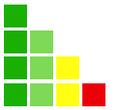


2021 State Of
CX In Africa
REPORT

2020



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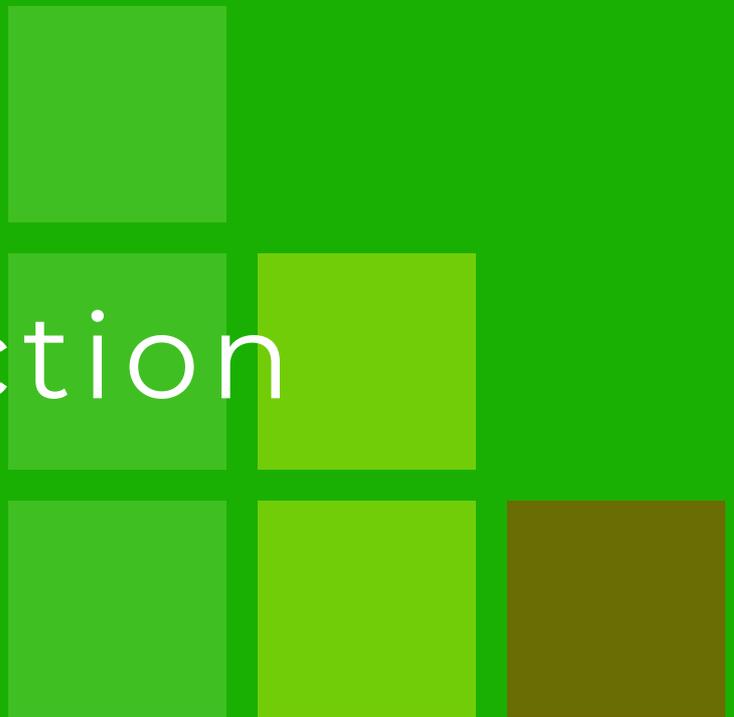
Customer Experience Insights West Africa

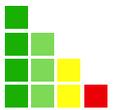
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Conclusion

Introduction





NON F C D D O R F N

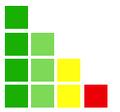
The State of Customer Experience in West Africa report is a report that contains region-specific data about who customers are, what they prefer and how they feel about their customer service experiences and overall satisfaction with product or service providers in English-speaking West African countries in 2020.

Reporting on the current state of customer experience (CX) in Western Africa is vital in defining the CX blueprint for the region and the best methodology or framework for managing CX in the region.

The State of Customer Experience in West Africa Report caters to various audiences and addresses corresponding concerns of:

- **Business Owners** seeking to sustain and grow customer base, increase their share of customer wallet, increase profitability and expand business operations across West Africa
- **Business Leaders** seeking to broadly understand customer behaviour in the region with a view to designing, implementing and monitoring business strategies to increase customer acquisition, retention and extension
- **Business Managers/Supervisors** seeking to broadly understand how the execution of their CX impacting routine activities influence customer perception and behaviour

It is our view that an understanding of the current customer experience in West Africa will provide context to how it is managed successfully and profitably in the region.



MESSAGE FROM FOUNDER & GROUP CEO

We are committed to growing businesses across West Africa, one customer experience (CX) at a time by providing CX insights to help businesses make better customer experience management decisions.

There is a lot of reliance on global customer experience data and insights that excludes Africa-specific insights. The absence of region-specific insights has led to business owners, business leaders and business managers making wrong CX-impacting decisions or wrongly adopting CX management methodologies & digital solutions without taking into cognisance their unique operating environment resulting in less than desired outcomes howbeit efforts to leverage CX management as a business strategy for increased customer profitability.

To bridge this gap, we launched this annual research to survey customers and highlight the current state of CX in English-speaking West African countries for better CX management decision-making.

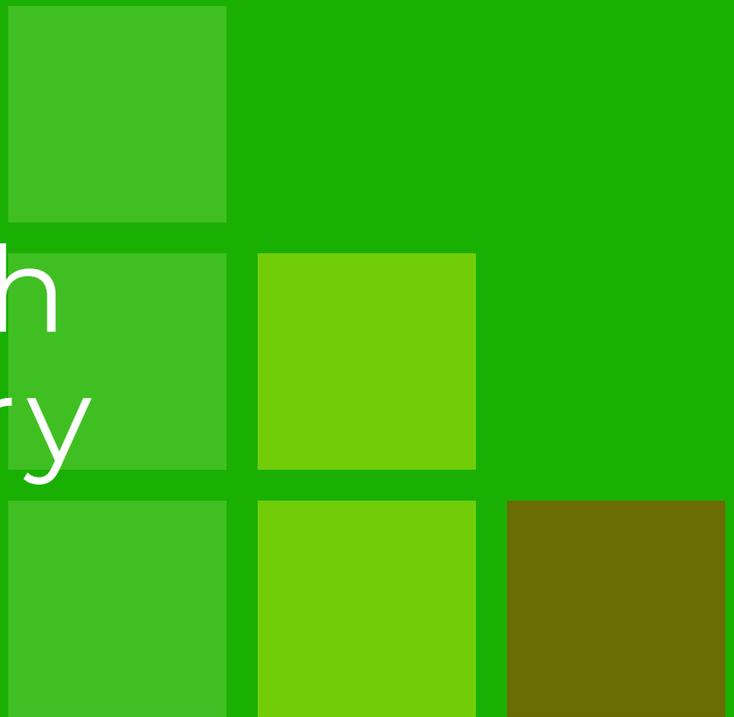
We hope that this report will in some way provide insights on how customers feel about their current experiences causing product or service providers to approach CX management from a perspective of fixing current customer pain points impacting profitability and evolving into a state of maturity in customer experience.

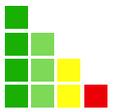


“
We launched this annual research to highlight the current state of CX in English-speaking West African countries for better CX management decision-making

deBBie akwara
Niche Customer Experience Group

Research Summary





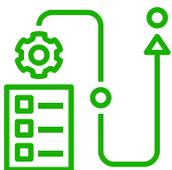
RESEARCH SUMMARY

The State of Customer Experience in West Africa research was conducted to understand the current state of CX, identify its maturity level and define a practical roadmap to guide businesses in defining, developing, implementing and measuring the outcomes of CX activities leading to CX maturity.



Research Questions

The research questions deployed in this study were designed to provide insights into basic information about respondents i.e. location, age, gender, employment status, the preferred channel of communication, the reason for choosing and perception of product/service providers, customer service experience rating, customer satisfaction with and referral of product/service provider and recommendations for the Customer's Choice West Africa Award 2020.



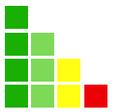
Methodology

The research was conducted using the Survey2Connect platform and contracted to market research companies in Nigeria and Ghana to deploy the research in English-speaking West African countries i.e. Gambia, Ghana, Liberia, Nigeria and Sierra Leone.



Number of Respondents

Overall, 385 West Africans responded to the survey spread across Gambia, Ghana, Liberia, Nigeria and Sierra Leone.

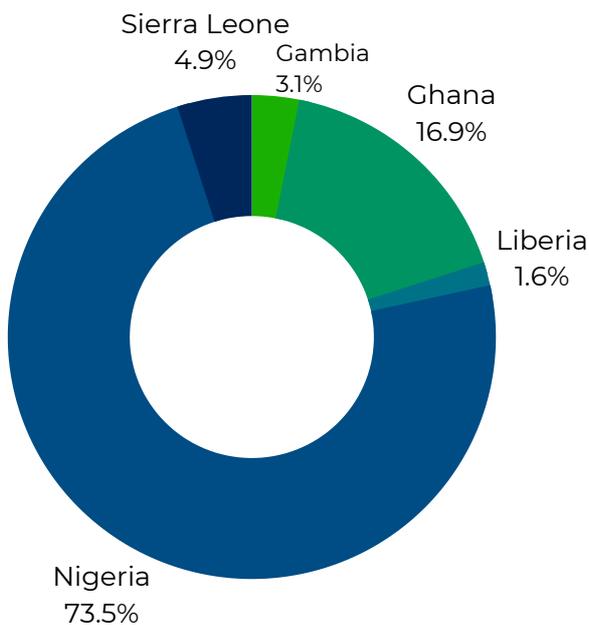


The State of Customer Experience in West Africa 2020 research - a focus on English-speaking countries.



Responses Per Country

385 survey responses across English-speaking West African countries.



Respondents' Devices

The devices used by the 385 respondents when they responded to the survey.



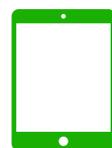
90%

Responded using mobile survey version



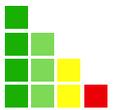
9%

Responded using desktop survey version



1%

Responded using tablet survey version



Major highlights of the State of Customer Experience in West Africa research in the customer journey - a focus on six (6) customer journey cycle stages.

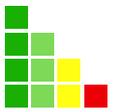
94%

The number of customers that are still patronizing product and service providers after the 2020 COVID-19 lockdown in West Africa (English-speaking countries).



The Customers





THE CUSTOMERS

Snapshot of respondents' demographic analysis across the five (5) countries.



Gender



Age

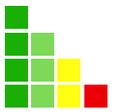


Employment Status



Customers' Preferences & Priorities





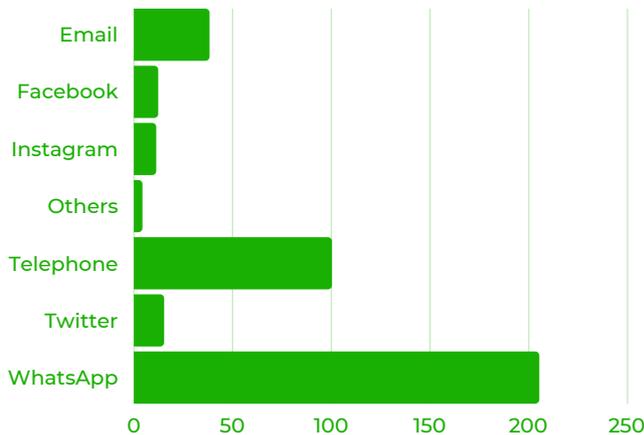
CUSTOMERS' PREFERENCES & PRIORITIES

Customers shared in the research:

- Their preferred channel of communication
- How they heard about the product or service provider of the product/service they patronized in 2020
- Sectors they patronized and names of providers
- Factors they considered when buying a product or service
- The reason why they chose the product or service provider

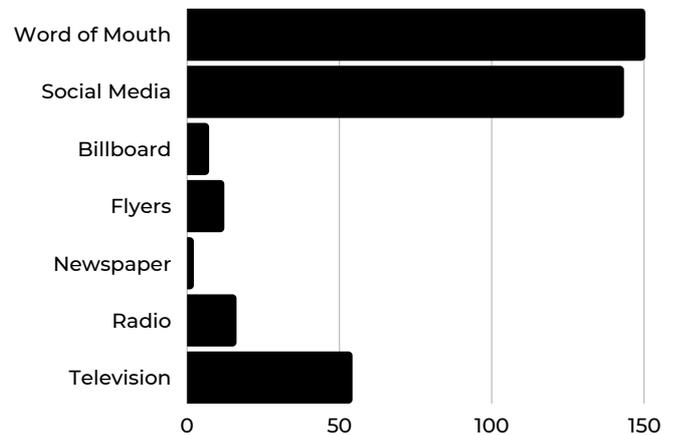
Preferred Channel of Interaction

How respondents prefer to communicate (channels)



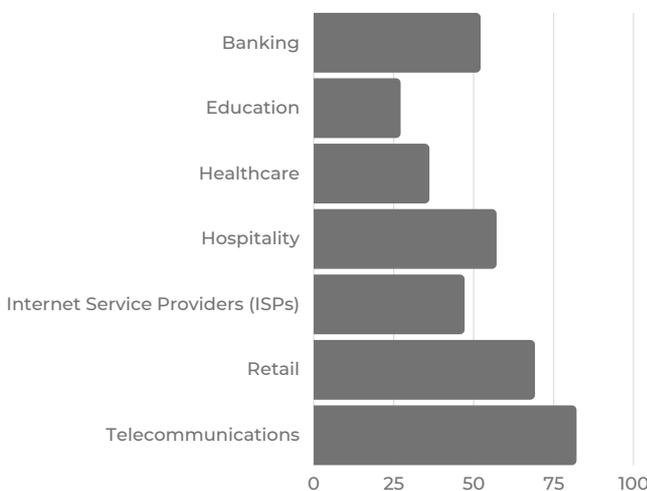
Source of Customer Awareness

How respondents heard about providers



Most Patronized Sectors

Sectors that respondents patronized the most



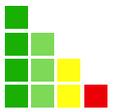
Factors Considered

What respondents considered when buying



Customer Experience Ratings





CUSTOMER EXPERIENCE RATINGS

Respondents rated their customer service experiences (CSX) in 2020 with product or service providers across 10 CSX parameters. The parameters are:

1. Availability of multiple and convenient interaction channels (e.g. phone, email, social media, etc)
2. How quickly product or service providers responded to queries (requests, complaints and/or enquiries)
3. How quickly product or service providers resolved queries (requests, complaints and/or enquiries)
4. Availability of the product or service needed
5. Availability of multiple payment options
6. Helpfulness of staff
7. Courteousness of staff
8. The willingness of staff to go an extra mile
9. Knowledge and skill sets of staff
10. Engagement/Communication from product or service provider after a purchase

01

Overall Rating - BELOW AVERAGE (POOR)

Customers rate their customer service experience across 10 parameters, 1.8 out of 5 points.

02

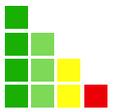
Overall Rating - HIGHEST SCORES

Customers rate the helpfulness & courteousness of staff the highest at 1.98 and 1.98 out of 5 points respectively.

03

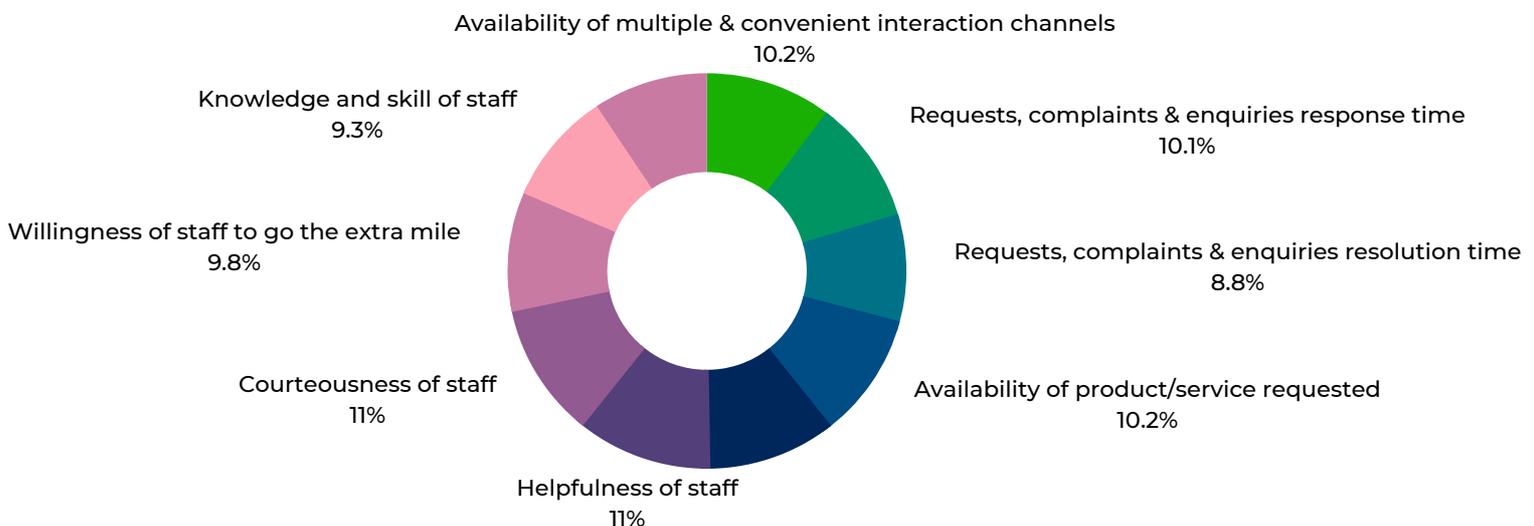
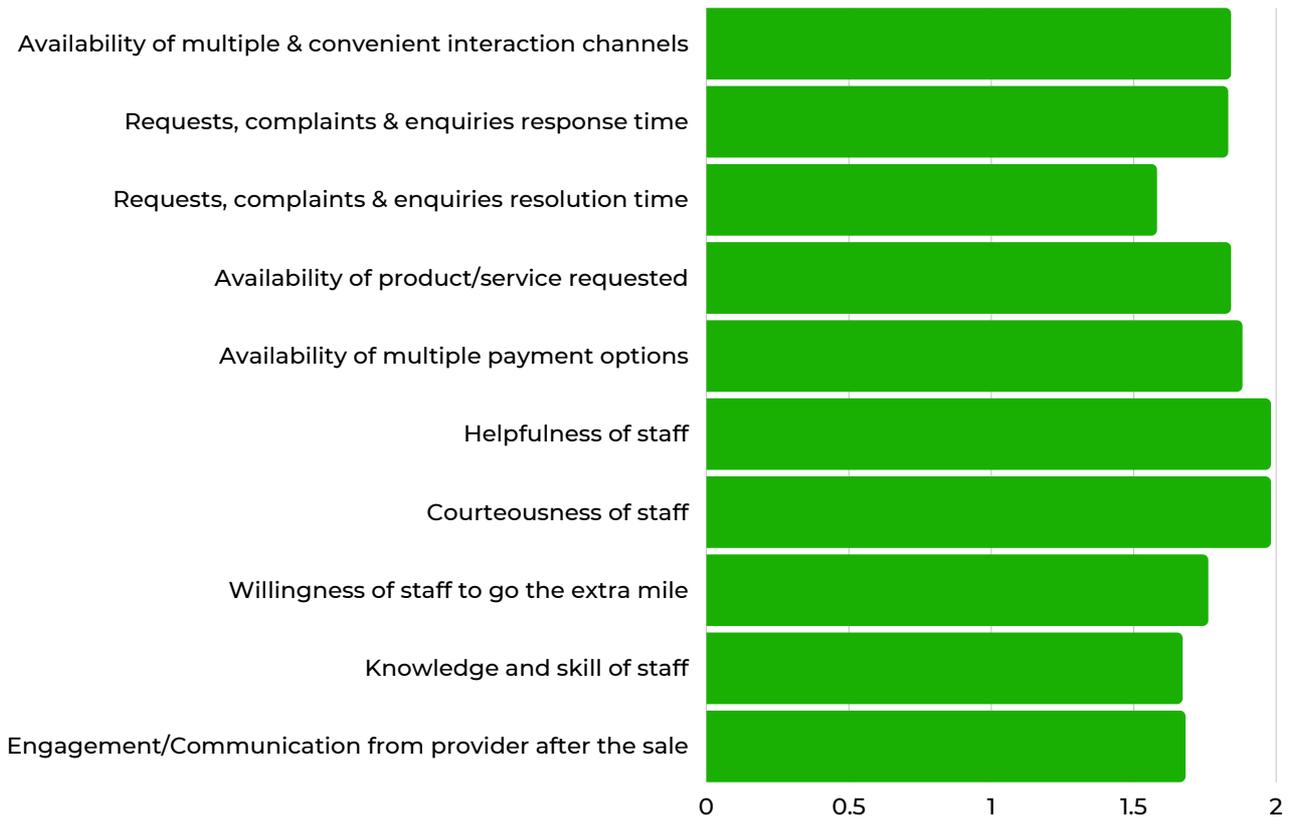
Overall Rating - LOWEST SCORE

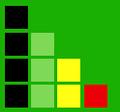
Customers rate how quickly product/service providers resolve enquiries, requests or complaints the least at 1.58 out of 5 points.



How respondents rated their customer service experience.

How respondents rate their customer service experience on a scale of 1 (lowest score) to 5 (highest score)





Customer Service Experience Score

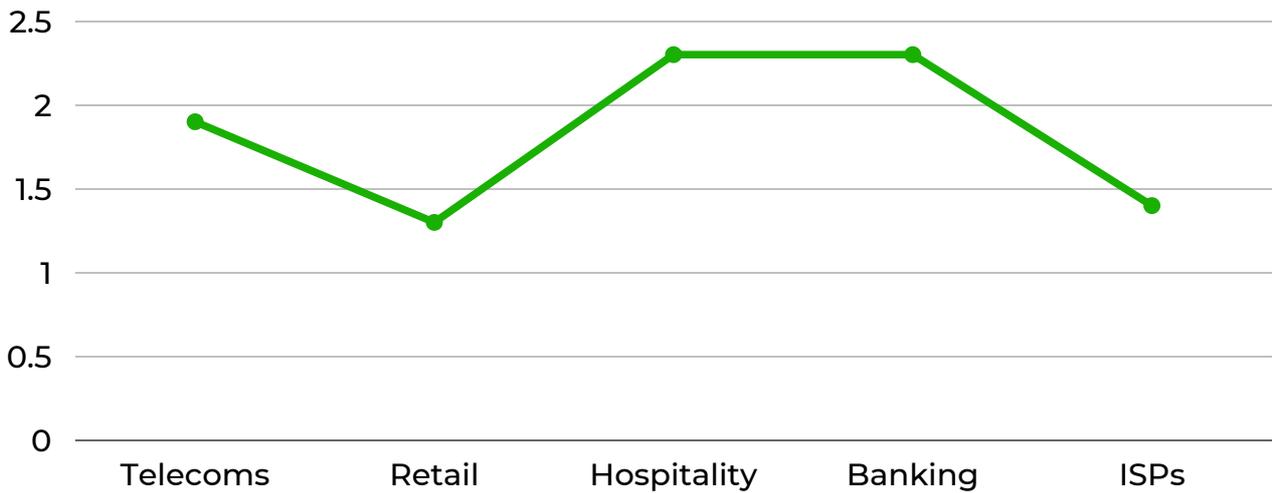
How would you rate your customer service experience with the product or service provider in 2020?



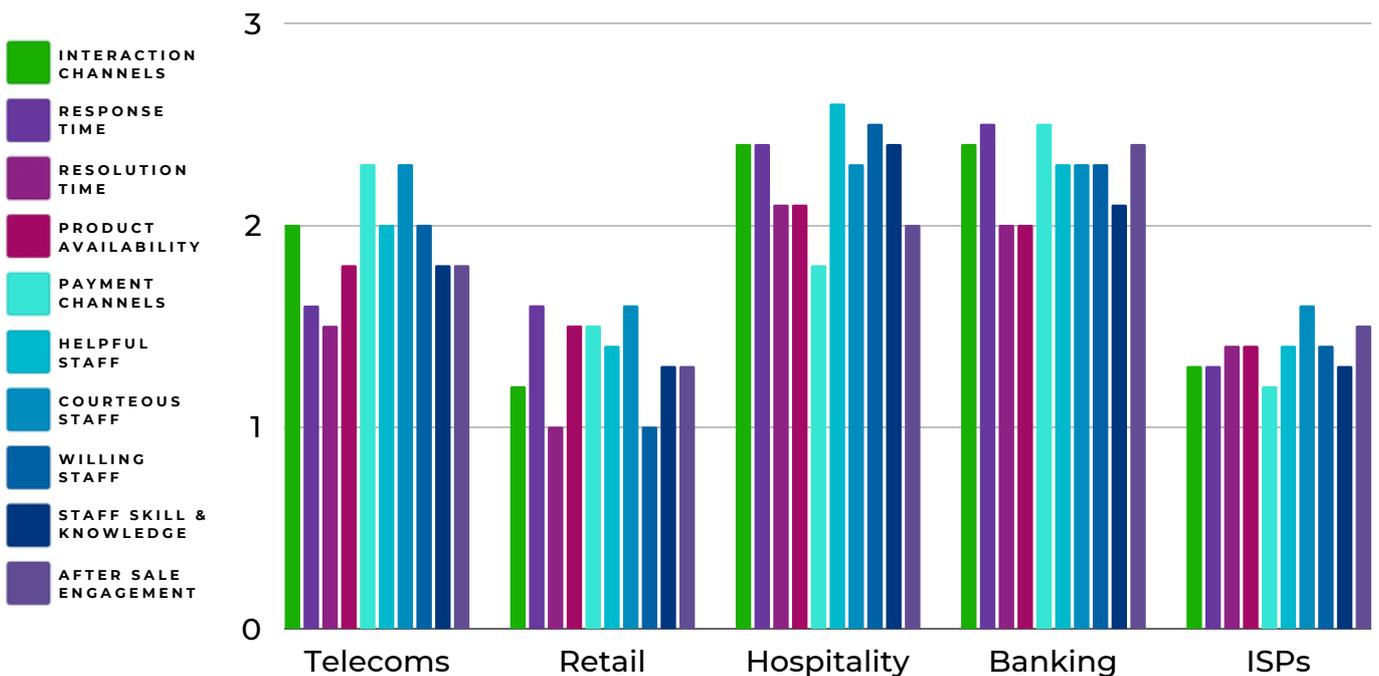
1.8/5 points (**POOR**)

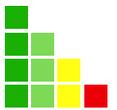
Looking across customer service experience in the top 5 patronized sectors

While the overall customer service experience (CSX) rating is poor, the chart below shows the CSX rating per sector with a focus on the top 5 sectors highlighting the highest rating at 2.3 out of 5 points to the banking and hospitality sectors and the lowest rating at 1.3 out of 5 points to the retail sector (in-store, supermarkets & e-commerce).



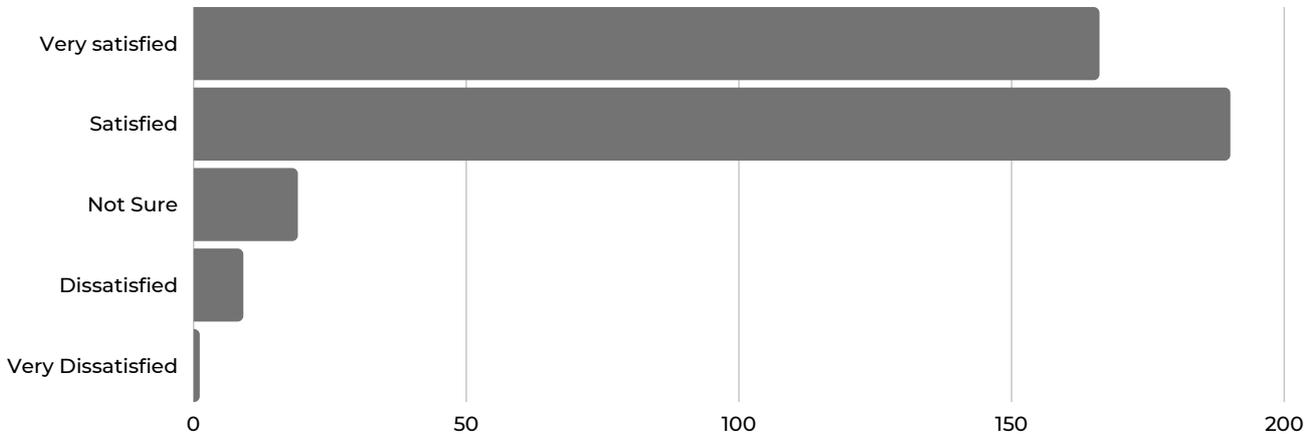
Customer service experience ranking across all parameters and top 5 sectors.





Overall Customer Satisfaction

How customers rated their overall experience with product/service providers patronized in 2020



CSAT Score



DSAT Score



Likelihood To Recommend

How likely respondents are to referring the product or service provider to family and friends

Promoters (Yes, I will recommend)

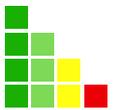


Passives (Maybe, I will recommend)



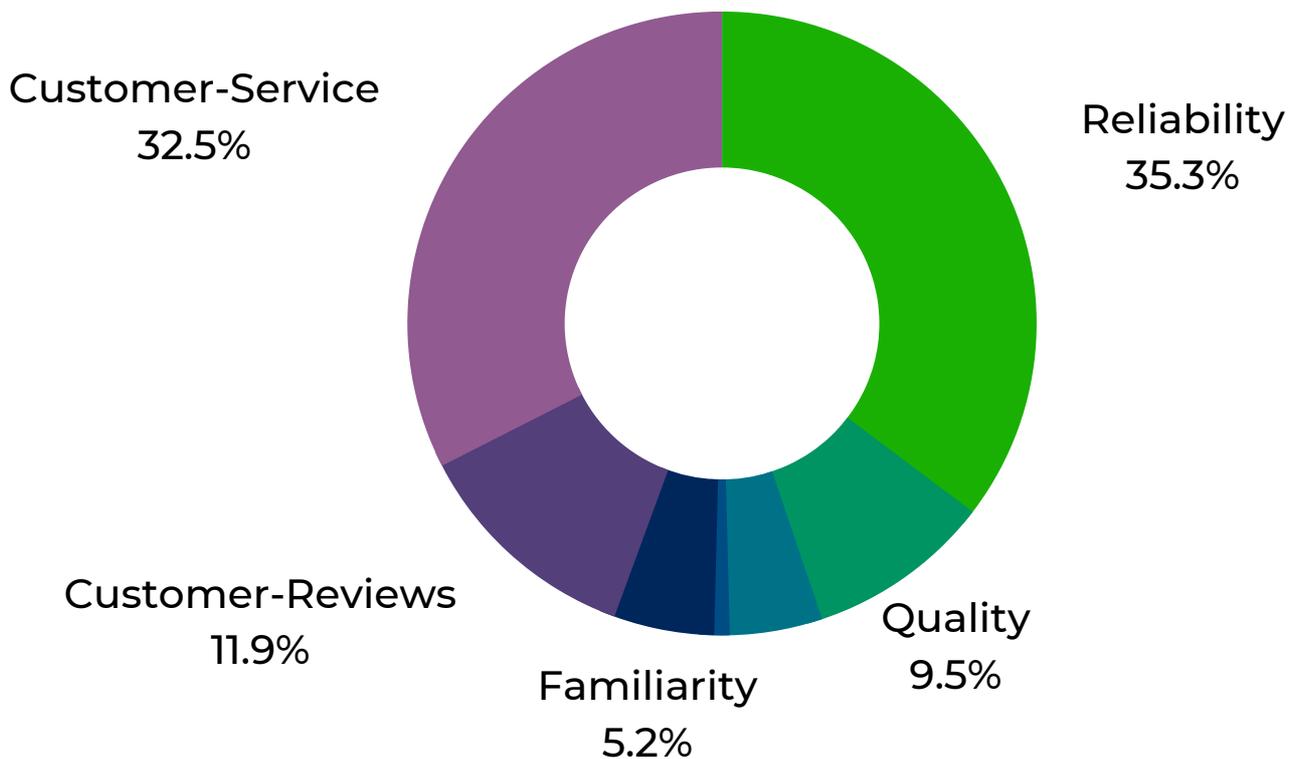
Detractors (No, I will not recommend)





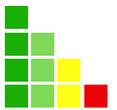
Customer Retention Insights

Drivers of customer retention i.e. reasons why customers are buying again from product or service providers.



Customer Experience Outcomes



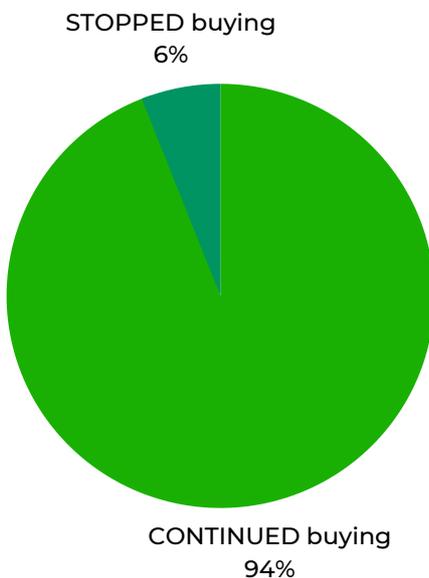


CUSTOMER EXPERIENCE OUTCOMES

What customers have done after patronizing product or service providers in 2020.

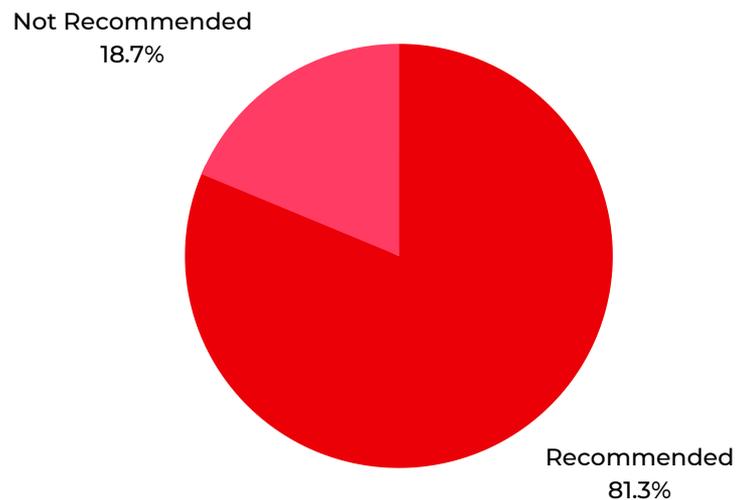
Continued Buying

Customers that have continued or stopped buying from product/service providers in 2021.

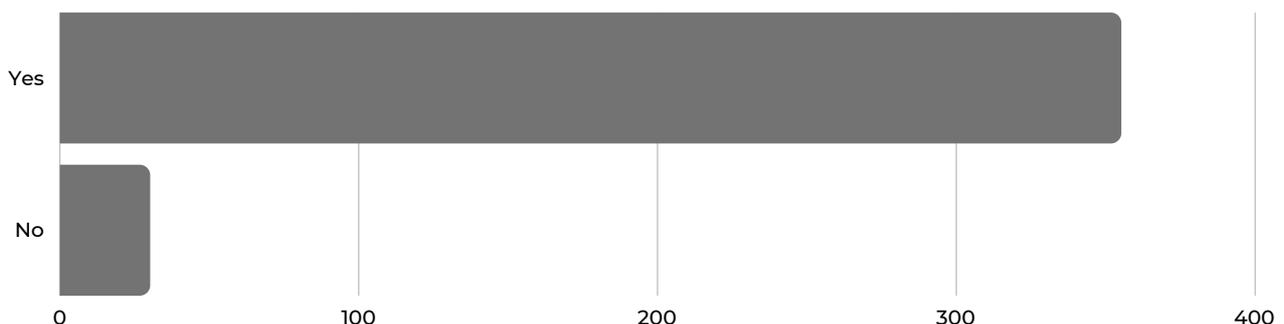


Has Recommended

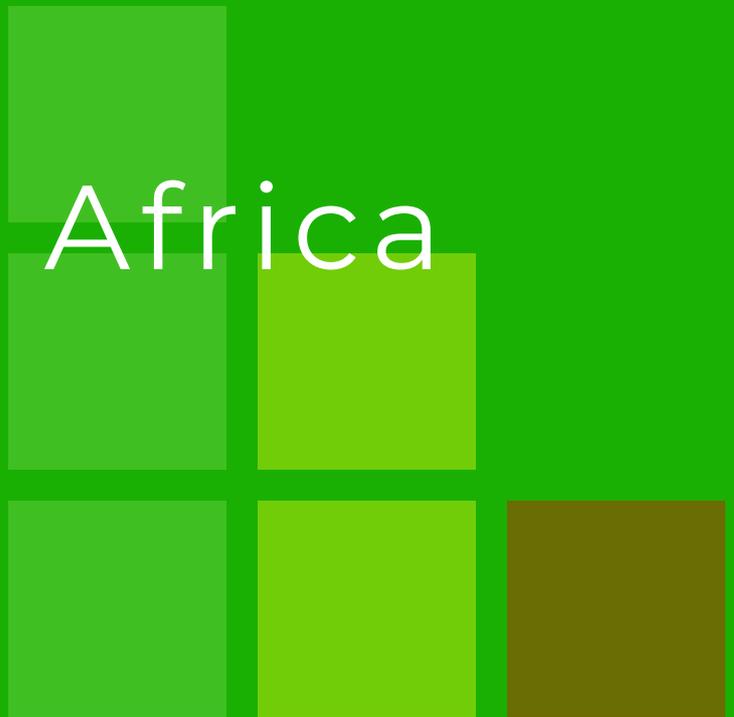
Respondents that have or have not recommended product or service provider to family and friends.

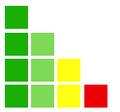


Would Recommend Provider For The COVID-19 Customers' Choice West Africa Award



CX West Africa Insights





WHERE ARE WE NOW?

Customer experience is all about how a customer feels after interacting with a business or using its product or service.

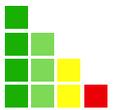
Is West Africa ready for customer experience?



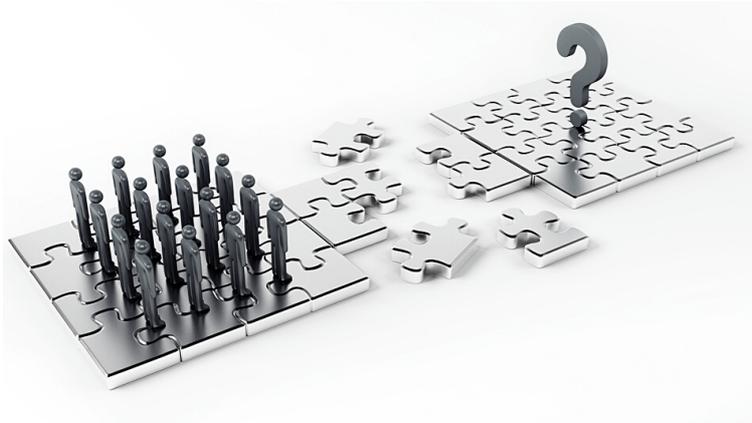
The State of CX in West Africa Report 2020 begs the question



Should businesses in English-speaking West African countries focus on catching up with global trends or take baby steps stemming from points of interaction management (customer service, sales or user experiences) allowing for progressive and sustainable growth towards CX maturity?



The answer is the latter.



Businesses in West Africa should take baby steps stemming from points of interaction management (customer service, sales or user experiences) allowing for progressive and sustainable growth towards CX maturity.

Responses from the survey indicate that while customers are satisfied with their overall experience (popular CX metric), comments suggest other factors that impact retention and perception which is disconnected from business CX efforts.

Some comments from customers



“ Because I needed their service, I had no option but to put up with them in order to meet my own need. ”

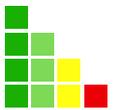
“ Generally in Sierra Leone, customer service is very poor but few businesses are doing exceptionally especially those in the private sector. I thought you should know. ”



“ Most times it’s out of habit. In the area where I live, there aren’t a lot of options. ”

Food For Thought

- Do customer satisfaction scores & customer retention rates reflect how customers feel 100%?
- Are we monitoring customer interactions across sales, customer service and user experience appropriately?
- Is our idea of CX transactional?
- What happens when there are new options that expose customers to better experiences?
- If there is a below-average interaction experience, on what foundation are we laying CX in West Africa?
- Are we focused on the wrong things and putting the cart before the horse?



Businesses in 2021/22, should focus on the basics i.e. defining & institutionalizing customer-aware business operations.



Focusing on global CX trends, digital adoption and management frameworks as a strategy is putting the cart before the horse. Going back to the basics should be the focus.

Comments from satisfied customers and customers who have recommended products and/or service providers suggest that there is generally a poor customer-aware and service culture in West Africa thus the low CSX rating. If this continues howbeit great marketing and sale efforts, customers would highly likely churn when a better experience becomes available.



Do businesses in West Africa want to be tolerated by customers or do they want to be the first and only choice because of how amazing they make customers feel?

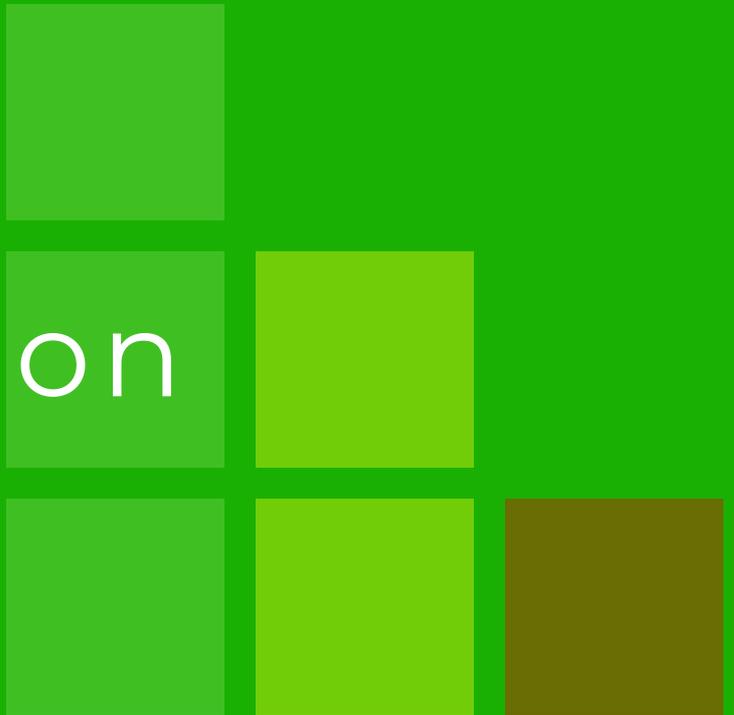


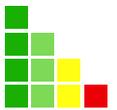
What is working and not working?

Cycle Stage	Working	Not Working	Opportunities
AWARE	<ul style="list-style-type: none"> High WoM Likely reduced marketing spend due to high WoM Social media and TV spend yielded results as awareness channels 	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> Leverage high WoM to increase number of leads by making marketing messages tell real customer stories and successes
ENGAGE	<ul style="list-style-type: none"> Availability of multiple channels Availability of staff Availability of information on customer conversion drivers 	<ul style="list-style-type: none"> Poor customer service experience rating 	<ul style="list-style-type: none"> Improve customer relationship management to increase conversion
BUY	<ul style="list-style-type: none"> Availability of multiple payment options or channels Access to product after purchase 	<ul style="list-style-type: none"> Poor customer service experience rating 	<ul style="list-style-type: none"> Improve sales and user experience to support value proposition and build anticipation
GET HELP	<ul style="list-style-type: none"> Availability of multiple contact channels Availability of staff Courteous and helpful staff 	<ul style="list-style-type: none"> Poor customer service experience rating 	<ul style="list-style-type: none"> Improve customer service and user experience so customers feel important, appreciated and triggered to buy again for the preferred reasons. Equip staff with knowledge, skills, tools, processes & enablers to resolve quickly & go the extra mile
BUY AGAIN	<ul style="list-style-type: none"> Seamless repeat purchase Convenient Familiar High repurchase rate 	<ul style="list-style-type: none"> Stickiness with provider driven majorly by convenience, familiarity & limited or no alternatives 	<ul style="list-style-type: none"> Improve customer relationship management for increased lifetime value Improve customer service and user experience for increased stickiness
TELL OTHERS	<ul style="list-style-type: none"> High WoM High repeat purchase 	<ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> N/A

Overall, there are opportunities for growth in CX maturity and customer profitability in the region if businesses focus on customer relationship management (sales and customer service experiences) and user experience management (applicable to mobile channels).

Conclusion





CONCLUSION

Customer experience as a business strategy (outcome-driven), needs the foundation of a sound customer aware and committed culture to thrive.

Overall, CX in West Africa (English-speaking countries) is at its NOVICE stage as the research indicates that while basic channels of customer interaction and relevant people, processes and systems exist, there is generally a reactive approach to CX because there are huge lapses in customer service and sales experience which is the foundation on which CX should be built on. This is also the reason why a clear CX strategy is generally lacking because businesses prioritize being reactive to being proactive.

In 2021/22, organizations in English-speaking West African countries need to go back to the basics which means defining and instilling a culture that prioritizes customers through clearly defined standards. While organizations may claim to have these standards, it is important to consider if they are realistic (take into cognizance customer behaviour in the region), practical, adaptable, monitored, audited and used as a framework in the selection, adoption and maintenance of people, systems and processes to deliver great customer experiences.



What are the painpoints in the customer journey in West Africa? Boost them starting with the bottom 5 CSX parameters.

- Resolution time
- Knowledge & skill of the staff
- After-sale engagement & communication
- Willingness to go the extra mile
- Response time

What are the gain points in the customer journey in West Africa? Improve them to increase positive customer stickiness and lifetime value

- Use real customer stories for better connection and increased conversion
- Tell customers the perks of choosing you and sell how amazing their after-sale experience will be and keep your promise



What can be done to sustain efforts to boost and improve customer experience in West Africa?

- Have a customer service or CX standard. Articulate your promise to customers, create systems & processes to help fulfil the promise and monitor compliance while allowing innovation and for use of initiative
- Prioritize customer relationship management digital solutions to support staff to give better customer service experiences

This report was made possible due to the contributions of an exceptional team of professionals at Niche Customer Experience Group and market research vendors who worked tirelessly on the project mentioned within.

Responsible for this research and coordination.

- Researchers: Ituen George Ituen; Acting Head, CX Insights & Intelligence (Niche Customer Experience Group), Firmus Advisory and CFS West Africa
- Report Authors: deBBie akwara; Founder & Group CEO, Niche Customer Experience Group
- Research Data Analyst: Efe Ogundowole; Country Manager, Niche Customer Experience Group, Ghana
- Research Co-Sponsor: Survey2Connect

We thank you for reading this report and we will be delighted to engage on how businesses in West Africa can leverage these insights & more to increase profitability

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