Our analysis of the South African market indicates that reduced purchasing power and downwards pressure on prices will continue to create a low margin environment going forward. In response, telcos will focus on core products and drive digital transformation to become lower-cost operators that are as digitised as possible – prioritising customer facing processes and interactions in order to differentiate through customer experience while maintaining spend.

Many companies, however, have struggled to maintain meaningful customer relationships under lockdown conditions. This is where BrandsEye’s findings will prove particularly valuable to network providers. Digital channels offer an affordable, lockdown-proof and effective touch point with customers. Self-service capabilities need to be expanded on to permanently convert walk-in customers to more digital, asynchronous channels that deliver faster and better outcomes.

Some consumers that were reluctant to embrace digital interactions were forced to use digital channels, and providing them with a user-friendly, proactive and personalised experience means that many of them will opt for digital channels even after the lockdown.

*Mark Joseph,*  
*Africa TMT Industry Leader*

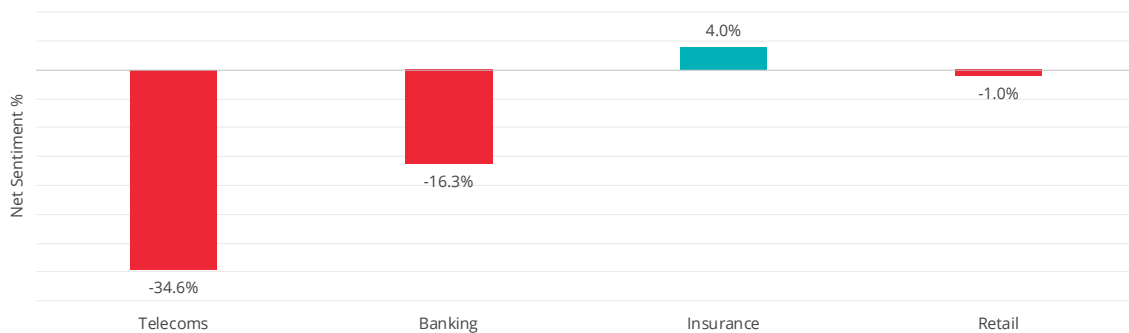
**Deloitte.**

# Introduction

The telecommunications industry in South Africa is a highly competitive environment in which players vie to attract and retain consumers who typically show little brand loyalty and, instead, are looking to maximise the value they get out of network providers.

In 2020, South Africans were considerably more negative towards telcos than banks, insurers or retailers. While this could partly reflect the country's high percentage of mobile penetration, the difference in Net Sentiment for the telecoms industry in comparison to these other industries is large enough to suggest dissatisfaction among telecoms customers to be more pervasive.

## Cross-industry Net Sentiment comparison



In our second South African Telecommunications Sentiment Index, having tracked over two million social media posts, we continue to analyse consumer sentiment towards the country's four major network providers, namely Vodacom; MTN; Telkom; and Cell C. This year, however, we also included the new data-exclusive network, rain, into our analysis, in order to see how it compares with the more established and traditional local players.

There are three major aspects through which network providers can offer value to consumers: pricing; network quality; and customer service. The goal of this study is to measure how South African network providers compare in terms of these three aspects and ascertain who provides the most value in the eyes of the consumer. Furthermore, it aims to determine how these aspects impact consumer sentiment, as well as what drives sentiment towards each of them.

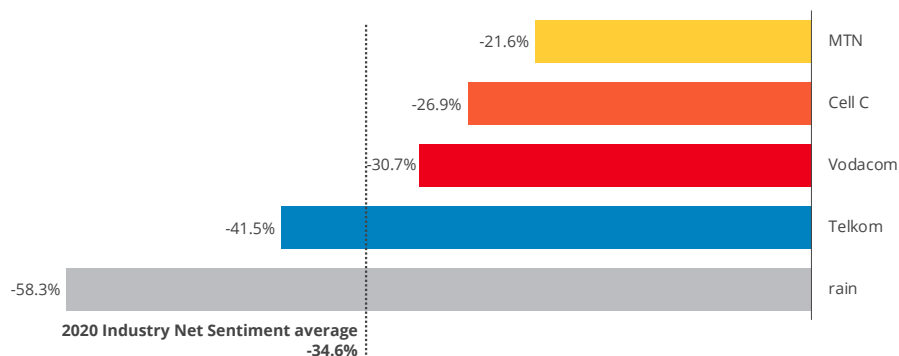
When analysing the aspect of service, special focus is applied to the market conduct performance of South African telcos, particularly their adherence to the Treating Customers Fairly (TCF) framework. This focus area comes as a result of network providers increasingly delving into the financial services space, offering products ranging from cell phone insurance and funeral cover, to e-wallets and personal loans.



# Industry Net Sentiment analysis

In 2020, all five network providers saw considerably more negative than positive conversation on social media. Nevertheless, some did significantly worse in Net Sentiment than others.

## Net Sentiment ranking



## MTN claims top spot while rain lags behind

Having recorded the lowest negative sentiment and highest positive sentiment, MTN ranked first in terms of Net Sentiment. Unexpectedly, Cell C – whose survival came into question in 2020 – placed second. Newcomer rain lagged behind, sitting over 20 percentage points below the overall Net Sentiment for the industry (-34.6%) which aggregates all five telcos.

While rain went from approximately 100 000 customers in 2019 to about 800 000 in 2020, its share of the market remained marginal, as can be seen in the below graph, which overlays Net Sentiment, share of voice (limited to Twitter) and the most recent publicly available mobile subscriber numbers <sup>1</sup>.

1. Vodacom: <https://www.vodacom.com/pdf/investor/quarterly-results/2021/vodacom-announcement-3Q21-final.pdf>

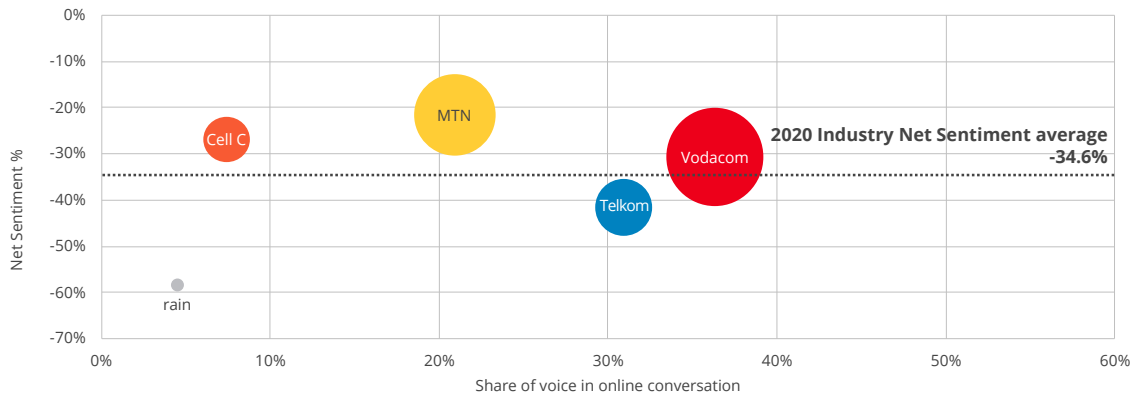
MTN: <https://www.mtn.com/wp-content/uploads/2020/10/MTN-Group-Q3-results.pdf>

Cell C - Subscriber numbers estimated from: [https://www.bluelabeltelecoms.co.za/online\\_results/interim-results-2021/pdf/interim-results-presentation.pdf](https://www.bluelabeltelecoms.co.za/online_results/interim-results-2021/pdf/interim-results-presentation.pdf); [https://www.cellc.co.za/cellc/static-content/PDF/investorRelations/Interim\\_Financial\\_Results\\_2020.pdf](https://www.cellc.co.za/cellc/static-content/PDF/investorRelations/Interim_Financial_Results_2020.pdf)

Telkom: [https://www.moneyweb.co.za/mny\\_sens/telkom-sa-soc-limited-market-update-for-the-nine-months-ended-31-december-2020/](https://www.moneyweb.co.za/mny_sens/telkom-sa-soc-limited-market-update-for-the-nine-months-ended-31-december-2020/)

rain - Subscriber numbers estimated from: <https://www.businesslive.co.za/bd/companies/telecoms-and-technology/2019-10-07-rain-takes-on-fibre-companies-with-5g-to-the-home/>; <https://mybroadband.co.za/news/cellular/367456-impressive-rain-numbers-released.html>

### Telco industry landscape



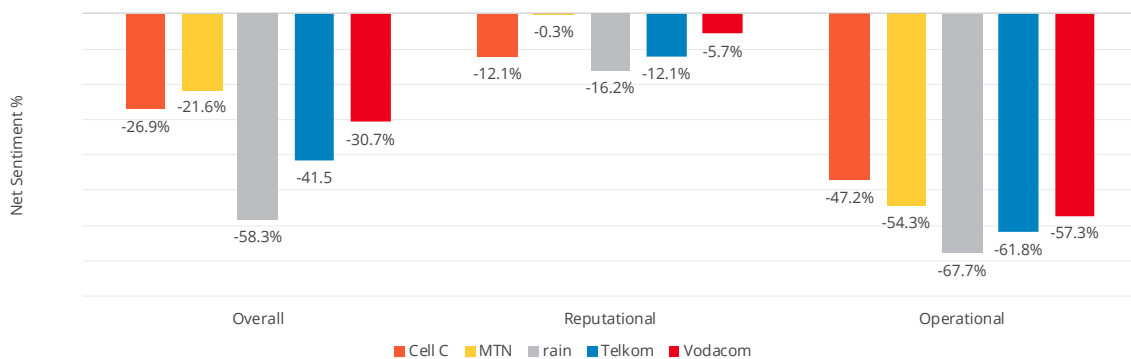
The size of the bubbles indicate each network provider's mobile subscriber base according to latest results reported in 2020.

Despite overtaking Cell C as SA's third largest network provider in 2020 in terms of mobile customers, after seeing the most year-on-year customer growth in the industry, Telkom placed second-last in Net Sentiment. Data complaints were the network provider's leading source of negative sentiment, as users grew discontented with data prices and often noted not being able to use their data due to network issues.

This serves as a good reminder that while growth is important, it must be seen alongside customer satisfaction if telcos want to build the sort of loyalty that will see their customers not just sticking with them, but hopefully also trusting them as their financial service providers.

Dissecting conversation into operational and reputational issues provided a telling look at what drove each telco's overall Net Sentiment performance.

### Reputational and Operational Net Sentiment comparison



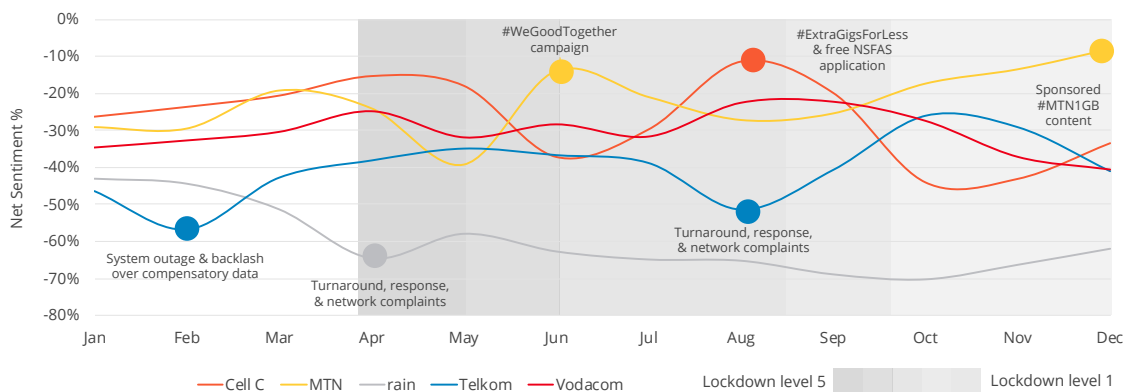
Across the board, operational conversation – from consumers who are in the customer journey – was considerably more negative than reputational conversation, which pertains to marketing content, press coverage, sponsorships or general remarks about the brand’s reputation overall.

MTN, who topped the overall Net Sentiment ranking, was aided by its reputational efforts, which accounted for 46.9% of overall positive conversation. Meanwhile, Cell C, who placed second in overall Net Sentiment had its approach to customer experience to thank for this. While operational complaints accounted for 61.4% of Cell C’s overall negative conversation, this was the smallest proportion out of the telcos in review.

## Net Sentiment trends

In terms of monthly Net Sentiment, Cell C, rain, and Vodacom all saw a downward trend over 2020, whereas MTN and Telkom’s Net Sentiment followed an upward path.

### Monthly Net Sentiment



### Cell C’s monthly Net Sentiment trends downward for 2020

The first dip seen in Cell C’s Net Sentiment in June resulted from news of plans to retrench 40% of its workforce. A post by @AdvoBarryRoux claiming Cell C had failed to inform staff of a COVID-19 case in its head office, resulting in further infections, which fuelled this negativity.

Cell C’s Net Sentiment peaked in August thanks to sponsored influencer content which highlighted the network provider’s #ExtraGigsForLess deals. The deals included a free GB when purchasing a 30-day 1 GB bundle, as well the extension of five-day bundles into seven-day bundles. Engagement with a consumer post

highlighting that students could apply for the National Student Financial Aid Scheme for free with Cell C added to the positivity seen in August.

Retrenchment plans led to an even more pronounced dip in October and November, as consumers accused Cell C of planning to carry out retrenchments without audited finances and of intending to replace retrenched employees with outsourced staff. Consumers reached out to the EFF for support, and encouraged others to boycott Cell C.

### **MTN records the steepest upward trend**

MTN recorded its lowest Net Sentiment for 2020 in May, when some users reported having been double debited, while system and network downtime drove further consumer unhappiness. Additionally, UNISA students reported delays in receiving data promised to them to assist with their May/June examinations.

However, the neutral engagement – social conversation that was neither overtly negative, nor positive – derived from MTN's recognition of everyday pandemic heroes through its #WeGoodTogether campaign, offset complaints and boosted Net Sentiment in June.

MTN's Net Sentiment was at its highest in December, during which the network provider relied on affiliated content to promote its offer of a free GB when downloading its mobile app and festive season data deals.

### **rain records the steepest downward trend**

At the start of 2020, rain users shared positive experiences with the network provider, particularly around its unlimited data deals and 5G offering, boosting Net Sentiment over the January and February period. Purchase interest further contributed to the high Net Sentiment during this period.

In April, coinciding with the beginning of lockdown, rain saw its largest month-on-month Net Sentiment decline. Customers reported delays in service turnaround; lack of response from the network provider; and poor network quality. These issues continued to drive the most negative sentiment for the remainder of the year.

### Telkom one of two providers to see an upward monthly trend

Telkom's Net Sentiment took a tumble in February, due to a major network outage and subsequent complaints about the compensatory data offered to users in retribution for the inconvenience – users felt cheated after reportedly not receiving or being unable to use the free data. Complaints around poor customer service turnaround and response, and engagement with a consumer post poking fun at the Telkom's network quality, drove a second dip in August.



Net Sentiment for Telkom peaked in October. While no unusual levels of positive sentiment were recorded during this month, the network provider drove significant neutral engagement through various giveaways as part of its #LiveYourMonate anniversary campaign.

### Vodacom's Net Sentiment relatively stable throughout 2020

Vodacom drove positive sentiment in August through affiliated content on its NXT LVL career expo and youth-exclusive data deals. Meanwhile, data giveaways in partnership with its sponsored soccer teams drove neutral engagement in September, which in turn improved Net Sentiment.

Net Sentiment was at its lowest over November and December. This is because Vodacom users were hit by widespread network downtime twice in November, while poor service responsiveness and vanishing data complaints impacted Net Sentiment in December. Consumers also complained about Vodacom's ShakeOff puzzles, claiming they were impossible to complete.

# Industry risk analysis

## Downtime and accusations of unethical behaviour drove similar levels of risk across the industry

Across the telecoms industry, downtime and accusations of unethical behaviour were the two largest sources of risk, having seen largely the same volume of conversation. Risk here refers to mentions that pose an immediate reputational or operational risk and, as such, require urgent attention.

### Biggest risk drivers across the industry

	Downtime	Accusations of unethical behaviour	Protests or boycotts	Threatening legal or regulatory action	Discrimination
Industry	47.2%	46.9%	3.6%	2.6%	1.2%
Cell C	39.8%	43.5%	16.5%	2.4%	1.5%
MTN	30.7%	58.9%	5.4%	3.0%	2.5%
rain	64.5%	32.9%	1.5%	3.8%	0.3%
Telkom	55.7%	40.0%	1.9%	2.4%	1.2%
Vodacom	40.0%	56.8%	1.5%	1.6%	1.0%

rain faced a considerably higher prevalence of risk conversation due to downtime – further evidencing network quality as one of its major weaknesses – while both MTN and Vodacom saw above-industry levels of risk related to accusations of unethical behaviour. Reports of data vanishing, or depleting abnormally, were the main source of these accusations for both operators.

As previously highlighted, Cell C staff's response to their employer's retrenchment plans was reflected in the operator's high prevalence of boycott-related risk.

# Customer perceptions of value

## Customer service is an industry-wide issue, and an opportunity for differentiation

When comparing the three aspects of customer value; namely, pricing, network quality, and customer service; service emerged as the area that most negatively impacted sentiment towards the South African telecoms industry in 2020. While network also played a significant role in the negativity seen online towards the industry, pricing had a relatively marginal impact on industry Net Sentiment.

Considering the telcos' poor Net Sentiment performance in relation to other local industries, this points at customer service as the area that could most hinder network providers' ability to compete in a market that is increasingly seeing brands adopt a cross-industry strategy. Examples of this can be seen in FNB Connect and PnP Mobile.

### Net Sentiment for the topics of customer service, network coverage/quality and pricing

	SERVICE NET SENTIMENT	NETWORK NET SENTIMENT	PRICING NET SENTIMENT	CUSTOMER VALUE SCORE
Cell C	-86.9%	-83.3%	-19.2%	-13.9%
MTN	-90.1%	-71.4%	-28.3%	-18.2%
rain	-91.8%	-85.4%	-42.0%	-32.9%
Telkom	-92.8%	-88.2%	-49.8%	-40.8%
Vodacom	-87.1%	-85.2%	-60.8%	-45.1%

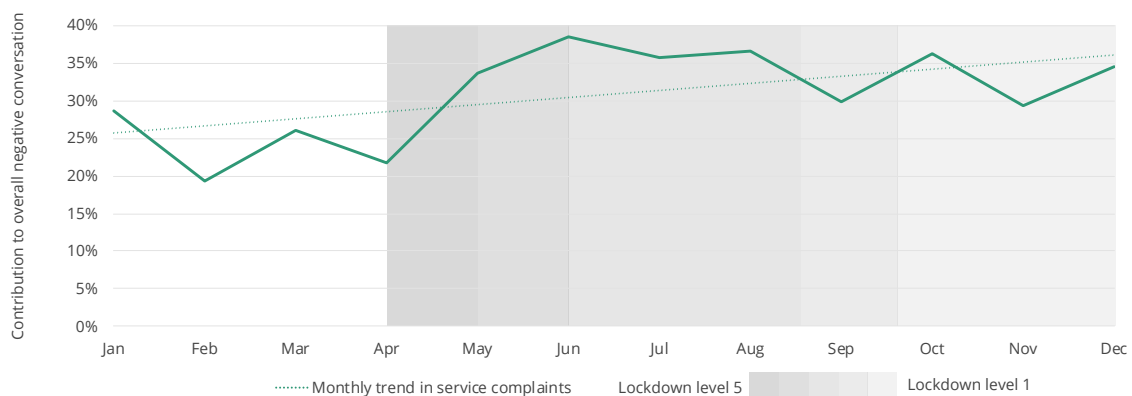
*This table summarises each network provider's Net Sentiment for the topics of customer service, network coverage or quality and pricing. It then multiplies these scores to obtain a combined customer value score.*

In terms of customer value, Cell C offered the best value in the eyes of South African consumers, holding a marginal lead in service; placing second in network; and leading strongly in pricing. MTN who did relatively well in network and was middle of the pack in service, placed second in customer value perception. Vodacom, Telkom and rain were all ranked lower in terms of customer value, having placed among the bottom two in at least one of the three customer value components.

## Service

A month into lockdown, service complaints saw a steep increase, remaining consistently above pre-lockdown levels for the rest of the year. While this could indicate that increased reliance on connectivity upped expectations and demand for service, it could also suggest network providers were unable to maintain the same level of pre-pandemic service during lockdown.

### Service complaints as a percentage of industry-wide negative conversation



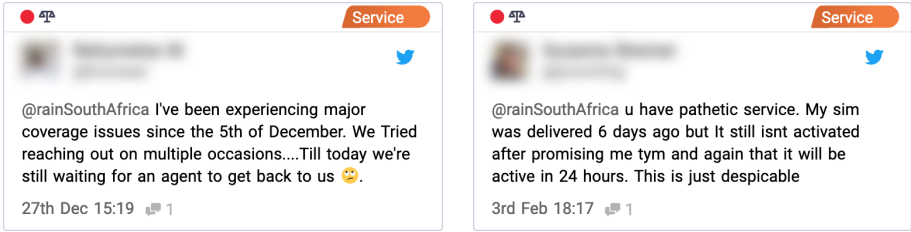
The industry’s leading drivers of service complaints spoke to a need for improved customer service responsiveness. Turnaround time was discussed in the bulk of these complaints and largely drove reports of lack of response from network providers and of having to contact them multiple times in order to get assistance.

### Top drivers of service complaints for telcos

	Turnaround time	No response received	Multiple contacts	Feedback given by a brand representative	Placed on hold/call dropped/not answered
Industry	81.9%	37.8%	31.2%	17.5%	11.7%
Cell C	74.4%	26.5%	30.3%	27.2%	10.8%
MTN	82.1%	31.8%	31.1%	19.7%	17.3%
rain	91.4%	55.6%	35.1%	9.5%	7.9%
Telkom	81.2%	29.7%	28.6%	20.3%	14.9%
Vodacom	68.2%	23.1%	26.8%	23.7%	11.2%



rain received the highest proportion of complaints for the industry's top three service-related categories, suggesting their affordability approach came at the expense of customer experience.



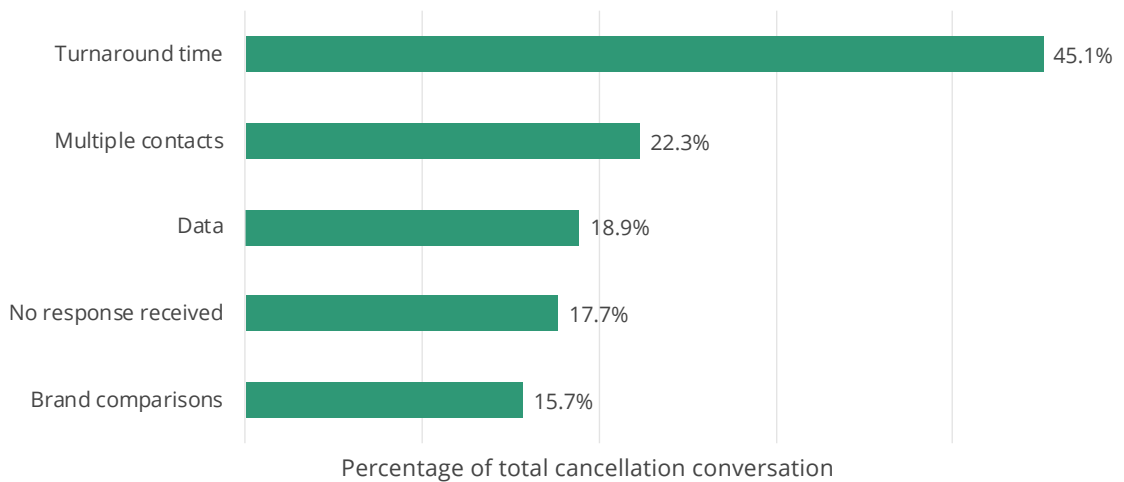
An analysis on response rates highlighted Cell C as the most responsive network provider on Twitter. This suggests Cell C's service agents are engaging more actively with customers and could explain why its customers cited feedback given by brand representatives in their service complaints more often than other telcos.

MTN customers appeared to struggle the most when trying to contact their network provider telephonically. These complaints increased steadily from April to June, suggesting the initial stages of lockdown impaired MTN's call centre.

Network providers should take note of their sources of service complaints, as these often lead to cancellation risk.

The top drivers of cancellation risk in the telco industry largely mirrored the leading sources of service complaints, highlighting the close relationship between service quality and customer retention.

**Top drivers of cancellation threats for telcos**

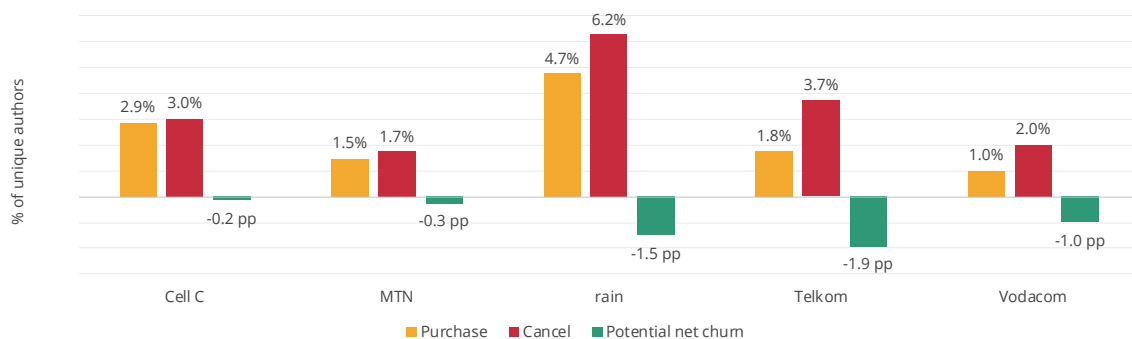


Difficulties in cancellation were an industry-wide issue, also driving turnaround time complaints. Users reporting vanishing data and looking for more affordable data were other major sources of cancellation threats.

## Cancellation risk outweighed purchase interest

Across the industry, the percentage of authors at risk of cancellation was 3.0% versus those expressing purchase interest at 2.0%.

### Purchase interest vs cancellation risk



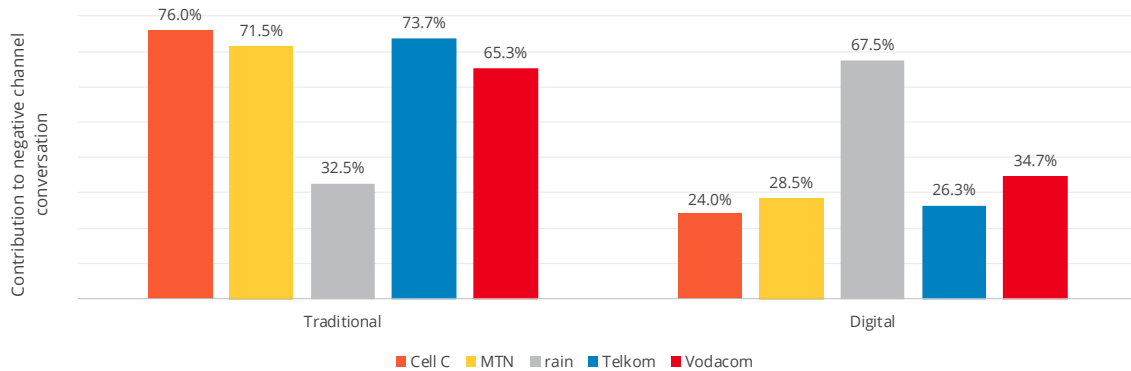
Out of the five operators, Telkom recorded the highest potential net churn, with its high cancellation risk likely reflecting its shrinking fixed subscriber base.

rain, who saw its subscriber base grow from around 100 000 to approximately 800 000 in the span of a year, recorded both the highest proportion of purchase and cancel conversation. This suggests the newcomer could see its growth slow down or even reverse if it fails to address the issues driving its high cancellation risk, namely poor customer service and network quality.

Notably, the country's two largest providers – MTN and Vodacom – recorded the lowest levels of both purchase interest and cancellation risk. With regards to purchase interest, this is mostly due to people seeking more affordable deals at the smaller providers. However, the relatively low percentage of conversation around cancellation suggests that MTN and Vodacom are doing well in terms of customer retention, in comparison to the smaller telcos.

## Traditional touchpoints generate bulk of social media complaints

### Volume of social media complaints generated by traditional vs digital channels

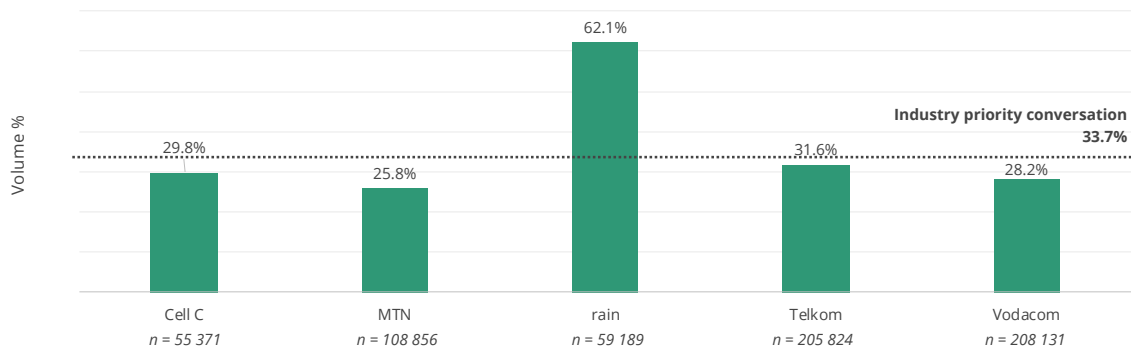


Complaints about traditional channels outweighed negative conversation towards digital channels in the telecoms industry, indicating a higher reliance on traditional touchpoints among telco customers. The bulk of these complaints are related to call centres.

With telcos likely to face a contracted economy and further regulation on prices, digitising the customer experience could ease pressure on margins. However, the reliance of telco customers on traditional channels could prove a hurdle in this shift towards digitised customer service.

While rain has struggled with teething problems in terms of customer service, their experience with digital channels could give them a competitive advantage when the rest of the industry is forced to accelerate their digital transformation CX efforts.

### Priority conversation comparison across telcos

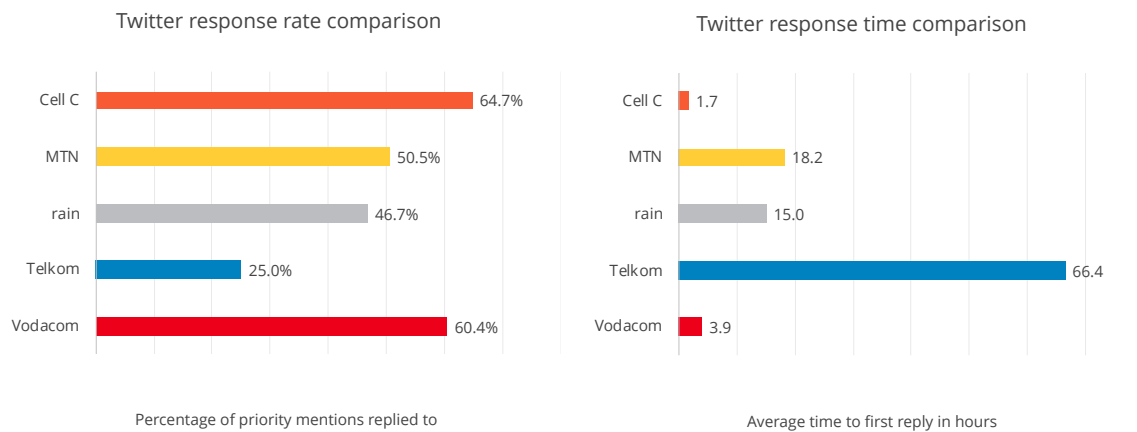


One in every three online mentions in the telecoms industry posed a risk or consisted of a service request; an acquisition opportunity; or a cancellation threat – all of which are seen as priority conversation and require a response from network providers.

This means that two-thirds of online conversation about network providers was noise to social customer service teams, hindering their ability to prioritise the mentions which did warrant a reply.

Notably, the proportion of rain’s conversation that required a response was nearly double the industry average.

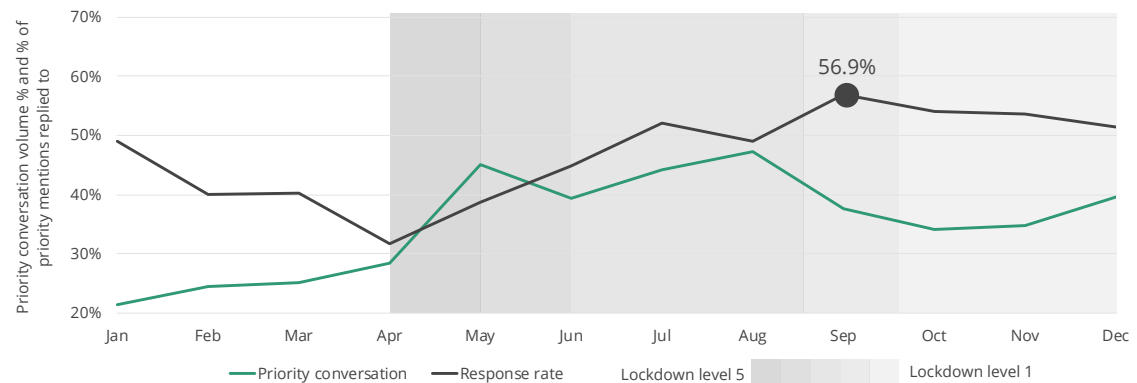
### Twitter response rate and time comparison



Cell C replied to the largest portion of its priority conversation while also responding to customers in the shortest time out of the telcos in review.

Telkom, the only state-owned enterprise (SOE) in the mix, appeared unable to compete with its private rivals when it came to online responsiveness.

### Monthly response rate and priority conversation in the telecoms industry



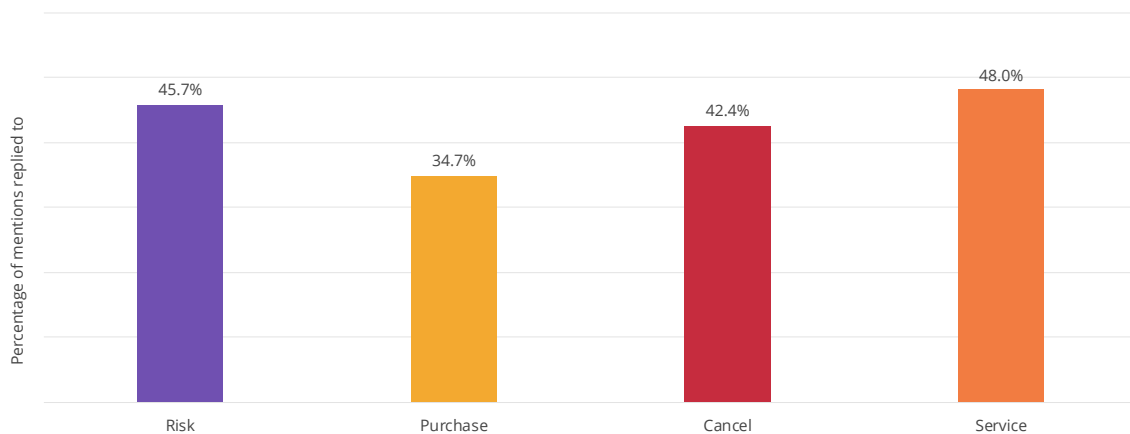
Unlike what BrandsEye observed in the retail banking industry, where the implementation of lockdown resulted in an immediate surge in priority conversation, the telecoms industry saw a delayed increase in customer queries, which only began in May. It’s likely that, as restrictions were eased to level 4 at the start of May – allowing the purchase of more than just groceries and with the prospect of a long lockdown ahead – consumers looked for ways to stay connected at home. May also brought about the lift of the ban on mobile porting.

## Telcos fail to keep up with customer queries on social media

In contrast, the introduction of the lockdown resulted in an initial drop in online responsiveness in the telecoms industry, which was promptly followed by a recovery rally. Nonetheless, despite network providers’ efforts to improve response, more than half of all mentions requiring a response from network providers did not receive one in 2020.

This evidences the telecoms industry has yet to put the adequate systems in place to deal with the volumes of customers reaching out through social media.

### Industry response rate by priority category



Counterintuitively, mentions expressing purchase interest saw the lowest response rate out of all categories of mentions warranting a response, with two thirds of these going unanswered. Authors expressing purchase interest, however, accounted for only 2% of consumers speaking about telcos, making it particularly challenging for network providers to surface them.

## Service - Deloitte Commentary

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As technology is advancing and new developments continue to enhance our lives, consumer behaviour has evolved, and customer service expectations have risen. Although a service is intangible, it is the experience that makes the lasting impact, and modern-day consumers expect better, faster, and more personalised service at all levels.

In 2020, downtime of networks was a pervasive challenge for telcos, which would directly impact customer service. One of the biggest influences on customer experience is reliability to ensure an “always on” experience. This means that regardless of the circumstances, the network will continue to perform its intended function.

As the country went into lockdown, we saw that the incidence of service complaints dramatically jumped from just under 25% to close to 40%. There are many factors that likely contributed to this spike, but none more than the surge in demand placed on the infrastructure. This could also have had a direct impact on the increase in downtime which led to the increase in service complaints.

It is evident that the spike in service complaints is not a unique occurrence as all five providers experienced this since the country went into lockdown, with only a few recovering close to “pre-lockdown” percentages.

Today, however, the network capacity – using data from previous years – would be able to better determine an accurate forecast for capacity given the past year, which could be a good indication for future capacity requirements while the country continues to work through the lockdown.

The majority of complaints are classified under turnaround time. It is that responsiveness that a customer is so desperately looking for to have the assurance that their issue was acknowledged and that the service will be restored in an acceptable timeframe.

As increasingly more customers are utilising social media platforms to stress their frustrations, it is important to have a great response on these platforms and to use the channel to inform customers of possible downtime. Not only will this ensure that customers are informed, but with customers looking to social media platforms to create more visibility of their issues, it is vital for network providers to respond quickly, and with accurate information to stop possible future complaints.

Service quality is and will remain critical going forward. It is the act or deed that is performed continuously that is reliable and consistent, and will create powerful human experiences to help providers understand throughout the service lifecycle where customers have good or bad experiences.

*Jacques Compaan,  
Business for Tech Transformation Lead,  
Deloitte Africa*

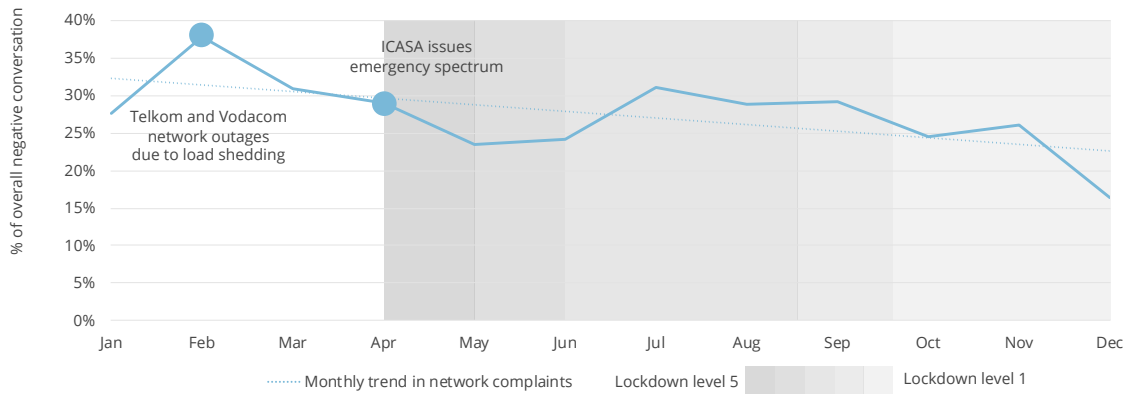
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## Network

Network complaints were at their highest in February, as Vodacom and Telkom clients were hit by network outages due to load shedding.

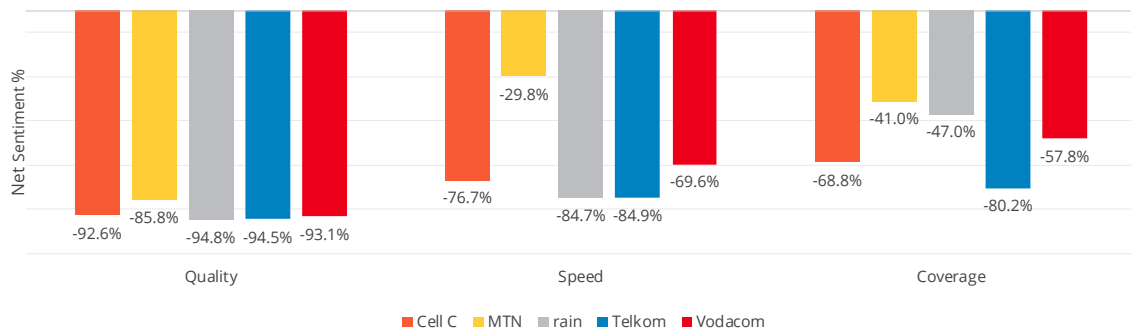
### Network complaints as a percentage of industry-wide negative conversation



As many consumers were forced to work and study from home during the lockdown, network operators faced a surge in traffic. However, this did not translate into an increase in network-related complaints, suggesting providers largely were able to meet the rising demand for connectivity. Network providers were aided in this effort by ICASA, who assigned emergency temporary spectrum to telecommunications operators to deal with network demand during the COVID-19 crisis.

While Net Sentiment for network was very negative across all providers, MTN led in terms of network quality. Vodacom – who is at the very top of the pricing spectrum and from whom most would expect premium connectivity – recorded virtually the same network Net Sentiment as rain, who despite sharing a roaming agreement, has a price per GB that is half that of Vodacom’s.

### Quality, speed and coverage Net Sentiment comparison

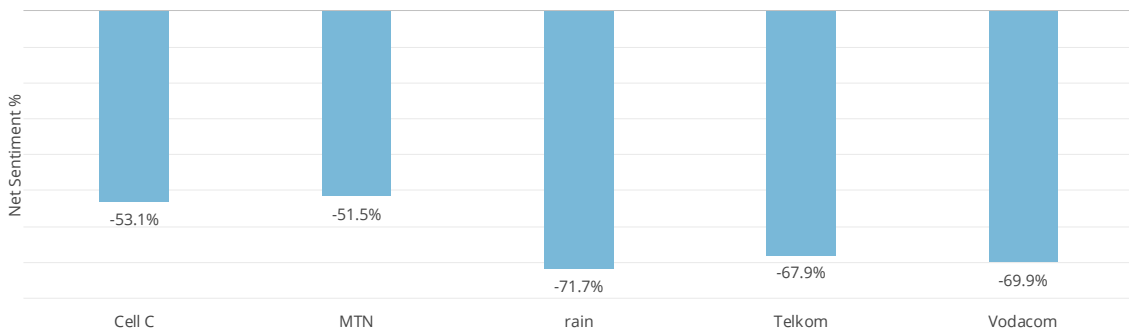




MTN outperformed every provider in all three of the drivers of network conversation. While it saw only a small advantage in quality, it was speed and coverage with which consumers were most satisfied. Consumers praised MTN for its 5G speeds and engaged with news it had once more been named ‘best mobile network’ in SA for data speeds by MyBroadband. Positive coverage conversation came from Telkom users, who noted their roaming experience was better before Telkom switched from MTN to Vodacom as its roaming partner.

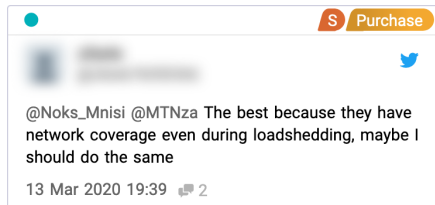
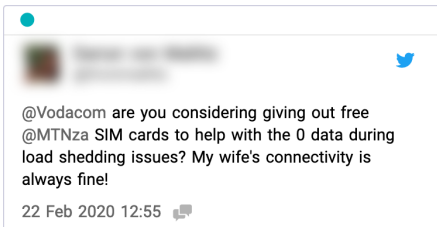
rain’s relatively high Net Sentiment for coverage resulted from purchase interest rather than customer experience, with customers looking to join the network and querying about or requesting coverage in their area.

**Net Sentiment in load shedding conversation**



Both Cell C and MTN saw considerably higher Net Sentiment in load shedding conversation when compared to other network providers, suggesting their users were the least affected by power outages and further explaining why these operators did the best in overall network Net Sentiment.

A common theme behind MTN's relatively high Net Sentiment in load shedding conversation was that its network was the most reliable during load shedding. This conversation came from both MTN and their competitors' customers.



## Network - Deloitte Commentary

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The majority of mobile network customers expect speed as a priority when it comes to network quality. The network, however, is often blamed for service interruptions, without realising that “the network” is a complex construct where mathematics, physics and hundreds of protocols dance in harmony together with thousands of variables – each of which can potentially cause a service interruption.

The good news from the report is that network complaints were on the decline over most of 2020. This might be linked to the mass migration of customers to Fibre to the Home (FTTH) networks. On paper, a fixed-line network outperforms the mobile equivalent in terms of speed and quality delivered. With the majority of the workforce adapting to a work-from-home environment in 2020 (where fibre is available), and the new FTTH connection numbers on a very steep rise, this might explain the reduced number of network complaints.

Another possible explanation might be the additional spectrum that was made available by ICASA for the mobile operators to use. More spectrum means more transport capacity, which in turn means higher throughput – in the end, this translates to higher quality of service delivered to the end user.

We are also seeing a lot of artificial intelligence (AI) and machine learning algorithms being applied to the telco networks for multiple purposes. Are these algorithms starting to return positive results by helping telcos predict and fix network quality automatically without human intervention, resulting in fewer network-related outages and thus less network-related complaints? We would not be surprised.

A major concern is the volume of network-related complaints about rain, whose 5G offering has driven much consumer interest. Could this high number of network complaints be related to the fact that telco operators are overpromising and underdelivering on the true capabilities of 5G? If consumers are unable to enjoy the network speeds promised due to slow, poor-quality networks, they will naturally be dissatisfied.

Another major concern is the poor quality experience during load shedding. This should not be the case at all. We live in Africa where we have mastered the management of redundant power on the sites, and surely understand the importance of this. Operators could overcome network quality issues linked to load shedding and this does not only refer to power on site. Their networks (RAN and Backhaul) should have the ability to instantly adapt to major changes without affecting the network performance or quality delivered. For the operators, the correct application of self-organising networks should not be a question of when, but how they can continuously improve and learn to adapt faster with every power outage.

Network providers who are serious about a customer-centric organisation, should use these results together with their internal deep dive analysis on their network's quality and performance in order to pinpoint and address the real network problems. The focus should not only be on the network operations' side of things, but also on the service level and quality of service monitoring and improvement, for example, the introduction of a SOC (Service Operating Centre). The SOC can be one of the most important steps in the operators' transition towards a customer-centric organisation and should be at the heart of an operator's customer experience management strategy.

The network is the pride of the operator. Operators should not view investment into the quality of the network as optional, but as an investment into its customers. Delivering quality of service to customers is the secret to a sustainable future operating model for any network provider. Operators could use these results and plan for improvements, if their AI and machine learning algorithms have not already done so.

*Stefanus van der Merwe,  
Operations Transformation,  
Deloitte Africa*

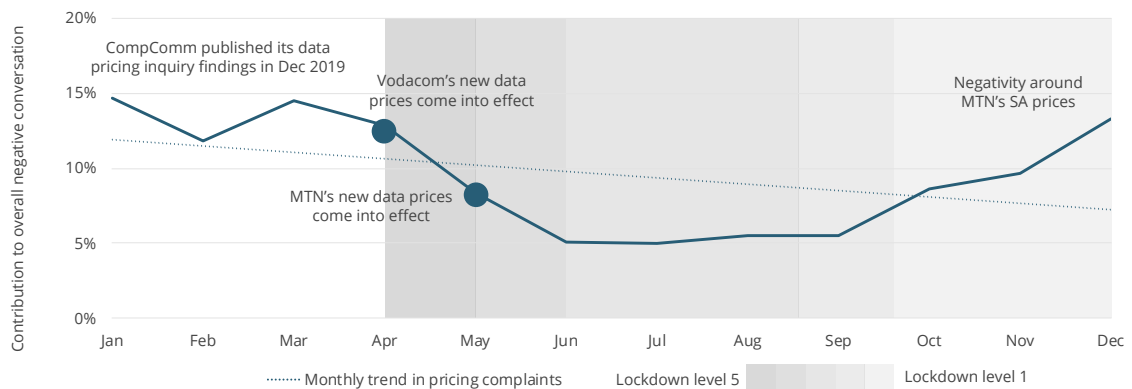
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## Pricing

Despite lockdown restrictions delivering a devastating blow to an already impaired South African economy, the prevalence of pricing complaints decreased overall in 2020.

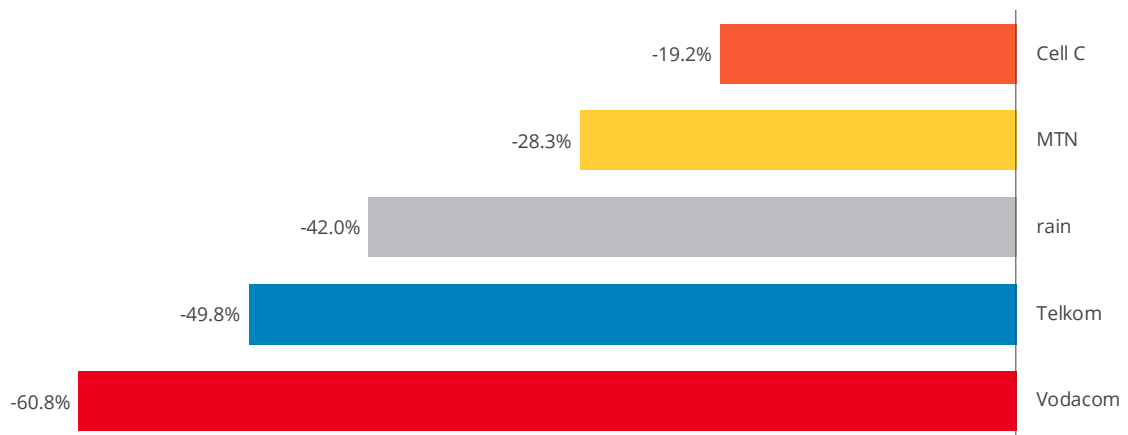
### Pricing complaints as a percentage of industry-wide negative conversation



Pricing complaints were at their highest over the first quarter of 2020, largely the result of the Competition Commission’s inquiry into data prices and subsequent negotiations with network providers. The Commission’s findings fuelled consumer discontent with data prices in South Africa.

Over the second quarter, both MTN and Vodacom implemented significant price cuts on data, coinciding with a steep drop in pricing complaints, which remained stable across the third quarter of 2020. Pricing complaints, however, picked up again over the last quarter of the year, mainly driven by dissatisfaction with MTN prices in South Africa, when compared to other African countries, which led to a call to boycott the telco.

### Pricing Net Sentiment ranking



Cell C recorded the highest positive sentiment and least negative sentiment towards pricing, putting it at the top of the ranking in this aspect of customer value. While affiliated content around its #ExtraGigsForLess and #AllInOneBundles data deals contributed significantly to its leading pricing Net Sentiment, comparisons to Vodacom’s updated data prices gave it the edge in pricing.

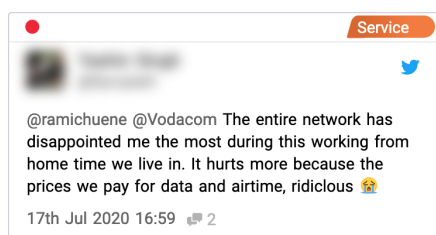
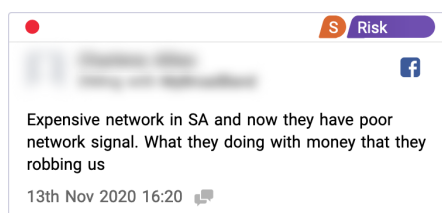
Despite reducing data prices by up to 40% following the Competition Commission’s inquiry into data prices in SA, Vodacom saw the worst Net Sentiment in pricing conversation for 2020.

### Top drivers of pricing complaints across the industry

	Affordability	Special offers	Changes in pricing	Free data	Fees or changes
Industry	74.7%	16.8%	11.0%	1.7%	1.1%
Cell C	73.6%	8.2%	12.6%	1.1%	2.0%
MTN	81.0%	10.4%	13.2%	3.6%	1.0%
rain	61.1%	8.3%	6.0%	0.6%	2.9%
Telkom	59.9%	41.5%	9.6%	0.7%	1.1%
Vodacom	82.6%	8.6%	10.5%	0.8%	0.7%

Vodacom saw the highest prevalence of affordability complaints in the industry. Following their price cuts, some consumers felt that at R99 for 1GB, the provider’s data prices were still unaffordable.

Another common theme in Vodacom’s affordability complaints were comments about the network quality, with consumers noting they paid too much to have to struggle with network issues. This shows how pricing and network influence each other.



Despite being a major source of positivity for Telkom when they were first introduced, the subsequent unhappiness around the Mo’Nice deals reflected in its high prevalence of special offers complaints, as consumers felt the deals were arbitrary and worsened over time.

## Pricing - Deloitte Commentary

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2020 was an eventful year for both data prices and growth in data demand. Given the difficulties of merely reducing prices, such as revenue cannibalisation and share price pressure, the market also saw some movement towards providing customers with a more distinct value proposition and an increased interest in the importance of differentiating on customer service.

Effective 27 March 2020, the enforced lockdown drove the demand for increased data volumes and improved download speeds, while the two largest mobile operators provided a  $\pm 33\%$  decrease in headline data tariffs. Unfortunately, the reduction in mobile tariffs was not in response to the COVID-19 pandemic or a radical pricing strategy, but a mere compliance to the Competition Commission's Data Services Market Inquiry.

Following a decision by the Competition Commission in December 2019, MTN and Vodacom were instructed to reduce their prices by 30- 50%. After discussions with the Commission, Vodacom reduced its headline 1GB data, valid for 30 days price by  $\pm 34\%$  to R99 per GB on the 1st of April 2020. This price point was extremely close to Cell C's price point initiated in 2018. It could therefore be argued that some of Vodacom's pricing decisions might have been a mere price match of Cell C's price point.

MTN followed a month later and matched Vodacom's price. These price changes happened to coincide with the start of lockdown, which increased people's dependency on data as they were forced to work and participate in educational activities from home. Almost serendipitously, these price reductions supported customers to better manage the increased demand in home data usage.

While this price reduction coincided with a 7pp decrease in pricing complaints, these low levels of price complaints were short lived and pre-price reduction complaint levels were seen in December 2020. A fundamental driver of increased price complaints can be attributed to the public comparison of data rates for MTN SA versus MTN Nigeria on social media.

Pricing, coupled with the perceived service customers receive, culminate in a value proposition. During 2020, Cell C scored the highest on the aspects of “pricing Net Sentiment”, “customer value perception” as well as “service Net Sentiment”. The public’s perception of Cell C is fascinating when seen against the backdrop of their large decline in mobile subscribers, and the subsequent high increase in subscriber numbers at Telkom mobile.

During 2020 Telkom became the third-largest mobile provider by subscriber numbers. Even though Cell C’s subscriber numbers fell between 28% and 30%, the revenue decline over the same period was only about 10%. This implies the customers who were retained were higher-value customers and the average revenue per user (ARPU) indeed increased by close to 27% over the period. This smaller, higher-value subscriber base could be making it easier for the operator to service them and drive the improved service perception.

The opposite could be true for Telkom, where a large influx of subscribers might overextend their service teams and perhaps their network. This culminates in a “customer value perception” which only managed to beat Vodacom. Vodacom experienced the poorest customer value perception in 2020. Since it predominantly has quite similar above-the-line price points than other mobile operators in the market, the difference is perhaps the combination of “network Net Sentiment” coupled with “pricing Net Sentiment” which upset their customers.

Despite the mandatory data price reductions enforced by ICASA in 2020, data pricing in South Africa remains high compared to many African countries and most of the barriers to entry persist. Three of these barriers are the cost of smart devices compared to the spending power of the average South African, share price pressure, and the lack of spectrum. All three of these aspects are closely related to South Africa’s current political and economic environment. The expectation for 2021 is for network operators to focus more on providing tangible value, expand the range of offerings and improve the customer experience instead of leading with above the line data price reductions.

*Theo Kotzé,  
Analytics and Cognitive,  
Deloitte Africa*

**Deloitte.**

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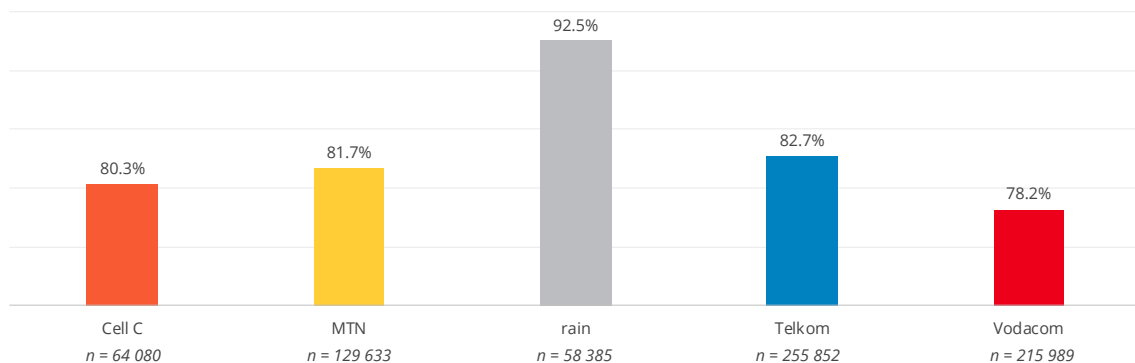
# Market Conduct

Treating Customers Fairly (TCF) is an outcomes-based regulatory and supervisory approach designed to ensure that regulated financial institutions deliver specific, clearly set out fairness outcomes for financial customers.

As highlighted in this report, customer service has proven to be the biggest challenge for SA network providers when it comes to providing customer value. The TCF approach could, therefore, assist telcos in improving their relationship with customers, as well as avoid potential legal action in the future.

Furthermore, it's likely that TCF will eventually become applicable in the telecoms space, as it has in the United Kingdom – where the framework originated – providing those network providers who adopt it early with a competitive advantage.

## Percentage of complaints linked to TCF outcomes per telco



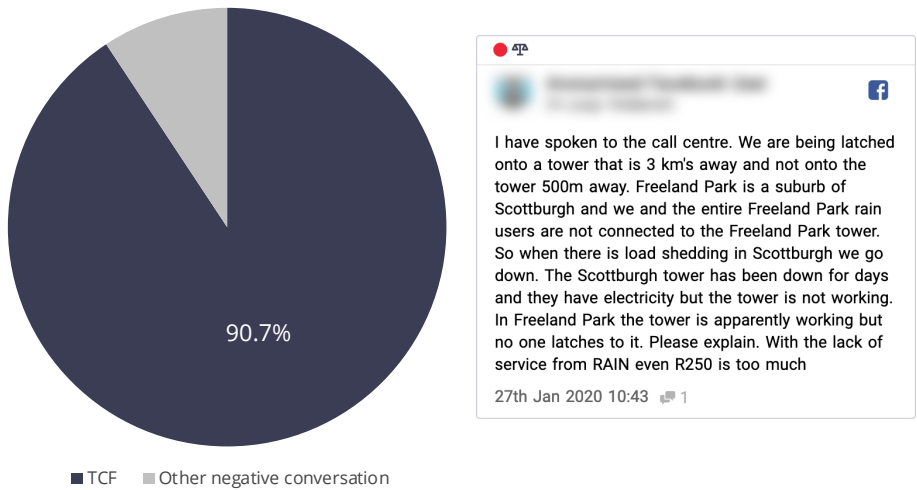
While Telkom, followed by Vodacom, received the highest volume of TCF complaints through social media, it was rain who saw the highest proportion of TCF complaints relative to volume of conversation.

As previously highlighted, this could partly reflect rain's digital business model, which would result in higher volumes of digital conversation in the absence of physical branches. However, the discrepancy in this percentage when compared to other providers suggests that this digital-focused model is not yet able to adequately service customers.



90.7% of social media complaints included TCF outcomes

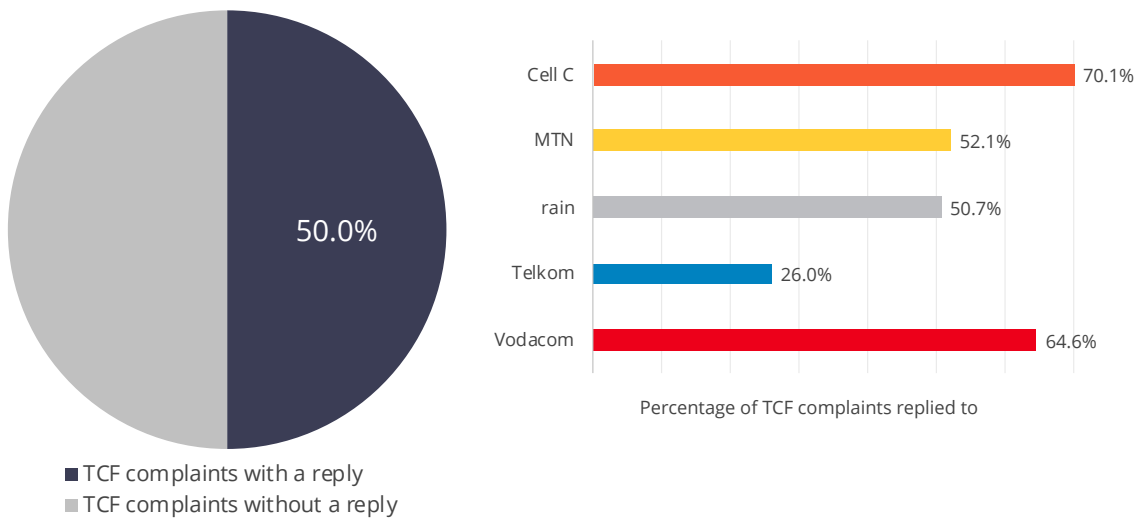
Share of TCF-relevant complaints in negative priority conversation



The bulk of priority complaints fell within one or more of the six outcomes of TCF, which highlights the applicability of the framework for the telecoms industry beyond its financial services offering. It also shows that the industry has a long way to go in treating customers fairly.

To put the previous statistic into perspective, TCF complaints warranting a response from network providers accounted for nearly a quarter of all online consumer conversation (24%), which equates to nearly half a million consumer mentions in 2020.

Telcos' response rates to TCF-related complaints

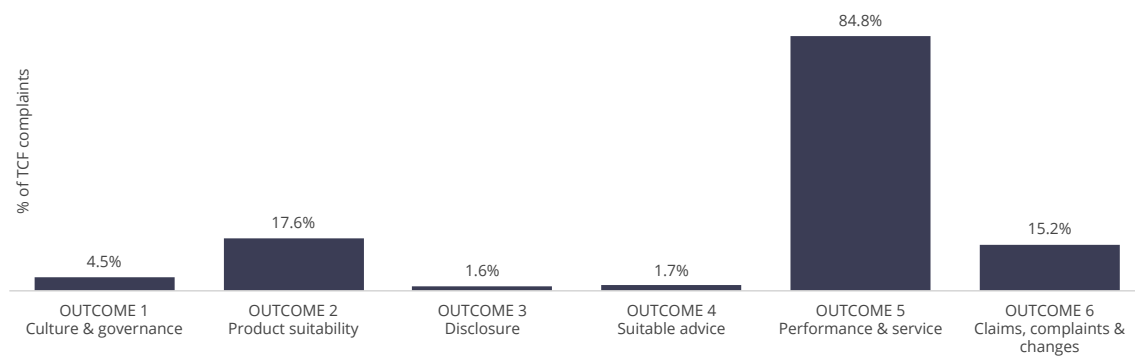


## Half of all TCF-related complaints on social media went unanswered

As previously noted, responsiveness has proven a major challenge for network providers, and TCF complaints were no exception. Cell C and Vodacom replied to the largest proportion of TCF complaints, while Telkom neglected three quarters of the TCF-relevant complaints it received on social media.

Outcome 5, which speaks to performance of products and service, was the leading driver of TCF complaints, with product and service-related complaints driving similar volumes of conversation. Complaints about the performance of products and service, however, saw little overlap between the two, suggesting they are areas needing to be addressed separately.

### Volume of TCF-related complaints



When it came to product performance, consumers most often cited network issues and disappearing data for their complaints. Meanwhile, as previously highlighted, turnaround time was the industry's main customer service pain point.

## Turnaround time requires attention

Turnaround time was the main source of TCF complaints relating to culture and governance; disclosure; performance & service; and claims, complaints & changes, while also having a major contribution to complaints around the suitability of advice. Improved responsiveness would therefore not only boost consumer sentiment, but also assist network providers in reducing the TCF risk they would face if the framework were to be implemented in the telecoms industry.

**TCF outcome by network provider**

	Outcome 1: Culture & governance	Outcome 2: Product suitability	Outcome 3: Disclosure	Outcome 4: Suitable advice	Outcome 5: Performance & service	Outcome 6: Claims, complaints & changes
Industry	4.5%	17.6%	1.6%	1.7%	84.8%	15.2%
Cell C	5.4%	16.3%	1.8%	2.9%	83.4%	19.0%
MTN	5.7%	24.6%	2.6%	1.8%	77.4%	13.7%
rain	2.3%	9.0%	1.4%	0.6%	95.3%	14.4%
Telkom	3.5%	17.3%	1.0%	1.5%	85.0%	16.4%
Vodacom	6.6%	22.5%	1.6%	2.4%	79.8%	13.5%

**Vodacom vanishing data leads to accusations of unethical behaviour**

As highlighted in the risk analysis, Vodacom faced the most risk relating to reports of vanishing data, as this often led to accusations of unethical behaviour. This, however, also negatively impacted the perception of the telco’s governance and culture.

MTN saw the highest prevalence of product suitability and disclosure complaints, which largely revolved around its data prices and data expiring or depleting abnormally.

Cell C’s high incidence of complaints around the feedback provided by brand representatives also reflected in its relatively high volume of complaints around advice suitability. It appeared both were driven by the frequency with which Cell C’s social service agents engage with customers. Meanwhile, reports from Cell C users struggling to cancel their contracts reflected in its relatively high incidence of complaints around outcome 6.

**rain customers complained of poor performance and service**

While all providers saw the bulk of their TCF complaints relating to product performance and service, rain had the highest proportion of complaints for this outcome. This aligns with other findings in this study that speak to rain customers dealing most often with both poor service responsiveness and network quality.

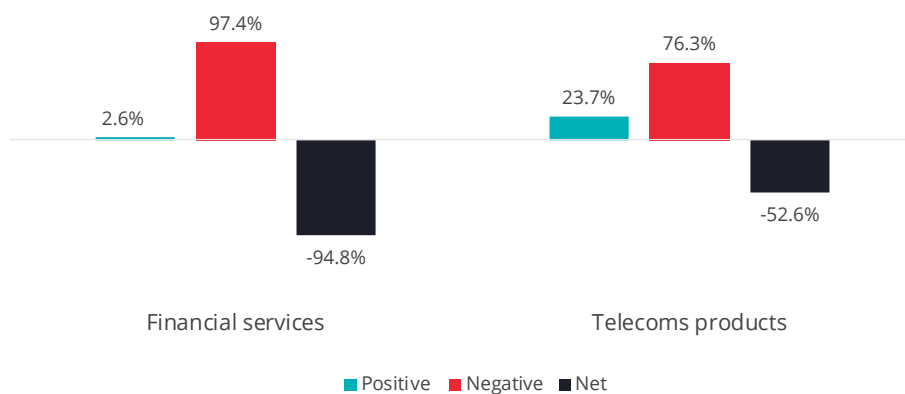
Call centres were the most discussed channel for all six outcomes; however, complaints around culture & governance and suitable advice mentioned call centres the most. Customers who struggled to get resolution through the call centre often questioned their provider’s ability to deliver service and referenced feedback provided by call centre agents.

Similarly, customers often referenced the feedback provided by in-branch staff in their TCF complaints, denoting the importance of call centre and branch staff training in complaint handling. Meanwhile, customers often cited information provided in emails and on network providers' websites when raising complaints about disclosure.

### Consumers markedly more negative towards telcos' financial services than telecoms products

When comparing conversation sentiment about financial services offered by network providers, to sentiment in conversations about other telecoms products, the former saw a considerably lower Net Sentiment.

#### Sentiment towards financial services and telecoms products



However, negative conversation around financial services showed many of the same issues impacting overall customer service in the industry, with turnaround time accounting for 79.8% of complaints. The topics of multiple contacts and no response received drove 42.1% and 28.1% of financial services complaints, respectively.

## Market Conduct - Deloitte Commentary

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The fair treatment of customers – where they can be confident when engaging with a company, that their query or complaint will be heard, prioritised and resolved as efficiently and effectively as possible – is not an unreasonable expectation. Even more so when the product or service is essential, and critical to their increased connectivity needs during a lockdown.

It is understandable then, that the emotional context of last year resulted in customers being more negative towards network providers when urgency to resolve issues was met with slow turnaround times and unresponsiveness across all channels.

In the first two months of lockdown (April and May 2020), complaint volumes leapt by approximately 18pp (from 21% to 39%), but even as lockdown level restrictions eased, the monthly complaint trend continued to rise. Nine out of 10 relevant to TCF (treating customer fairly) complaints, required a response and half of social media complaints went unanswered. All network providers experienced an upward trend in service complaints in 2020.

Unsatisfactory product performance such as disappearing data and network issues were most often cited by consumers as the initial complaint triggers, and this resulted in service complaints as operations tried to handle the inbound flood of interactions that moved from physical channels to the contact centres and other digital channels.

When one analyses the top three drivers of the service complaints – turnaround times, no response received and multiple contacts – this indicates that service operations struggled to respond to the volumes and repeat interactions as customers grew increasingly impatient. One must acknowledge that service operations faced the same challenges during lockdown that consumers faced, like travel limitations on staff, adapting to working from home, etc. Many service operations had to adjust to immediately implement remote working, re-route interaction types and channels, and find ways to enable their people to resolve escalated queries while working from home.

The fourth and fifth drivers of service complaints – feedback given by a brand representative and being placed on hold or dropped from a call – speak to people-related issues. This indicates the emotional frustrations experienced by both customers and service staff as a result of the exponential increase in engagement traffic, lack of ability to resolve issues and settling into new ways of working.

Looking at the increasing level of dissatisfaction in 2020, based on an industry Net Sentiment for service of -90.4%, there can be no doubt that we can't continue with service delivery in its current construct and that we have reached a point where something has to give. What then should network providers do?

It's not just a simple digital transformation exercise of moving things to self-service channels, or an automation opportunity to implement bots and AI, or even placing this at the door of the service operation with more pressure to find ways to handle rising volumes and cut costs. It needs to start with a deep understanding of the root causes of service requests and finding the core reasons of "why do customers need to engage?" If you don't start there, you might just find that you digitise or automate things that aren't broken.

Once a good understanding is gained of the issues that trigger interactions, then new digital tools, omnichannel opportunities, automation and service bots could hold many benefits to reduce the service complaints and increase the customer sentiment with the brand. New operating models and remote working also hold opportunities to load balance volumes and create a workforce solution that can engage with customers when they want.

The TCF Framework does offer a good starting point as it starts with the product, then considers the expectations that marketing and promotions create, followed by what information is given at the point of sale, and only then does it consider service. However, it clearly acknowledges that queries and complaints are not just the responsibility of the service operations. It needs to be a leadership focus and form part of the culture to ensure the entire business is focused on the customer.

There is almost no company that does not acknowledge the need to improve customer experience, but statements are easy, delivering on these statements is hard and requires a disciplined approach.

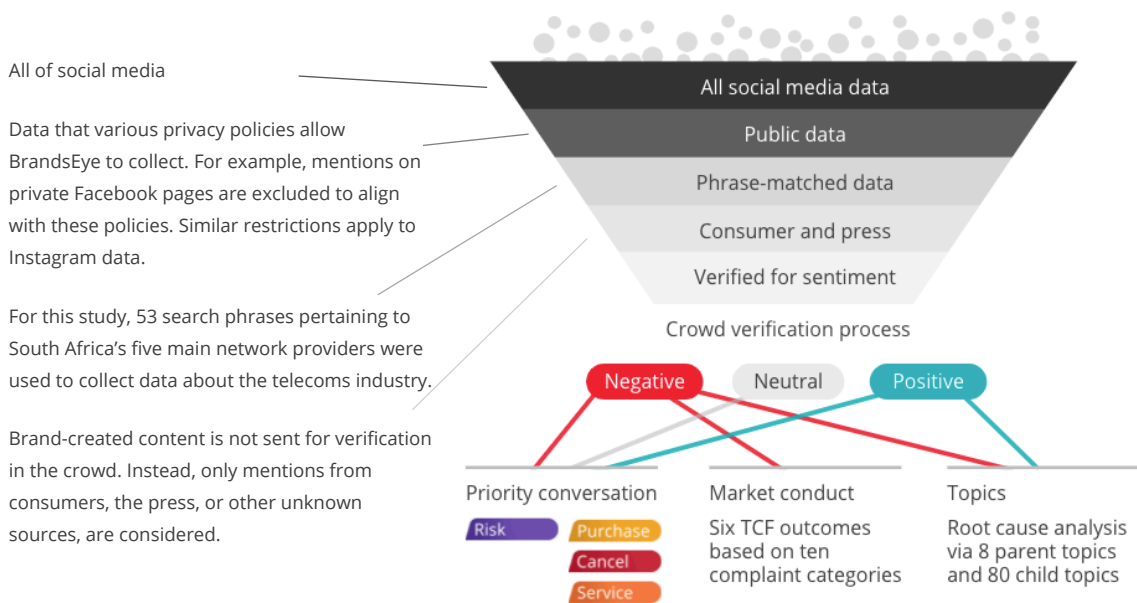
*Ica van Eeden,  
Digital Commerce Leader,  
Deloitte Africa*

**Deloitte.**

# Methodology

BrandsEye tracked 2 091 904 non-brand social media posts about Cell C, MTN, rain, Telkom and Vodacom from 1 January 2020 to 31 Dec 2020. Data sources were mainly Twitter and Facebook, but also included multiple other online sources.

## Data funnel



## Sampling Methodology

	TOTAL NON-BRAND MENTIONS	VERIFIED FOR SENTIMENT	VERIFIED FOR TOPICS	VERIFIED FOR MARKET CONDUCT	MARGIN OF ERROR ON OVERALL NET SENTIMENT
Cell C	185 808	32 292	14 594	6 294	±1.0
MTN	421 643	71 621	30 299	7 417	±0.7
rain	95 319	46 744	35 217	8 543	±0.6
Telkom	651 014	62 540	35 710	8 814	±0.7
Vodacom	738 120	90 278	41 760	9 083	±0.6

## Sentiment Methodology

To achieve a 95% confidence level and a margin of error of ±1 percentage point or less, a random, representative sample of consumer and press mentions was processed through BrandsEye’s Crowd of human contributors for evaluation and verification. Each post was coded and verified by multiple Crowd members who assessed the sentiment in the post (positive, negative or neutral).

## Topics methodology

Topic analysis enables a granular understanding of the specific themes driving consumer sentiment. A sample of 157 580 sentiment-bearing (i.e. positive and negative only) mentions was sent to the Crowd for topic assignment.

The Crowd identified which of the pre-defined telecoms topics were contained in each mention. Eight broad themes encompass a total of 80 topics.

### Telecoms topic wheel





The broad themes are customer service; telecoms products; reputation; account admin; network coverage or quality; pricing; digital experience; and physical facilities.

Mentions can be assigned more than one topic, enabling detailed analysis of issues influencing consumer sentiment. This means that totals on topics analyses can exceed 100%.

## Market conduct methodology

A random, representative sample of 40 151 mentions was verified by the BrandsEye Crowd to surface market conduct complaints. These complaints were segmented according to the six outcomes of the Treating Customers Fairly regulatory framework which governs the financial services industry and which, for this report, was adapted to the telecoms industry. In order to segment the complaints into the six TCF outcomes, a total of ten possible labels were applied to the data.

OUTCOME	OUTCOME DEFINITION	LABEL	LABEL DEFINITION
Outcome 1: Culture & governance	Customers can be confident they are dealing with firms where TCF is central to the corporate culture	1a TCF perception	Author references whether the brand treats customers fairly
Outcome 2: Product suitability	Products & services marketed and sold in the retail market are designed to meet the needs of identified customer groups and are targeted accordingly	2a Product design	The design of a product or related service, especially whether it fits the needs of the customer
Outcome 3: Disclosure	Customers are provided with clear information and kept appropriately informed before, during and after point of sale	3a Information provided	Information provided, e.g. through documentation for products or services (not advertising)
		3b Advertising	Information provided through advertising of products and services - is it clear, accurate and complete?
Outcome 4: Suitable advice	Where advice is given, it is suitable and takes account of customer circumstance	4a Advice	Advice provided by staff
Outcome 5: Performance & service	Products perform as firms have led customers to expect, and service is of an acceptable standard and as they have been led to expect	5a Product performance	Product performance - is the product doing what the customer expected?
		5b Customer service	Feedback on customer service - e.g. how the brand deals with queries and resolves issues
Outcome 6: Claims, complaints & changes	Customers do not face unreasonable post-sale barriers imposed by firms to change products, switch providers, submit a claim or make a complaint	6a Insurance and claims	The ease of making an insurance claim
		6b Complaint handling	The ease of submitting a complaint to the brand
		6c Switching	The ease of switching products or providers

# Conclusion

2020 was an exceptionally challenging year for South African telcos, with already immense pressure on margins and cashflow further compounded by the coronavirus pandemic.

While some network providers were able to differentiate themselves through pricing or network quality, the same cannot be said about customer service. With only a 5.9 percentage point difference in Net Sentiment between the best and worst performer in customer service, consumer perception is that telcos offered largely the same level of service.

Engaging in price wars, however, can lead providers on a race to the bottom, while increasing regulatory pressure on pricing and limited spectrum allocation make it difficult to offer much more improvement in network quality and coverage. This makes customer service an area prime for disruption, offering an opportunity for telcos to become market leaders through meaningful improvements in service.

One of the most effective ways to do this will be to move more customers away from physical branch and call centre channels – opening up more digital, asynchronous channels that deliver faster and better outcomes. This would include channels such as social media, WhatsApp, and in-app chat.

This will, however, require that telcos continuously monitor, respond to, and report on digital channel feedback from consumers. Furthermore, with customers reaching out to network providers on social media every day to voice their complaints, it's crucial for these firms to surface complaints that speak to their financial services offering in order to ensure TCF compliance. Considering that this will likely become applicable in the telecoms space, as it has in the United Kingdom, network providers who adopt it early will gain a competitive advantage.

### **About BrandsEye**

BrandsEye, the world's most accurate social customer data business, helps large organisations to find and prioritise the most valuable customer interactions. Using a unique blend of AI and human intelligence, BrandsEye filters the noise of unstructured feedback for the conversation that's high risk, high value or requires an urgent response.

Using BrandsEye' Crowd powered prioritisation platform, companies are able to better respond to customers, generate more accurate and actionable CX insights, manage risk, and improve market conduct reporting.

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