

# SA Customer Satisfaction Index reveals preferred mobile network

According to Consulta's latest South African Customer Satisfaction Index (SAcsi) for Cellular Networks, cellular network customers are the least satisfied with MTN and most satisfied with Vodacom.



Now in its fifth year, the SAcsi for Cellular Networks offers impartial insights into the South African mobile network industry by measuring customers' overall satisfaction. This satisfaction score is based on brands exceeding or falling short of customer expectations and the respondents' idea of the ideal product to achieve an overall result out of 100.

The Index also includes, amongst other measures, a Customer Expectations Index, a Perceived Quality Index and a Perceived Value Index. The sample included 1,183 network subscribers in the pre-paid and contract markets, who were randomly selected to participate in the 2017 survey.

## Scores

MTN's score declined from 75.8 to 74.2 points, a 1.6-point decline compared to 2016 and well below its 2015 level of 75.6, and was the lowest in the Index.

With an overall SAcsi score of 79.2, Vodacom was 0.3 points ahead of its 2016 score of 78.9, and surpassed the 2017

industry average of 77.2. Telkom Mobile ranked second overall with a 3.9-point jump to 76.8, followed by Cell C, which scored 76.7 (up 1.6 points from 2016).

“MTN may have grown the biggest footprint across Africa and the Middle East, but it has struggled to provide good quality and customer service at home,” says Consulta CEO, Professor Adré Schreuder. “This has allowed value-focused brands such as Cell C (founded in 2001) and Telkom Mobile (initially launched as 8ta in 2010) to attract cost-conscious customers, while Vodacom has solidified its hold in the premium segment.

“Telkom Mobile continues to make major inroads with its aggressive data offers,” says Schreuder. “While coverage might be an issue, the operator’s customers seem satisfied with its service in key areas. When customers travel outside these coverage areas, they roam on MTN’s network. This isn’t optimal, but the company has promised aggressive expansion of its LTE network.”



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Telkom Mobile was the clear leader in the perceived value index, with a score of 81.1 (up from 78.7), outperforming the industry score of 76.7 (down from 77.2). Vodacom achieved the second best-perceived value score of 77.8 (up from 77.0), followed by Cell C’s 77.7 points (down from 78.2). And, not surprisingly, MTN saw the greatest fall in this measure, falling 2.4 points to 74.5 (down from 76.9 points).

A popular metric for measuring a brand’s performance is the Net Promoter Score (NPS), which measures the likelihood that customers will recommend a brand to their family and friends (promoters) compared to customers who would actively discourage a relationship with the brand (detractors).

Vodacom achieved the highest NPS of 49.4%, which is 12 percentage points higher than the industry average of 37.4%. Telkom Mobile had the next highest NPS of 42.6%, followed by Cell C on 30.9% and MTN lagging significantly on 21.6%. MTN and Cell C fell below the collective industry NPS.

“Vodacom has kept its customers happy by reducing cause for customer complaints and handling complaints better than any other operator, often through its very effective social media community management,” says Schreuder. “However, MTN has the highest incidence of complaints, and the research has shown that it is the worst at resolving the escalated service problems.”

## "Overall network remains underdeveloped by world standards"

South Africa’s overall network remains underdeveloped by world standards but is gradually improving. According to the latest Global State of Mobile Networks report, South Africa ranks 34th out of 95 countries for 3G (or better) availability, with coverage of 87% of the country. In contrast, list leader South Korea has availability of 98.5%. In the same report, South African networks ranked even lower, in 51st place for overall speeds, with overall average speeds of 8.3Mbps, compared to South Korea’s 41.4Mbps.



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Juanita Pienaar 6 Nov 2017



The SAcSi research revealed that operators’ biggest challenges were airtime costs, network quality and call centers. Common complaints related to the unexplainable disappearance of data, dropped calls and poor service from call centre

agents. With recent pressure from the Independent Communications Authority of South Africa (Icasa) targeting high out-of-bundle data costs and short data expiry windows, operators have proactively cut tariffs and extended data expiry on certain packages.

The full SAcSi for Cellular Networks report and other SAcSi reports are available from Consulta.

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