



South Africa: consumer survey



Oliver Bruff

About this report

This report provides key findings from consumer survey data from South Africa and gives an analysis at the operator level. It covers fixed broadband, mobile and pay-TV services.

The survey was conducted in association with Dynata in July 2023. The survey group was chosen to be representative of the mobile-internet-using population in South Africa. We set quotas on age, gender and geographical spread to that effect. There were at least 1000 respondents.



GEOGRAPHICAL COVERAGE

- South Africa

KEY QUESTIONS ANSWERED IN THIS REPORT

- What are the most-significant factors that affect Net Promoter Scores (NPSs) for fixed broadband and mobile operators? Which operators score highly and why?
- What are the most significant drivers of fixed broadband and mobile churn and how can operators approach customer retention?
- What are the mobile and fixed broadband data usage patterns among respondents?
- What are the most popular pay-TV and video streaming services? Which services lead to high satisfaction scores and why?



WHO SHOULD READ THIS REPORT

- Strategy teams and managers who are interested in improving the customer experience within telecoms operators and understanding the drivers of customer satisfaction and churn.
- Market intelligence and regional research teams of equipment/device manufacturers that are responsible for understanding end-user trends and support business units in identifying and addressing new opportunities.
- Product managers and strategy teams working for telecoms operators or pay-TV providers that are interested in using streaming video services as a value-added service (VAS) to support their core services.



Contents



Executive summary

Analysis and key findings

Methodology and panel information





About the author and Analysys Mason

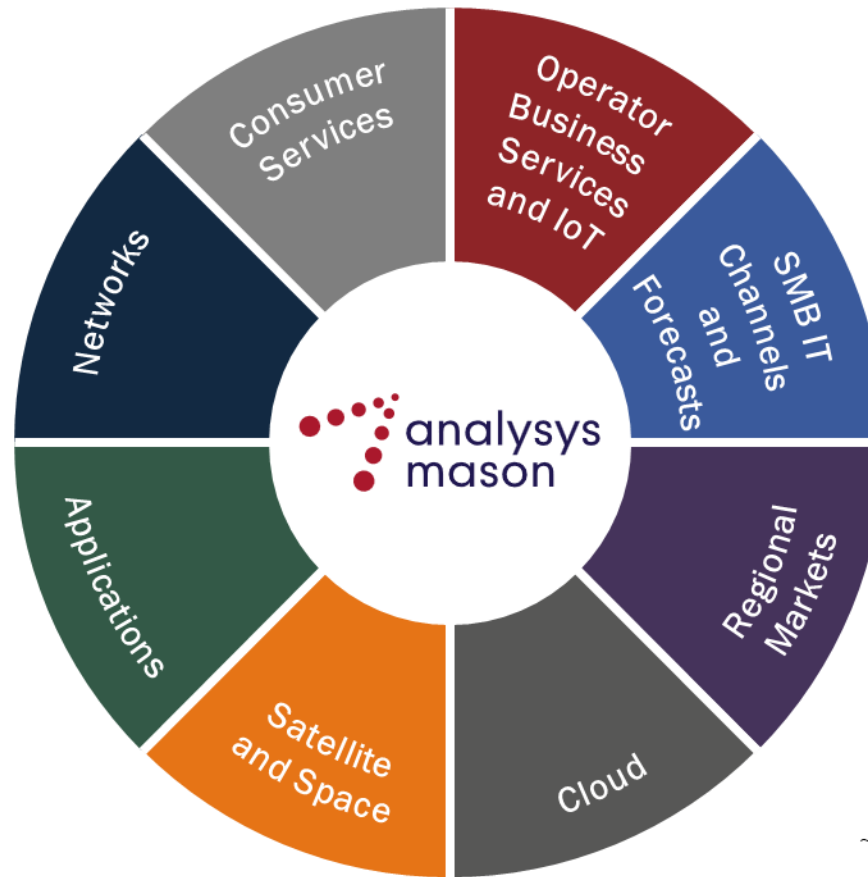
About the author



Oliver Bruff (Analyst) is an Analyst in Analysys Mason's consumer services research team in London. He holds a BSc with honours in economic history with economics from the London School of Economics and Political Science, where he also worked as a research assistant.

Our research services

- 
Consumer Services
 Fixed Broadband Services
 Mobile Services
 Fixed-Mobile Convergence
 Smart Devices
 Future Comms
 Video, Gaming and Entertainment
- 
Networks
 Next-Generation Wireless Networks
 Wireless Infrastructure Strategies
 Fibre Infrastructure Strategies
 Operator Investment Strategies
 Telecoms Strategy and Forecast
 Transport Network Strategies
- 
Applications
 Network Automation and Orchestration
 Customer Engagement
 Monetisation Platforms
 Digital Experience
 Automated Assurance
 Service Design and Orchestration
 Telecoms Software Market Shares
- 
Satellite and Space
 Satellite Communications
 Space Applications and Infrastructure



Operator Business Services and IoT

- Enterprise Services
- SME Services
- IoT Services
- Private Networks



SMB IT Channels and Forecasts

- Cyber Security
- SMB Technology Forecaster



Regional Markets

- Global Telecoms Data and Financial KPIs
- Americas
- Asia-Pacific
- Middle East and Africa
- European Core Forecasts
- European Telecoms Market Matrix
- European Country Reports



Cloud

- Cloud Infrastructure Strategies
- Data, AI and Development Platforms
- Edge and Media Platforms
- Multi-Cloud Networking



DataHub

- ~2800 forecast and 280+ historical metrics
- Regional results and worldwide totals
- Operator historical data



analysismason.com/what-we-do/practices/research

PUBLISHED BY ANALYSYS MASON LIMITED IN **SEPTEMBER 2023**

Analysys Mason Limited. Registered in England and Wales with company number 05177472. Registered office: North West Wing Bush House, Aldwych, London, England, WC2B 4PJ.

We have used reasonable care and skill to prepare this publication and are not responsible for any errors or omissions, or for the results obtained from the use of this publication. The opinions expressed are those of the authors only. All information is provided “as is”, with no guarantee of completeness or accuracy, and without warranty of any kind, express or implied, including, but not limited to warranties of performance, merchantability and fitness for a particular purpose. In no event will we be liable to you or any third party for any decision made or action taken in reliance on the information, including but not limited to investment decisions, or for any loss (including consequential, special or similar losses), even if advised of the possibility of such losses.

We reserve the rights to all intellectual property in this publication. This publication, or any part of it, may not be reproduced, redistributed or republished without our prior written consent, nor may any reference be made to Analysys Mason in a regulatory statement or prospectus on the basis of this publication without our prior written consent.

© Analysys Mason Limited and/or its group companies 2023.