

## Unpacking "SOSES" 2024 results by sector - going beyond for you

### Telecoms Sector

"SOSES" State of the Service Economy survey, is an annual survey, bankrolled by ZB Financial Holdings Limited, in partnership with The Financial Gazette, and Tatu Advertising to position Zimbabwe as the preferred economic hub for global, regional, and local investors, tourists, and consumers leveraging service.

According to the World Bank, the services sector accounts for around 70-80 percent of GDP in developed economies, 50-60 percent in developing economies, and 40-50 percent in emerging economies, making it a significant contributor to the world's economies. Informed by the above, and the national vision of becoming a prosperous upper-middle-income economy by 2030, Zimbabwe has a golden opportunity for sustainable economic growth through investing in service.

The survey's direct impact transcends various sectors of the economy, including tourism, public utilities, energy, real estate, banking, insurance, retail, education, healthcare, MSMEs, and the informal sector, among others.

#### Central Objective

##### Purpose:

The main objective of this study is to measure service delivery across various sectors in the country and to identify key measures and outputs that will inform and improve on the State of Service quality in Zimbabwe.

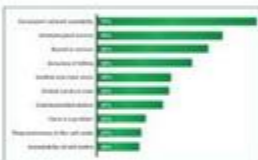
#### Definition of Key Terms

- **Customer Satisfaction Index (CSI):**  
The level at which customers are happy or unhappy with the quality of service delivered by a service provider.
- **Customer Effort Score (CES):**  
A metric that measures how much effort a customer has to put in to get a service.
- **Customer Experience (CX):**  
The total perception built by a customer throughout the engagement with a service provider / product, be it cognitive, affective, sensory, or behavioral.
- **Corporate SOSES Index:**  
The aggregate performance of corporate players within a sector.
- **Sectorial SOSES Service Index (SSI):**  
The aggregate performance of sectors.
- **National SOSES Service Index (NSSI):**  
The aggregate performance of the Zimbabwe service economy at a national level.



#### Telecoms Sector Service Expectations

This survey reveals that consistent network availability (75%) is the absolute top priority for telecom customers, far outweighing all other factors. This highlights the critical importance of reliable connectivity in today's world, where communication and access to information are essential. Uninterrupted service (59%), speed of service (52%) and accuracy of billing (45%) form the next tier of customer expectations, indicating that efficient service and transparent billing practices are also important.



CSI 75%

CES 67%

CX 64%

SSI 68%

Highest Rating: 79%

Lowest Rating: 53%

So please call on us, talk to us and tell us how we can make you happy!

Gladys Mubaiwa  
ZBFH Brand Specialist