

Africa on the Rise: The Next Frontier in Customer Experience Management (CXM)

March 2023: Complimentary Abstract / Table of Contents



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Introduction

In recent years, Africa has emerged as a hub for CXM centers, attracting businesses from around the world seeking to tap into the growing African market. The growth of the CXM industry in Africa has been fueled by a range of factors, including economic growth, technological advances, increasing competition, and a focus on customer-centricity. With 17% of the world's population, Africa has a large and diverse market with great potential for growth and development. The CXM industry in Africa is driven by both local and international demand, and it encompasses a wide range of services such as customer support, technical support, IT services, and Business Process Services (BPS).

South Africa and Egypt have traditionally been the main centers for the delivery of CXM services to the EMEA region; however, there has been a recent uptick in interest and adoption of other African countries such as Morocco, Madagascar, and Kenya by both buyers and service providers. This trend reflects the increasing availability of talented individuals in these regions and the potential for specialized and judgment-intensive processes to be outsourced to Africa.

In this research, the focus is to:

- Understand the current state of the CXM industry in Africa
- Identify the main reason for growth of Africa as a region
- Provide insights about Africa's leading service providers
- Provide a brief overview of leading African CXM providers

Scope of this report



Geography
Africa



Industry
All



Services
Customer Experience
Management (CXM) services

Overview and abbreviated summary of key messages

Some of the findings in this report, among others, are:

Africa market overview

- The outsourced CXM services market in Africa is growing rapidly, driven by demand from global enterprises and local customers, and advances in technology
- While over 50% of the customers being served from Africa are located within the EMEA region, there is an uptick in buyers from Americas for service delivery

Growth driver of CXM market and delivery in Africa

- Skilled and multi-lingual workforce and cost advantages make Africa an attractive location for CXM delivery centers. Additionally, providers can ensure business continuity and impact sourcing through expansion into Africa
- Companies in Africa are increasingly focusing on improving the customer experience to differentiate themselves from competitors and build brand loyalty to win over the large and growing middle class in many African countries

Competitive and impact sourcing landscape

- Providers of CXM services in Africa are a mix of global and regional players that are heavily leveraging African delivery locations for providing services in and out of the continent
- The Sub-Saharan African region is gaining prominence and these countries are being preferred for English language capabilities and favorable time zones to serve English-speaking regions in Europe
- Providers are aiming to increase the percentage of impact sourcing through collaboration with NGOs and setting up of skill-based institutes for marginalized communities

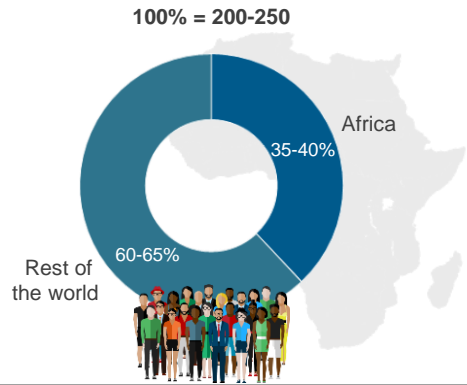
16 leading CXM providers identified

- 16 leading CXM providers in Africa have been identified and the capabilities of these providers, including delivery capabilities, impact sourcing mix, language coverage, and digital CX capabilities have been studied
- The leading CXM providers in Africa identified are CallForce, Comdata, CCI, Foundever, iContact BPO, Ignition Group, Intelcia Group, iSON Xperiences, Majorel, Merchants, Startek, Teleperformance, Transcom, Webhelp, WNS, and Xceed

This study offers two distinct chapters providing a deep dive into key aspects of Africa CXM market; below are four charts to illustrate the depth of the report

Overview of CXM in Africa

African outsourced CXM overall FTE size by buyer geography
2022; percentage of FTEs in '000s



Delivery presence in Africa has been increasing with an FTE strength of 200,000-250,000 in 2022, as many countries in Africa become sought-after destinations. The majority of these FTEs are leveraged for service delivery to countries outside Africa

Growth drivers of CXM delivery from Africa

Skilled and multi-lingual workforce

Cost advantages

Business Continuity Planning (BCP)

Impact sourcing

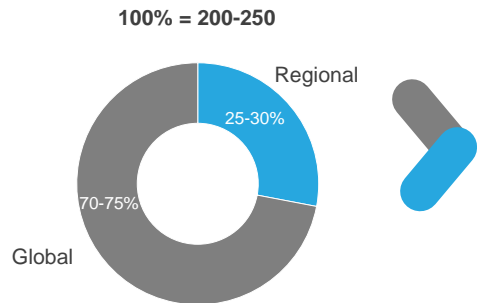
Proximity to customers

Government and regulatory support



Competitive landscape of Africa

FTE share of global vs. regional CXM players
2022; percentage of FTEs in '000s



¹ Service providers who are headquartered in Africa

Leading CXM providers identified

We have studied 16 leading CXM providers in Africa that have significant amount of experience of serving clients across different regions as well as globally, in multiple languages.

Leading players have been covered across following parameters

Strength

Capabilities

Spread

16 leading CXM providers¹



The market report has 16 CXM provider profiles delivering services from Africa

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Provider (page 1 of 2)

Overview

Company overview:
 Provider is a business process outsourcing organization, which provides outsourced customer contact services for clients worldwide. It is a leading BPO service providers in Africa. The provider manages various extensive outsourcing agreements with leading Fortune Global 500 companies in 10 different languages and offers services across Customer Relationship Management (CRM) cycle including inbound & outbound, recruitment process outsourcing, and social media analysis services.

Headquarters: _____ **Website:** _____

Leadership:

- Leader 1, Chief Executive Officer
- Leader 2, Chief Operating Officer
- Leader 3
- Leader 4

Top verticals served from Africa

Vertical 1 Vertical 2 Vertical 3 Vertical 4 Vertical 5

Split of revenue from Africa operations by channel mix

XYZ% Voice XYZ% Non-voice

Key Metrics:

- Total number of current clients served from Africa: [Icon]
- Total number of FTEs in Africa: [Icon]
- Total number of impact sourced FTEs in Africa: [Icon]

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Provider (page 2 of 2)

Delivery landscape

Key delivery locations

Measure of delivery: Low ○○○○ High

Region	Scale of delivery	Key countries served from Africa
Americas	●●●●●	<ul style="list-style-type: none"> • Country 1 • Country 2
Europe & Middle East	●●●●●	<ul style="list-style-type: none"> • Country 1 • Country 2
Africa	●●●●●	<ul style="list-style-type: none"> • Country 1 • Country 2
Asia Pacific	●●●●●	<ul style="list-style-type: none"> • Country 1 • Country 2

Language coverage

English	European	Middle Eastern	African	Asian
	Language 1, Language 2	Language 1, Language 2	Language 1, Language 2	Language 1, Language 2

(#) – number of cities having delivery centers in the country, as of 2022

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Research calendar

Customer Experience Management (CXM) Services

Published Planned Current release

Reports title	Release date
Healthcare Customer Experience Management (CXM) Services in North America – PEAK Matrix® Assessment 2023	November 2022
Driving the Digital Wave and Advancing Contact Centers through Digital Customer Experience Management (CXM)	December 2022
Capturing the Post-pandemic Resurgence: Customer Experience Management (CXM) State of the Market Report 2023	December 2022
Healthcare Customer Experience Management (CXM) Services in North America – Provider Compendium 2023	January 2023
The Contact Center for Rapidly Scaling Organizations: Leveraging Service Providers to Unleash Growth	January 2023
Delivering Extraordinary Customer Experiences Using Conversational AI	January 2023
Africa on the Rise: The Next Frontier in Customer Experience Management (CXM)	March 2023
Engaging with Customers in the Metaverse – Turning Fantasy into Reality	Q2 2023
Impact Sourcing Adoption in the CXM Industry	Q2 2023
Contact Center as a Service (CCaaS) PEAK Matrix® Report 2023	Q2 2023
Customer Experience Management (CXM) – Provider Compendium 2023	Q2 2023
Driving Data-Led Digital Customer Experience Management	Q2 2023
Conversational AI (CAI) Technology Vendor Landscape with Products PEAK Matrix® Assessment 2023	Q2 2023
Customer Experience Management (CXM) Service Provider Landscape with PEAK Matrix® Assessment 2023 – Global, Americas, APAC, and EMEA	Q2 2023
Customer Experience Management (CXM) State of the Market Report 2023 – Digital CXM Trends	Q3 2023

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