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Causes of Customer Switching Behaviour in the Zimbabwean Mobile Telecommunication Industry

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ABSTRACT

Although several industries suffer from churn, it is more pronounced in the telecommunication sector where customers are acquired and also defect quickly. Controlling customer defection is the major problem facing the telecom industry nowadays. The research aimed to explore the underlying causes of customer switch behaviour in Zimbabwe's mobile telecom industry. Primary data was gathered from three mobile telecommunication operators using a case study design. Data was gathered from key informants who comprised telecommunication subscribers, employees and management. The population of the study included more than 12,000,000 subscribers of Econet Wireless, Telecel, and Net One Pvt Ltd inter alia offering mobile services. Stratified and purposive sampling was used in this study as a form of triangulation. Quantitative data was gathered from a sample of 356 subscribers. Findings from the study showed that customer defection in Zimbabwe's mobile telecommunication industry is fueled by competitor promotions, poor service quality, and customer dissatisfaction among other factors. It is recommended that Zimbabwe telecom firms should collaborate with rivals in the industry when launching marketing-mix elements and other strategies. In addition, the industry should benchmark its service standards with international principles. Furthermore, the industry should regularly carry out market research in the form of customer surveys to understand customer needs, wants and preferences to reduce customer switching behaviour. It is also recommended that telecom firms procure quality products for sale to their customers.

Keywords: Customer, Deregulation, Retention, Switching.

1. INTRODUCTION

Due to low- switching costs and undifferentiated offerings, a serious challenge that operators face is how to retain customers. Even though customer switching is a persistent problem in the entire service industry, it is more pronounced in the telecommunication industry. Generally, the current scenario in the hyperactive corporate world, and especially in the telecommunication sector, renders companies to compete on two fronts: The expansion of their customer base and the retention of their current customers (Hadi, Aslam & Gulzar, 2019). Battles for market dominance are intense in the information technology industry (Lunn and Lyons, 2018). The telecommunication industry is marked by intense competition, with companies fighting for customers, market share, and long-term survival (Kyei and Bayoh, 2017).

Customer loyalty is essential to business success, particularly in today's competitive marketplace where retaining customers has become increasingly challenging and the cost of acquiring new customers has skyrocketed. Service quality is one of the strategies which businesses use to retain customers (Rane, Achari and Choudhary, 2023).

Telecommunication is the most competitive and fastest-growing market in the globe. Dynamic competition in telecommunication is produced by a battle among companies to produce more reliable or more economical commodities (Meena and Geng, 2022). Globally, telecommunication has been transformed into an enormously competitive arena owing to the liberalization of the communication system to improve the communication process. Waverman and Roller (2001) demonstrate that investment in telecommunication generates a growth dividend, as network expansion reduces costs, increases market boundaries, and greatly increases information flows.

These days, the telecommunication sector affects almost all socioeconomic life of every nation. The influence is anchored on strategic linkages the sector provides to other sectors of the economy. In comparison to other industries, Zimbabwe's mobile telecommunication industry is also affected by the effects of globalization, technological dynamism, competition and deregulation. Privatization reforms in the industry under the pretext of deregulation promoted competition among operators and wide consumer choices. Deregulation was perceived to enhance efficiency, eliminate wastage of resources, increase flexibility and create of competitive environment (Perak, 2022). To maintain success in the competitive telecommunication business, telecommunication firms should understand the needs of customers and serve them smarter to develop customer loyalty (Hossain et al., 2017).

Zimbabwe's mobile telecommunication industry continues to experience significant growth despite persistent macroeconomic instability characterized by recession, and inflation. Since the year 2019, the country has been adversely affected by macroeconomic challenges, the effects of COVID-19, and a climate-related drought. Furthermore, the Russia-Ukraine conflict exacerbated the situation by worsening inflation, currency depreciation and shortages of other products. This war caused economic sanctions on multiple countries, a surge in commodity prices, and supply chain disruptions affecting many markets across the globe. However, the global telecom analytics market size is estimated to reach USD16.21 billion by 20230 expanding at a CAGR OF 14.9% from 2025 to 2030.

The telecommunication industry is adversely affected by inflation which increases operational costs. Service providers have resorted to tariff increases to enhance average revenue per user. They do this at the risk of losing more customers and decreasing usage. As prices rise

telecommunication firms are more susceptible to customer switching. However, with the rise of 5G networks, coverage and speed are increasing rapidly in all markets. It is becoming extremely difficult for operators to differentiate, leading to commoditization of connectivity, fierce competition and erosion of margins. Against this backdrop, customer experience is emerging as the primary competitive differentiator (McKinsey & Company, 2023).

The price of fuel increased drastically causing price hikes and increasing the cost of living. In addition, the sector is also vulnerable to plummeting foreign exchange rates which are also undermining operator viability. Consequently, revenue from the sector decreased due to regulatory measures and taxes imposed by the government. Furthermore, operational costs continue to increase in line with inflationary pressures. Consumer expenditure on telecommunication products and services is under pressure from the financial effect of employee retrenchment and the consequent restriction of disposable incomes (Barton, 2020). Due to the foregoing developments, mobile operators are forced to continuously hike the prices of tariffs and broadband, yet the majority of consumers cannot afford them.

Due to rampant customer switching behaviour, one of the most serious challenges Zimbabwean telecommunication firms face is how to maintain customer loyalty. To survive in this competitive market, mobile service providers are providing attractive promotions in terms of products and services to attract customers. Loyal customers reduce costs associated with customer education and marketing, especially when they become promoters of your firm (Rolston and Glick, 2021). A 5 per cent increase in customer retention, increases business profits by 25 to 95 per cent (Champers, 2022).

Telecommunication is the suite of technologies, devices, equipment, facilities, networks and applications that support communication at a distance. These days, consumers consider telecommunication in terms of products and services. Globally, the telecommunication industry is growing very fast due to globalization, deregulation, technology, competition and customer demand for better products and services. The telecommunication industry has been transformed by vigorous competition in an environment of rapid change. McDonough (2017) also observed that the U.S. telco Industry has been shaped by the interplay of technological change, free enterprise, politics, public pressure, and government regulation. Deregulation of the telecommunication sector could be defined as introducing competition in the industry by private participation through well-defined rules, regulations and policies (Owusu-Kumih et al., 2022).

1.1 Telecommunication Liberalization and Deregulation

Historically, telecommunication has been provided by state-owned monopolies. Globally, countries have liberalized the provision of telecommunication within their borders. Telecommunication reformation was initiated by privatization, total liberalization and dynamic competition (Meena and Geng, 2022). In Africa, the deregulation of the telecommunication sector was initially a requirement of the International Monetary Fund (IMF) and the World Bank within the framework of Structural Adjustment Programs. Telecommunication liberalization means the introduction of competition into the telecommunication sector by allowing commercial enterprises to establish new telecom businesses provided they comply with government-defined policies, rules and regulations.

Lessons learnt in several countries show that the efficient and effective deregulation of the telecommunication sector results in greater economic growth and development, incremental investment, job creation, lower prices, a better quality of services, and more rapid technological innovation. The main purposes of deregulation were underpinned by the country's determination to drive economic growth by utilizing the fruits of technology (Zeru, 2022). Its potential benefits were to promote competition that would result in affordable prices, provision of quality products, variety and protection of consumer interests. The transition from monopoly to competition in the basic telecommunication service would have a positive effect on affordability by increasing technical efficiency which lowers costs and results in a decrease in the price of the service. The other objectives of deregulation were promoting competition, attracting new investments, enhancing the quality and variety of services as well as fostering service innovation (Hook, 2023). Deregulation of the telecommunication sector resulted in improved infrastructure as a result of foreign investments, improved communication among the people, simplified business processes and transactions, employment opportunities, enhanced productivity and increased national output (Awoyele et al., 2012). Studies carried out in Bangladesh postulated that role of the telecommunication had a significant influence on economic development. Generally, the growth of tele-density improves the Gross Domestic Product per capita of the economy.

Telecommunication markets in several countries are deregulated to permit competition. However, deregulation does not promote competition overnight. In countries that deregulated their telecommunication sector, the following benefits were realized; (a) prices of services have fallen, (b) customer service has improved, (c) innovation has increased (d) advanced infrastructure has been built. Generally, there has been a correlation between the countries that have deregulated their telecommunication industries and the overall competitiveness of those countries in the global economy. However, the correlation is difficult to quantify and prove (Leo, 1998). The World Economic Forum (WEF) defines competitiveness as a set of institutions, policies and factors that determine the level of productivity of a country. The opening up of mobile markets to competition seems to have greatly facilitated the spread of mobile phones. Liberalization and privatization had a significant impact on the availability of mobile and internet telecommunication services However, deregulation policies did not have a significant impact on the price of fixed telephony in the Cemac region mainly due to tariff rebalancing (Otavid, Njifon and Valerie, 2022). In the Nigerian telecommunication industry, deregulation promoted competition, improved broadband penetration, enhanced service innovation, caused a decline in prices and created employment (Ezenwa, 2020).

The widely accepted objectives of regulation were: (a) to optimize the use of scarce resources, such as frequency spectrum, telephone numbers and rights of way, and (b) to promote competitive markets that are characterized by the efficient supply of telecommunication services. (c) To promote universal access to basic telecommunication and broadcasting services. (d) Where competitive markets do not exist or fail, to prevent abuse of market power in the form of excessive pricing and anti-competitive behavior by dominant firms. (e) To create a favorable climate for investment and the expansion of telecoms and broadcasting services. (f) To protect consumer rights, including freedom of expression and the right to privacy (MISA, 2007).

After the deregulation of the industry, the industry is now regulated by the Postal and Telecommunications Regulatory Authority of Zimbabwe (POTRAZ).POTRAZ was formed through the Postal and Telecommunications Act, Chapter 12:05 of 2000 and it commenced business in September 2001. The functions of the organization are too many to mention including the promotion of the development of the telecommunication industry, licensing and regulatory functions, ensuring that customer demands are fulfilled and promoting effective competition. A key goal of deregulation is that effective competition would emerge and prove sustainable (Lunn and Lyons, 2018).

As customers are more demanding and the market is maturing and becoming increasingly competitive, companies are using a variety of strategies and tactics. One such strategy is Customer Relationship Management (Al-Mashraie et al., 2020).

1.2 Statement of the problem

The deregulation of Zimbabwe's telecommunications industry encouraged fierce competition for subscribers among service providers. This is exacerbated by an industry that is almost completely saturated in terms of subscriber base. Customers can switch operators without losing their original phone numbers thanks to the implementation of Mobile Number Portability. While this improves customer welfare, it also encourages customer switching behavior in the industry, which has the potential to jeopardize organizational competitiveness and sustainability. Customer churn reduces margins, profits, and market value. Zimbabwe telecommunications companies must understand the factors that influence customer churn to develop appropriate strategies for controlling it. The purpose of the study is to explore the determinants of customer switching in the Zimbabwean telecommunication industry.

2. LITERATURE REVIEW

Customer switching is often referred to as customer attrition or customer defection which is the rate at which customers are lost to competitor firms. Customer defection refers to the gradual loss of customers to rival service providers due to several factors. The churn rate in developing markets ranges from 20% to 70%. In some of these markets, more than 90% of all mobile subscribers are prepaid. Some operators in developing markets lose in aggregate their entire subscriber base in a year (WIPRO, 2023).

In today's globalized and borderless market, quality, productivity and satisfaction of customers pose a challenge to the survival of firms. The growth and survival of firms depend on attracting and retaining customers (Boohene and Agyapong, 2011). Efforts to retain customers are compromised by customer churn or switching.

Competition is very high among the three mobile service providers in Zimbabwe's telecommunication industry, namely Econet Wireless Zimbabwe, Net One and Telecel. Marumbwa (2013) argues that several brands exist in mobile telecommunications and consumers make their purchase decisions depending on their perceptions of brand image. To grow their customer base, service providers engage in aggressive promotional campaigns to encourage subscribers to switch from other service providers or even in multi-loyalty by subscribing to more than two service providers (Hwambo, Shamuyenhanzva & Sandada, 2017). In today's highly competitive, volatile and intense service environment, marketers are seeking ways to both engage and interact with their customers and establish long-standing relationships and customer loyalty (Hwambo, Shamuyenhanzva & Sandada, 2017).

Telecommunication companies apply switching as a key business metric to predict the number of customers who will leave the service provider. According to Hughes, (2010) the average switching rate in the telecom industry is 1.9% per month across the four service providers but could rise to as high as 67% annually for prepaid services. With low switching costs and an abundance of alternative providers, customer satisfaction is the most effective means of reducing customer churn. Hyper-competition, availability of several subscriber options, and diverse tariff rates compel customers to switch service providers.

Since the cost of acquiring a new customer is up to 25 times higher than the cost of retaining them, fostering loyalty is key. A rise of 5% in customer satisfaction is followed by a 95% increase in sales. Customer switching is significant in the telecommunication industry because it directly affects the competitiveness of the service provider (Sundararajan, & Gursoy, 2020).In the telecommunications market, competitiveness is measured by switching. Customer switching in the telecom industry poses one of the most significant risks to loss of revenue. It is important to be able to proactively determine customers who are most at risk of defecting and then take preventive measures against this by understanding their needs and also providing a positive customer experience. They need to know who is leaving and why.

To survive in this competitive environment telecom firms should adopt three strategies (a) Acquire new customers (b) Upsell to existing customers (c) Increase the retention period of customers. Retaining customers with high churn risk is considered to be the toughest challenge facing the telecommunication industry today. It has been proven by research that it costs five times more to attract a new customer than it does to retain an existing one. Furthermore, increasing retention rates by 5% can increase profits by 25% to 95% according to research by Bain & Company.

The deregulation of the telecommunication industry has increased competition and the situation has been made worse by the fact that customers have more choices than ever (Alman, Aksoy & Alzahrani, 2014). Omni. sci. (2021) proposes that customer churns in the telecommunication industry can be reduced by (a) network optimization (b) managing customer lifetime value (c) customer complaint analytics and (d) Using big data analytics. Customer switching can be controlled by addressing the following aspects in the telecommunication industry (a) Service quality. (b) Availability of features and content (c) Lower cost substitutes from competitors(c) Negative customer experiences from customers (Bhanot, 2020).

3. METHODOLOGY

The purpose of the study was to examine factors that promote customer switching in Zimbabwe's mobile telecommunication industry. To find answers to the research problem the study used a mixed method of data collection combining both qualitative and quantitative data through questionnaires and interviews. Stratified sampling was used to collect data from Zimbabwean telecommunication subscribers, employees and management. The sampling frame comprised telecommunication subscribers, employees and management from the three service providers in Zimbabwe. The study adopted a cross-sectional case study research design whereby information was gathered from respondents in Zimbabwe's mobile telecommunication industry. A sample of 356 subscribers was conveniently picked to participate in the study. The strata comprised telecommunication subscribers, employees and management who were picked through random selection. Some of the questionnaires were distributed through email and in person. Quantitative data was gathered using self-administered structured questionnaires in Harare Metropolitan City, Bulawayo, Gweru, Chinhoyi, Mutare, and other towns. Furthermore, 35 key informants participated in the interviews from Econet Wireless, Net One and Telecel through a purposive sampling technique. The study was based on the need to understand the underlying causes of customer switching in Zimbabwe's mobile telecommunication industry. Completed questionnaires were analyzed using SPSS version 23 was used to analyze the data.

4. RESULTS AND DISCUSSION

The study explored gender representation in the composition of the participants and this is shown in the figure below.

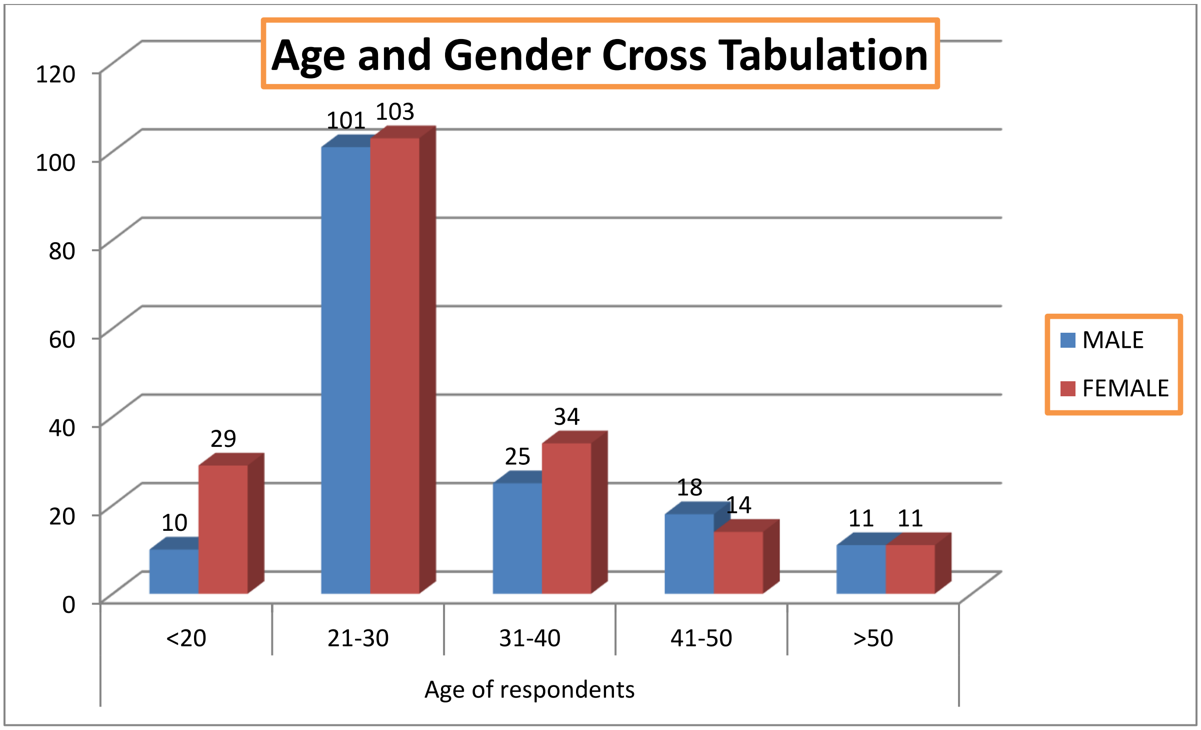

Figure 1. Age-Gender Cross Tabulation

The above graphs portray the age of respondents who participated in the study. The age group between 21-30 and 31-40 predominated the study. This represents a youthful age group who were eager to participate in research for the quest of knowledge development.

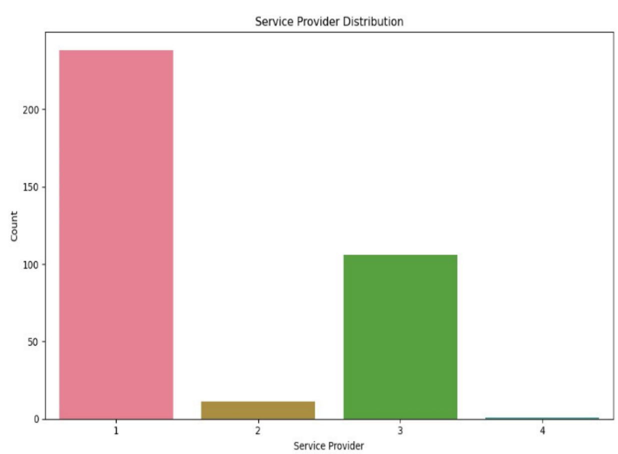

Figure 2. Service Provider Distribution

The above graph shows that Econet Wireless is the market leader in the Zimbabwean mobile telecommunication industry with the greatest market, followed by Net One and Telecel. Zimbabwe Telecommunications staff and management were asked this question, ‘Indicate that the following reasons for defection apply to your customers?’ As alluded to earlier, customer switching appears to be a common practice in the telecommunication sector. One sample test was done and the reasons for customer defection were outlined in the table below,

Table 1: One-Sample T-Test: Customer Defection in the telecom industry.						
	Test Value = 3					
					95% C.I. of differences	
	T	**Df**	**Sig. (2-tailed)**	**Mean Difference**	**Lower**	**Upper**
Customer defection is a problem to company	8.902	62	.000	1.063	.82	1.30

Research findings confirm that customer defection is a serious problem in the Zimbabwe telecommunication industry since the majority of subscribers own multiple SIM cards from several service providers to take advantage of promotions and other lucrative offers. For example, Econet Wireless is the first Zimbabwe mobile telecommunication company to introduce an E-SIM card. This is a digital card that is embedded in smartphones, eliminating the need for a physical SIM card. The E-SIM permits the use of multiple SIM cards and is quite a flexible and sustainable experience (The Exchange, 2023). Zimbabwe mobile telecommunication firms were asked the following questions;

Table 2: Have you ever changed your mobile service provider before?					
		Frequency	**Per cent**	**Valid Percent**	**Cumulative Percent**
Valid	Yes	232	65.2	65.2	65.2
	No	124	34.8	34.8	100.0
	Total	356	100.0	100.0	

The results shown in the above table show the majority, 65.2 percent switched between Econet Wireless, Net One and Telecel. Possible causes of customer switching include the need for coverage, cheaper data bundles and network coverage among other factors. Fig. 3 below shows usage and ownership of multiple SIM cards and customer switching behavior is a common phenomenon in Zimbabwe's mobile telecommunication industry.

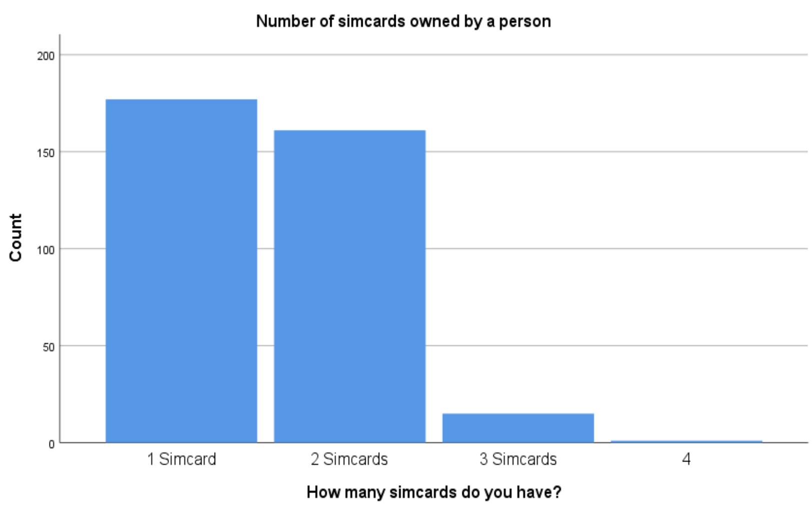

Fig 3.

As illustrated above, some subscribers own three SIM cards from all service providers as a way of tapping into specific deals and promotions for extra data or free minutes offered by the different service providers.

Table 3: Causes of Customer Switching in the Zimbabwe Telecommunication Industry

	Mean	**Std Dev.**	**T**	**Df**	**Sig. (2 tailed)**
Poor Customer service	3.83	1.009	6.495	62	.0000
Poor network coverage	3.86	0.895		62	0.0000
Competitor promotions	4.27	.653	6.495	62	.0000
Ineffective promotions	3.89	.969	7.598	62	.0000
Fake products and services	3.63	1.126	15.442	62	.0000
Customer dissatisfaction with services	4.00	.950	7.281	62	.0000
Slow internet connection	4.06	.965	4.476	62	.0000
Poor call quality	4.06	.948	8.352	62	.0000
Ineffective communication with customers	4.00	1.000	8.747	62	.0000
Expensive tariffs	3.94	.965	8.902	62	.0000
Poor Customer service of switching costs	4.00	.898	7.937	62	.0000
Poor relationships with telecom. Firms	3.94	1.061	7.702	62	.0000
Poor complaint handling procedures	3.95	.923	8.187	62	.0000
Poor network quality	4.02	.992	8.130	62	.000

The mean values of each factor show a level of agreement. All factors under consideration were causes of customer defection in the sector. Research findings demonstrated that most customers defect service providers due to competitor promotions (M=4.27) followed by slow internet connection (M=4.06), followed by poor call quality (4.02). Other causes of customer churn in the sector include low switching costs (M=4.00), ineffective communication with customers (M=4.00) and customers' dissatisfaction with services (M=4.00). Customers switch service providers because of poor complaint-handling procedures (M=3.95), expensive tariffs (3.94) and poor relationships with customers (M=3.94). Customer defect from the service provider because of ineffective promotions (M=3.89), poor network coverage (M=3.86), and poor customer service (M=3.84). There were several causes of customer defection in the telecommunication sector. Studies undertaken by Salman and Kalya (2018) in Indian telecoms recommended service providers increase switching costs, provide high-quality services to customers, maintain a strong and appealing brand image, and offer low charges. They need to assure customers. However, within Zimbabwean mobile telecommunication, customer retention is determined by network coverage, price of data bundles, tariffs and competitor offerings. However, studies by Awan et al., (2016) in Pakistan about determinants of brand switching in the mobile sector, identified factors such as price, inconvenience, customer services, customer satisfaction and core service failure as main causes of customer switching. Srividya and Akilla (2023) factors influencing consumer brand switching in India's telecommunications industry. In a nutshell, the study concluded that provision of value-added services, effective pricing strategies, service quality and establishment of customer relationship management control customer switching in the industry.

Marumbwa (2013) recommended that Zimbabwe's mobile telecommunication industry should consider improvements in service quality variables such as network coverage, internet broadband, call connectivity and customer complaints handling procedures. Secondly, tariff charges and SIM card registration procedures should be streamlined.

According to Shah, Hossain and Zubairshah (2018), switching behaviour in the telecommunication industry is influenced by price perception, customer satisfaction, customer service, inconvenience, perceived expectations, perceived quality and brand image. The results indicate that customer loyalty in Zimbabwe's telecommunication sector has been deteriorating as evidenced by (a) customer switching and (b) several customer grievances and complaints registered at telecommunications firms. Within the sector, ownership of multiple SIM cards and switching was quite a common phenomenon and trendy. To stay competitive in the current economic situation, telecommunication firms are required to provide quality services. This would enable them to attract a new customer base for competitive advantage (Agha et al., 2021). Rizomyliotis et al., (2018) studied antecedents of customer loyalty in UAE telecommunications. The study made the following recommendations (a) Operators should continuously upgrade their infrastructure to improve service quality. (b) Network operators should adopt digital analytics to retain customers, and maximize customer relationships, productivity and performance (c) Maximize trusting relationships with customers. Hossain et al., (2017) studied antecedents of customer satisfaction and retention in Bangladesh telecommunication. The study revealed that price fairness, customer care and brand image were important antecedents of customer satisfaction. Customer satisfaction influences customer retention.

5. CONCLUSIONS

Zimbabwe telecommunication subscribers also confirmed that customer defection was a serious problem in Zimbabwe the telecommunication industry. This has adverse effects on operator revenue, market share and competitiveness (Blouch et al, 2023). Due to the increased number of service providers, there was intense competition in the Zimbabwean telecommunication sector. This was worsened by the impact of globalization, technological advancement deregulation and dynamic changes in consumer tastes. Consequently, the telecommunication sector was finding it difficult to retain customers as they constantly switched service providers. Customer retention strategies are concerted efforts by telecommunication firms to reduce customer defections. It is a strategic process to maintain and retain profitable customers with high lifetime value.

Concerning service delivery, customers had grievances regarding expensive tariffs, poor network coverage, insufficient customer service, and the sudden disappearance of airtime. Customers also complained that once they change service providers, they forfeit their cell numbers. Customers suggested the adoption of a Mobile Portability Number (MPN) whereby they retain their numbers even if they switch service providers (Chen and Liang, 2023). Due to current economic challenges adversely affecting the country like cash shortages, poor liquidity, and inflation, customers switch telecommunication firms to cut costs, enjoy conveniences, and take advantage of loyalty programs offered by different service providers.

6. Recommendations

Reducing customer switching in the telecoms industry requires a multi-faceted approach that focuses on improving customer satisfaction, loyalty and retention. Research findings assist managers in understanding the factors that cause customer switching in Zimbabwe's telecommunication industry. Firms like Econet Wireless Zimbabwe, Net One and Telecel Zimbabwe should identify determinants of customer satisfaction in the industry. Service providers need to consider the heterogeneity of their customer base rethink customer segmentation. The segmentation approach is also useful to consider the business model towards sustainable development. Service providers should use predictive analytics to derive actionable insights to reduce churn. Ideally, they should use customer data to get insights about those customers with a propensity to switch and take actionable strategies (Kastouni and Lahcen, 2022). Telecom firms should exploit business and artificial intelligence in this regard. Zimbabwe telecommunication firms should not engage in aggressive competition but collaborate in setting tariffs. Furthermore, they should improve service quality through continuous training of staff. The industry is advised to offer personalized offers and bundled services. In addition, these firms should upgrade their network connectivity. Most importantly, they should improve the way they solve customer queries through self-service, the use of technology, and customer surveys. Regular communication is critical in the industry. Zimbabwe telecommunication firms should launch credible promotions and find ways to lock in their customers to reduce switching. Zimbabwe telecom firms should compare their tariffs with regional standards. The problem of poor network coverage in Zimbabwe can be solved by infrastructure-sharing arrangements. This would improve network coverage, and customer satisfaction, reduce costs, and improve efficiency. They should improve network quality, simplify tariffs and plans and enhance customer support. Zimbabwe mobile telecommunication operators should delight their customers through quality products and services to achieve customer satisfaction. The industry is advised to have customer feedbacks and analytics, churn prediction and prevention and always monitor service quality. This will enable them to retain customers and control switching behaviour.

7. Areas for Future Research

Further studies can be done on other factors that cause customer switching like social, technological or political influences which were not covered by this study.

Declaration by Authors

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