BrandsEye

Customer Experience Festive Season Report

DATE RANGE: 1 NOVEMBER 2020 – 7 JANUARY 2021

Deloitte.

Table of contents

Research questions

1. How did retailers perform over the festive season overall?
2. How did retailers perform over Black Friday versus the Christmas period?
    a) What were the key learnings from the highest performing retailer?
    b) What were the key learnings from the lowest performing retailer?
3. How did retailers perform e-commerce wise over the festive season?
    a) What were the key learnings from the highest performing retailer?
    b) What were the key learnings from the lowest performing retailer?
4. Which delivery options were the most frequently listed, and how did they perform?
5. What were consumers saying about refunds and/or returns?
6. What were perceptions around affordability?
7. What were the strengths and weaknesses of each retailer?

Sampling methodology

A total of 396 522 non-brand mentions were retrieved for the 1 November 2020 – 7 January 2021 period. Enterprise mentions are excluded from sentiment analyses to prevent bias. Twitter was used as the data source. Location limited to South African and unknown only.

To carry out sentiment analysis with a 95% confidence level and an overall ± 0.6 pp margin of error on Net Sentiment, a random sample of 52 676 mentions were processed through BrandsEye's Crowd of human contributors for evaluation and verification.

	Total non-brand mentions	Verified for sentiment	Margin of error on overall net sentiment
Retailer A	72 121	8 530	1.5%
Retailer B	70 823	6 446	1.8%
Retailer C	67 099	7 323	1.7%
Retailer D	58 075	3 195	2.1%
Retailer E	49 695	7 588	1.7%
Retailer F	40 981	11 061	1.0%
Retailer G	21 936	3 228	2.0%
Retailer H	11 201	3 474	2.2%
Retailer I	4 591	1 831	2.2%

The data contained in this report has been subject to quality assurance processes and deemed accurate on 27 January 2021
There may be slight changes in statistics thereafter due to changes or updates on or from social media native platforms.

Disclaimers

Retailer A
Retailer B
Retailer C
Retailer D
Retailer E
Retailer F
Retailer G
Retailer H
Retailer I

For the sake of consistency, the retailers will be anonymised and referred to their respective letters throughout the report.

The focus of this study intended to solely analyse conversation around online facilities. However, in order to minimize the margin of error, all conversation, including physical facilities, was included in this analysis.

Foreword

GAINING INSIGHTS INTO CONSUMER ONLINE EXPERIENCES

In a tumultuous year for South African retailers, consumers took to online and omni-channel shopping during lockdown. Many of the previous assumed barriers consumers had, shifted and most categories experienced online growth and even after lockdown levels eased, consumers continued to shop online.

At the end of 2020, Deloitte Africa commissioned a South African consumer survey on online shopping and complemented these findings by applying a South African filter to the *Deloitte Global State of the Consumer Tracker* longitudinal survey to gain a better understanding of the factors influencing online shopper behaviour and to identify specific nuances among various consumer groups. The report allowed us to ***identify seven factors that matter most to South African online shoppers***. You can read more about these as well as find the report here.

The survey allowed us to quantify certain influencing factors, but we needed to add qualitative insights into the consumers experiences and the key topics that drive satisfaction and positive or negative sentiment.

Deloitte partnered with BrandsEye as we felt there is no better way to understand online shopping than to listen to the online conversations that consumers are willing to share about their retail experiences. Using the festive period when transactional volumes and conversations are high, gave a robust and valid sample to gain insights if consumer expectations were met.

So did retailers live up to online shopper expectations? How satisfied were consumers with their online shopping experiences? And did retailers meet the seven factors that matter to South African online shoppers? Let's find out.

Ica van Eeden
Associate Director and Digital Commerce Leader Deloitte Africa
Tel: +27 (0) 11 304 5404
Email: ivaneeden@deloitte.co.za

Introduction

- Social media platforms such as Twitter, Facebook, and Instagram have become powerful tools for consumers to engage in virtually all aspects of their lives from relationships, to shopping, or to any kind of service they may receive.
- Due to the nation-wide lockdown associated with Coronavirus restrictions, consumers are arguably more engaged than ever before. Greater reliance on online platforms and high expectations around omnichannel performance saw a shift and interesting trends in shopper behaviour.
- Deloitte partnered with BrandsEye to gain more insights into the state of South Africa's retail sector. By analysing social media posts from Twitter we gauged the current sentiment of local consumers towards the country's leading grocery retail chains.
- We analysed just under 400 000 posts to find out what the burning issues for South African retail consumers are and how they perceive leading retailers.

Executive summary

- Festive season overview: During the festive season, consumers had high expectations around turnaround time, including deliveries and the speed at which retailers responded and resolved service queries. Following this, consumers were also price-sensitive, frequently comparing brands and questioning deals. The top performer, retailer A, exceeded customer expectations for its pricing, however, consumers mainly praised the brand for its quality of products, above and beyond price. This suggests that many consumers were happy to spend more over the festive season if their expectations around product quality and experience were met.

- Black Friday vs Christmas: Consumers were more engaged during the Black Friday period than they were over Christmas, posting fewer complaints and more praise. Retailers who performed particularly poorly over the period were unable to meet delivery time expectations and also were not geared operationally to handle returns and refunds.

Executive Summary

- E-commerce performance: Consumers were overall dissatisfied with their online shopping (including apps) experiences over the festive season. Expectations around timeous deliveries and ease of use with apps and websites were generally not met. Consumers also expected faster and more efficient communication about deliveries than what was experienced.
- Refunds or returns: 45.0% of complaints involving refunds and returns involved turnaround time and a further 23.7%, management and/or supervisors. This highlights high customer expectations around the timeous process of returning or refunding goods as well as in-store management know-how of these procedures.

Festive Season overview

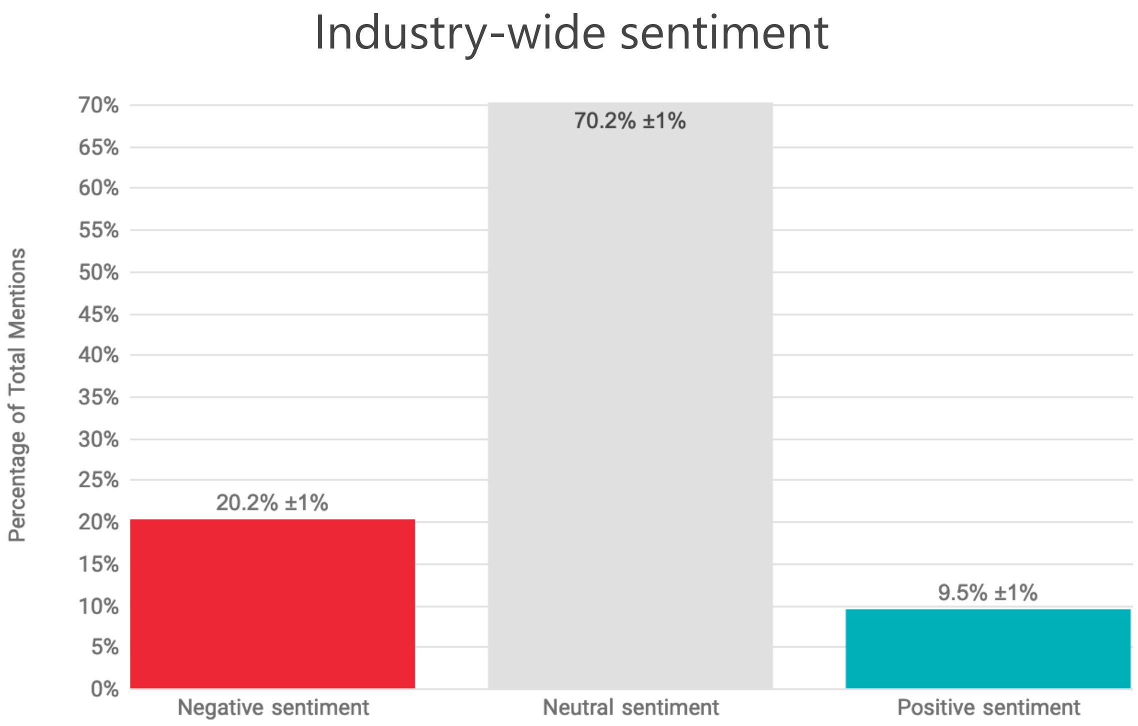
Key Findings

- **Industry:** Complaints around *affordability* and *turnaround time* drove negative experiences for consumers over the festive season. Negative sentiment = 30.2%, positive sentiment 9.5%.

- **Highest performing retailer:** Retailer A had the highest performance over the festive season due to its quality of *house brands*, *service*, and *staff*.

- **Low performing retailer**: Retailer C ranked third in terms of volume, however, performed poorly customer experience sentiment wise. *Affordability* and accusations of price gouging emerged as key issues for this retailer. Customer experiences with this retailer's *online facilities* also emerged as a pain-point for customers. Timeous deliveries and adequate customer service support were listed as possible areas for improvement.

Consumers complained about affordability and turnaround

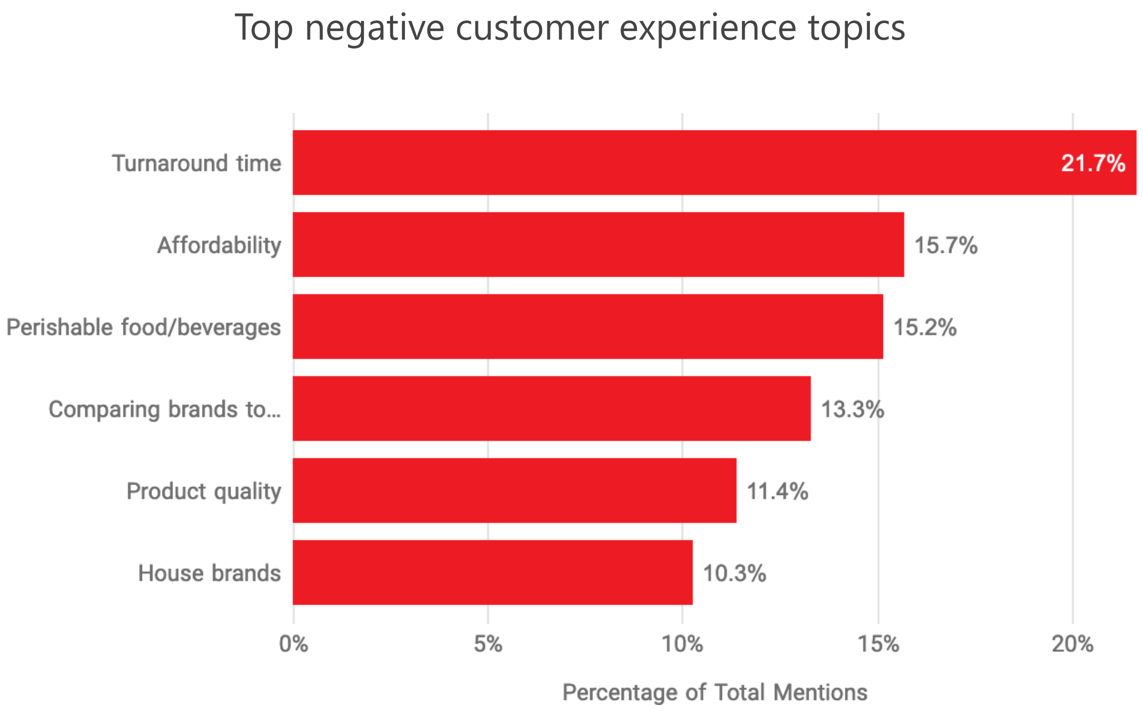


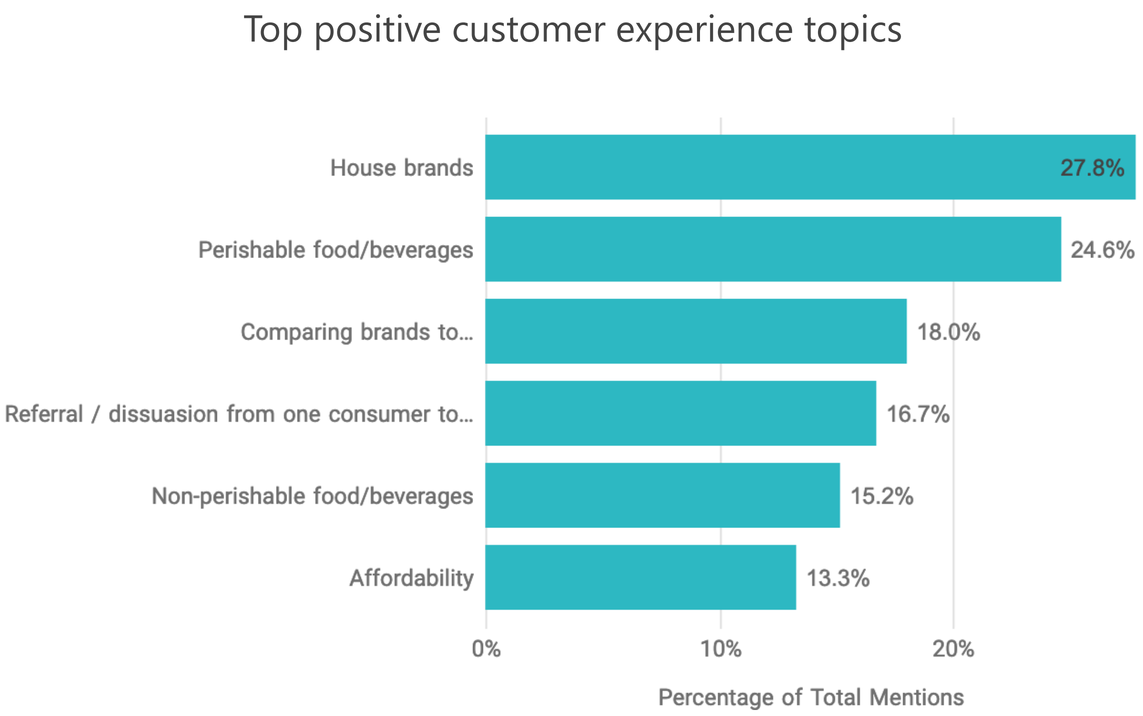
N = 1 139 for online facilities. Negative conversation n = 3 720, positive conversation n = 2 839.

The following chart displays the aggregated sentiment from 1 November – 07 January 2021 across the nine retailers.

- Almost a quarter of the conversation was negative as consumers complained more than praised the services.
- Although this is quite typical behaviour seen on social media, data shows that a combination of customer experience and logistical issues drove complaints. *Affordability,* as well as *turnaround time,* were frequently listed complaints.
- The following slides will review the top positive and top negative drivers of this topic across the various retailers.

Top negative and positive customer experience topics





N = 1 139 for online facilities. Negative conversation n = 3 720, positive conversation n = 2 836.

Customer experience across the festive season

Customer experience volume and Net Sentiment

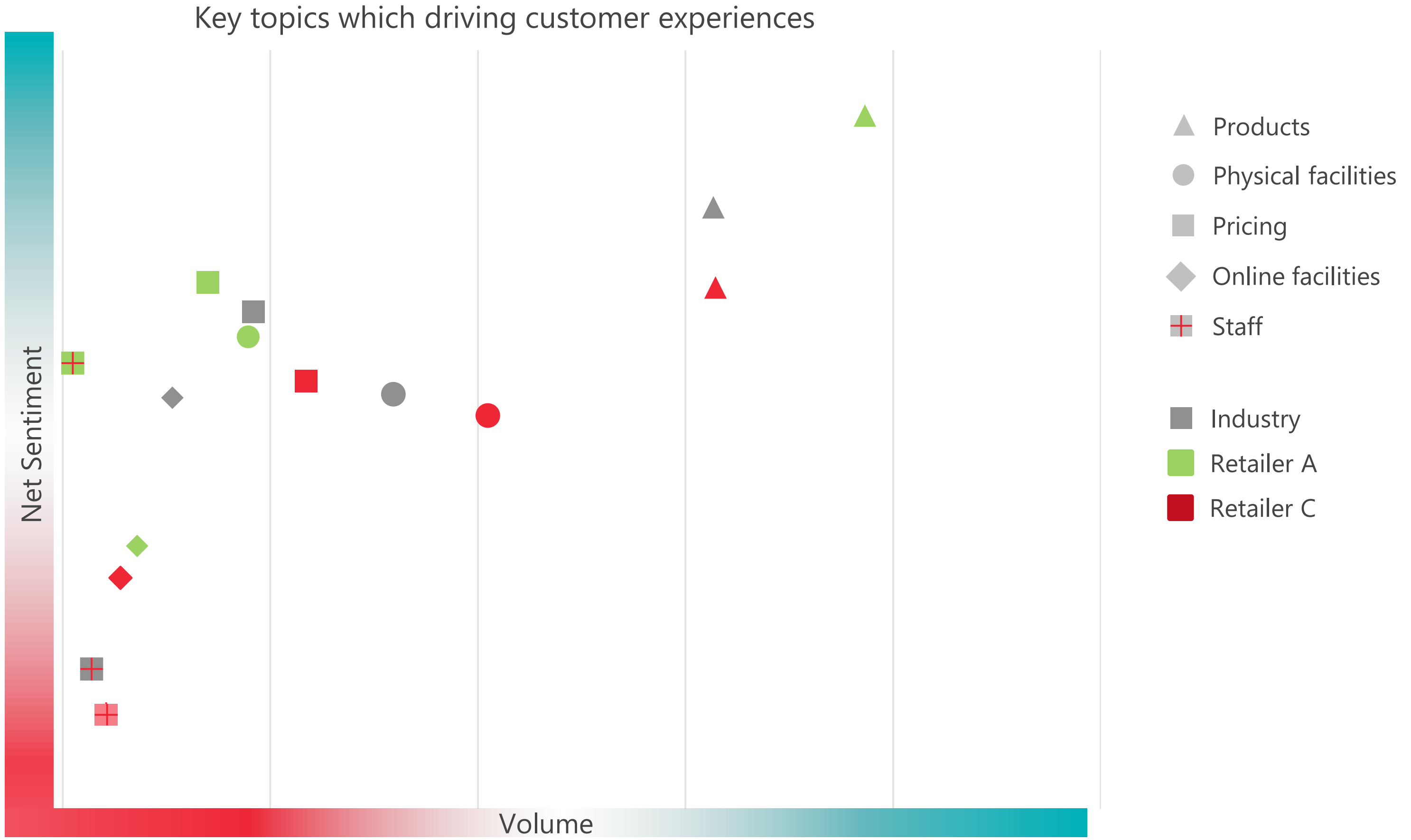
	Volume	Net Sentiment
Retailer A	24.9%	9.6%
Retailer B	21.2%	-4.9%
Retailer C	16.0%	-17.9%
Retailer D	15.2%	-16.0%
Retailer E	6.7%	-15.2%
Retailer F	5.2%	-27.8%
Retailer G	5.2%	-19.9%
Retailer H	3.1%	-9.6%
Retailer I	2.4%	3.5%

Net Sentiment is the sum of negative sentiment subtracted from the sum of positive sentiment. n = 11 889

Retailer A saw the highest proportion of customer experience mentions. This retailer also performed relatively well Net Sentiment-wise, experiencing more praise than complaints about the festive season. A combination of service from staff and quality of products drove positive customer experiences for this retailer.

Retailer C saw above-average customer experience queries however, it performed relatively poorly compared to the rest of the industry with a -17.9% Net Sentiment. The brand's poor online facilities, products, and pricing negatively impacted experiences. More detail on this is provided in the following slides.

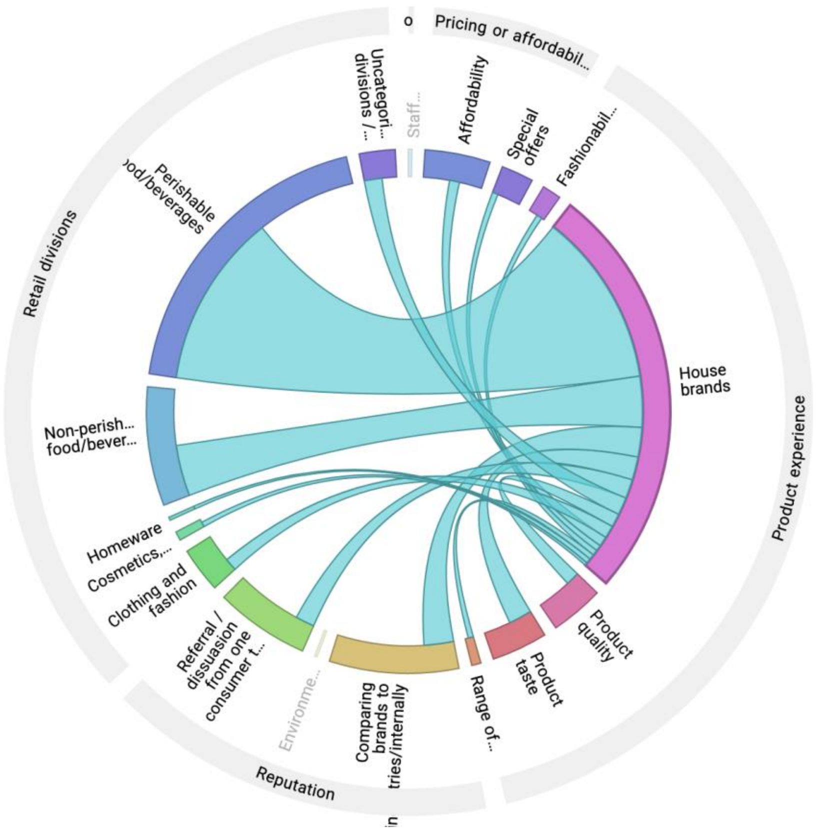
Topics driving customer experiences: Retailer A vs C



- The adjacent chart displays the relationship between the volume and Net Sentiment of the top topics driving customer experience conversation. Findings are compared between retailer A (green), retailer C (red), and the overall industry (grey).
- Retailer A performed above the industry aggregate for all topics, performing notably better for its products, pricing, and staff.
- Retailer C performed lower than the industry aggregate across the board, with poor performance seen in its pricing and its online facilities.

The focus of this study intended to solely analyse conversation around online facilities. However, in order to minimize the margin of error, all conversation, including physical facilities, was included in this analysis.

Retailer A offered high quality of house brands and exceptional service from staff



Positive topic co-occurrence chord diagram shows overlapping themes driving product conversation. N = 495

There are ice creams and there is Retailer A ice cream😋😋😋😋 t.co/WLVgo1FnF2

7th Dec 20:49 23

Instant hot drink lovers 👀 R 59.99 each #RetailerA #VeganFinds #FoodHaul t.co/rarl9fUlR3

18th Nov 11:39 5

Service

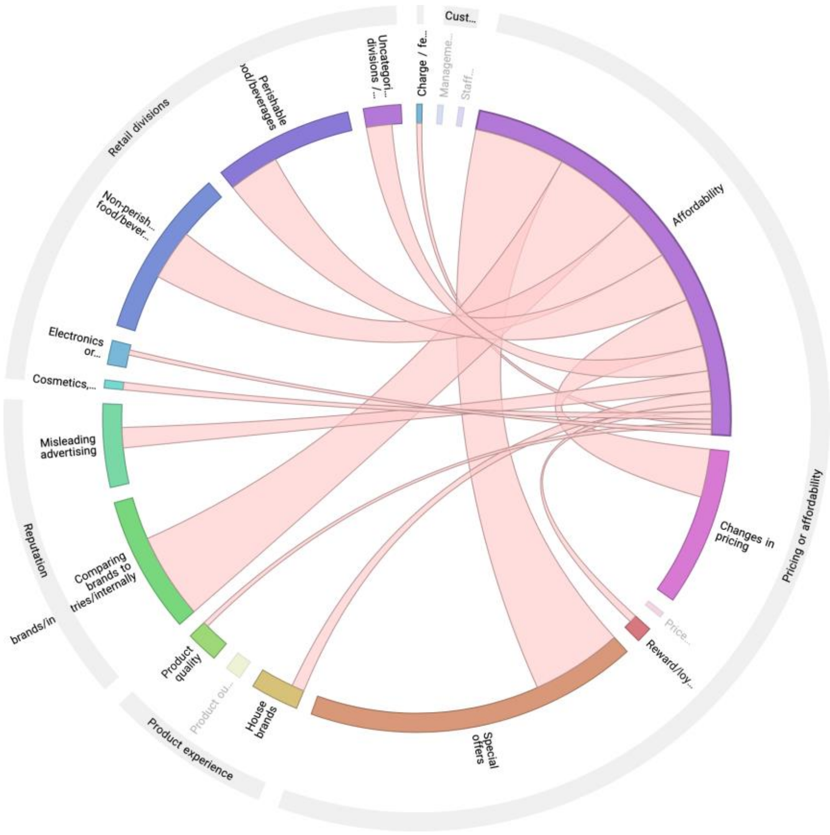
Was just at Retailer A, my cashier's name was Freedom. She was born in 94. Friendly and wonderful she is a reminder of so many good things in this beautiful country. I feel privileged to have met her.

6th Nov 09:31 3

Retailer A's *house brands* were key in driving positive experiences. Both *perishable and non-perishable goods* were listed as reasons to shop with the brand (as opposed to other brands). Interestingly, quality was praised above *affordability*.

Conduct and friendlier service from *staff* was another driver of positive sentiment. Although experiences with staff was less important than *product quality*, it was a notable outlier for the retailer compared to the rest of the industry.

Consumers accused retailer C of price gouging



Negative topic co-occurrence chord diagram shows overlapping themes driving pricing conversation. N = 162

Service

@_BlackZA Yes this is true, Retailer C is actually expensive

7th Dec 19:32 5

Service

@RetailerC how do you go from WAS R2199 to NOW R 3299 ? I dont think this is a bargain ? 🤔😔 t.co/MP8w2EThEP

11th Nov 19:59 7

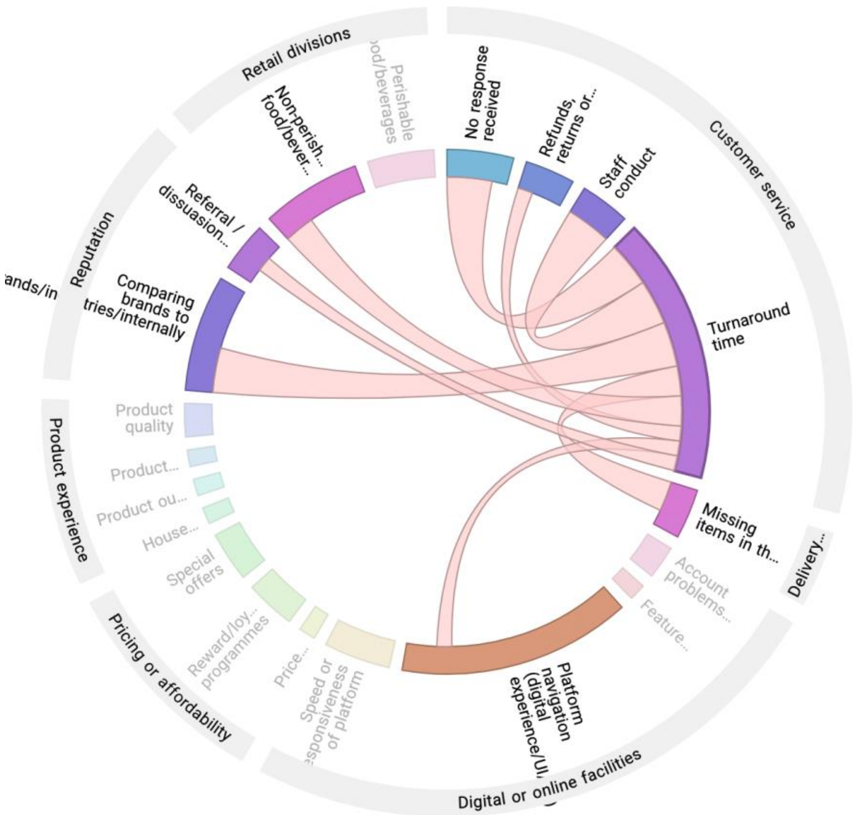
Retailer C Black Friday special for Tastic rice 2kg says R48 for two. But I've seen it at R19,99 before, for one. It's a scam!

26th Nov 17:41 2

Retailer C's *affordability* emerged as a prominent complaint. Looking at the chord diagram, authors also listed *specials* as an issue and also frequently negatively compared prices with other retailers.

Consumers also accused the retailer of price gouging, inflating prices just before the festive season in order to offer attractive specials.

Retailer C impacted by issues with online facilities



Negative topic co-occurrence chord diagram shows overlapping themes driving online facilities. N = 52

Service

@RetailerC I paid a week ago for an online order and arranged a specific time and date to collect my order at Store Name. Zero stock of my order and promises to call me back and arrange delivery to my house yesterday.

1st Dec 05:40 2

Service

@RetailerC Hi, I bought stuff from you online, but you never fulfilled the full delivery. You didn't even let me know. You don't even respond to your WhatsApp!!

6th Jan 11:25 1

Service

@RetailerC your online service is sh*t never again what nonsense is this? I placed my order at 13:15 it's 15:09 and it's not here am going back to competitor they not great but on their app you can communicate with them and their waiting time is shorter I can't even cancel t.co/UYKzsBK4VP

29th Nov 15:11 1

Retailer C's *online facilities also* emerged as a prominent complaint over the festive season. Looking at the chord diagram, authors also frequently cited issues around *turnaround time*.

Complaints around delays with deliveries were further compounded by negative customer experiences. In the first example mention, this consumer complained about waiting for call backs from the retailer. In the second example mention, the author complained about the brand not to their WhatsApp service.

Turnaround issues led consumers to make frequent comparisons to other competitors who offer similar delivery options.

Black Friday vs. Christmas
Retailer performance

Key Findings

- **Industry:** Across all retailers, the Black Friday saw a higher volume of mentions than Christmas. Furthermore, the period saw a higher Net Sentiment with 8.0% and 1.2% respectively.

- **Highest performing retailer:** Retailer I performed particularly well over **Black Friday**, with its competitive pricing strategy, it offered attractive specials to its customers.

- **Low performing retailer**: Retailer F performed particularly poorly over the Christmas period as consumers complained about items not being delivered timeously, and poor customer service around returns and/or refunds.

Industry overview: Black Friday vs Christmas

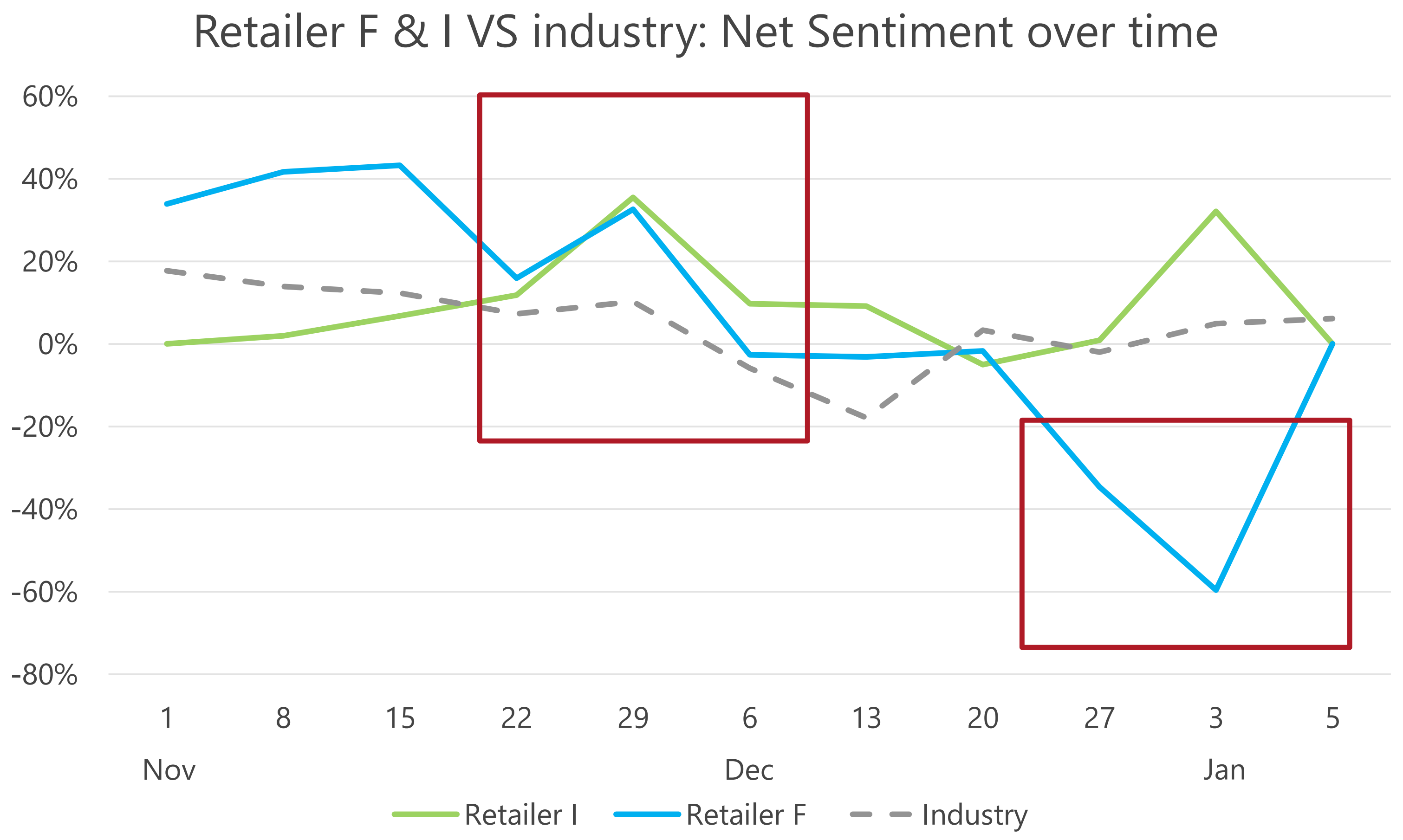
	Volume	Sentiment
Christmas period	62 338	1.2%
Black Friday period	113 263	8.0%

Christmas period was defined from 21 December – 3 January. Black Friday period was defined from 16 – 30 November.

These periods were segmented according to these dates as this was when consumers tended to post highly emotive customer experience queries about their purchases.

Black Friday experienced almost double the amount of mentions than the Christmas period. It also saw more praise than complaints, suggesting more favourable experiences with purchases.

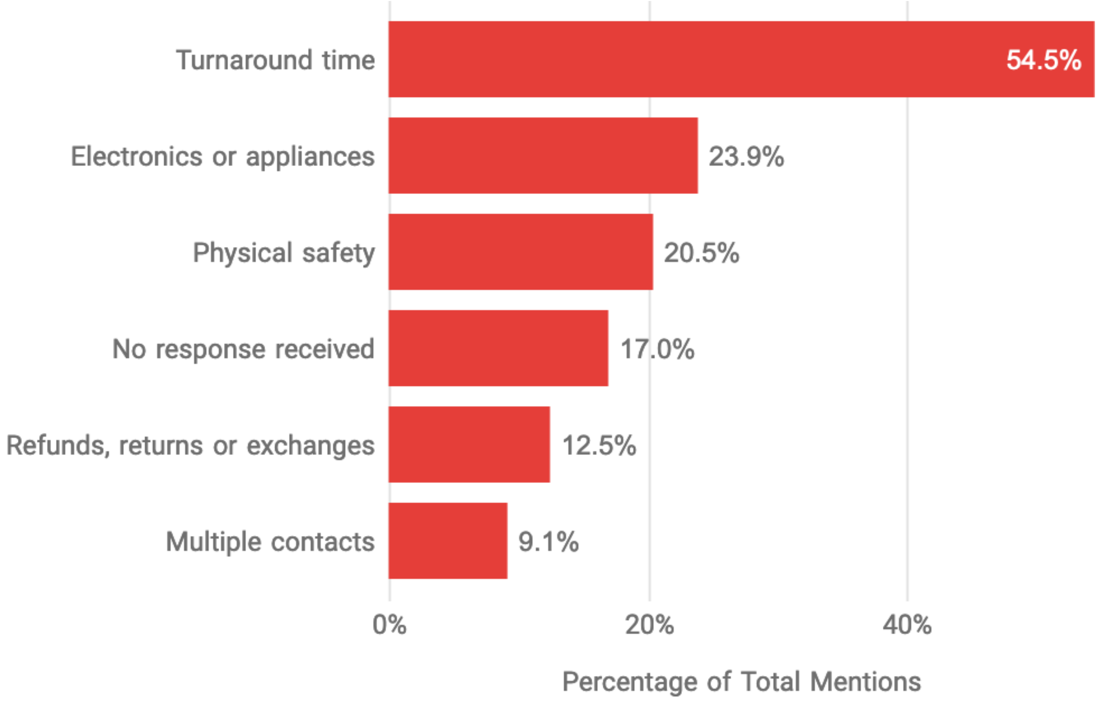
Net Sentiment over time



- The adjacent chart displays the retailer F and I's Net Sentiment plotted over time. The dotted line indicates the aggregated industry-wide Net Sentiment.
- Retailer I was the highest performing brand over Black Friday, seeing higher volumes of positive sentiment than the rest of the industry.
- Retailer F performed particularly poorly over the Christmas period with a -59.5% Net Sentiment on the week of 28 December. Negative experiences with *turnaround* of deliveries, and stock of *electronics or appliances* drove complaints. A further 17.0% of all complaints can be attributed to lack of *adequate responses* to queries.

Retailer F: Items not delivered, request for refunds

Top negative topics retailer 6: 21 Dec – 3 Jan



- Customers from Retailer F complained about not receiving their deliveries over the Christmas period. Some complained about having to wait over four weeks for their deliveries to arrive.
- When items were not delivered, consumers requested refunds. Due to a lack of communication from the retailer, consumers threatened to log complaints with the Ombudsman.
- Interestingly, the retailer tended to be fairly responsive social media replying on average to 83.0% to customer service queries within 9-12 hours. Consumers were rather looking for pro-active and reliable communication during around the time of their deliveries.

Retailer F: Consumers disappointed not to receive PS5 orders over Christmas

Service

@CookiesNkream @mbulelo_mango @PlayStation_SA @RetailerF Seems like they sold more units than they have and we just have to wait. Now they coming witth all kinds of lies and excuses.

24th Dec 07:12 2

S Risk

@RetailerF #how your stores stole Christmas - one day before Christmas and still no PS5. Some recieved dispatch emails but no goods. Told some shipment not in country yet. Some told at warehouse. Some told in Johannesburg. Tell us the truth Retailer F! Stop your BS!

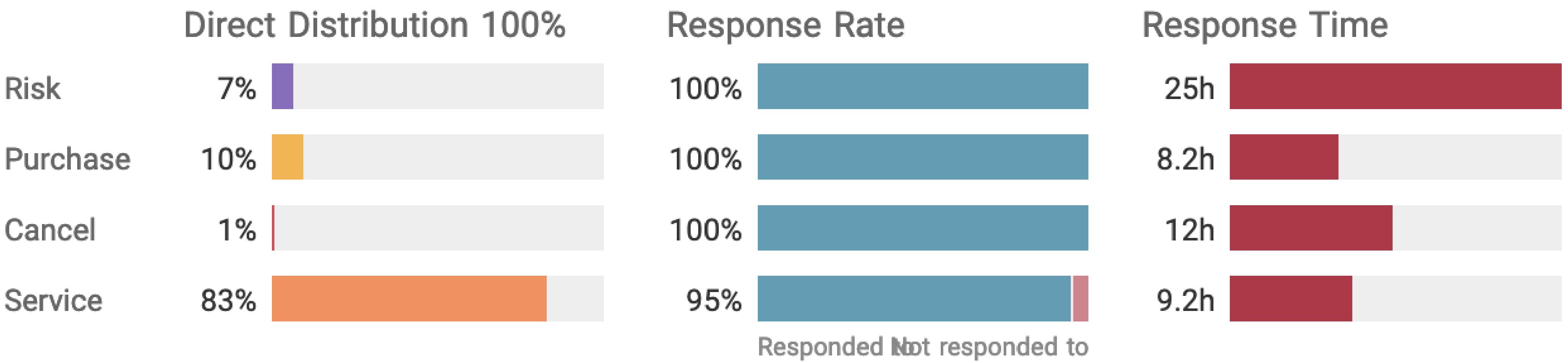
24th Dec 06:34 1

@PlayStation_SA For @RetailerF to deliver my PlayStation 5 coz wow.. 😩

23rd Dec 11:20 2

Retailer F: Responds on social media- missing communication during delivery customer journey

The following table shows the rate and time in which retailer F responded to customer queries. The majority of consumer mentions were general service queries, and the retailer responded to 95.0% of these. Furthermore, it took retailer an average of 9.2 hours to reply. Despite this, many consumers complained about not receiving a response from the brand usually during the delivery customer journey. This suggests that consumers are perhaps looking for more communication (pro-active) during or at the time of delivery.



Retailer F: Customer fails to receive order or refund

Service

@RetailerF your agents are not giving me concrete information about my refund, this is so frustrating!!! This is now my 2nd time having to bring this matter on social media, your lack of proactive communication is disgusting.

30th Dec 08:21 1

Service

@RetailerF you have been making empty promises, I want my money TODAY! I AM TIRED of your silly meaningless EXCUSES!!

30th Dec 12:17

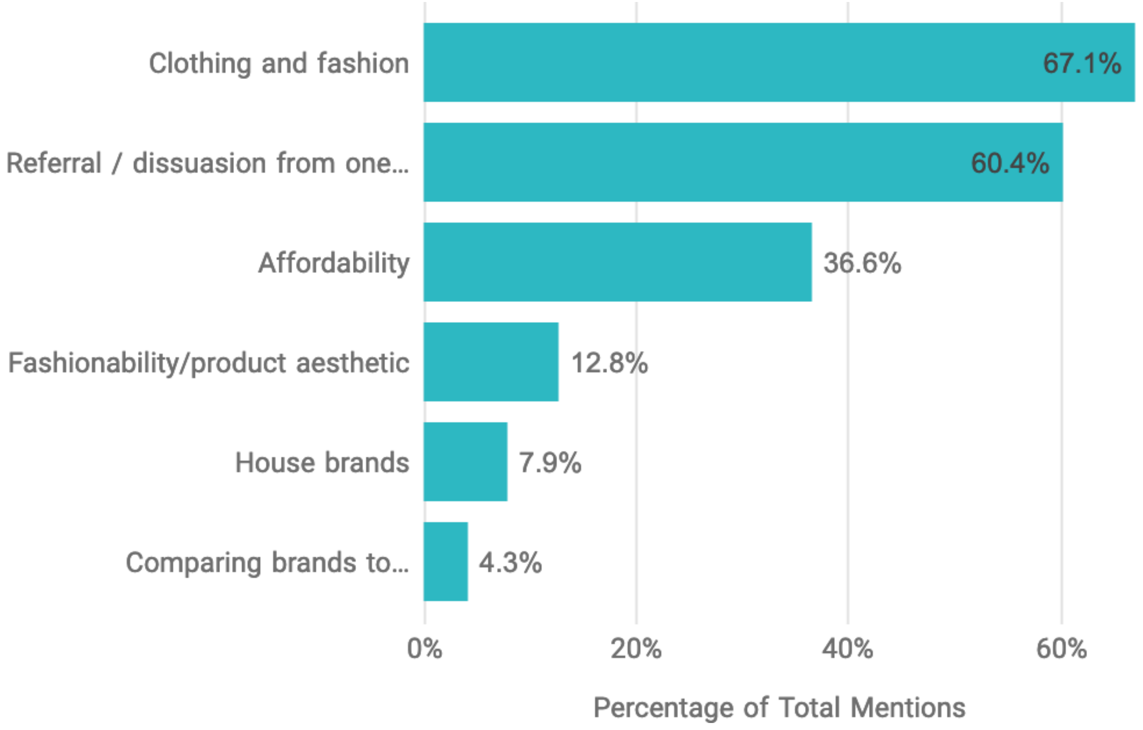
Service

@RetailerF when should I expectmy refund? it has been over a month since I ordered, you failed delivering my order and I ended up cancelling now you are failing to refund me. 😡 You not even ashamed of the bad publicity sies!

31st Dec 14:09

Retailer I: Praised for its affordability

Top positive topics retailer I: 16 – 20 November



- Looking at top positive drivers of conversation for Retailer I over the Black Friday period, Just over a third of praise was due to *affordability*.
- Online facilities and door-to-door deliveries is not a key proponent for this retailer, thus, its competitive pricing strategy and campaigns advertising prices drove positive sentiment.

Retailer I: Affordability drives positive conversation

RT @ZethuBruh: #GirlzTalkZa Ladies don't say I don't plug y'all, only R19.99 at @RetailerI. Satin Sleep Caps t.co/LKfVevz8r7

26th Nov 15:12

Saving you even more on must have summer styles. Visit your nearest @RetailerI and get Ladies dresses for R139.99, available in sizes 30 - 40 and R159.99 for sizes 42 - 46. 👗 Looking good, feeling even better. Tune in to #LTP for more! #RetailerI t.co/8nUw2DNgoS

17th Nov 11:51 19

@Jenniemqoqi Please go to @RetailerI and get yourself this range of product. Its a spray, hairfood and hair lotion. You will get all 3 of them at R50 or less... it works wonders for my hair. I have never been hapier... all the best!😘 t.co/1glnjQlWps

27th Nov 09:11 1

A review of e-commerce performance

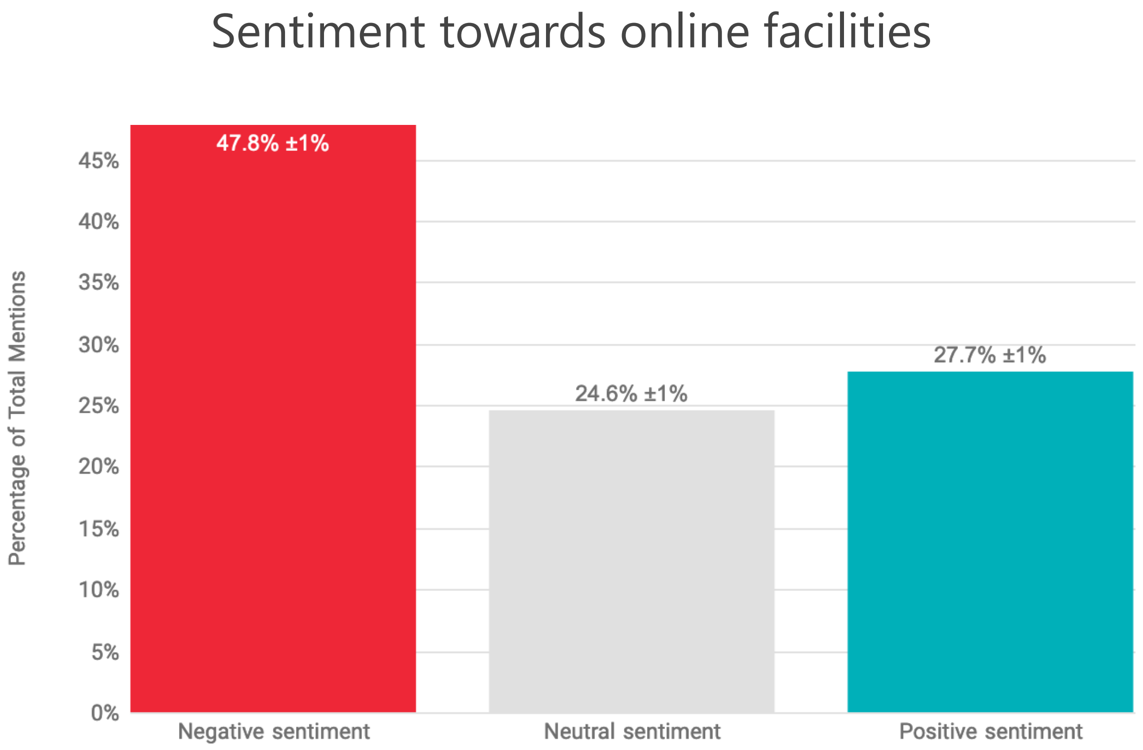
Key Findings

- **Industry:** Consumers were overall dissatisfied with their online shopping (including apps) experiences over the festive season. Expectations around timeous deliveries and ease of use with apps and websites were generally not met. Consumers also expected faster and more efficient communication about deliveries than what was experienced.

- **Highest performing retailer:** Retailer B was the only brand to either supersede or meet consumer expectations over the festive period.

- **Low performing retailer:** Retailer F was the lowest performing retailer for e-commerce. Lack of visibility around order tracking and consistent communication from customer service teams across channels emerged as key areas for improvement.

How did consumers feel about online facilities?



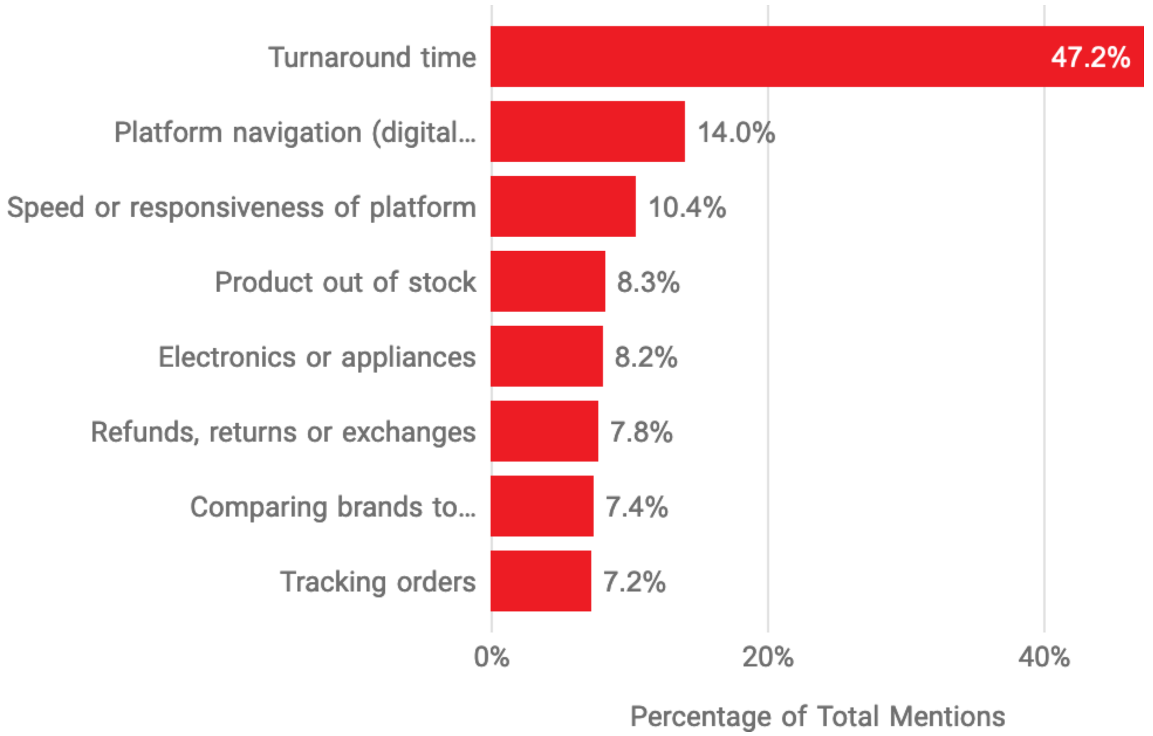
N = 1 139 for online facilities. Negative conversation n = 527, positive conversation n = 305.

The following chart displays the aggregated sentiment towards the topic *online facilities* from 1 November – 07 January 2021 across nine major retailers.

- Almost half of the conversation was negative as consumers complained more than praised the services.
- Although this is quite typical behaviour seen on social media, data shows that a combination of customer experience and logistical issues drove complaints.
- The following slides will review the top positive and top negative drivers of this topic.

What drove customer complaints?

Top negative topics of online facilities

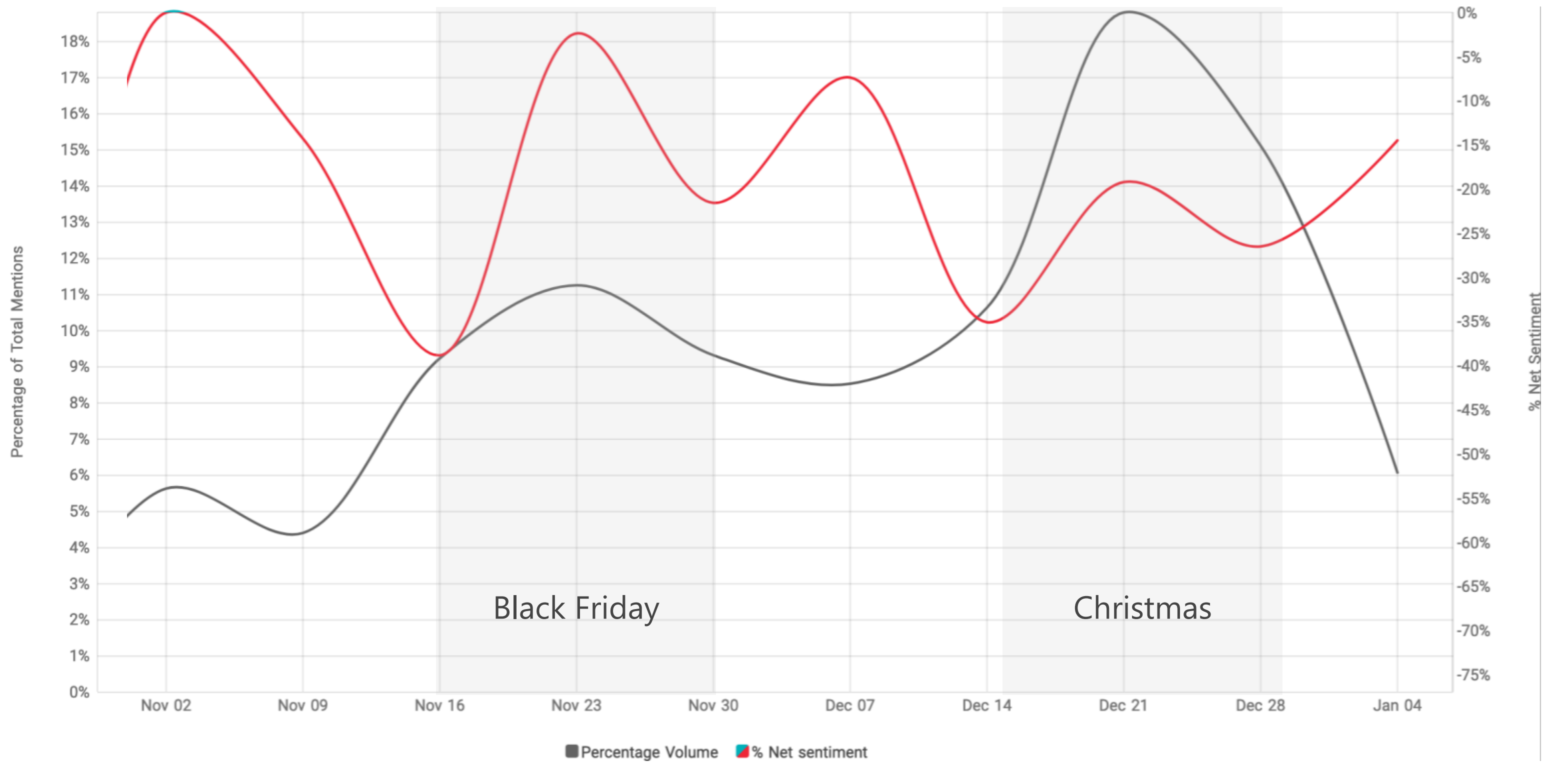


N = 1 139 for online facilities. Negative topic conversation n = 527

- Consumers complained the most about items not being delivered *timeously*. Complaints compounded when their queries were not responded to immediately from the retailers online.
- *Platform navigation (digital UX/UI)* drove just under 15.0% of the complaints. In-app service errors (bugs) such as payment errors and the app unexpectedly closing drove these complaints.
- *Speed or responsiveness of platform* comprised around 10.0% of complaints. System delays on app or websites were frequently listed as pain-points.
- *Stock availability* was the fourth-most prominent complaint. Consumers complained about discrepancies of online versus instore product availability. Some also noted that online stores were not transparent about whether stock was available and this information was often only provided after payment.

High expectations and a greater reliance on online facilities impacted experiences

Net Sentiment and volume around online facilities



Net Sentiment is the sum of negative sentiment subtracted from the sum of positive sentiment. Please note, sentiment conversation has a margin of error of 3.8%.

The following chart displays the sentiment towards the topic *online facilities*, measured in weeks, across the nine major retailers.

The volume of mentions (depicted in grey) trended upwards considerably towards Christmas, indicating an increasing reliance of online services.

Net Sentiment (depicted in red) was overall negative across the period, dipping considerably on the week of 16 November and again on 14 December.

Example mentions: What drove customer complaints?

Turnaround time

Service

@RetailerI Guys my parcel hasn't been picked from the store since last week and I paid for 3-5 business days. It's says "waiting upliftment" when I track it. This is unacceptable!

8th Dec 11:57

Service

@RetailerF it's almost Christmas I ordered online in august and I'm still waiting... Your service is PATHETIC!!!!

6th Nov 10:23 1

Platform navigation (UX/UI)

Service

The Retailer H app is not easy to navigate on the phone 🤬

27th Nov 07:31

S Cancel

I'm trying to order a laptop charger on Retailer G and it keeps glitching. Maybe it's a sign.

23rd Nov 08:29 1

Speed or responsiveness

Service

Mmm, @RetailerG doesn't want my money, is this a taste of what #BlackFriday is going to be like on your system? (website freezes on payment, fun.) t.co/NlgtvPLaAl

16th Nov 14:51 1

Service

@Zoddies @RetailerB I was also wondering what's wrong. Took a while to place my order.

1st Nov 12:00 1

Stock availability

S Purchase

@TimePiece28 @RetailerI do you sell online, because there's a lot of things I see on this app from Retailer I, but I don't find any of them at Retailer I PTA CBD it is so dry.

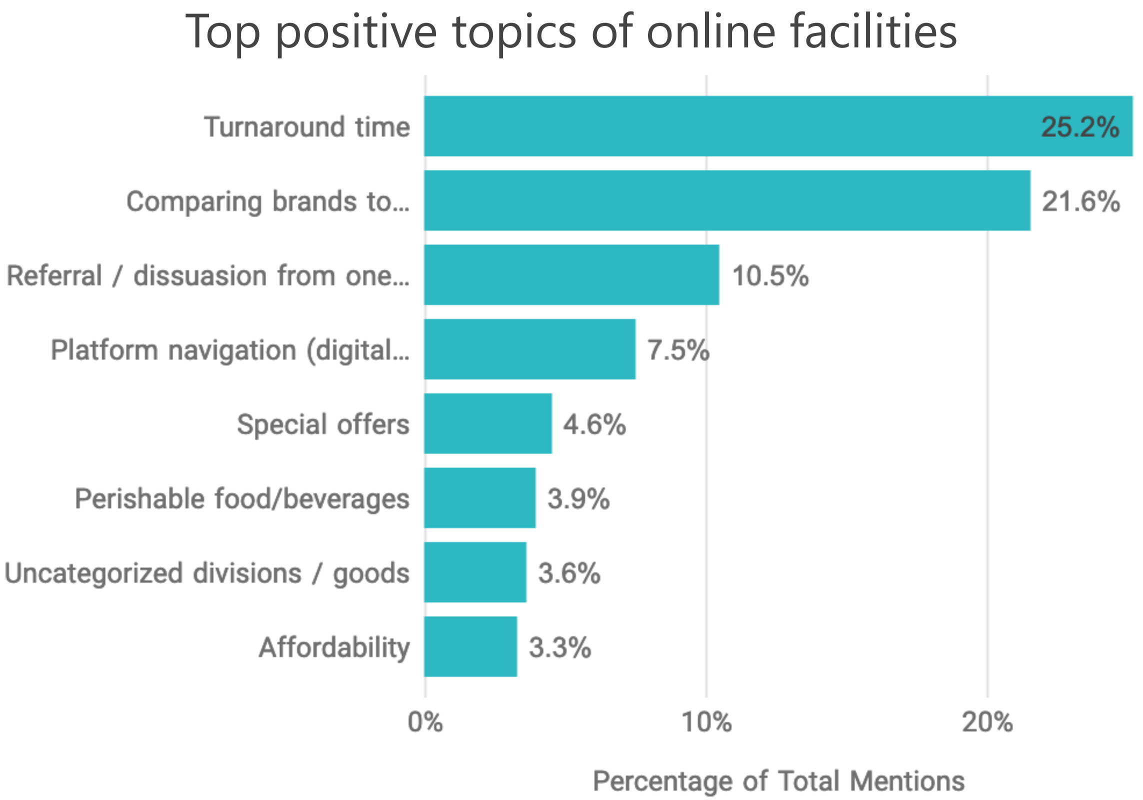
26th Nov 21:05 1

Service

Save yourself and never buy from @RetailerH online. I don't understand how an order goes through when there is no stock available 😡

14th Dec 13:17 1

What drove customer praise?



N = 1 139 for online facilities. Positive topic conversation n = 305

- Deliveries which arrived earlier than expected as well as prompt updates and notifications were important to customers, making *turnaround time* the top positive topic.
- *Brand comparison* and *positive referrals* were the second and third most prominent themes in positive conversation. This indicates the competitiveness of the online retail space over the festive season. Positive experiences shared online can influence other prospective customers.

Example mentions: What drove customer praise?

Turnaround time

Service

What an awesome experience to buy things and they get delivered in your door in time @RetailerG #anythingyoucanimagine

2nd Nov 20:00

Service

My @RetailerB order came in less than 40 minutes from ordering it! What an awesome service.t.co/CIAATO2sax

10th Nov 13:21 2

Brand comparison

Service

If @RetailerB sold halaal meat i would write off @RetailerA online shopping forever. Retailer B has been amazing with their service thus far! You really need to step up Retailer A!

6th Nov 21:42

Service

@Lonka @RetailerB @RetailerA Yes fully agress. Stopped bothering with the others 'cos who wants to order groceries a week before delivery.

15th Nov 16:39

Positive referrals

@Tumisang_93 Check Retailer G app it's a bargain #RetailerG

24th Nov 10:07

Service

@RetailerB app has some awesome early Black Friday deals. Look at the price of butter! I also bought the watermelon red bull to try and quite a few other things. Just received my delivery 👏🏿 t.co/gq0CIEZJP9

21st Nov 12:01

Platform navigation (UX/UI)

Service

@StaceLM @beanbagboy I've also used Retailer A a few times now. The UX improves every time. Wish I could tip a driver, too.

22nd Dec 17:41 1

Service

@RetailerB I just love😍😍 the delivery app and use it a lot. Please consider adding cigarettes maybe in the liquor store and more gluten free products. Wouldn't be without it 💃💃🥰🥰

8th Dec 17:50 2

Retailer B supersedes all competition in e-commerce

Online facilities volume and Net Sentiment

	Volume	Net Sentiment
Retailer B	47.8%	-0.2%
Retailer A	17.4%	-42.1%
Retailer G	13.4%	-18.8%
Retailer C	8.1%	-46.5%
Retailer F	7.9%	-69.7%
Retailer H	3.4%	-48.6%
Retailer D	0.8%	-
Retailer I	0.7%	-
Retailer E	0.4%	-

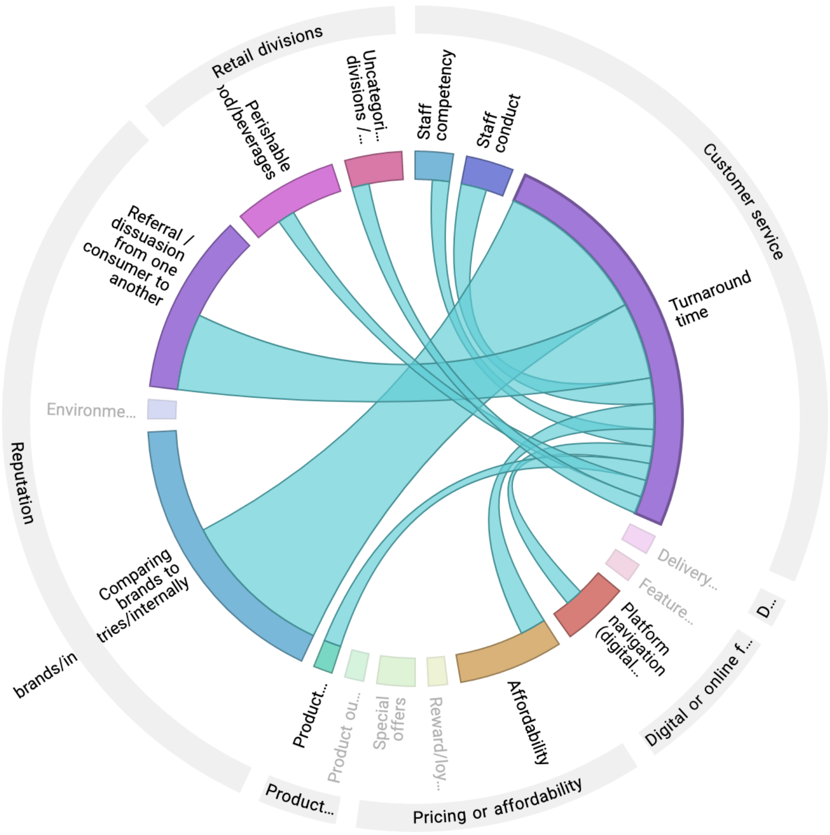
Retailers D, I, and E's margin of error is too high to report on Net Sentiment. These retailers do not typically offer delivery options.

Across the industry, Retailer B saw the most mentions around *online facilities*, with a 47.5% share of voice. Retailer A placed second with 17.4%, and Retailer G third with 13.5%.

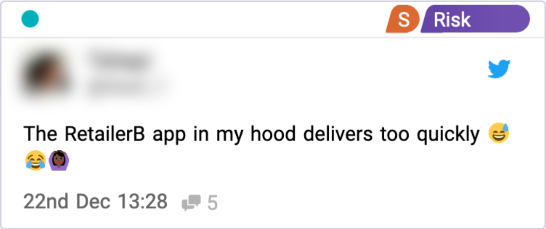
Retailer B saw a -0.2% Net Sentiment, indicating that it saw almost as many compliments as complaints. The retailer excelled at speedy deliveries. Almost a third of its positive conversation was due to praise around its *turnaround time.*

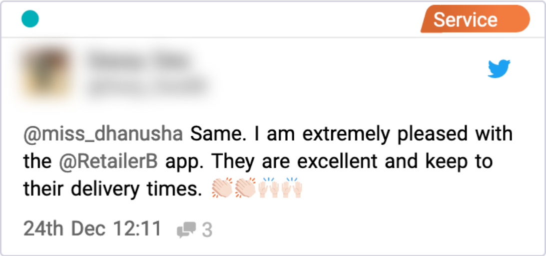
Retailer F saw the lowest Net Sentiment with -69.7%. Although the retailer saw much lower volumes than its competitors, consumers complained about its *turnaround, payment process, tracking orders* and multiple service related issues.

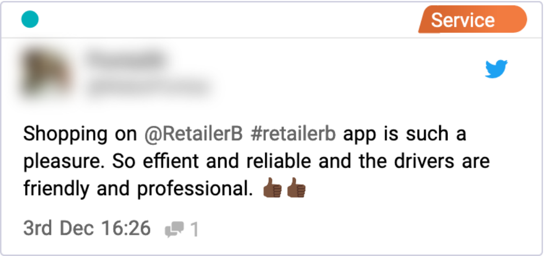
Retailer B: Recommended above all other retailers



Positive topic co-occurrence chord diagram shows overlapping themes driving online facilities conversation.



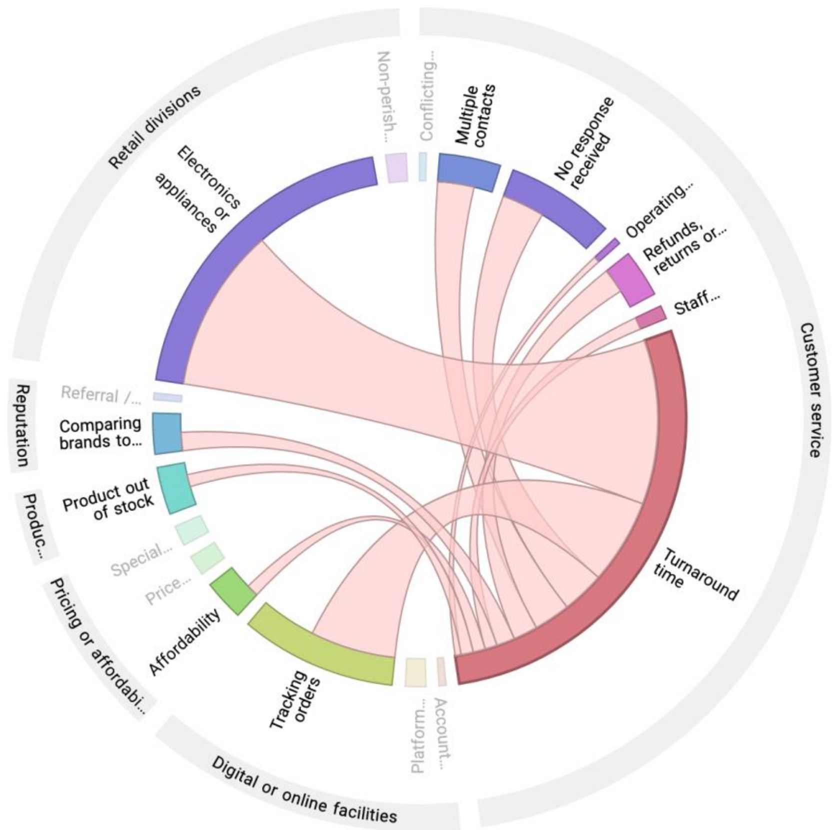




Retailer B's strength lay in its ability to deliver products timeously. Looking at the co-occurrence diagram, *turnaround time* conversation overlapped frequently with *brand comparison* and *referrals*. This suggests that consumer often favoured retailer B to competitor offerings.

Turnaround time also co-occurred with *staff conduct* as consumer described delivery personal as efficient and reliable.

Retailer F: Tracking orders, an area for improvement



Negative topic co-occurrence chord diagram shows overlapping themes driving online facilities conversation.

S Risk

@RetailerF Just got off the phone with Spencer from your call centre, he says to me, NO orders were delivered yestesrday, my order was not dispatched yesterday although I was told it was, the waybill number is NOT your order number with G in front, this is a separate number. Why the lies

20th Nov 08:26 2

Service

@mrscillarules @Mindset011 @RetailerF Keep checking. My details only updated around 18:00. Of course, it still needs to be delivery and I remain deeply upset with @RetailerF service.

19th Nov 20:04 1

Service

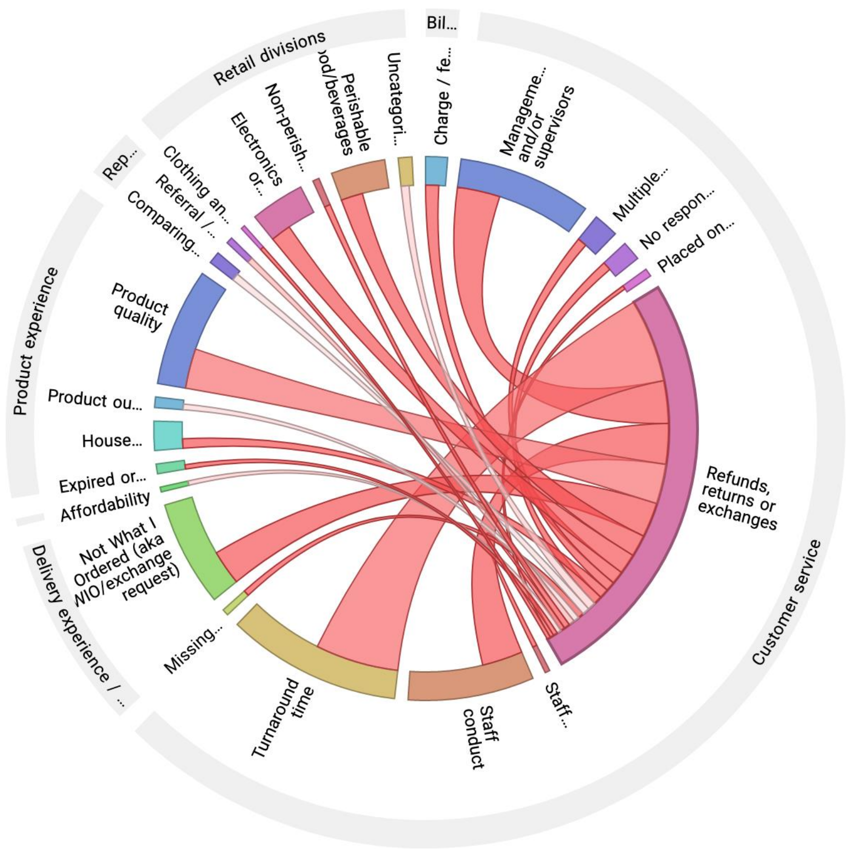
@mrscillarules @RetailerF Can we not collect it ourselves atleast? My order also shows no waybill number. People that ordered before me in the same area are receiving theirs today. It's ridiculous

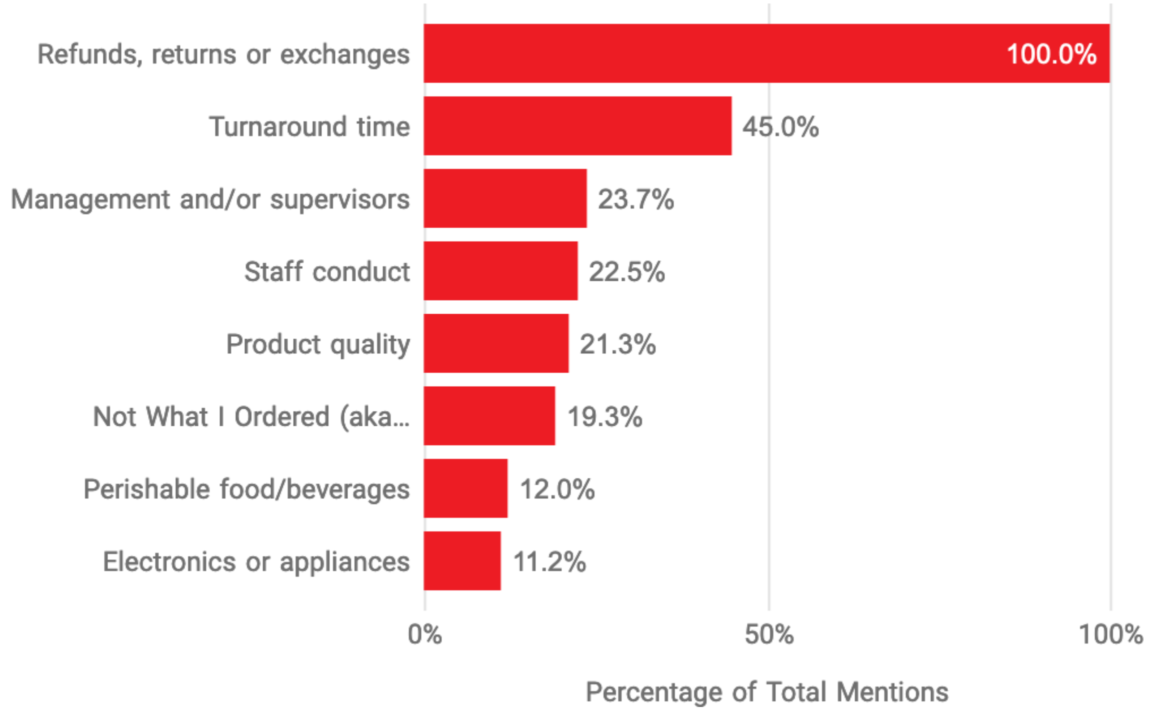
20th Nov 09:57 1

Consumers of Retailer F complained about *turnaround time*. Looking at the co-occurrence diagram, this frequently overlapped in conversation about *electronics or appliances* as well as *tracking orders*.

Refunds/returns

What drove refund and returns conversation?





Glossary

Glossary of terms 1/2

Volume and mentions

Volume is the number of mentions. BrandsEye counts each tweet, Facebook post or comment, blog post, or article as an individual mention.

Opportunities-to-see

Opportunities-to-see (OTS) reflects the number of individuals who would have had the opportunity to see a mention online; it represents the potential exposure of the content. OTS is based on the number of mentions and followers of the contributor(s).

Engagement

The engagement score consists of the total number of reshares and replies on a post.

Category

This refers to the type of author a mention comes from—consumer, press, enterprise (brand property, like Twitter handles, Facebook pages, or websites), or directory (classifieds).

Source

The source of a mention is the domain it comes from. For example, a tweet's source is twitter.com, and an article's source might be iol.co.za.

Net sentiment

Negative sentiment is subtracted from positive sentiment. This results in a net value. This value is useful as the sentiment at a specific point in time can be understood as a whole value.

Weighted sentiment

Weighted Net Sentiment is calculated by multiplying Net Sentiment by the total conversation volume. For example, if the conversation volume is 24 839, and Net Sentiment is -3.4%, the weighted Net Sentiment would be -855.

Customer journey

A consumer's current relationship with the brand. Includes six stages: not a customer, pre-customer, new customer, current customer, churning customer, and post-customer.

Channels

Touchpoints through which a consumer can interact with the brand.

BrandsEye

Deloitte.

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.

Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited ("DTTL"), its global network of member firms, and their related entities (collectively, the "Deloitte organization"). DTTL (also referred to as "Deloitte Global") and each of its member firms and related entities are legally separate and independent entities, which cannot obligate or bind each other in respect of third parties. DTTL and each DTTL member firm and related entity is liable only for its own acts and omissions, and not those of each other. DTTL does not provide services to clients. Please see www.deloitte.com/about to learn more.

Deloitte is a leading global provider of audit and assurance, consulting, financial advisory, risk advisory, tax and related services. Our global network of member firms and related entities in more than 150 countries and territories (collectively, the "Deloitte organization") serves four out of five Fortune Global 500® companies. Learn how Deloitte's approximately 330,000 people make an impact that matters at www.deloitte.com.

contact@brandseye.com

www.brandseye.com

Ica van Eeden
Digital Commerce Leader
Deloitte Africa
Tel: +27 (0) 11 304 5404
Email: ivaneeden@deloitte.co.za