

CX+ Retail 2020. The South African and global ranking

By [Mark Molenaar](#), issued by [Kantar](#)

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What fashion can learn about brand promise from grocery retail. Find out this year's movers and shakers!



Kantar has combined insights from the CX+ 2020 study with an understanding of the new customer landscape across different retail sectors in Covid-19 times and into recovery, releasing the first-ever [CX+ 2020 retail ranking](#) across grocery, general and fashion retail. The only sector-specific study to analyse customer-centricity holistically, CX+ pinpoints how to bridge the gap between customer experience and brand promise by revealing brand pressure points. It is informed by research in 17 countries, including South Africa, across over 1,300 brands with feedback from more than 140,000 people.

Retail has been one of the hardest-hit industries throughout the pandemic, making it ripe for a CX strategy rethink. Brands need to mitigate short-term risk and find pockets of opportunity to fend off future shocks by gaining the customer experience advantage.

These insights are key to driving CX strategy in retail as the concept of customer experience itself has changed dramatically in 2020, with trends accelerating as life takes on new rhythms. Brands that were ahead of the pack on customer-centricity and ensured they created and delivered on a compelling brand promise before the start of the pandemic will be those that emerge ahead of the pack afterwards, too.

The five key success factors of CX are as follows:



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In evaluating the gap between the brand promise and actual customer experience delivery, we compare the experience of current customers with the expectations of potential customers to reveal where the brand has overpromised and under delivered or vice versa.

Local brands trump global when it comes to customer experience

We're living in the Information Age, where consumers no longer compare your brand to the category best-in-class – they compare you to every other brand in the industry. So, brand promise and customer experience need to be harmonised for optimal brand momentum and brand love. Now more than ever before, brands need to recognise their weak areas and leverage their strengths of understanding the market to deliver positive experiences.

Interestingly, it's local brands that dominate the global CX battle. South African grocery retailer Woolworths tops the CX+ 2020 Retail Global Ranking, with reinforced brand choice based on overall excellent customer experience across all touchpoints.



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Global top 10 CX+ winners











Woolworths featured twice in the global top 10 ranking for retail, topping the table with its grocery offering and snagging eighth spot for its fashion offering. This impressive result highlights the power of Woolworths' slogan 'The difference', epitomising its brand promise to provide superior quality products that are trusted to deliver on expectations – the very crux of CX.

Its strong values and focus on quality and integrity is expressed in staff training and attitude, with friendliness and helpfulness central to empowering employees to make that difference to customers.

A strong focus on taste, innovation and ideas for customers through their magazine *Taste* as well as enticing social media posts, empower customers to create great meals at home, with online ordering and delivery and collection options providing more choice. Woolworths also has a wide footprint with many smaller-format stores and sites located at service stations, making it easy for customers to get hold of the products they desire.

Ultimately, the brand's strong focus on sustainability and a good food journey translates into consistent store design, layout and atmosphere that reinforces its quality cues of freshness and taste. Woolworths' reliable quality and care in selection of products and brands offered in-store and online ensures a positive brand experience that reinforces that all important customer consideration of choice.

The top 10 global CX+ retail ranking

KANTAR CX+			
Rank	Category	Brand	CX+ Index
1		Woolworths	133
2		Coolblue	130
3		Zaffari	129
4		Esselunga	129
5		John Lewis	128
6		Liverpool	128
7		Shopee - Online	127
8		Woolworths	127
9		ICA	127
10		Nordstrom	126

Legend: shoe/fashion retail, shopping basket/grocery retail, trolley/general retail

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The top 30 South African CX+ retail ranking

Rank	Category	Brand	CX+ Index	Rank	Category	Brand	CX+ Index
1		Woolworths	133	16		Mr Price	99
2		Woolworths	127	17		OK	99
3		Takealot	120	18		Game	98
4		Pick n Pay	115	19		Game	98
5		Checkers	114	20		Checkout	97
6		Sportscene	110	21		Bidorbuy	95
7		Makro	110	22		Foschini	94
8		Truworths	107	23		Shoprite	93
9		Markham	105	24		Boxer	92
10		Checkers	105	25		Cambridge Foods	92
11		Pick n Pay	101	26		Studio 88	91
12		H&M	101	27		Usave	88
13		Fruit and Veg City	100	28		Edgars	86
14		Amazon	100	29		Saverite	85
15		Spar/Super Spar/Kwik Spar	99	30		Ackermans	76

Legend: shoe/fashion retail, shopping basket/grocery retail, trolley/general retail

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Charlene Van Zyl, Head of Customer at Woolworths, chats to Ivan Mroke, CEO South Africa Insights Division at Kantar, on coming out tops in brand experience. Over and above the win in Kantar's global CX+ 2020 study, Woolies also won a special award for Best Brand Experience as well as the Most Responsible Brand in the 2020 BrandZ™ Top 30 Most Valuable South African Brands report.

Grocery retail insights

The entire supply chain in grocery retail has been affected by Covid-19.

Unfortunately, the bulk of grocery retailers were simply not delivering CX excellence pre-Covid-19. So, while most have stepped up commendably to assist shoppers in this difficult time, there's still room for improvement when it comes to e-commerce and the online-to-offline (O2O) experience.

Building preference and loyalty via omnichannel CX is not a luxury, it's a necessity and, as customer loyalties shift, customers spend 35% more at grocery retailers when they receive excellent customer experience. If you don't offer value

or time savings to customers ordering weeks' worth of groceries per visit, they simply won't return. So, find the opportunity while consumers are willing to experiment with different retailers or lose to those who offer a CX advantage.

Australia's IGA supermarkets did this well in launching a limited home-delivery service, soon scaled to include a deeper offer based on demand. They also created an [e-commerce website](#) in just two weeks.

Grocery retailers also need to better understand the cause-and-effect of positive employees in creating moments that matter to drive CX. The grocery retail experience has not changed drastically for decades, but it's time to rediscover how people shop and reimagine the grocery experience of the future to deliver positive emotion. We can't expect to simply go back to the way things were.

South Africa's top three CX+ 2020 grocery retailers were Woolworths, Pick n Pay and Checkers.



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General retail insights

Many categories collide in the realm of general retail, from FMCG to fashion, furniture and electronics. While the pandemic hit retail brands differently, most perform poorly on the pillar of helpful employees. Pre-Covid-19, just 17% of consumers claimed to be delighted with their last retail employee interaction.

Analysis here shows availability of employees is the top CX driver of brand preference. General retailers need to improve on promptness of support both online and offline and in offering innovative digital services – this again links to the ease of combining online and offline shopping experiences.

American warehouse chain Sam's Club has taken this to heart, empowering employees with new technology and an in-house learning lab app for training, while scaling an omnichannel response in just six days for contactless drive-through concierge service through [Club Pickup](#).

South Africa's top three CX+ 2020 general retailers were Takealot, Makro and Checkers.

Fashion retail insights

Pre-Covid-19, retail CX excellence came in at just 17%. Having taken a massive hit in the pandemic, fashion itself now has an image problem as it is said to be 'blanding', with unclear and undifferentiated communications and brand promise. Think of all the points across the customer journey – could your brand stand to improve on in-store experience by adding visual cues and branding to your change rooms or at online check-out?

Dig deep on brand promise and explore your core values. What sits at the centre of your offering, functionally and emotionally? In fashion retail, global athleisure star Lululemon came up as CX best-in-class for brand promise, with an engaged community based on those ingrained brand values of integrity, curiosity and inclusion. Physical distancing has merely highlighted digital as an opportunity to gain new users beyond meeting orders, by also meeting the new customer needs. Those who focus on omnichannel personalisation and fast-track CX and UX innovation will be the winners once the dust settles.

South Africa's top three CX+ 2020 fashion retailers were Woolworths, Sportscene and Truworths.



CX and the accelerating pace of change

Mark Molenaar, Kantar 8 Jan 2020



The future of retail CX

Delivering positive experiences engenders brand loyalty in nine out of 10 customers, so the payoff is huge. Pursue these emotional connections strategically, as putting customer needs first is a central challenge, no matter the external pressures. It's also a good time to revisit your brand promise, as brands are increasingly expected to take a position.

To meet customers' new emotional, social and functional needs you can't just reshuffle the deck chairs – that won't be enough for the budget-conscious shopper. The pandemic has taught us that customers are open to change, so retailers that were forced to close during the crisis need to learn from those who were forced to innovate to survive.

For example, Woolworths in Australia created a [real-time app](#) so customers could see what store queues were like in real-time – a win as people are trying to shop close to home, away from the crowds. Not only did they innovate their own supply chain, but they continue to do so in a way that benefits the customer. That's customer-centricity at its best.

About CX+

CX+ is the only sector-specific index that identifies the gap between brand promise and customer experience and shows you how to close that gap. The index scores are a tally of how the brand scores on the following metrics: clear brand promise, empowered employees, empowered customers, lasting memories and reinforced brand choice.



[click to enlarge](#)

To find out how your brand scores on customer experience and what you can do to close the gap, contact me at mark.molenaar@kantarc.com.

Find out more about our [CX+ 2020 findings](#) and follow us on [LinkedIn](#) and [Twitter](#) to keep up to date with our comms.

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