

# Strategies for Enhancing Client Loyalty in the ICT Sector

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## Abstract

The information and communication technology (ICT) industry significantly impacts a country's economic growth and development. During the COVID-19 pandemic, broadband connectivity was crucial for sustaining economic activity. However, the ICT sector in South Africa faces challenges such as low customer and corporate loyalty, primarily due to price sensitivity. This literature review explores strategies for enhancing client loyalty in the ICT sector in South Africa.

The primary objective is determining strategies to enhance client loyalty within South Africa's ICT industry. The secondary objectives are to ascertain how South Africa's inadequate infrastructure affects ICT adoption, examine how high poverty rates impact ICT growth, determine the effect of ICT workers' skill deficiencies on service quality, and examine the level of competition in the connectivity sector and its influence on decision-making.

The study employs a qualitative approach, reviewing relevant literature on customer loyalty, the marketing mix, and the ICT sector in South Africa. The findings provide insights into factors influencing customer loyalty and how service providers can improve customer retention and satisfaction. The research contributes to understanding strategies for enhancing client loyalty in the ICT sector, particularly in South Africa.

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# **1. Introduction**

## **1.1. Background**

The information and communication technology (ICT) industry significantly impacts a country's economic growth and development (Maryska *et al.*, 2012:1060). ICT improves the population's quality of life, increases productivity, and facilitates business operations (Appiah-Otoo & Song, 2021:3). During the COVID-19 pandemic, broadband connectivity was crucial for sustaining economic activity, enabling businesses to continue operations, and reducing job loss risks (Reggi & Gil-Garcia, 2021:1).

ICT includes internet service providers (ISPs) offering various internet packages at different speeds. The sector contributes to a country's GDP, as seen in South Africa, where it contributed approximately R93 billion, or 3%, to the GDP (Chiou, 2004:685). The demand for connectivity in South Africa skyrocketed during the pandemic, necessitating affordable solutions (Moyo *et al.*, 2021).

South Africa's telecommunication industry is divided into B2B and B2C markets, with fixed and wireless networks (Gao, 2021:1113). The industry is growing due to increasing wireless connectivity and mobile services demand. New technologies are emerging, driving growth and network redesigns. The intense competition in the ICT market has led to a price war, prompting service providers to focus on customer loyalty (Dhir *et al.*, 2021:49).

Customer loyalty is influenced by client satisfaction, which is crucial for establishing loyalty towards a brand or product (Chiou, 2004:686). This literature review explores ICT and connectivity, focusing on customer loyalty and how the marketing Ps (price, product, place, and promotion) can help ISPs or WISPs achieve exceptional customer satisfaction (Chiou, 2004:686). The review provides insights into factors influencing customer loyalty in the ICT industry and how service providers can improve customer retention and satisfaction. The next section outlines the problem statement.

## **1.2. Problem Statement**

Because the ICT business is large, the study will mostly concentrate on Internet service providers. The primary limitation examined during the research is the low level of customer and corporate loyalty in the ICT sector, mostly due to price sensitivity (Mpwanya & Letsoalo, 2019:68). Customers frequently transfer service providers for better deals, even when the offered services are efficient and helpful. Regarding telecommunications infrastructure, South Africa is the most advanced country in Africa. But even with its more advanced infrastructures, the nation still requires assistance with several issues, including high mobile data costs and subpar network quality (Mpwanya & Letsoalo, 2019:68). Due to their everyday communication needs and requirements not being met, these difficulties

directly impact consumers' expectations for the quality of the services they receive, leading to high levels of frustration (Mpwanyana & Letsoalo, 2019:68).

If a client finds better quality services from another supplier or the services offered do not satisfy their needs, Morgan and Govender (2017:2) claim that this could lead to a decline in client loyalty. Many customers in South Africa prefer internet service providers that offer better deals and services. Customers can easily go to a more dependable service provider with higher quality standards; thus, they don't grow loyal to these suppliers (SA\_Telco\_Sentiment\_Index., 2019).

The primary problem South Africans face is extreme price sensitivity due to the country's persistent economic difficulties (Gillwald *et al.*, 2018:7). The public expects top-notch customer service from its providers and needs reasonably priced ICT services. A few things must change to offer these services at reasonable prices: South Africa's infrastructure, the availability of tools, knowledge, and training, a decline in the country's poverty rate, and a willingness to accept new ICT technology (Gillwald *et al.*, 2018:7). Notwithstanding the limitations and problems encountered by the sector, ICT service providers must retain client loyalty (Mntande *et al.*, 2022:2). The research objectives are discussed in the next section.

### **1.3. Research objectives**

#### **1.3.1. Primary objective**

Determining what strategies can enhance client loyalty of internet service providers within South Africa's ICT industry. The following secondary objectives have been identified to achieve the above-mentioned primary objective.

#### **1.3.2. Secondary objectives**

**1.3.2.1. Objective 1:** To ascertain how South Africa's inadequate infrastructure affects the country's adoption of ICT.

**1.3.2.2. Objective 2:** Examine how South Africa's high poverty rates affect the country's ICT growth, especially for internet service providers.

**1.3.2.3. Objective 3:** To determine the effect of ICT workers' skill deficiencies on service quality.

**1.3.2.4. Objective 4:** Examine the level of competition in South Africa's connection sector and how it influences internet service providers' and customers' decision-making.

The remainder of the article is organised as follows: The literature is reviewed in section 2. Section 3 describes the research methodology, whereas Section 4 provides the findings and results of the empirical investigation. The management implications are described in Section 5, and conclusions, restrictions, and directions for further research are provided in Section 6. The following section examines the literature.

## 2. Literature Review

### 2.1. Introduction

Over the past ten years, all nations have experienced a substantial digital revolution. Since mobile operators at the time offered LTE services, which enabled high-speed connectivity for mobile phones, every household in more industrialised nations had access to rapid internet connectivity (Grzybowski, 2022:1). Due to the large ICT expenditures made by the telecom sector, there was a surge in demand for new internet services as more individuals needed dependable and quick internet access (Grzybowski, 2022:1). In the end, these internet services transformed how businesses are conducted in the media, retail, and numerous other industries. The availability of the Internet gave rise to several social media and online platforms, which increased the demand for connectivity (Grzybowski, 2022:1). Additionally, having a mobile Internet connection raises living standards, particularly in poorer nations (Grzybowski, 2022:1).

Any communication between various devices or applications is called information and communication technology, or ICT. Examples of such devices include computers, satellite communication systems, networking hardware, software, cell phones, and many more (Adeleye & Eboagu, 2019:32). ICT encompasses a range of operations, such as information retrieval, storage, conversion, and transmission of incoming and outgoing data. These operations can then be utilised to automate various controls and procedures (Adeleye & Eboagu, 2019:32).

Using new technologies, ICT enables nations to increase output and productivity while eschewing traditional human resources. Furthermore, ICT is vital to economic growth because of the significant rise of production and productivity (Adeleye & Eboagu, 2019:32). Sadly, Africa has not yet fully tapped into its ICT potential because of the delayed adoption of ICT infrastructure by these nations' low technological literacy (Adeleye & Eboagu, 2019:32).

In addition, several developing nations find it difficult to implement ICT convergence technologies because of low levels of power supply, sluggish economic development, and insufficient telecommunication and infrastructure density (Saba & David, 2020:2). However, because of such a significant need for information exchange, the telecommunications industry—especially internet connectivity—has advanced. Despite the increase in connectivity, there are still obstacles to overcome because internet connectivity technology systems can be expensive and not always available in all areas and nations (Saba & David, 2020:2).

A nation lacks the Internet of Things (IoT) if its internet access is not fast, steady, and dependable. Due to the increasing demand for integrating new and innovative technology, fast internet connectivity solutions are necessary for homes, organisations, and individuals (Azcarraga & Peña, 2019:1). The theoretical network is discussed in the next section.

## **2.2. Theoretical Framework**

The study incorporates the following theories as they concentrate on enhancing consumer loyalty. A key idea that focuses on consumer behaviour and post-purchase intentions is the expectation-confirmation theory (ECT) (Hossain & Quaddus, 2012:443). Moreover, the theory suggests that customers' happiness or discontent will influence their choice to make additional purchases, file complaints, and make investments in the future (Hossain & Quaddus, 2012:443). Any business that wants to be able to predict its customers and better tailor marketing efforts to meet their demands must keep an eye on customer satisfaction levels (Hossain & Quaddus, 2012:443).

The consistency of consumer happiness is the main emphasis of the disconfirmation satisfaction theory. The three phases—dissatisfaction, satisfaction, and delight—are essential components of this idea and must be comprehended to guarantee efficient client management (Mahmood *et al.*, 2018:136-139). The theory also clarifies why no client will ever be the same. Nonetheless, companies need to try to learn about the three phases and their rivals in the industry (Mahmood *et al.*, 2018:136-139). The total levels of client loyalty are ultimately determined by the quality of the service or product, which impacts these satisfaction levels (Mahmood *et al.*, 2018:136-139).

Moreover, the product lifecycle and evolution cycle paradigms align with the switching cost theory. The theory outlines the perceived and monetary costs of customers switching to a different service provider (Mishra, 2019:99). These expenses directly affect a customer's satisfaction, loyalty, and propensity to return. Effective cost management and ongoing monitoring can yield more accurate client behaviour, overall business performance, and long-term viability (Mishra, 2019:99). The following section focuses on the internet connectivity conditions in South Africa.

## **2.3. The Internet connectivity landscape in South Africa: Conditions, providers, adoption challenges, service quality, and client loyalty in the ICT industry.**

South Africa's telecommunication industry revenue has increased by 3.94% from 2021 to 2022, reaching R208.1 billion (ICASA, 2023:19). However, many South Africans still lack reliable internet and technology due to poverty and an unreliable power grid. While over 36 million people have mobile phones, 60% still lack sufficient connectivity (ICASA, 2023:19).

The 4IR is transforming how technology is embedded in people's everyday lives, with innovations like artificial intelligence, robotics, and virtual/augmented reality (Mhlanga & Moloji, 2020:2). Yet, many rural areas in South Africa lack the basic ICT infrastructure to adopt the 4IR fully, hindering remote work, education, and other essential services (Mhlanga & Moloji, 2020:2).

Despite the industry's growth, the digital divide persists in South Africa, with significant disparities in access to technology and connectivity, especially in rural communities (Mhlanga & Moloji, 2020:7).

Addressing this gap is crucial to ensure equitable participation in the 4IR and unlock its full potential for all South Africans (Mhlanga & Moloi, 2020:7). The following paragraph evaluates the internet service providers in South Africa.

Internet service providers (ISPs) in South Africa offer internet connectivity packages to subscribers at various data speeds and rates (Ali, 2020:8). These ISPs connect their clients with fixed broadband services, including wireless networks and fibre optic solutions internet (Ali, 2020:13-14).

The industry is dominated by large telecom companies, such as Telkom, Neotel, MTN, Vodacom, and Cell-C, which have the capital to invest in sophisticated technology (Akande & Van Belle, 2014:2). Smaller ISPs, of which there are over 250 with ICASA licenses, face challenges in entering or staying competitive in the market (Akande & Van Belle, 2014:2).

High-speed internet (HSI) services are in high demand, leading ISPs to adopt fibre optic solutions like Fibre to the Home (FTTH) and Fibre to the Node (FTTN). These technologies provide clients with higher and more stable data rates (Ali, 2020:13-14).

Around 14 small operators have obtained rights for under-serviced area licenses (USALs) to provide telecommunications facilities in areas with low tele density and inadequate commercial viability (Akande & Van Belle, 2014:2). The following paragraph discusses ICT adoption challenges in South Africa.

It's no secret that successfully implementing ICT in South Africa presents several challenges. The high expense of ICT infrastructure is one of the primary problems, making it challenging for ISPs to expand their services to rural areas (Akande & Van Belle, 2014:4). Unfortunately, many South Africans cannot afford the monthly access packages ISPs offer because of the costs associated with building ICT infrastructure. ISPs were consequently compelled to discontinue subscriptions, depriving a sizable portion of the population of internet access (Akande & Van Belle, 2014:4).

Politics and cultural diversity present the second obstacle to developing South Africa's ICT sector. Unfortunately, South Africa's political past has resulted in an unequal distribution of infrastructure and wealth across the nation. While metropolitan areas have greatly embraced technology over time, rural areas have remained untouched (Akande & Van Belle, 2014:4). The next paragraph reflects on internet service quality in South Africa.

South Africa's broadband adoption has been slow but has grown since 2003. While ADSL remains the primary home/business internet access, mobile dongles and 3G/4G modems have become popular due to their cost-effectiveness and lower maintenance (Chetty *et al.*, 2013:3). However, uncapped internet packages remain expensive, with most users relying on capped plans (Chetty *et al.*, 2013:3).

Fibre deployments are gaining popularity, overcoming challenges like cable theft and signal loss (Oki & Lawrence, 2022:113-116). However, fibre rollout in rural areas is costly and difficult, creating a

connectivity gap between urban and rural areas (Oki & Lawrence, 2022:113-116). This is problematic as high-speed internet is in high demand for data-intensive applications (Oki & Lawrence, 2022:113-116).

Overall, South Africa's broadband landscape is evolving, with mobile solutions and fibre gaining traction, but affordability and rural access remain key challenges (Oki & Lawrence, 2022:113-116). Client loyalty in the ICT industry will be discussed in the next paragraph.

Customer loyalty refers to the continued buying behaviour of a client, while customer satisfaction is when a product or service exceeds a client's expectations, leading to positive feelings (Lina, 2022:22; Saraswati, 2022:29). Studies have shown a positive correlation between customer satisfaction and loyalty across various industries (Khan *et al.*, 2022:6).

Several factors drive customer loyalty, such as the need for affordable or reliable connectivity services. However, customer loyalty can fade if clients use multiple service providers or if the industry is highly competitive with low margins, as seen in the telecommunications industry in South Africa (Morgan & Govender, 2017:3).

Customers who switch suppliers because of comparable goods and services—often by severing ties with one to join another with comparable offerings—are referred to as switching behaviour (Panama *et al.*, 2023:21). The factors influencing a customer's loyalty are debated in the following section.

## **2.4. Factors that affect a customer's loyalty**

A marketing mix is a methodical approach a firm might employ to guarantee the enterprise's long-term viability. The approach relates to tactical marketing, emphasising the 4Ps: product, place, pricing, and promotion. A customer's degree of loyalty is known to be positively connected with a marketing mix (Simanjuntak *et al.*, 2020:451-452).

In addition, a marketing mix comprises many elements that aid in selecting a strategic choice to guarantee that a business gains a competitive edge in a fiercely competitive market. Additionally, research has demonstrated a favourable correlation between customer satisfaction and loyalty and pricing, place, product, and promotion (Verma & Singh, 2017:124-126). The many facets of a marketing mix's 4Ps and 4Cs are covered in the following section.

### **2.4.1. Marketing mix (4P's and 4c's)**

The marketing mix is fundamental framework businesses use to market their products or services effectively. The traditional marketing mix comprises the 4Ps: Product, Price, Place, and Promotion. However, in the 1990s, Robert Lauterborn proposed an alternative model called the 4Cs, which focuses more on the customer's perspective (Siripipattanakul *et al.*, 2022:33).

The 4Ps of the Marketing Mix

**Product:** This refers to the good or service that a business offers to its target market. Factors to consider include design, quality, packaging, features, after-sales service, and customer service (Khan, 2014:97-98).

**Price:** This is the amount customers pay for the product. Pricing strategies should consider production costs, market demand, and competitor pricing (Hachim *et al.*, 2022:111).

**Place:** This is where and how the product is made available to customers. It includes distribution channels, logistics, and retail locations (Hachim *et al.*, 2022:111).

**Promotion:** The business communicates with customers to promote the product. It includes advertising, sales promotions, public relations, and personal selling (Hachim *et al.*, 2022:111).

#### The 4Cs of the Marketing Mix

**Customer solution:** This corresponds to the Product P. It focuses on solving the customer's problem or meeting their needs (Asiaktewen & Ibrahim, 2019:116).

**Cost:** This corresponds to the Price P. It considers the total cost to the customer, including time and effort, not just the monetary price (Asiaktewen & Ibrahim, 2019:116; Siripipattanakul *et al.*, 2022:33).

**Convenience:** This corresponds to the Place P. It focuses on making it easy for customers to obtain the product or service (Siripipattanakul *et al.*, 2022:33).

**Communication:** This corresponds to the Promotion P. It emphasises two-way communication and building relationships with customers (Siripipattanakul *et al.*, 2022:33).

The 4Cs model is more customer-oriented and better suited for niche marketing (Siripipattanakul *et al.*, 2022:33). However, the 4Ps and 4Cs are helpful conceptual frameworks for developing marketing strategies (Siripipattanakul *et al.*, 2022:33). Businesses can adapt either model to their specific needs and goals. The section is concluded in the following paragraph.



## **2.5. Conclusion**

South Africa has the most advanced ICT infrastructure in Africa but still faces significant challenges (Deen-Swarray *et al.*, 2012:11). Despite its advanced infrastructure, issues with service quality and high connectivity rates make it difficult for many South Africans to afford these services (Gillwald *et al.*, 2018:7; Mpwanya & Van Heerden, 2016:439). This directly impacts customer satisfaction and loyalty. To address these challenges, the telecommunication industry must focus on improving infrastructure, power grids, and affordability to ensure reliable and accessible ICT services for all (Deen-Swarray *et al.*, 2012:11). Enhancing customer satisfaction through the marketing mix is crucial for improving client loyalty and driving the industry's growth. The next section discusses the research methodology used in this study.

## **3. Research Methodology**

Target sample interviews are a means of obtaining raw data for an inductive research approach. The primary study question, "What aspects of South Africa's ICT business affect customer loyalty?" was addressed through an inductive research approach. To gather information about the issue and potential solutions, semi-structured interviews were conducted with people working in the ICT sector of companies providing internet services (Dalati, 2021:96). Open-ended questions were employed in the data collection process. Interviewees were invited to share their opinions and experiences through feedback. The study population and sampling method are discussed in the next paragraph.

The research sought to identify individuals within a predefined context with similar characteristics. The population identified was relevant because all participants were directors, owners, and high-level managers from small to large ISPs in South Africa, focusing on those with knowledge of company direction and industry challenges. Convenience sampling was used to select participants based on their accessibility and relevance to the study (Stratton, 2021:373). A total of 9 potential interviewees were selected from a total population of 15 ISPs that fit the research question of this study. The data collection methods are discussed in the following paragraph.

The researcher conducted semi-structured interviews, adhering to POPIA regulations to ensure the confidentiality and security of collected information (Adams *et al.*, 2021:1). Most interviews were conducted via MS Teams due to time constraints and cost considerations, with in-person interviews available. Before the interviews, consent forms, interview questions, and study topics were shared with participants to allow them time to review. The researcher followed up to confirm participation. All data, including interview recordings and transcripts, were securely stored on a separate hard drive. Data saturation was reached after six interviews were conducted. The following paragraph discusses the data analysis process.

The data analysis process aims to identify patterns in the data, providing a deeper understanding of the subject matter. The qualitative data analyses examine language and non-verbal communication to uncover the individual's meanings and perspectives (Creswell & Creswell, 2017:31). The researcher transcribed the recorded data and organised it into themes and categories. The transcription was checked against the original recordings to ensure accuracy (Creswell & Creswell, 2017:31). The researcher utilised Creswell's thematic data analysis steps to analyse the qualitative data. ATLAS.ti assisted the researcher in organising the data thematically, providing a structured data analysis method. The following paragraph discusses the data's trustworthiness.

Trustworthiness in qualitative research is essential, as it addresses the reliability and validity of the research process (King & Stahl, 2020:26). To ensure trustworthiness in this study, the following strategies and criteria were utilised:

**Credibility:** The research findings accurately reflect the participants' experiences and perspectives. This was achieved by utilising multiple data sources and providing detailed descriptions of the participants' perspectives and experiences (King & Stahl, 2020:26-27). The research proposal also underwent peer debriefing to ensure credibility.

**Transferability:** The study's findings can be transferred and applied within different contexts or other research settings. The researcher provided detailed descriptions of methods and procedures to enhance transferability (Creswell & Creswell, 2017:314; King & Stahl, 2020:27).

**Dependability:** The stability and consistency of the research process and findings were ensured through transparent recording of research methods, collaborative analysis with the study supervisor, and consensus discussions to establish mutual agreement on the identified themes and methods (Chowdhury, 2015:146,150; Creswell & Creswell, 2017:314).

**Confirmability:** The researcher's objectivity and impartiality were demonstrated by consulting the supervisor, transcribing voice recordings, and performing independent coding to compare the transcripts and coding with the researcher's work, thereby reducing the potential for researcher bias (Chowdhury, 2015:146,150; Creswell & Creswell, 2017:314).

Overall, the strategies employed in this study ensure the trustworthiness and integrity of the qualitative research, providing confidence in the validity and reliability of the findings (King & Stahl, 2020:28). The following section discusses research ethics.

### **3.1. Ethics**

Ethical considerations are crucial in research, requiring researchers to maintain professional standards, obtain informed consent, ensure voluntary participation, safeguard participants, and protect confidentiality, as demonstrated by the researcher's actions in this study, which included seeking

ethical clearance, sending permission letters, and clearly explaining participants' rights (Neuman, 2011:145) (Neuman, 2011:145). The results and findings will be discussed in the next section.

## 4. Results and Findings

### 4.1. Introduction

This section examines the qualitative information gathered through semi-structured interviews with six individuals. Additionally, the section begins with an explanation of data analysis and the integration of literature. Additionally covered are data gathering procedures, study samples, data collection processes, and data analysis of the information gathered.

### 4.2. Structure and overview of themes

The managers, owners, and directors of ISPs in South Africa who took part in the study provided their perspectives, which formed the basis for the three distinct themes that formed the study's empirical findings. Addressing the study question and objectives is made easier with the help of this discussion of empirical findings. In addition, this section contains the results of the empirical research for the following questions within the table. Each question is assigned one of the three themes. One of the three themes is assigned to each question. Table 1 summarises the research questions and themes.

Table 1: The relationship between the research questions and themes

Research questions	Codes	Description
What are the essential efforts of your business to increase customer loyalty levels?	<ul style="list-style-type: none"> <li>Factors/efforts to Increase client loyalty</li> </ul>	There are several factors that ISPs can implement to ensure they increase client loyalty. These factors typically fall within the marketing mix, which includes price, place, product, and promotion. The 4Cs also play an essential part and focus on the client's perspective. These aspects include customer, convenience, communication, and cost. Service also helps increase clients' loyalty levels for an ISP, as many clients would pay more for connectivity; if it works effectively and there is a problem, the ISP is there to assist.
Is customer loyalty affected by the services and products that your company provides?	<ul style="list-style-type: none"> <li>Connectivity products affecting client loyalty</li> <li>Connectivity services affecting client loyalty</li> </ul>	Loyalty strongly correlates with a company's service; if the service is ineffective, a client is likely to look for alternative providers. Furthermore, the products ISPs use to deliver the connectivity are also essential because if it is inferior, it will lead to weak data and service delivery, ultimately causing clients to lose faith and decrease their loyalty toward the ISP.

Research questions	Codes	Description
<p>How price sensitive is your current clientele base regarding internet connectivity, and will they move if the pricing is slightly less competitive?</p> <p>Furthermore, how important are product prices from local distributors to service providers, and will these prices ultimately affect end-users' decision-making?</p>	<ul style="list-style-type: none"> <li>• Price sensitivity levels of current clientele</li> <li>• Importance of ISP service price to end-users</li> <li>• Importance of distribution prices for equipment</li> </ul>	<p>Price sensitivity levels are high in South Africa due to the high unemployment rate and increasing levels of uncertainty. Therefore, this leads clients to seek alternative internet service providers offering affordable packages. Many South Africans worked from home during the pandemic, which led to spending more on connectivity packages as higher bandwidth data was required. However, many returned to the office, leading to fewer bandwidth requirements and end-users moving to more cost-effective packages to save money. Furthermore, many WISPs are losing clients due to the high fibre availability at highly affordable rates. WISPs typically provide more expensive connectivity packages because they can provide services and a personal touch when there is a problem, whereas fibre providers cannot. Due to weak services, many clients would move to alternative fibre providers in their area just to return to their previous WISP. However, some end-users would stay as the connectivity package is less, meaning they save money. These end-users do not care about the service, only looking for the best deal.</p> <p>The pricing of connectivity packages is highly important for an ISP, and, if that ISP is out by R100, they could potentially lose a client if the loyalty is not high or the services are not that effective. The prices from distributors, who import all the various connectivity equipment, are essential, as many smaller WISPs must absorb the installation and equipment costs to ensure they obtain the business. If the pricing from the distributor is too high, it will cause a more extended return on investment for the WISP. Also, suppose the pricing from the distributor is out due to fluctuating exchange rates or equipment cost increases. In that case, it causes end-users not to purchase an additional product or solution from the ISP because it is too expensive.</p>
<p>In your opinion, will clients typically stay with internet service providers if they deliver excellent after-sales services but still offer higher rates?</p>	<ul style="list-style-type: none"> <li>• High levels of services to keep clients from moving despite having higher prices</li> <li>• Connectivity services affecting client loyalty</li> </ul>	<p>With the new digital age, stable connectivity is essential to performing business and connecting with others. The problem is that many large internet operators cannot provide high-quality services, even on fibre, as the number of customers they need to serve is too large. Therefore, smaller and local WISPs have a significant advantage as they specialise in relationship building and high-</p>

Research questions	Codes	Description
	<ul style="list-style-type: none"> <li>Brand loyalty</li> </ul>	quality services to ensure the client is always connected. This means that many end-users would rather pay more for their connectivity packages from WISPs to benefit from their services when things go wrong.
What would be the leading causes of a client leaving a service provider and the same with a service provider leaving a local distributor? If price is one of the significant causes, what would be the overall percentage to make a client leave a service provider and a service provider their distributor?	<ul style="list-style-type: none"> <li>Reasons for clients leaving their ISPs</li> <li>Reasons for ISPs leaving their distributor</li> <li>The price or percentage differences that will drive end-users away from the ISP</li> <li>The price or percentage difference that will drive ISPs away from their distributor</li> </ul>	<p>End-users would leave an ISP for several reasons, such as too high prices, weak service delivery, ineffective bandwidth data, and not living up to their promises. Furthermore, there are also many reasons for ISPs to leave their local distributors, and these, once again, include less competitive pricing, weak technical assistance, weak stock availability, long waiting times, and poor return and service departments.</p> <p>Pricing is a major cause for clients to move to another provider and the same with ISPs to an alternative distributor. Some ISPs and end-users will move if the pricing is out by a couple of 100 rands. However, many ISPs and end-users value the services and support more than pricing, meaning they will remain with the ISP or supplier if the pricing is slightly higher, as long as the other party provides the required services.</p>

Source: Own Compilation

Table 2: Result Themes

Central themes	Colour of the central theme
Price sensitivity	
Service quality	
Challenging problems	

Source: Own Compilation

The following section will discuss the ICT industry competition levels.

### 4.3. Competition levels within the ICT industry

South Africa's telecommunication industry has a couple of large corporations that dominate the market, making it challenging for other ISPs to compete (Sutherland, 2021:1-4,5). Companies are

deploying fibre rapidly in urban areas, causing an increase in competition within these areas (Oki & Lawrence, 2022:113-116).

The following statements from participants stood out when they discussed the degrees of industry competition:

“It is very competitive, and that is why all the smaller WISPs need to think outside the box, approach customers differently, and adapt to all circumstances”.

“It is competitive; we normally say it is not survival of the fittest but survival of the fastest”.

The next section highlights price sensitivity in the South African ICT sector.

#### **4.4. Price sensitivity in the ICT sector in South Africa**

Constant competition in the telecommunications industry forces service providers to cut their rates to stay in business. The price-sensitive nature of South Africa's consumer market also drives customers to switch to ISPs, offering the most appealing and competitive rates for connectivity packages. The rising price sensitivity levels severely impact customer loyalty (Morgan & Govender, 2017:3).

##### **4.4.1. Connectivity war**

Customers in the telecom industry are susceptible to price, which causes them to switch to ISPs that offer the quickest speeds at the lowest costs and with the best services. Customer loyalty is being strained by the fierce price war brought about by the nation's growing levels of competitiveness (Lommerud & Sjørgard, 2003:57).

Participants stated that as all ISPs operate on thin profit margins, price is crucial to equipment costs. Additionally, the pricing issue is related to the loyalty of the customer. The fibre providers engage in a price war to increase their market share and artificially drive down prices, ultimately harming the market. The following section evaluates the service quality of ISPs.

#### **4.5. Service quality of ISPs**

Four codes make up this main theme, correlating and exacerbating the issue. These codes specifically relate to connectivity products affecting client loyalty, connectivity services affecting client loyalty, high levels of services to keep clients from moving despite having higher prices and the impact of employee training on high service levels.

##### **4.5.1. Connectivity products affecting client loyalty**

The participants acknowledge that the intense marketing surrounding fibre and the array of services from rival fibre providers make it difficult to sell wireless packages to end users and companies. Nonetheless, if the ISP meets agreed-upon speeds and ensures dependable, constant access, users will be happy regardless of the media. The participants also mentioned that consumers are not brand-aware

because they know little about connectivity. Thus, it's essential to educate them about quality wireless equipment. In addition, the participant brought up how wireless technology has advanced dramatically, enhancing the medium's total performance to guarantee its competitiveness. For end consumers, fibre is still a more appealing option.

#### **4.5.2. Connectivity services affecting client loyalty**

Participant 1 brought up a common misperception in the telecom sector and among end consumers that wireless is less dependable and slower than fibre, which isn't necessarily the case because of technological advancements. The necessity of creating new goods to stay competitive against all other ISPs in the industry was highlighted by Participant 2. Their ISP's value proposition is predicated on the availability of local professionals who can solve any issue at any time. Since larger companies cannot offer that individualised touch, they leverage their local presence to increase market share.

#### **4.5.3. High levels of services to keep clients from moving despite having higher prices**

The key points from the participant's feedback show:

Value is not just about lower prices but about providing products and services that meet customer needs.

-Excellent customer service is a key driver of client loyalty, as customers are willing to pay a premium for reliable and well-supported services.

Personalised service levels and responsive support are essential, as customers prefer to avoid dealing with impersonal or lengthy processes.

Companies can compete with lower-priced competitors by focusing on superior service and support, leading to higher customer retention and loyalty.

#### **4.5.4. Impact of employee training on high service**

Since it produces higher-quality services, employee training has increased productivity levels in any firm (Hanaysha, 2016:172).

Participants' quotes regarding employee training that stood out are included below.

Employee training is crucial for providing efficient customer support, ensuring technicians can handle any issue, and staying competitive in a rapidly evolving market. Investing in training helps organisations upskill their workforce, maintain high-quality service, and adapt to changing industry demands. Client Loyalty in the ISP sector will be discussed in the next section.

### **4.6. Client loyalty in the ISP industry**

Client loyalty is the commitment made by customers to a business or brand due to the services they get. There is strong resistance, and they won't go to another company. However, good customer

satisfaction levels are necessary to maintain high customer loyalty among clients, which may eventually result in a long-lasting connection (Arslan, 2020:11).

Three codes make up this fundamental theme, correlating with and exacerbating the issue. These codes consist of:

#### **4.6.1. Brand Loyalty**

Strong brand trust is a prerequisite for high consumer trust and has a significant impact on customer loyalty. Many customers are prepared to pay more for some specific high-end services. Consumers begin to trust a brand, service, or business when they believe it offers special services that meet their demands and that other businesses are unable to supply (Azizan & Yusr, 2019:97).

Participants shared the following opinions on brand loyalty:

Relationships and trust are the primary drivers of brand loyalty, even outweighing price considerations. Customers value long-standing relationships with distributors and are reluctant to switch brands, as they trust the known brand and want to maintain the business partnership. Brand loyalty is fostered through reliable products, strong customer relationships, and a demonstrated ability to meet the customer's needs. The perceived current customer loyalty levels are discussed in the next section.

#### **4.6.2. Perceived current customer loyalty levels**

The participants highlighted their companies' high customer loyalty, with some customers remaining loyal since their inception years ago. They emphasised their excellent customer retention rates, having lost only a few customers.

#### **4.6.3. Reasons for clients leaving their ISPs**

When clients' expectations are unmet by the services, and they discover more effective alternatives, their loyalty to the provider declines. Many South African customers place high importance on costs and services, particularly in the telecom sector (Morgan & Govender, 2017:2). Moreover, the customer will go to another ISP that can provide the needed features if they do not obtain these two value propositions (SA\_Telco\_Sentiment\_Index., 2019).

Participants indicated that the main reasons customers leave an ISP are:

Clients often leave ISPs due to price, with younger generations being more price sensitive. Quality of connectivity and administrative complexity are also significant factors.

### **4.7. Conclusion**

The study identified factors influencing client loyalty, such as adequate service, resolving problems, and building trust. High poverty rates in South Africa slow down the telecommunication industry's



growth due to price sensitivity. The competitiveness within the connectivity sector affects service providers' and consumers' decision-making. The results provided a comprehensive overview of the industry's opportunities and challenges based on interviews with six ISPs of varying sizes. Managerial implications will be highlighted in the next section.

- Provide descriptive statistics (if done) and details of the participants. Add additional statistics (ANOVA, etc.), present the significant findings and try to link your findings to the literature discussed.

## **5. Managerial Implications**

### **5.1. Introduction**

The study has a lot of ramifications for South African telecom firms. The results showed that various factors affect consumer loyalty and that if these factors are ignored, loyalty levels will fall. Customer loyalty is greatly influenced by cost, efficient service, communication, exceptional value-for-money services, minimal connectivity outages, and successful marketing. ISPs risk losing customers or not acquiring new ones if they choose not to implement this.

### **5.2. Implications for ISPs**

South African ISPs face infrastructure, power, and security challenges. They must understand the market, differentiate their offerings, and provide value-added solutions beyond internet access to compete.

Price sensitivity is strong because of the weak economy; thus, ISPs need to provide connectivity bundles at competitive rates. However, ISPs can charge higher rates if they provide good service and build strong relationships, although there are thresholds above which customers may quit.

## **6. Conclusions, Limitations and Future Research**

### **6.1. Introduction**

The objective of the study was to investigate the variables affecting customer loyalty in the ICT sector in South Africa. Addressing the study topic involved looking at several secondary objectives, which are listed below:

**Objective 1:** To determine the impact of underdeveloped infrastructure on adopting ICT technology in South Africa.

**Objective 2:** To investigate the effect of high poverty rates on ICT expansion within South Africa.

**Objective 3:** To establish the impact of the lack of skills among ICT employees on the quality of service.

**Objective 4:** To investigate how competitive the connectivity market in South Africa is and how it affects the decision-making of the service provider and consumer.

The following section outlines the research conclusions.

## **6.2. Research conclusions**

**Objective 1:** Weak infrastructure affects adequate service delivery and industry growth, with challenges like road construction damaging fibre lines, lack of infrastructure in rural areas, and weak power grids causing connectivity outages. Many ISPs overcome these by implementing wireless solutions.

**Objective 2:** High poverty levels increase price sensitivity among consumers, forcing ISPs to offer initial costs and free installations to remain competitive. However, ISPs are adapting by adjusting service delivery to suit lower-income markets.

**Objective 3:** Consumers have unrealistic expectations due to a lack of understanding, so ISPs educate clients to manage minor issues independently. Employee education is crucial, but training challenges exist due to the cost and time involved.

**Objective 4:** High competition leads to a price war, forcing ISPs to provide excellent services and build client loyalty or lower pricing. ISPs must differentiate themselves through exceptional services to retain clients despite price sensitivity.

The next section discusses the research recommendations.

## **6.3. Recommendations**

South Africa's ICT industry significantly contributes to the country's GDP, accounting for approximately R93 billion. However, the industry faces several challenges, including limited internet access, consumer price sensitivity, and intense competition among service providers.

The study found that while there are many opportunities in the telecommunication sector, participants expressed concerns about the current price war, infrastructure issues, and the impact of broader societal problems like weak road conditions, power outages, and high crime levels. These factors make it difficult for internet service providers (ISPs) to deliver reliable and effective services, hindering industry growth.

To address these challenges, the study recommends that the government invest in infrastructure, particularly the power grid and policing, to create a more stable environment for the ICT industry. Additionally, ISPs should focus on improving client loyalty by providing excellent services at

affordable rates, implementing proactive communication, building relationships and trust, and ensuring reliable connectivity speeds.

By addressing these key issues, the ICT industry in South Africa can continue to grow and contribute to the country's economic development.

The limitations of the study are considered in the next section.

#### **6.4. Limitations of the study**

The study's limitations, including a small sample size, regional focus, lack of consumer input, and exclusion of large enterprises, create opportunities for future research. The qualitative approach and focus on higher management also leave room for further studies. Future research could explore these gaps, potentially benefiting the whole industry. Suggestions for future research is deliberated in the next section.

#### **6.5. Suggestions for future research**

The study concentrated on tactics that ISPs in the ICT sector might employ to boost customer loyalty. The important subjects were price sensitivity, industry expansion, service quality, difficulties, and customer loyalty levels. The study's findings suggest that a mixed-method approach should be carried out to get a bigger sample size and investigate topics, including the cost of connectivity, the security of wireless towers, market expansion, underserved areas, and the development of fibre infrastructure.

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