

Service Dimensions

Airlines

Automotive: Car Service

Automotive: New Car Sales

Clothes & Accessories: Clothes

Communication: Mobile Operators

Financial: Retail Banks

Financial: Islamic Banks

Furniture: Home Furniture

Healthcare: Hospitals

Restaurants: Café

Restaurants: Casual Dining

Restaurants: Fast Food

Specialty Stores: Electronics



UAE RESULTS

The voice of the consumer

2016

Service categories

1 Staff Behavior index

2 Location index

3 Product or service quality index

4 Value to price index

5 Speed index

6 Reliability index

7 Call center index

8 Website index

9 Loyalty index

10 Ideal index

Service Dimensions

Airlines

Automotive: Car Service

Automotive: New Car Sales

Clothes & Accessories: Clothes

Communication: Mobile Operators

Financial: Retail Banks

Financial: Islamic Banks

Furniture: Home Furniture

Healthcare: Hospitals

Restaurants: Café

Restaurants: Casual Dining

Restaurants: Fast Food

Specialty Stores: Electronics

Service categories

1 Status behavior index

2 Location index

3 Product or service quality index

4 Value for price index

5 Special index

6 Fidelity index

7 Call center index

8 Website index

9 Loyalty index

10 Ideal index

Credibility.
Integrity.
Relevance.



Powered by



Member of



In partnership with the American Customer Satisfaction Index

The Arab World's only 100% consumer
powered customer satisfaction index



Our Services

Service Hero's voting platform enables measuring a brand's relationship with its customers over time to achieve higher satisfaction levels. Our service range includes:

Quantitative research

Standard and customized research for a brand or category in partnership with the respected American Customer Satisfaction Index and in line with ESOMAR standards:

- Annual Customer Satisfaction Index (CSI)
- Quarterly Customer Satisfaction Index (CSI)
- Customer Satisfaction Index (CSI) with customized questions
- Drivers of Satisfaction (based on the CSI)
- NPS Economics (based on the CSI)
- Employee Satisfaction Index (ESI)

Qualitative research

To complement the ratings and measurements of the CSI and ESI we conduct focus groups and in-depth interviews to understand underlying attitudes, behavior and concerns that affect service.

Consultancy & education

We conduct intensive fact finding engagements to address the building blocks of service and also offer a training curriculum for service excellence.

Index

1. Executive Summary

2. The UAE Index

Sample composition.....	9	UAE index by demographic factors.....	14
Interpreting the scores	10	Image and loyalty in the UAE index	25
UAE index: before and after.....	11	Overall satisfaction, comparison to ideal...	28
UAE index by service dimension.....	12	Category results: expected & actual	29

3. Summary & Strategic Implications

Market position of all 14 categories.....	32	Demographic Comparison.....	40
Correlation of dimensions	33	NPS Demographic Comparison	41
Net promoter score.....	34	Category NPS Comparison	42
UAE vs. Kuwait	37	Industry comparison with other markets...	43
Category Comparison	38	Factors affecting the UAE Index.....	44
Dimension Comparisons	39	Strategic implications for UAE	44
		Service Hero's benefits	45

4. UAE Award Winners

Nominees	47	Overall country 2016 winners	49
		Category winners 2016	52

5. Methodology

Overview	57	Security measures & rules for valid votes..	63
Service Hero Partners with the ACSI	58	Rules applied to ensure data integrity	63
The questionnaire	58	Advisory Council members	64
Sampling approach	59	Process overview of the key survey steps.	67
Source of Votes	62	Glossary of terms used	68

6. About Khayal Consultants

Khayal Consultants	71
--------------------------	----

Word from the president



Seven years ago, when we started the Arab world's first national customer satisfaction index (CSI), we had a simple aim. We wanted to provide companies with relevant, impartial data collected from everyday consumers. And to do so only using best-practices research standards.

Over the years, consumers increasingly asked if brands cared about their ratings. Although the Kuwait Index from 2010 and 2015 was trending up, implying that their voices were being heard, in time we understood we had an obligation to consumers. After all, it is they who form the backbone of our CSI. So our aim had to widen to give some insights back to consumers.

As a result, in 2016 we introduced two significant changes.


The first was in response to consumers: introducing a brand Scoreboard. Using the Scoreboard on our new website openly displays all user ratings and comments about brands. This allows consumers to search for brands, view their 3-star ratings, browse, agree, disagree and share other user comments, and even see brands' 12-month performance trends before deciding to deal with a brand. Moreover, companies wishing to engage with their customers now have the ability to directly respond to customer feedback or concerns using our Engagement Dashboard.

The second significant change was launching the index in the United Arab Emirates. The UAE CSI collects data from over 300 companies across 14 categories. That's in addition to the 17 categories and 300 brands in Kuwait. To date, we have collected around 150,000 customer assessments for brands in both markets. As always, all data collected is vetted for accuracy and validity. Companies operating in both countries can now compare their results to similar brands in both markets, as can consumers.

Consumers are the pillar of the CSI. Votes collected represent both genders, and all key age, nationality and education levels in both countries. Why do they take time to rate brands? Because they want to have a voice. They want companies to listen and care about their concerns.

Since our journey began 7 years ago, we have witnessed an increase in maturity and investment among companies on the essentials of service excellence. Companies today have a better understanding of what customers expect from them, how to provide satisfactory service, and importantly, how to connect with their customers in order to build loyalty.

We look forward to continuing our mission to shed light on the importance of customer (and employee) satisfaction, with the firm belief that it makes the quality of all our lives better.

A blue ink signature of Faten Abu Ghazaleh.

Faten Abu Ghazaleh
President

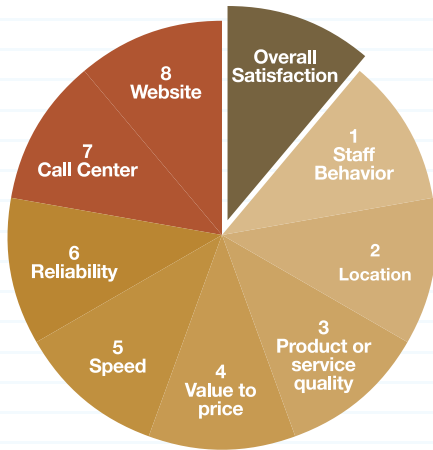


1
Executive
summary



Executive summary

1 of 2



Note: 11 categories assess all 8 service dimensions, while 3 categories assess 6 service dimensions.

Methodology

Service Hero is an online survey where respondents vote directly on www.servicehero.com from January 1- December 31st 2016. Consumers are aware of the survey via online ad banners and email shots. We adhere to the research protocols of ESOMAR as well as the American Customer Satisfaction Index. This year is also the first time we will be reporting our scores and findings in a 100 point scale to further emphasize our adherence to these protocols.

Rating assessment

Respondents rate each industry on a scale of 1-10 where 10 is the best score on 8 service dimensions. Respondents also assess overall satisfaction, the likelihood to recommend a brand, and how far a brand is from meeting their ideal offering. All questions asked are on an Expected and Actual satisfaction basis. Respondents also gave free comments.

Security

A number of security measures are deployed of either a technical nature to verify the authenticity of the voter, or later after reviewing the results to remove suspicious data and ensure data integrity.

Sample

A total sample of 23,219 assessments were cleaned to arrive at the final 18,510 sample of valid votes for UAE with a minimum of 350 votes per category. This gives a confidence level of 95% with +/- 2% error margin.

Findings

The UAE scored 80.1 on Expectation (before dealing with a brand) and 75.7 for Actual Satisfaction (after dealing with it). Since the score for Actual Satisfaction is lower, this means consumers have higher expectations than actual satisfaction. The highest dimensions are Location, Reliability, and Product Quality while the lowest are Call Center and Value for Money.

Demographics

Females, Arabs, 50 to 59 year olds, and customers with a low education level have the highest satisfaction scores while Males, Arabs, those aged 30 to 49, and customers with a high level of education have the lowest satisfaction scores.

Loyalty and Ideal

UAE scored 77.1 on the likelihood of recommending a brand (Loyalty). Females, Non Arabs, customers aged 16 to 17 and 50 to 59 and those with lower education tend to be most loyal. Looking at the Net Promoter Score (ratio of customers promoting the brand versus being detractors) we see that UAE overall scores 34%, with Arabs, Males, and customers with a higher education or aged over 60 are least loyal.

Ideal satisfaction scored a 75.9. This represents customers' perception of how they have been serviced, and how close it is to ideal service.

Because this score is marginally higher than the Actual Average satisfaction score by 0.1, it suggests that brands are meeting consumers service requirements, though there is always room for improvement.

Categories

Of the 14 categories assessed, 9 of them exceeded the UAE Index score. These are Cafes, New Car Sales, Electronics and Clothes. The lowest scoring categories are Mobile Operators, Retail Banks, and Car Service.

The industries with the highest number of customers promoting them (loyalty) are New Car Sales, Home Furniture, and Cafes, while the ones with the most detractors are Mobile Operators and the Banking category (Retail and Islamic).

Comparison to Kuwait CSI

Kuwait has a lower satisfaction score than the UAE in actual satisfaction though the difference is minimal (0.4 points). Comparing categories, there are a few categories that perform well in both countries such as Cafes, Clothes, and Supermarkets. They also share a couple of low scoring categories which are Mobile Operators and Private Hospitals.

Investigating dimensions between UAE & Kuwait shows similarities as well as differences. The highest scoring dimension for UAE is Location whereas in Kuwait Staff Attitude is scored highest. The lowest scoring dimensions for UAE & Kuwait are Call Center and Value for Money which means that consumers feel both these dimensions are the weakest areas of service for satisfying customers.

Comparing demographics, there are similar trends for most and least satisfied consumers. The most satisfied for both countries are younger consumers, females, Non Arabs, and those with a lower education. Kuwait & UAE share 2 low scoring demographics which are Males and those with a lower education. The demographic difference in satisfaction between countries comes with age and nationality where we see those aged 30 to 39 scoring and Arabs scoring lowest for UAE, and those aged 50 to 59 and Kuwaitis scoring lowest in Kuwait.

Looking at NPS scores, UAE posted a 34% score while Kuwait has a lower one at 29%. s that, on average, consumers in the UAE are more susceptible to promoting brands than in Kuwait.

Comparison to Kuwait, US, and Singapore CSI

UAE and Kuwait have close satisfaction scores with the Kuwait Index scoring 75.4 in satisfaction, a similar score to ACSI, compared to 75.7 for UAE satisfaction.

The Singapore CSI scored 70.2, making it the lowest national satisfaction score.



Dimension scores by nationality

Expectations before dealing with a brand



2

The UAE Index

Lowest

Arabs and Non Arabs have the lowest expectation for Call Center, while for Emiratis Website scored lowest.

Highest

All nationality types have the highest expectations for Reliability and Product Quality. They are either the highest, or second highest, dimensions amongst nationalities.



Sample composition

The national sample is accurate with a ± 2 error margin at a 95% confidence level. The sample is in line with the country composition for nationality, age and gender but reflects a slight bias towards higher educated consumers since the index is run online.

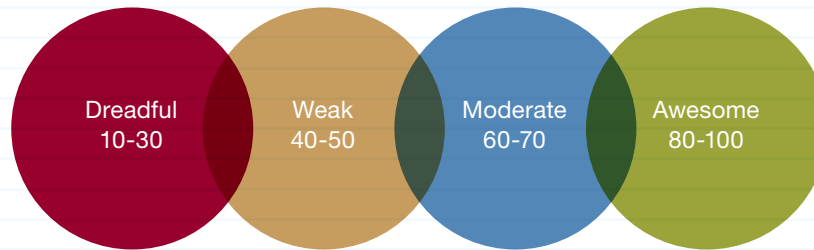
	Votes 2016	Votes 2016 Distribution
Gender		
Female	10,848	59%
Male	6,940	37%
Nationality		
Arabs	4,965	27%
Emiratis	777	4%
Non Arabs	11,814	64%
Age Groups		
16 to 17 Years	166	1%
18 to 29 Years	6,648	36%
30 to 39 Years	7,644	41%
40 to 49 Years	2,154	12%
50 to 59 Years	735	4%
More Than 60 Years	92	0%
Education		
Elementary or below	98	1%
High school	2,349	13%
Diploma	2,287	12%
University graduate	9,593	52%
Master or PHD	2,707	15%
Total	18,510	100%

Note 1: Demographic data is not a mandatory field and thus missing data is not reported on in this table.

Note 2: Since demographic information about the respondent is not a mandatory field in the survey, a small sample of data regarding gender, nationality, age, and education is “unknown” and as such the vote count does not reflect these scores which amount to less than 8% of votes.



Interpreting the score



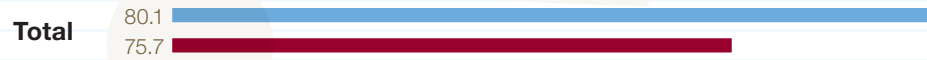
Since the Service Hero index measures companies on a 100 point scale, the overall index can be interpreted according to the legend above. Companies fall into one of the **four groups** regarding the strength of service based on the score that they obtain. On the country level, the same legend is applied. For example, if the score for Kuwait is a 60, it is then placed at the bottom of the **“Moderate”** category.



UAE Index: Before and after

Service Hero Index - UAE 2016

■ Average of Expectation Index ■ Average of Actual Index



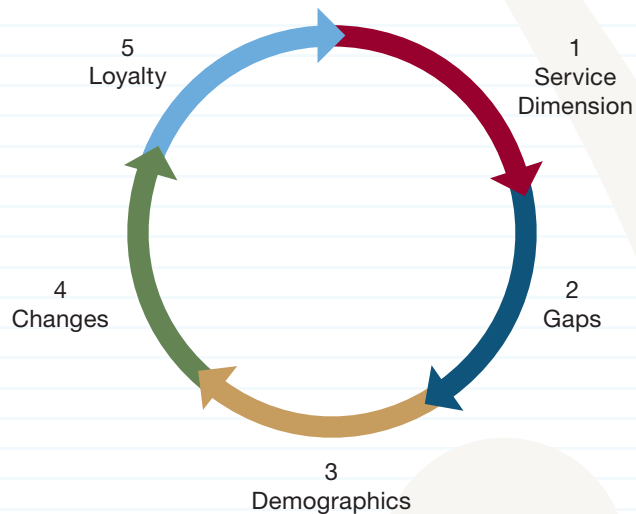
A gap of -4.4 between expected and actual

Usually consumer expectations will be higher than actual service assessments. Consumers had higher expectations and lower satisfaction, meaning we are below expectations by a gap of -4.4 which is not an unusual or unhealthy gap.

UAE scored 80.1 on average for **Expected** standards and it scored 75.7 on **Actual** service standards – placing it in the **Moderate** service level.



How results will be displayed



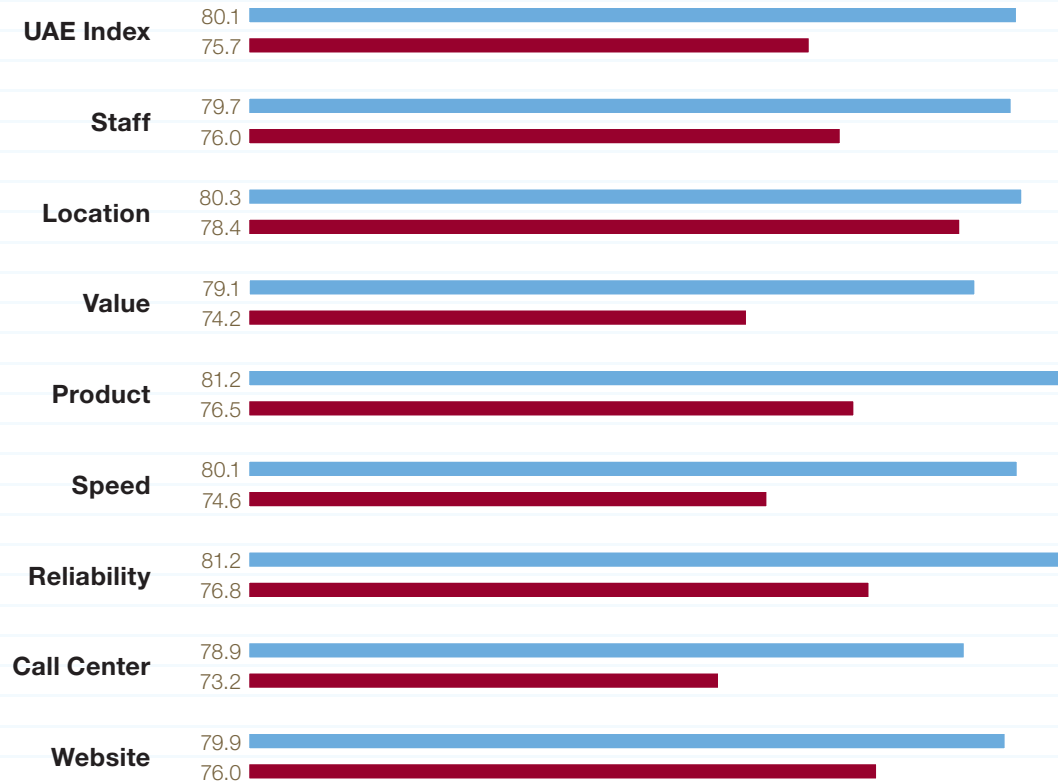
Results will be reported on five levels as seen in the chart.



UAE Index by service dimension

UAE Index 2016 service dimension

Expected Actual

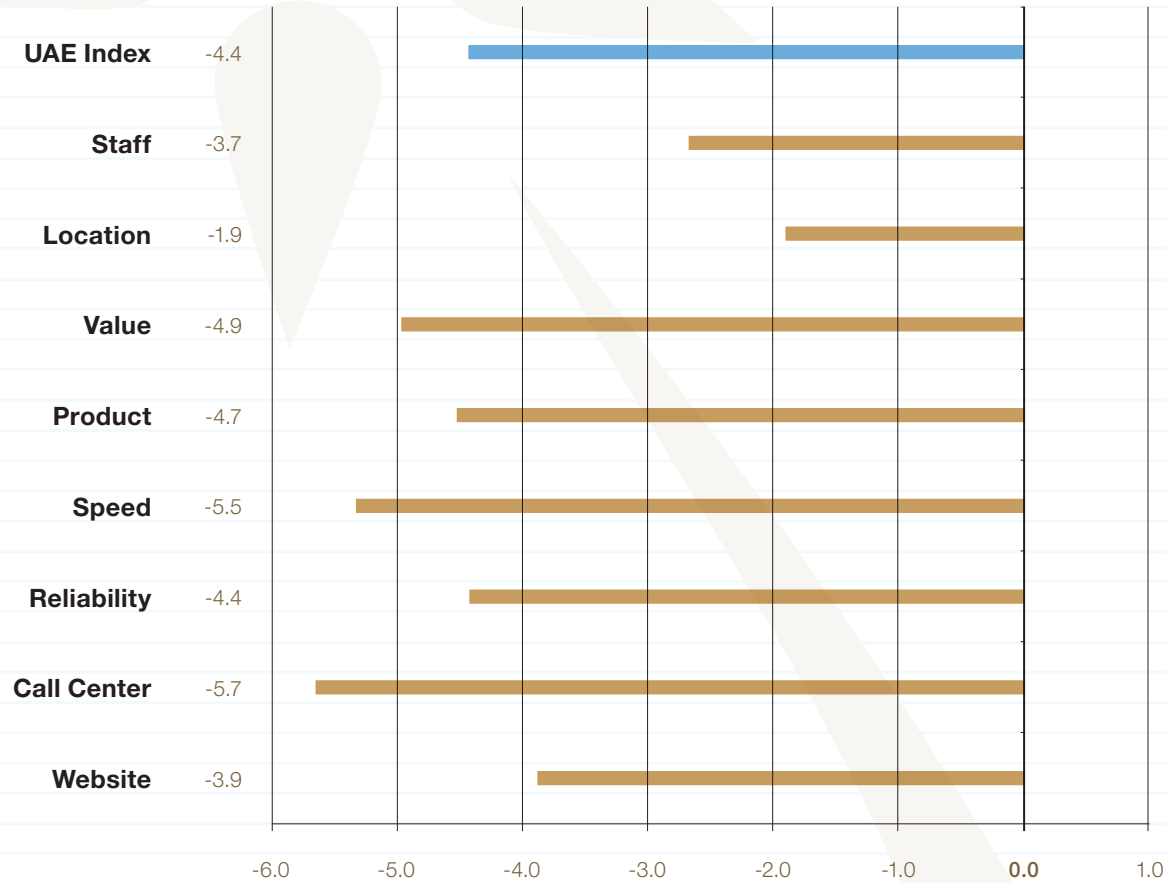


The highest score per dimension on an **Expected** level (before dealing with a brand) is for Reliability and Product Quality while the lowest is for Value for Money.

When we look at scores based on **Actual**, or after a brand was experienced, the highest is Location and Reliability, and the lowest satisfaction is for Call Center.



Gap analysis for UAE

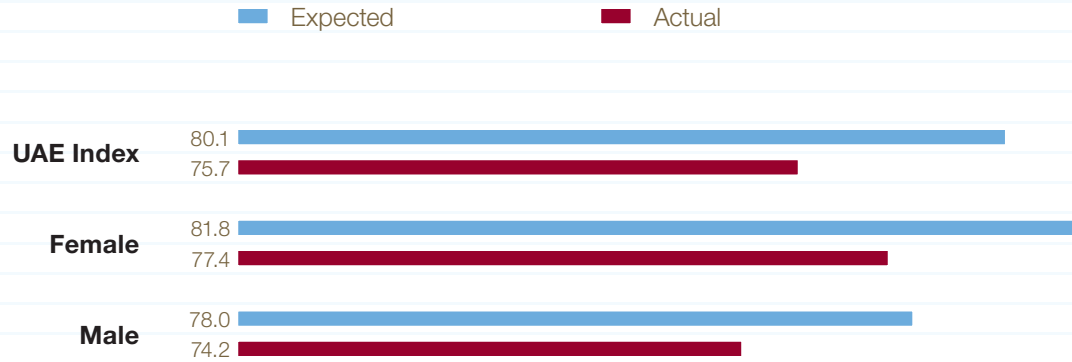


Analysis of positive and negative gaps between Expected and Actual scores

All dimensions obtained a Negative gap - i.e. Actual satisfaction after they experienced a brand was lower than their expectation before they dealt with it. However a negative gap is acceptable as long as it is above 3.00; therefore for most dimensions with the exception of Location, companies are generally unable to meet customer expectations.



Index by demographic factors UAE Index results by gender

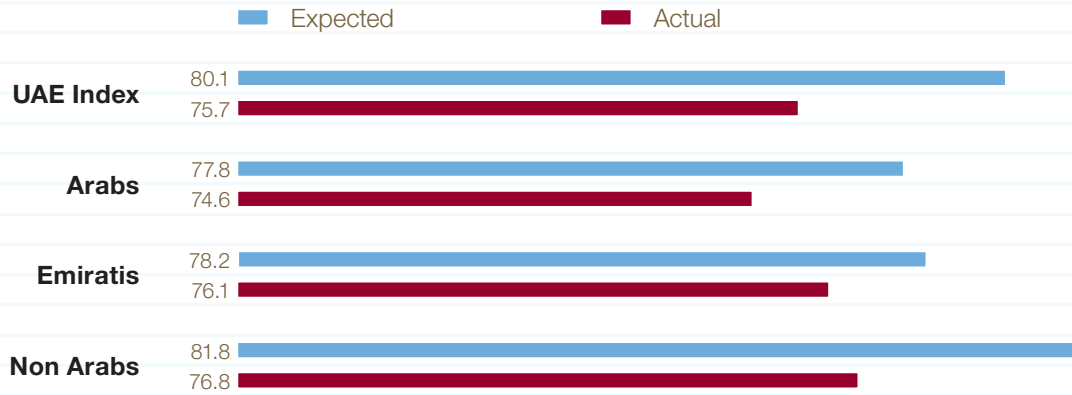


Gender

Women have both a higher expectation and higher assessment of standards on a before and after basis than men do.



UAE Index results by nationality

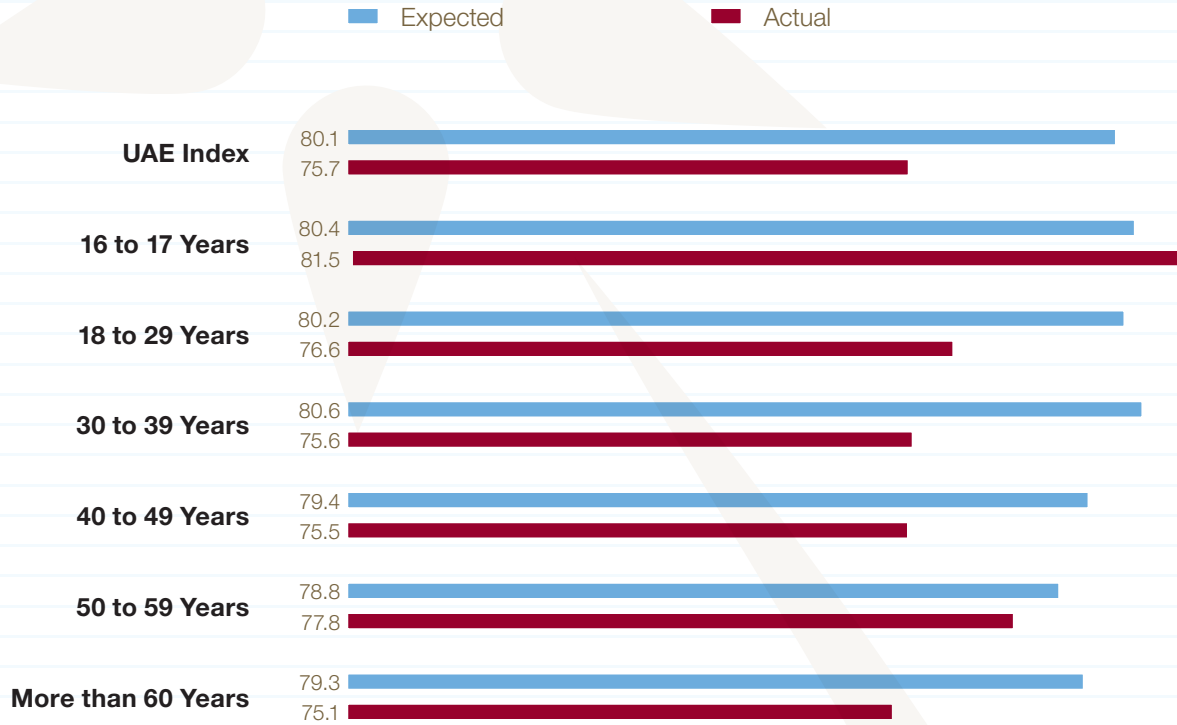


Nationality

Non Arabs have the highest expectation and scored the highest on actual satisfaction. Arabs scored the lowest on expected and actual satisfaction when dealing with a brand.



UAE Index results by age



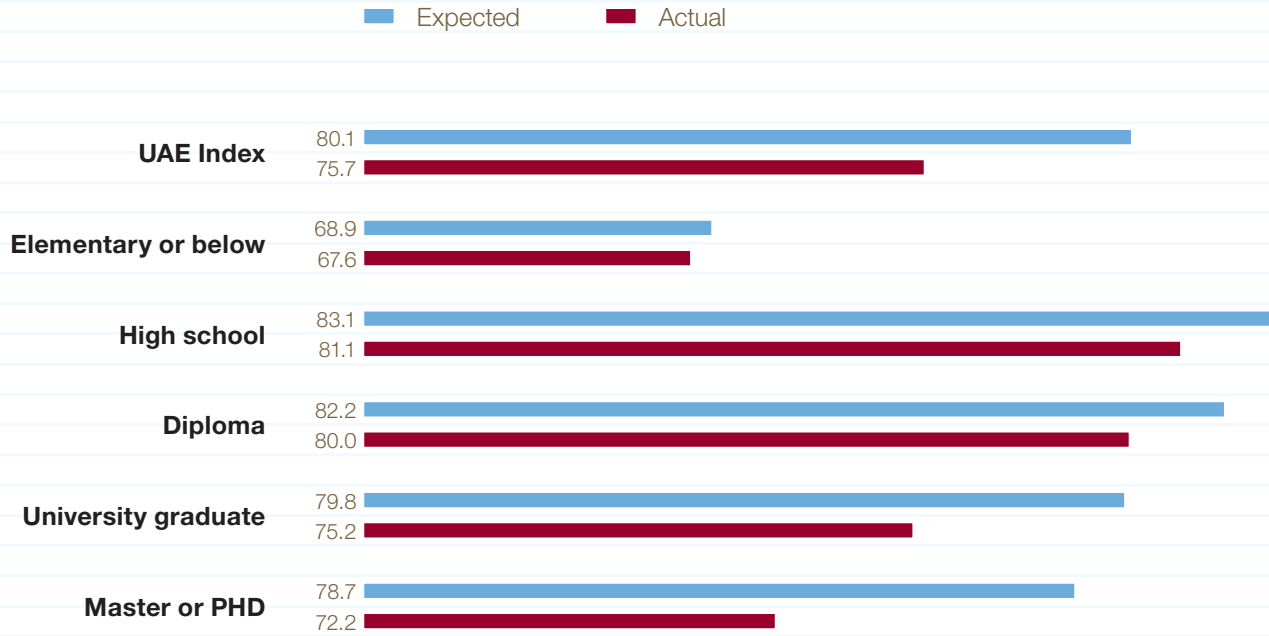
Age

Actual satisfaction is highest amongst teenagers and those aged 50-59 years. Satisfaction is lowest for adults in the 40-49 age group. This is possibly due to the age group being comprised of professionals who are balancing their personal and work lives and therefore are time constrained, pressured, and less tolerant of poor service.



Service dimension scores by education

Expected and Actual scores



Education

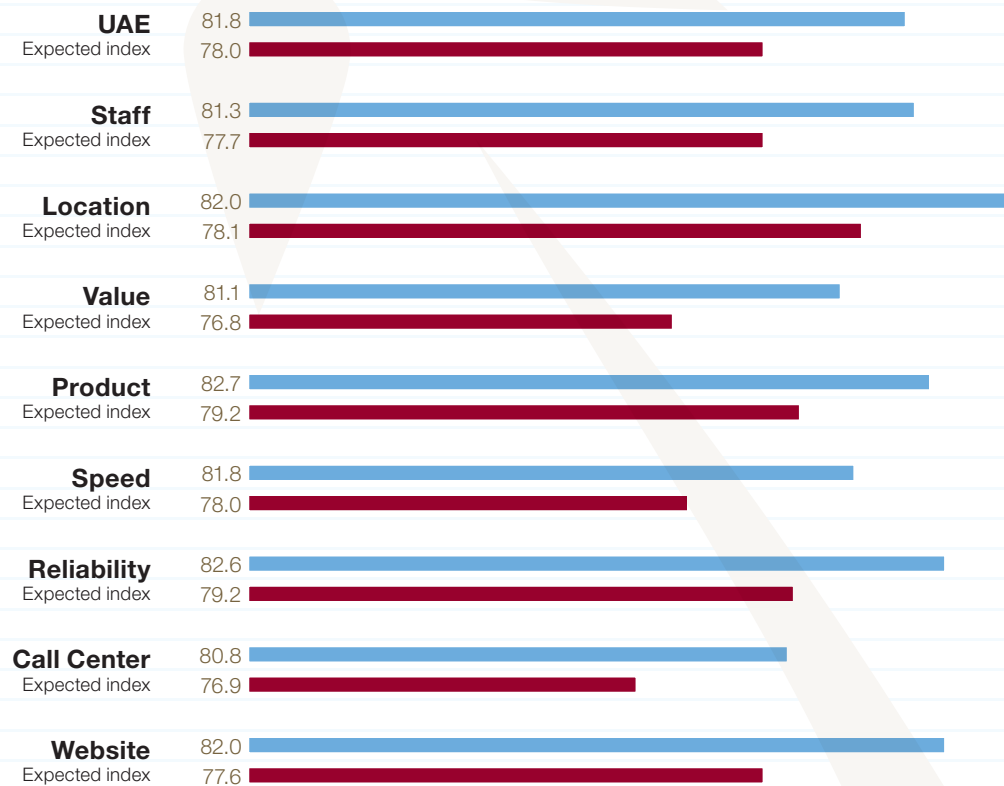
Actual satisfaction is highest amongst those with a High School education, and Diploma holders both rating a strong score. The lowest satisfaction level is among those with a Masters or PHD. This could be attributed to the fact that those with a higher education demand a higher level of service.



Service dimension scores by gender

UAE Expected Index

Female Male



Female

Expectation: Overall women's expectations exceed those of males on every dimension. Highest is Product Quality and Reliability, lowest is Call Center and Value for Money.

Male

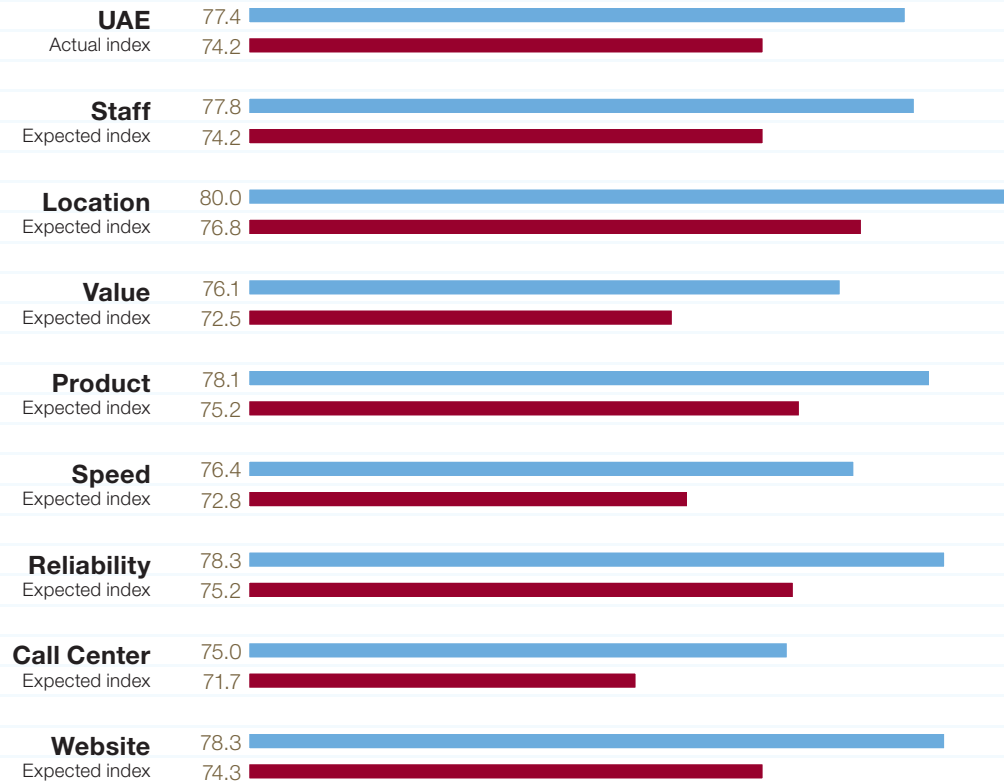
Expectation: Service expectations for males fall below women on every dimension. Highest is similar to females with Product Quality and Reliability. Lowest is Call Center and Value for Money.



Service dimension scores by gender

UAE Actual Index

Female Male



Female

Actual: Females are more satisfied than males on every service dimension. Their highest satisfaction score is Location followed by Reliability and Website. Their lowest is on Call Center and Value for Money.

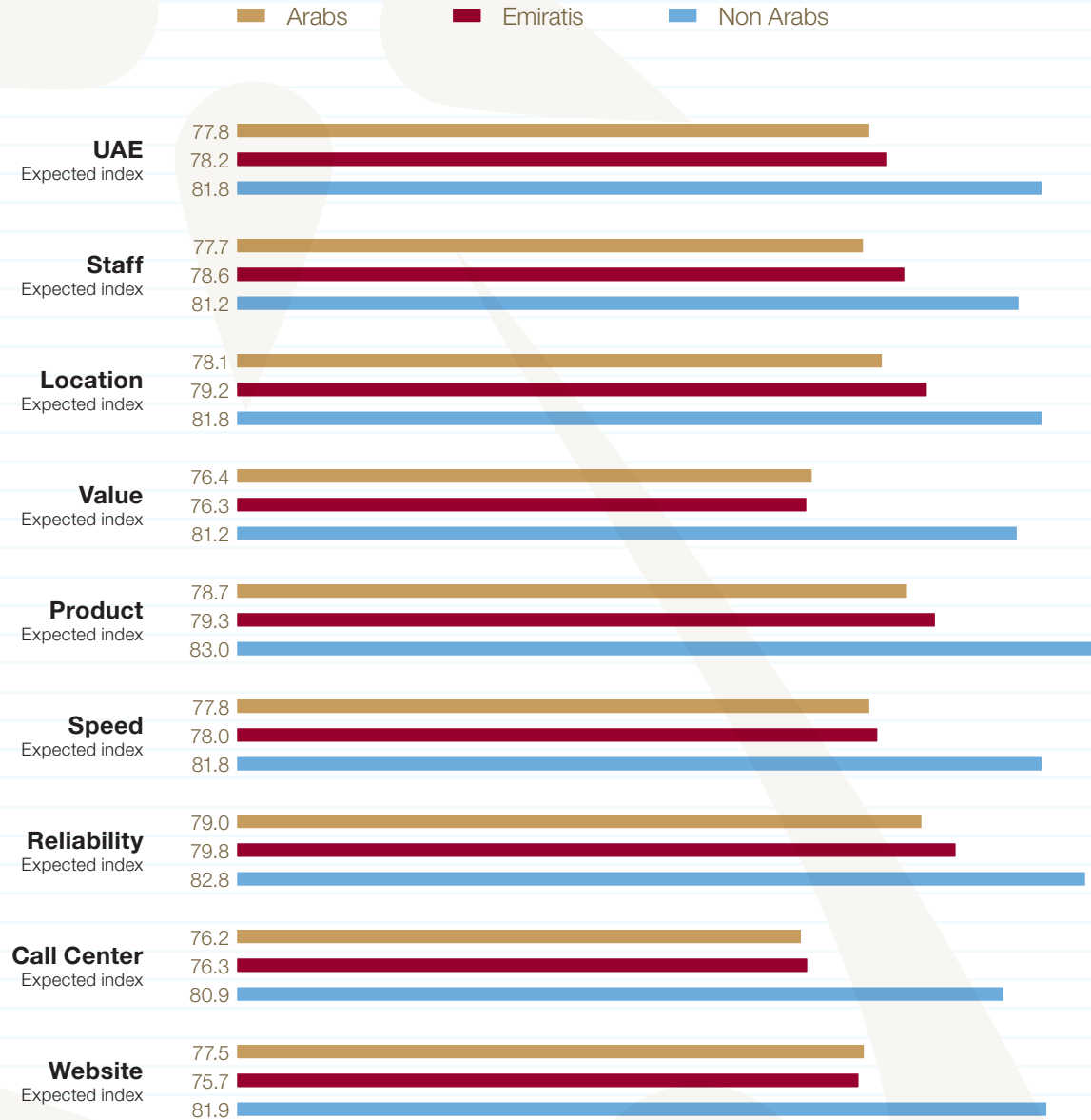
Male

Actual: Similar to females, Men are most satisfied with Location and the least satisfied with Call Center and Value for Money.



Dimension scores by nationality

Expectations before dealing with a brand



Lowest

Arabs and Non Arabs have the lowest expectation for Call Center, while for Emiratis Website scored lowest.

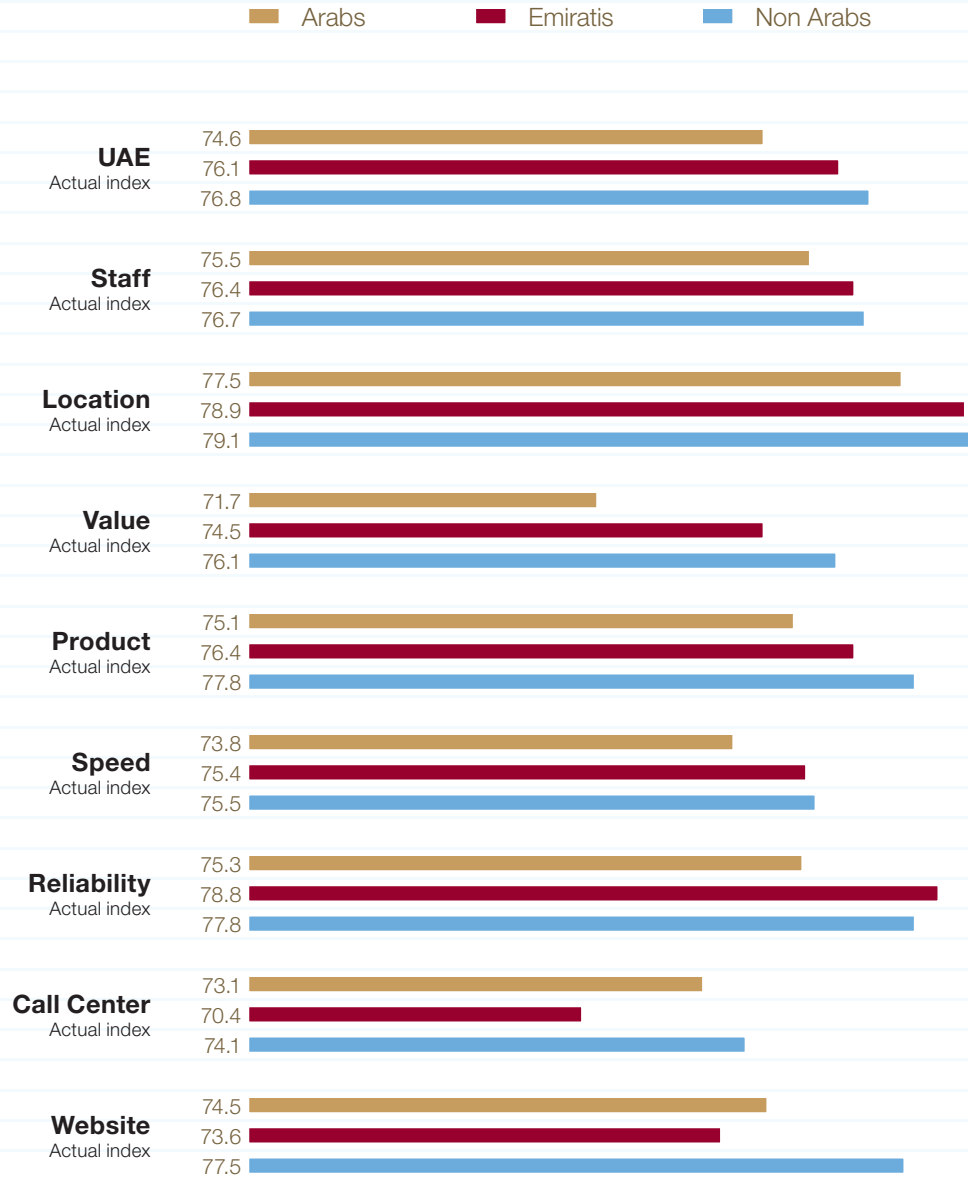
Highest

All nationality types have the highest expectations for Reliability and Product Quality. They are either the highest, or second highest, dimensions amongst nationalities.



Dimension scores by nationality

Actual satisfaction after dealing with a brand



Lowest

Emiratis and Non Arabs have the lowest score for Call Center. The lowest for Arabs is Value for Money.

Highest

All nationalities have Location as the highest satisfaction score for all dimensions.



Dimension scores by age group

Actual scores and gaps between actual and expected scores

	16-17	18-29	30-39	40-49	50-59	60+	UAE Index
Actual							
Staff	82.2	77.0	75.8	74.9	77.3	77.0	76.0
Location	79.1	79.1	78.4	78.1	80.2	75.8	78.4
Value	77.5	75.1	74.1	74.1	75.4	74.5	74.2
Product	85.2	77.8	76.1	76.1	77.5	75.8	76.5
Speed	82.5	75.5	74.2	74.6	76.9	74.3	74.6
Reliability	85.1	77.4	76.6	76.5	78.4	75.6	76.8
Call Center	78.7	73.8	73.1	73.4	77.8	72.4	73.2
Website	82.7	76.6	76.2	75.0	80.2	75.2	76.0
Overall	81.5	76.6	75.6	75.5	77.8	75.1	75.7
Gap							
Staff	2.6	-2.9	-4.3	-4.2	-0.5	-2.7	-3.7
Location	0.5	-1.6	-2.4	-1.3	2.5	-0.8	-1.9
Value	-0.6	-4.2	-5.7	-4.6	-2.2	-2.8	-4.9
Product	0.8	-3.5	-5.4	-4.5	-2.1	-4.7	-4.7
Speed	1.6	-4.7	-6.6	-4.1	-1.6	-4.5	-5.5
Reliability	2.9	-3.6	-5.0	-4.1	-1.3	-5.0	-4.4
Call Center	7.0	-5.3	-6.2	-4.0	-1.6	-6.8	-5.7
Website	2.2	-3.4	-4.4	-2.9	0.2	-6.4	-3.9
Overall Gap	1.1	-3.7	-5.0	-3.9	-1.0	-4.2	-4.4
Best							
Worst							

Satisfaction

Call Center satisfaction is **lowest** for most age groups except for teens and 50-59 year olds which is Value for Money. The **highest** for most age groups is Location, except for teens which have Product Quality and those aged more than 60 who have Staff Attitude.

Gaps

In terms of **positive** gap scores by age group, only 16-17 year olds showed positive gaps while the rest had negative gaps for most dimensions.



Dimension scores by education

Actual scores and gaps between actual and expected scores

Actual	Elementary or below	High school	Diploma	University Grad	Master or PHD	UAE Index
Staff	68.9	81.0	80.1	75.3	72.8	76.0
Location	69.1	82.3	82.5	77.7	76.0	78.4
Value	65.0	78.7	78.5	73.9	70.2	74.2
Product	69.6	82.6	80.4	76.0	72.8	76.5
Speed	61.3	79.7	79.0	74.0	71.0	74.6
Reliability	71.7	82.6	80.9	76.1	72.9	76.8
Call Center	60.8	78.8	77.3	72.9	69.6	73.2
Website	70.4	81.0	80.3	75.6	72.1	76.0
Overall	67.6	81.1	80.0	75.2	72.2	75.7
Gap						
Staff	2.0	-1.3	-1.8	-4.0	-5.6	-3.7
Location	-1.2	-0.6	0.4	-2.5	-2.4	-1.9
Value	-0.2	-3.4	-3.1	-4.9	-7.6	-4.9
Product	-2.5	-1.9	-2.6	-4.9	-6.7	-4.7
Speed	-7.6	-3.0	-2.9	-5.8	-7.9	-5.5
Reliability	-0.0	-1.7	-2.3	-4.6	-7.1	-4.4
Call Center	-0.8	-3.2	-3.8	-5.4	-7.6	-5.7
Website	3.5	-1.6	-2.4	-3.7	-5.6	-3.9
Overall Gap	-1.4	-2.0	-2.2	-4.6	-6.5	-4.4
Best						
Worst						

Satisfaction

High School degree holders have the highest satisfaction across most dimensions, while those with a Elementary level education had the lowest satisfaction in all dimensions compared to others. Among most education levels, Location had the highest average satisfaction, with Product Quality and Reliability following. The lowest satisfaction is shown with Call Center for most education levels, with Value for Money scored lowest for the High School educated consumers.

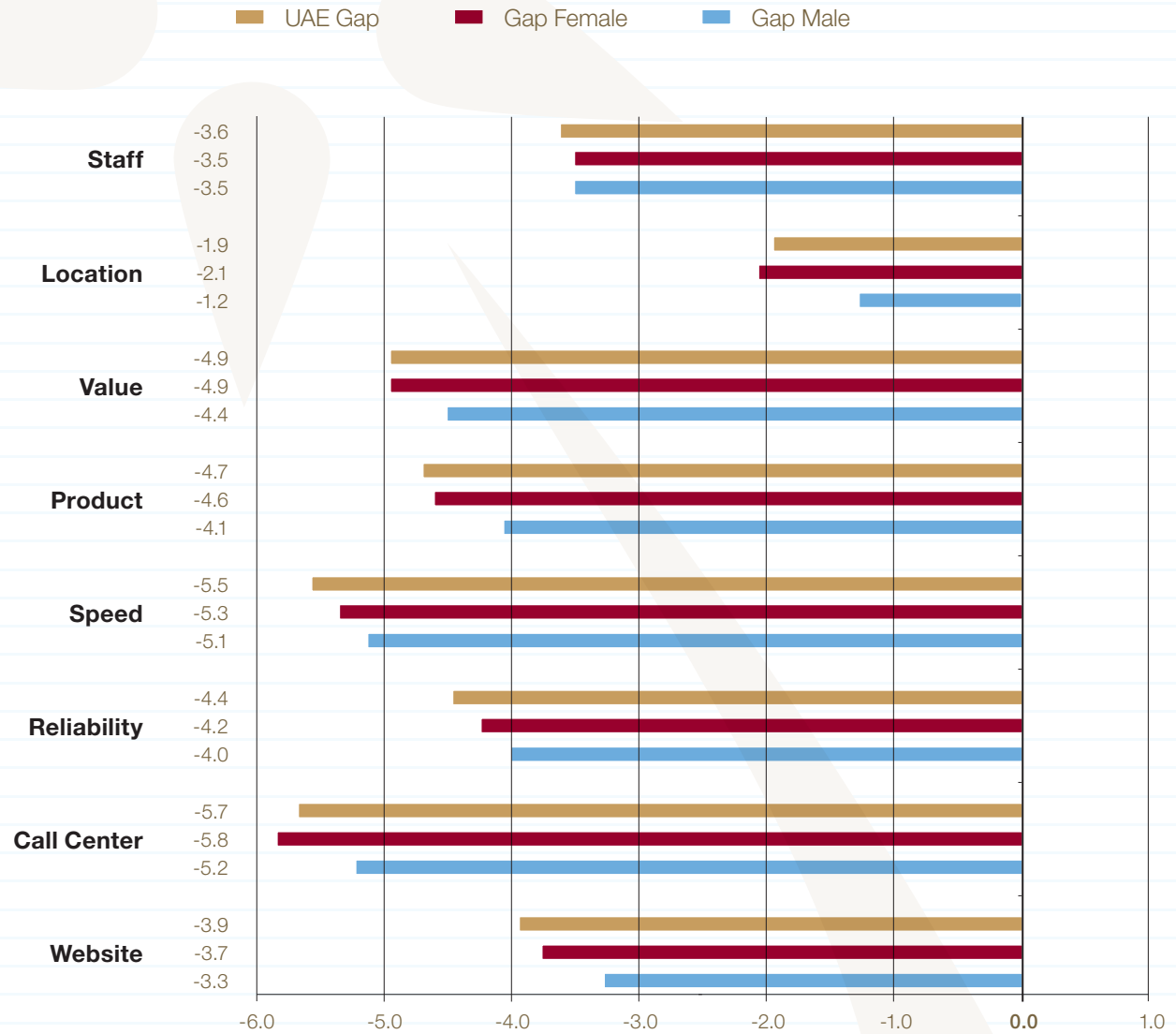
Gaps

There were minimal **positive** gaps across all education levels with expectations being exceeded only for consumers with a degree of Elementary or below. The group where expectations were not met the most is for Master or PHD holders. The highest negative gaps are with Speed in most levels.



Gaps by gender

UAE Index 2016 - Gap Analysis



Females

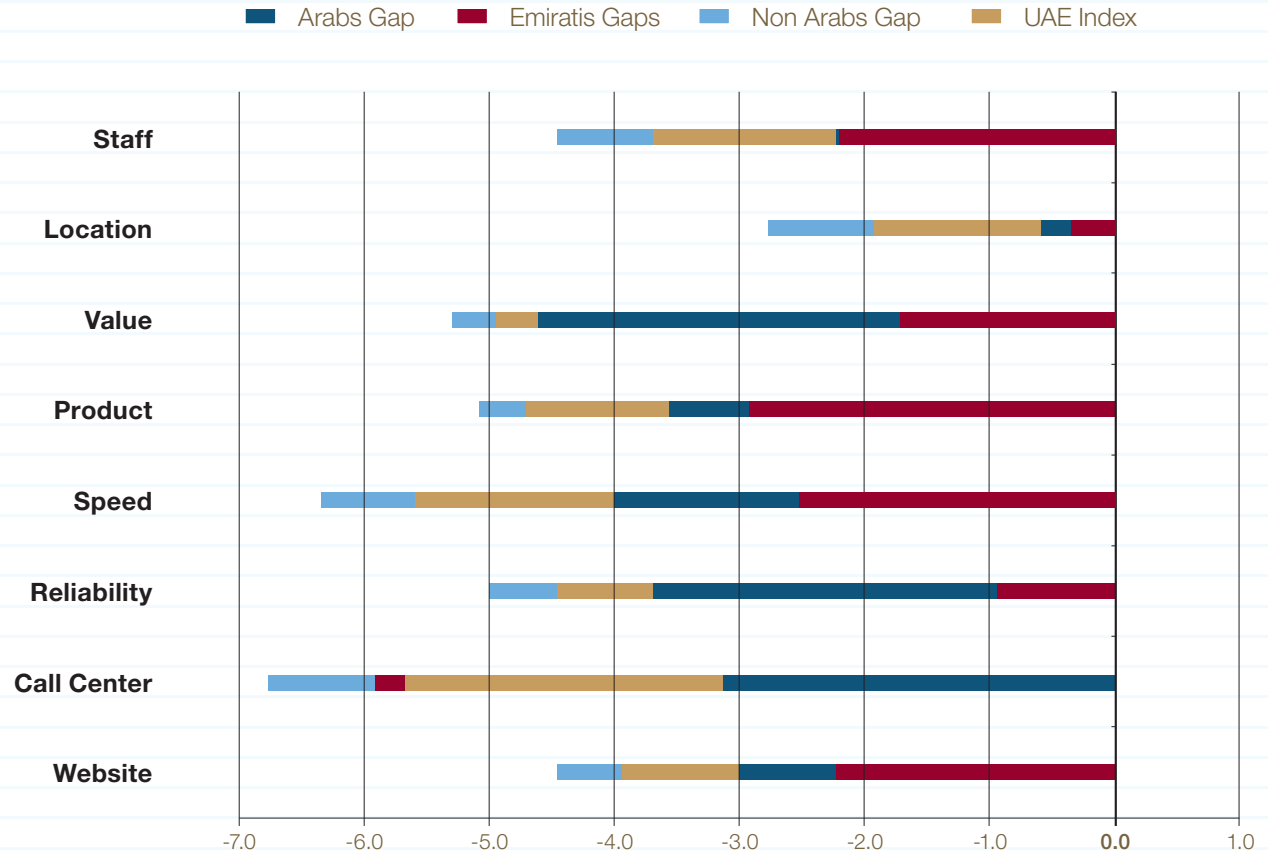
There are no positive gaps for females on any dimension. The largest gaps for females are for Call Center, Speed of Service, and Value for Money.

Males

Males also showed negative gaps across all dimensions. Similar to females, the highest gap for males are for Call Center, Speed of Service, and Value for Money.



Gaps by nationality



	Staff	Location	Value	Product	Speed	Reliability	Call Center	Website
Arab Gap	-2.2	-0.6	-4.6	-3.6	-4.0	-3.7	-3.1	-3.0
Emiratis Gap	-2.2	-0.3	-1.7	-2.9	-2.6	-0.9	-5.9	-2.2
Non Arabs Gap	-4.5	-2.7	-5.2	-5.1	-6.3	-5.0	-6.8	-4.4
UAE Index	-3.7	-1.9	-4.9	-4.7	-5.5	-4.4	-5.7	-3.9

No service dimension exceeded expectations for any nationality group as they all fell below expectations. Non Arabs had the largest negative gaps for all eight dimensions. Their largest gap is Call Center and Speed. For Arabs, the largest gap is Value for Money, while for Emiratis it is Call Center. The smallest gaps for all nationalities is Location.



Loyalty

UAE Index recommend scores 2016



One question is examined here - the likelihood to recommend a brand.

UAE scored a 77.1 on the **loyalty**, or the recommendation score.

Females are more likely to recommend a brand than men are.



Recommend scores by nationality

UAE Index recommend scores 2016

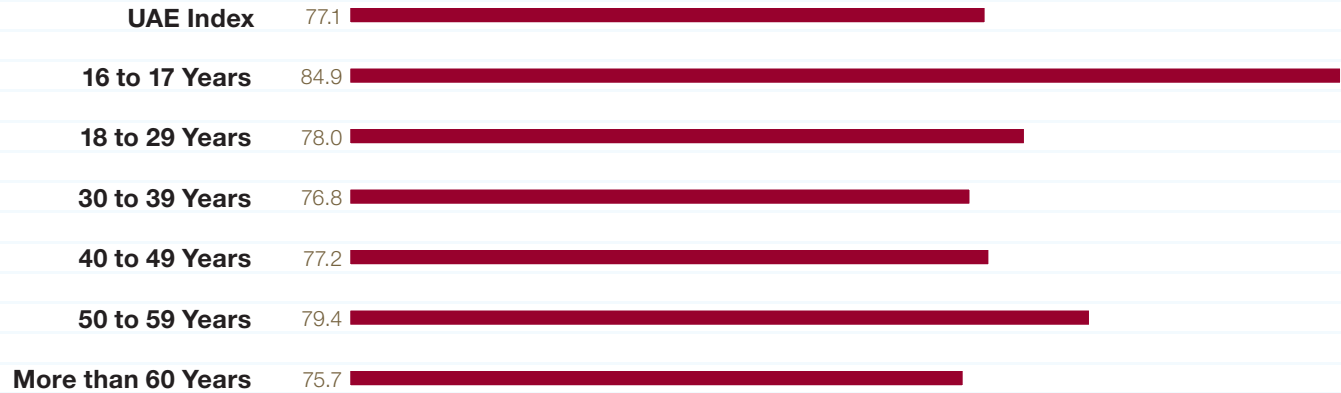


The least likely nationality to recommend a brand are Arabs, while the most likely to recommend a brand are Non Arabs. None of the nationalities had a 'strong' score.



Recommend scores by age group

UAE Index recommend scores 2016

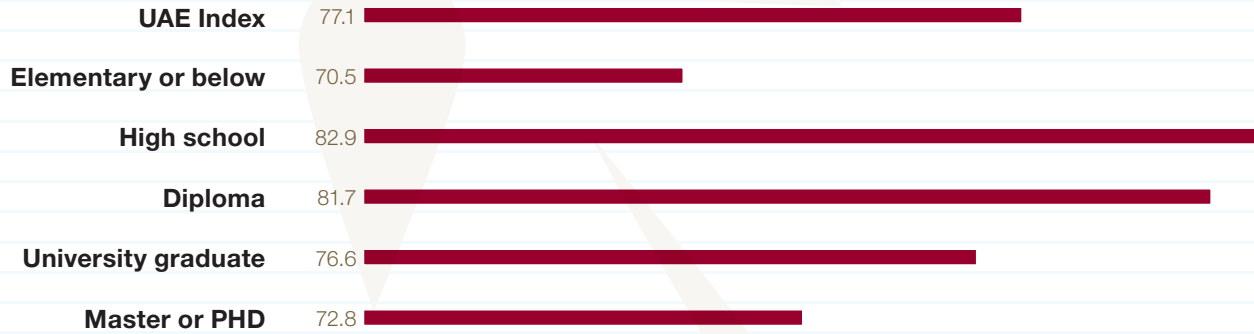


The two age groups that are more likely to recommend a brand are the 16-17 and 50-59 groups. Typically, very young consumers tend to recommend a brand to their peers while the older groups are more likely to recommend brands. The least likely to recommend a brand are the 30-49 and 60 and over age group.



Recommend scores by education level

UAE Index recommend scores 2016

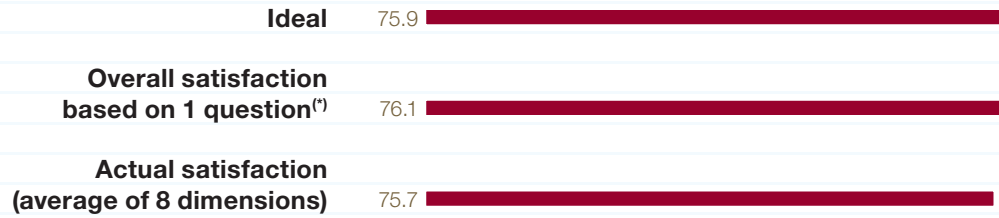


Those with the lowest and highest education levels are least likely to recommend a brand, while the most likely to recommend are those with High School education and Diplomas.



Satisfaction & comparison to an ideal

Overall Satisfaction, Average Satisfaction (8 dimensions), and Comparison to Ideal

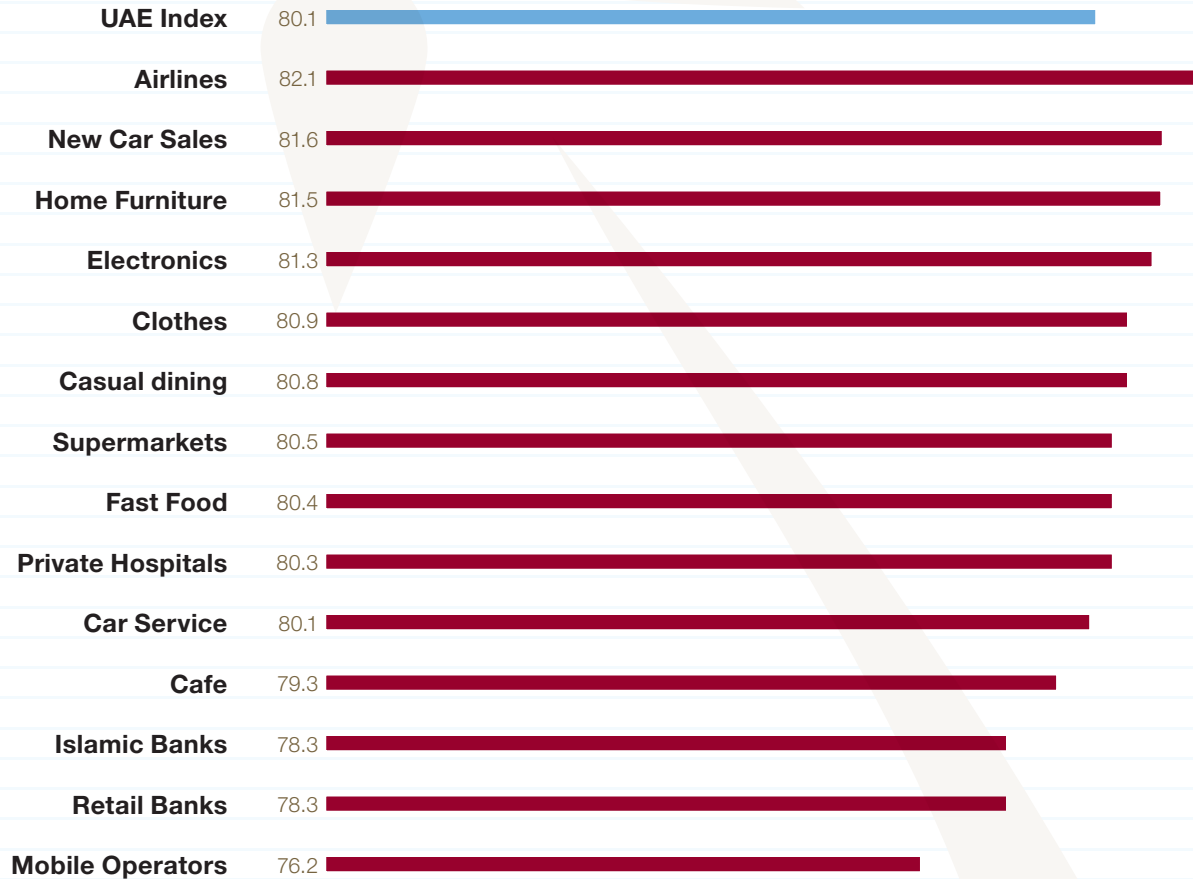


* Overall Satisfaction scored slightly more than the UAE Actual Satisfaction (the average of all eight dimensions). How a brand compares to its Ideal Offering is marginally above the Actual Satisfaction. This question is typically a more accurate representation of satisfaction, and seeing it very close to the national average suggests that service is matching their expectations.



The UAE expected index across all 14 categories

Expected Index



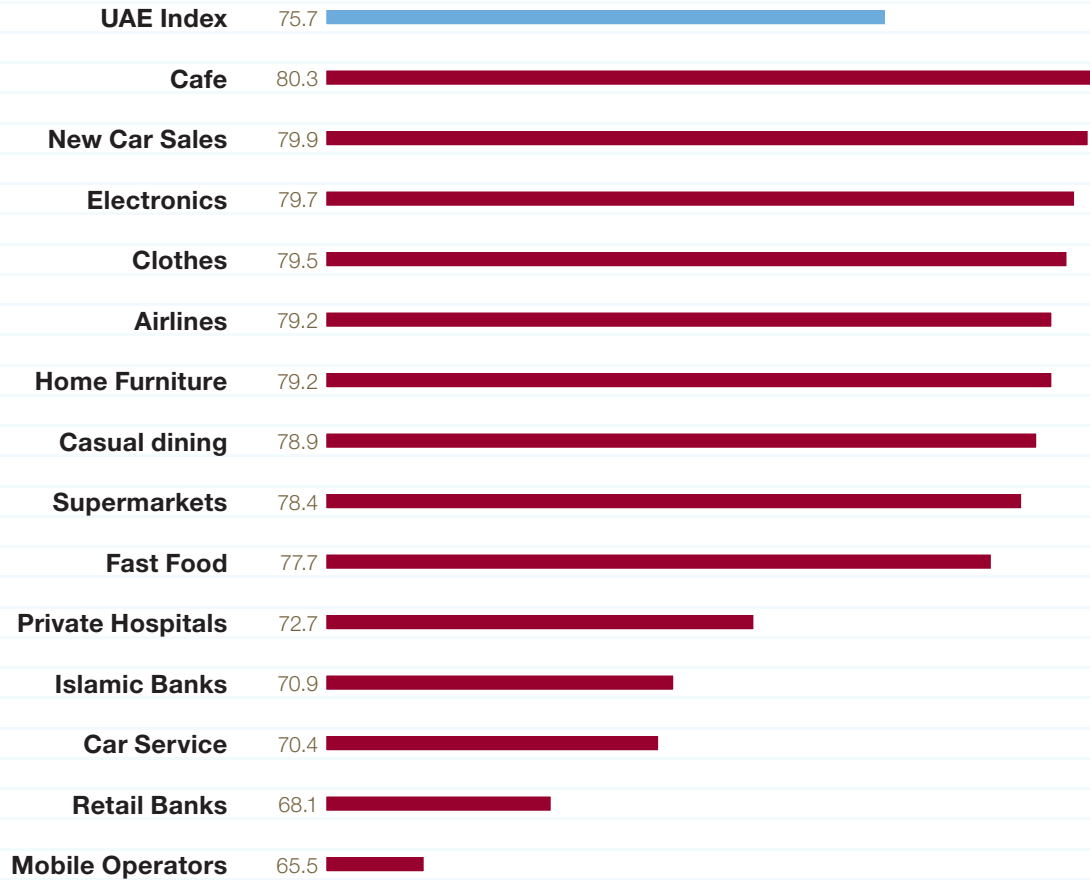
Nine industry categories exceeded the UAE Index score for the average of all 8 dimensions on a “before” basis.

The top expectations are for Airlines, New Car Sales, and Home Furniture. The lowest expectations for categories are Mobile Operators and the Banking category (Retail & Islamic Banks).



The UAE actual index across all 14 categories

Actual Index



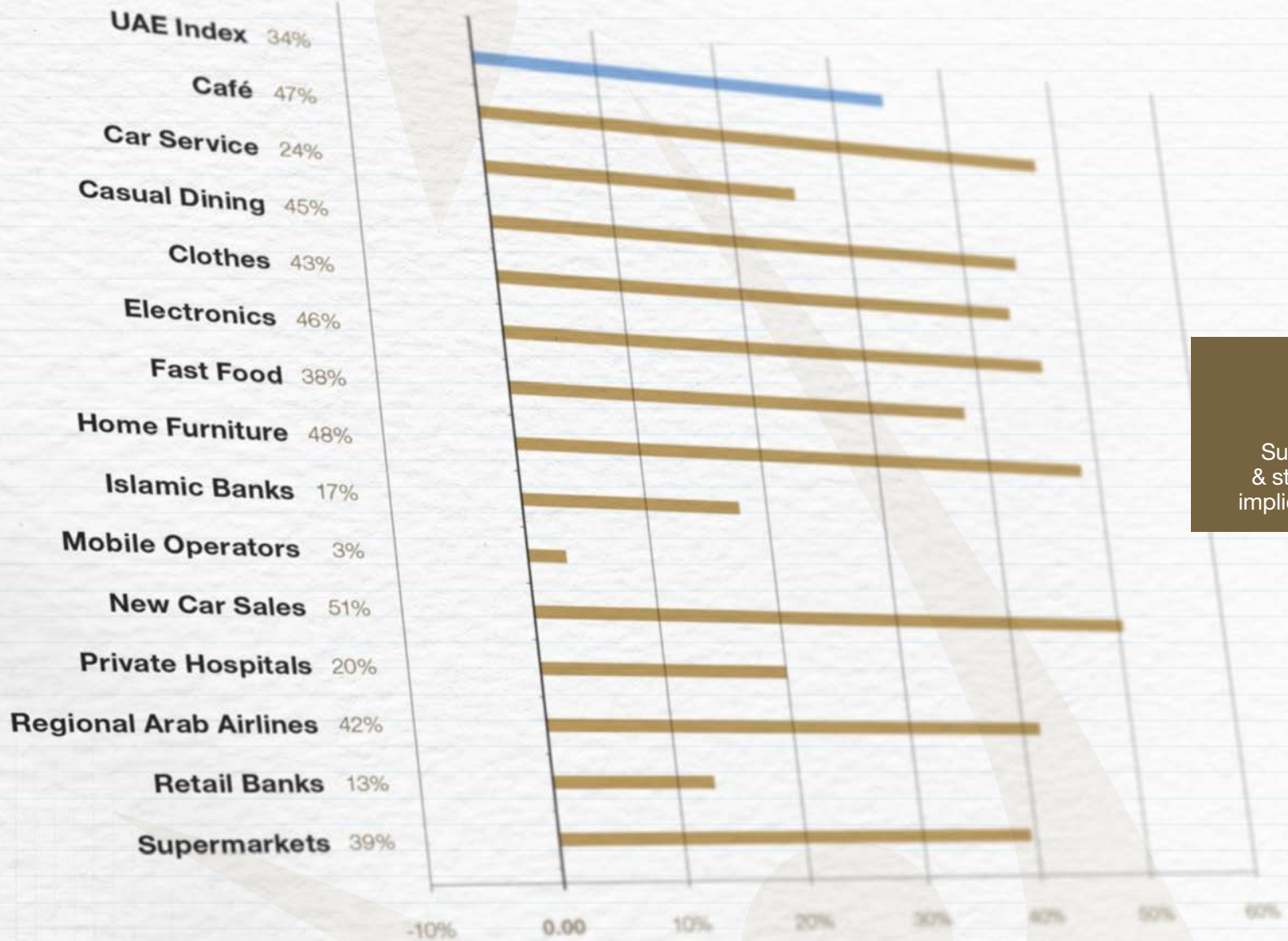
9 industries exceeded the UAE Index for the average of all 8 dimensions on an “after” basis.

The top three scoring industries are Cafes, New Car Sales, and Electronics. The lowest scoring industries are Mobile Operators, Retail Banks, and Car Service.



Category NPS

Service Hero CSI Category 2016 Net Promoter Score



3

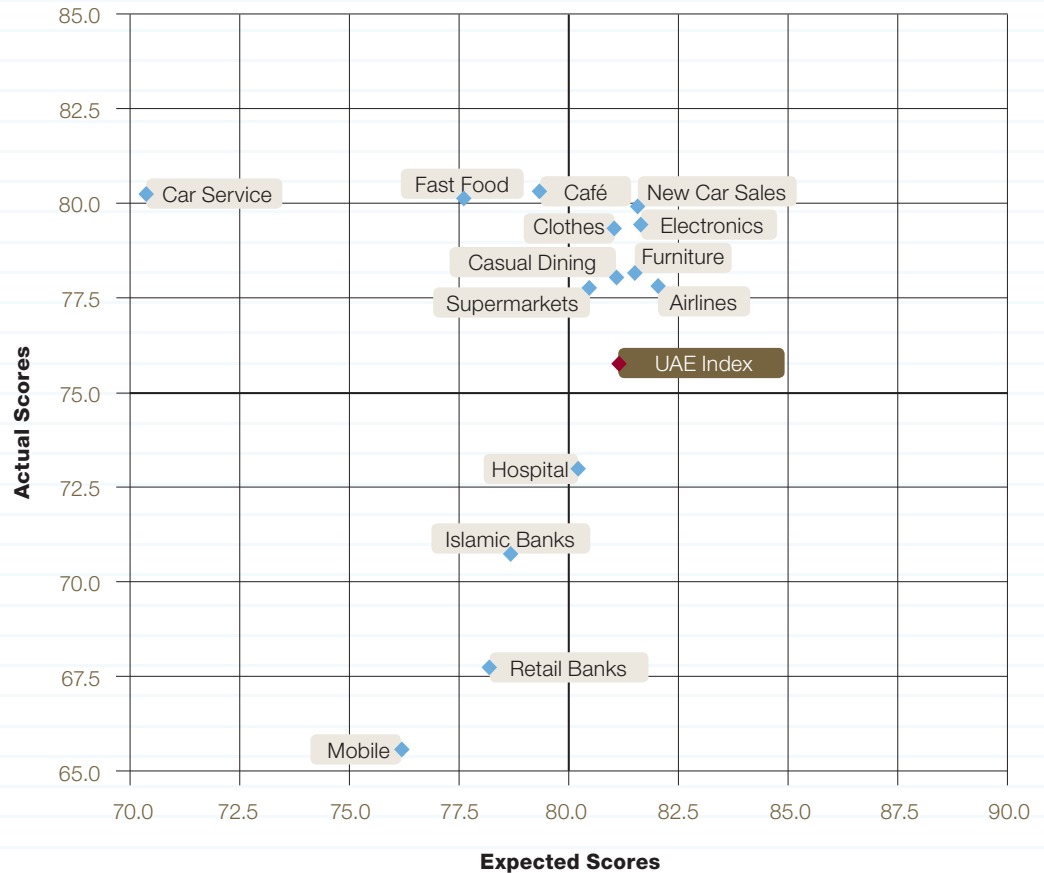
Summary
& strategic
implications

The overall NPS score for UAE, 34%, is higher than Kuwait, which is at 29%. This means that overall, UAE has a higher amount of brand Ambassadors than they do Detractors. The highest NPS scores for UAE is Café, Home Furniture, and New Car Sales. The lowest are Mobile Operators, Islamic Banks, and Retail Banks. For Kuwait, the highest scoring NPS categories are Casual Dining, Cafés, and Clothes while the lowest is ISPs, Mobile Operators and Private Hospitals.



Market position of all 14 categories

Mapping categories on expectation and actual scores to understand their market position

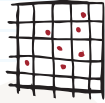


Industry categories in the top right quadrant such as New Car Sales, Home Furniture, and Cafe are in the best position as their actual scores exceed expected scores. They need to sustain this position over time.

Industry categories in the top left quadrant need to improve their image and overall performance as a small gap exists between expectation and actual scores.

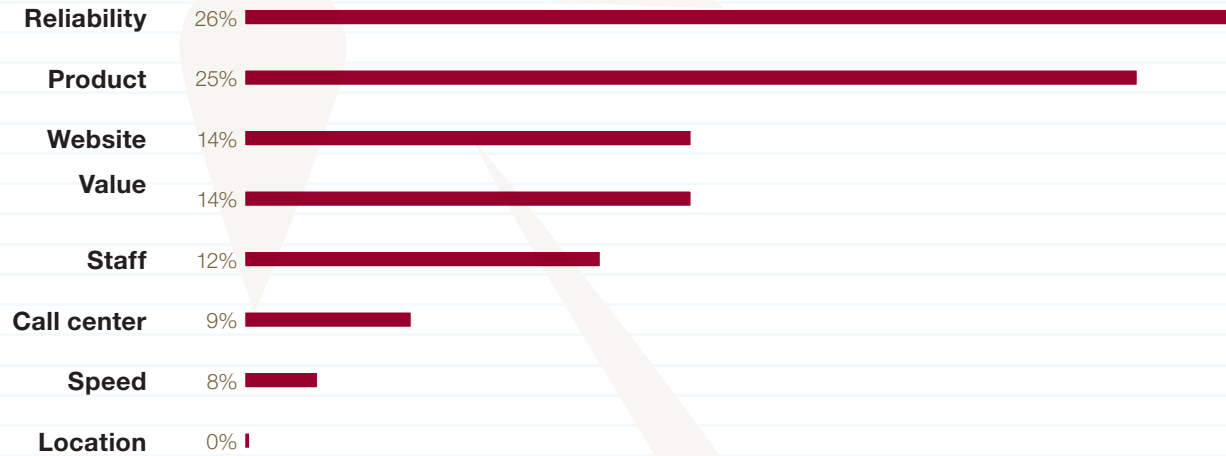
Industries in the bottom left quadrant such as the Banks (Retail & Islamic) and Mobile Operators are in a weak position as they are scoring low on expected and actual scores. Their challenge is improving service standards and the market perception of these standards.

Finally, categories in the right bottom quadrant do not meet customer expectations and have low satisfaction.



Correlation of dimensions to overall satisfaction

Service dimensions most influential to overall satisfaction (R Square 85%, 18,510 sample)



In order to help companies understand which service dimensions are most influential to overall satisfaction, correlation analysis on the entire dataset for all categories is conducted using standard statistical practices.

Based on the model, only two dimensions have a critical role in influencing overall satisfaction: Reliability and Accuracy (26% impact) and Product or Service Quality (26% impact). If companies prioritize their effort on only these two dimensions it would help them improve satisfaction.

On the flip side, Location has no impact on overall satisfaction while Call Center and Value for Money have a small degree of influence.



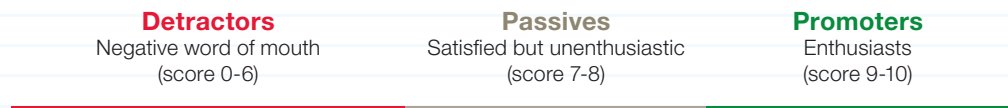
Net Promoter Score

Looking at the “likelihood to recommend” question from another perspective

A commonly used model called the Net Promoter Score was also used to evaluate the “likelihood to recommend” question. This measure groups customers into three groups: Detractors, Passives and Promoters. It basically ignores individuals whom are Passive and then subtracts the proportion of customers whom are Detractors from the proportion of customers whom are Promoters.

Note

- The score is displayed out of 100%
- The higher the score, the more customers are Promoters of a brand than there are Detractors



Promoters (score 9-10) are loyal enthusiasts who will keep buying and refer others, fueling growth.

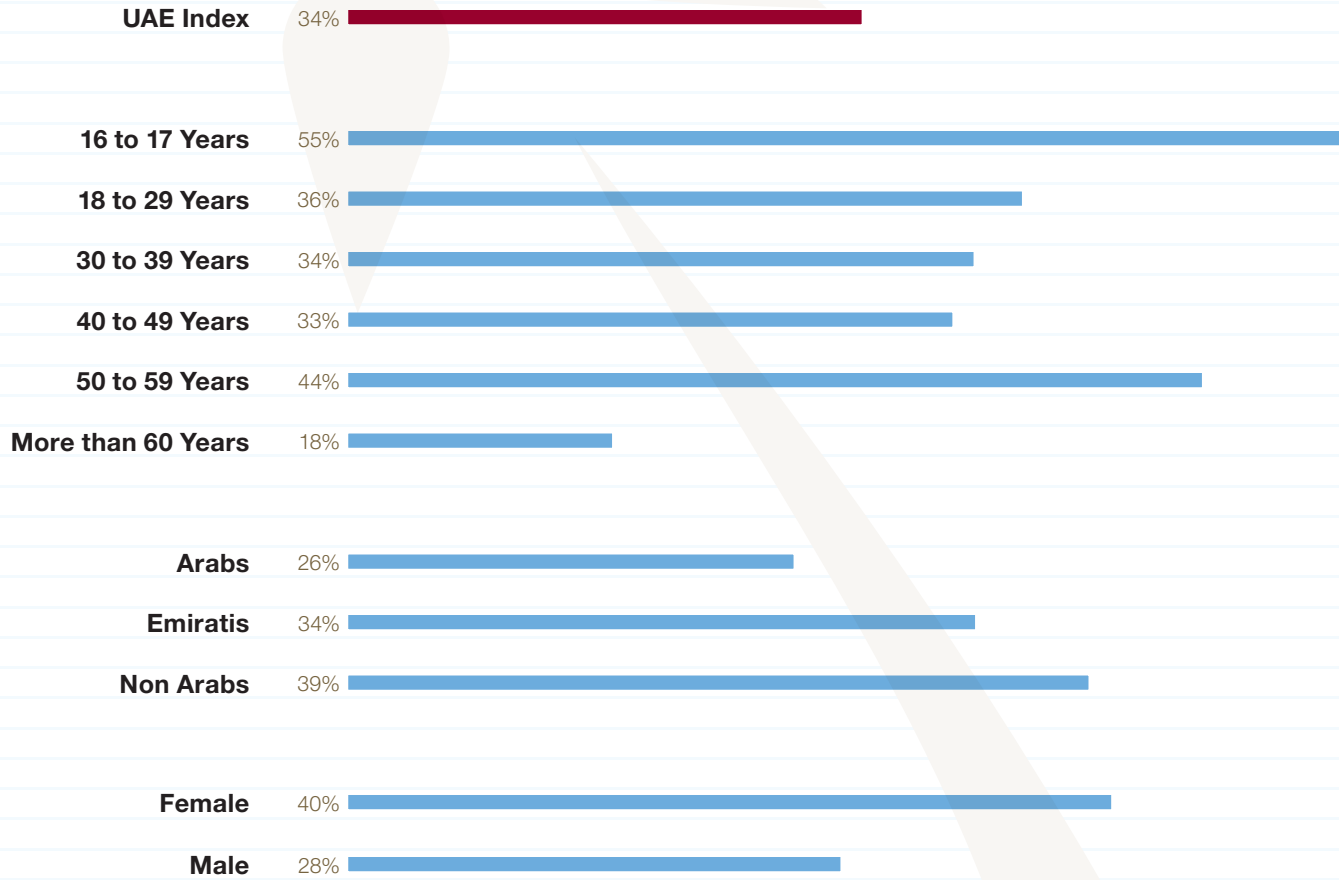
Passives (score 7-8) are satisfied but unenthusiastic customers who are vulnerable to competitive offerings.

Detractors (score 0-6) are unhappy customers who can damage your brand and impede growth through negative word-of-mouth.



The net promoter score for UAE is 34%

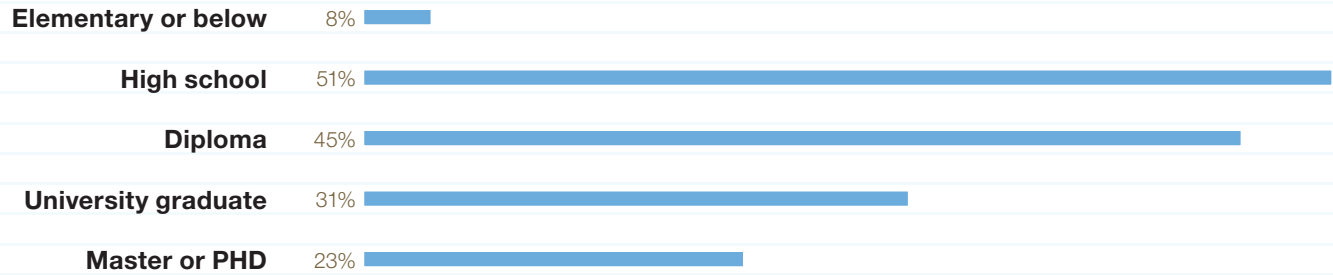
Net promoter score - Service Hero Index 2016





The net promoter score for UAE (continued)

Net promoter score - Service Hero Index 2016



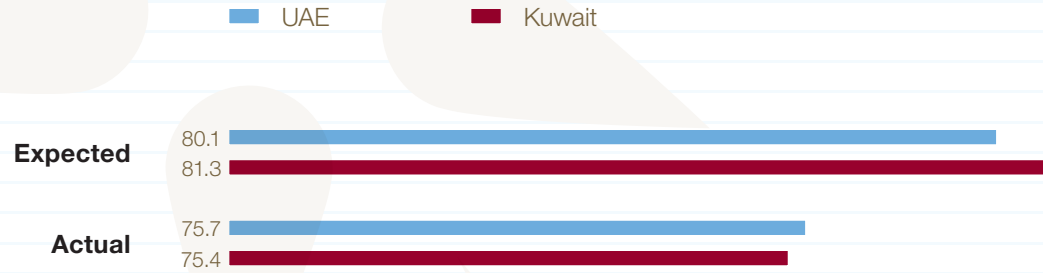
While the country average is 34%, demographic groups vary on being either Ambassadors or Detractors. The largest concentration of ambassadors seem to be all age groups except for those over 60 years old who are the only age group with an NPS lower than 30%. Males are bigger detractors than females, while Arabs are for nationalities. Those with a higher education are also brand detractors, while brand ambassadors represent the lower educated demographics.

Note: 1. NPS definition: How much more of customers promote a brand versus being detractors.
2. Promoters (score 9-10), Passives (score 7-8), and Detractors (score 1-6).



Country Comparison - UAE vs. Kuwait

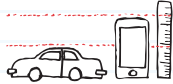
UAE with a slight edge in satisfaction



The UAE and Kuwait actual satisfaction scores are being compared for the first time. The UAE index scored 75.7 and the Kuwait index scored 75.4, giving it a marginal 0.4 difference between the countries.

The near similar satisfaction scores between UAE & Kuwait reveals that consumers may have identical needs when looking at service between the countries.

This country comparison will look into dimension, demographic, and category scores, as well as revealing which country tends to be more loyal towards brands.



Category Comparison UAE vs. Kuwait

Actual Satisfaction

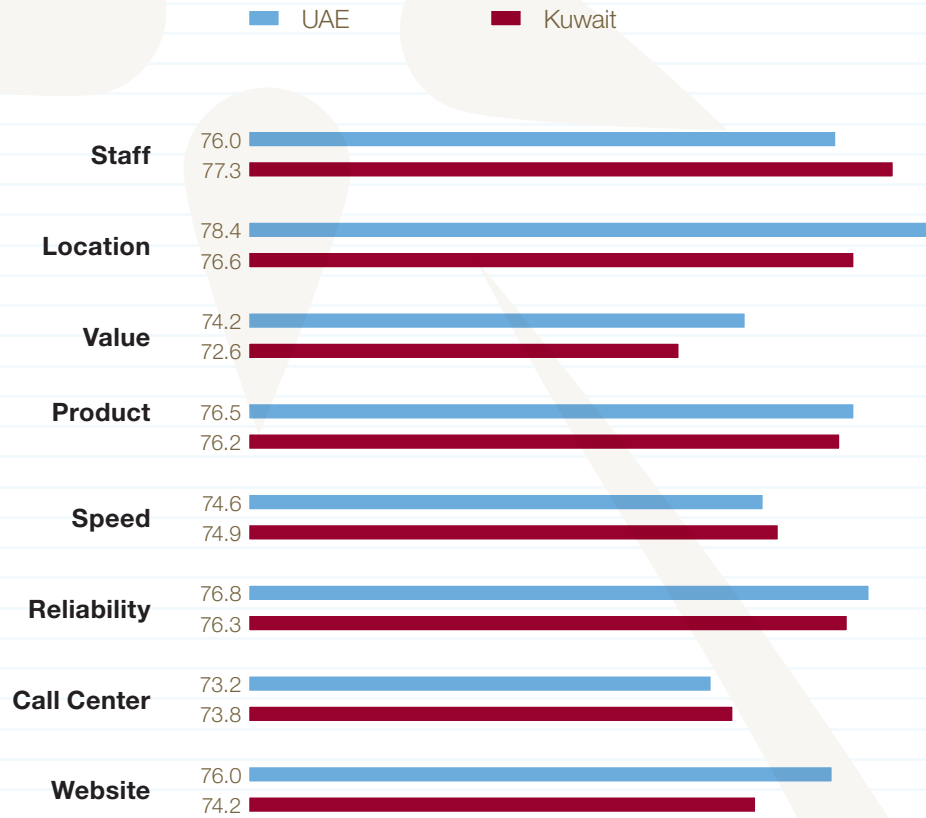
The overall satisfaction for UAE is marginally above the Kuwait average. The UAE & Kuwait Index share the top scoring category with Cafe. Both countries have Cafes as the highest category. Other notable comparisons are with Casual Dining, New Car Sales and Clothes. However, the top 3 categories in each country differ. For Kuwait, Cafes, Casual Dining, and Clothes are the 3 highest rated categories and in contrast, the UAE has Cafe, New Car Sales and Electronics as the highest rated categories. In both markets, Mobile Operators are among the lowest. Retail Banks in the UAE are lower than in Kuwait.

	UAE	Kuwait	Difference
Country Actual Index	75.7	75.4	0.4
Cafe	80.3	82.6	-2.3
Car Service	70.4	73.2	-2.8
Casual Dining	78.9	80.9	-2.0
Clothes	79.5	80.3	-0.8
Electronics	79.7	72.9	6.8
Fast Food	77.7	76.8	0.8
Fine Dining	N/A	76.3	N/A
Health Clubs	N/A	72.7	N/A
Home Furniture	79.2	79.6	-0.4
Islamic Banks	70.9	76.9	-6.0
ISPs	N/A	66.4	N/A
Mobile Operators	65.5	70.4	-4.9
New Car Sales	79.9	77.8	2.1
Private Hospitals	72.7	70.7	2.0
Regional Arab Airlines	79.2	74.9	4.4
Retail Banks	68.1	74.4	-6.2
Supermarkets	78.4	75.8	2.6

Note: The UAE Index measures 14 categories while the Kuwait Index measures 17.



Dimension Comparison - UAE vs. Kuwait



Patterns in service dimensions are similar in both markets as Location and Staff Attitude score high. Reliability is the second highest in the UAE while in Kuwait it is Staff Attitude. Lowest in the UAE is Call Center and Value for Money while in Kuwait they are the same but reversed.



Demographic Comparisons UAE vs. Kuwait

Actual Satisfaction

Demographics	UAE	Kuwait	Difference
Female	77.4	78.1	-0.69
Male	74.2	74.4	-0.18
Arabs	74.6	75.3	-0.69
Emiratis	76.1	75.1	0.97
Non Arabs	76.8	76.3	0.48
16 to 17 years	81.5	80.9	0.61
18 to 29 years	76.6	74.5	2.03
30 to 39 years	75.6	75.8	-0.20
40 to 49 years	75.5	74.8	0.74
50 to 59 years	77.8	75.6	2.25
More than 60 years	75.1	78.9	-3.79
Elementary or below	67.6	79.5	-11.91
High school	81.1	76.7	4.33
Diploma	80.0	75.9	4.19
University graduate	75.2	75.4	-0.26
Master or PHD	72.2	73.2	-1.03

Demographic comparison

Females are the most satisfied in the UAE and Kuwait while Males are least satisfied for both countries.

The age groups with the highest satisfaction in UAE and Kuwait are 16 to 17 year olds while the lowest scoring in UAE are those aged 60 or more. For Kuwait it is the 18 to 29 year olds that score the lowest.

By nationality, Non Arabs have the highest satisfaction for both countries while Arabs had the least satisfaction in UAE while Kuwaitis had the lowest in Kuwait.

With education levels, those with a higher level of education are least satisfied in Kuwait and Elementary graduates are least satisfied in the UAE. The highest satisfaction in the UAE is with Diploma graduates while in Kuwait it is Elementary graduates.

Gap

Looking at the difference, most demographics do not have a significant difference between countries. The major differences are with those aged 60 or more, and the lower Education levels.



Net Promoter Score by demographic group

	UAE	Kuwait
Demographics	34%	29%
Female	40%	37%
Male	28%	26%
Arabs	26%	29%
Emirati/Kuwaiti	34%	28%
Non Arabs	39%	35%
16 to 17 years	55%	50%
18 to 29 years	36%	27%
30 to 39 years	34%	30%
40 to 49 years	33%	29%
50 to 59 years	44%	32%
More than 60 years	18%	45%
Elementary or below	8%	41%
High school	51%	36%
Diploma	45%	32%
University graduate	31%	28%
Master or PHD	23%	18%

The NPS for UAE is higher than Kuwait, meaning UAE has more brand promoters than detractors.

The demographic groups show that those aged 16-17, Females, lower educated consumers and Non Arabs have the highest NPS score.



Category NPS UAE vs. Kuwait

Service Hero CSI Category 2016 Net Promoter Score

	UAE	Kuwait
Index	34%	29%
Café	47%	46%
Car Service	24%	22%
Casual Dining	45%	45%
Clothes	43%	47%
Electronics	46%	26%
Fast Food	38%	33%
Fine Dining	N/A	31%
Health Clubs	N/A	23%
Home Furniture	48%	43%
Islamic Banks	17%	36%
ISPs	N/A	-2%
Mobile Operators	3%	7%
New Car Sales	51%	37%
Private Hospitals	20%	16%
Regional Arab Airlines	42%	32%
Retail Banks	13%	22%
Supermarkets	39%	28%

The overall NPS score for UAE, 34%, is higher than Kuwait's, which is at 29%. This means that, overall, UAE has a higher amount of brand Ambassadors than they do Detractors. The highest NPS scores for UAE are Café, Home Furniture, and New Car Sales. The lowest are Mobile Operators, Islamic Banks, and Retail Banks. For Kuwait, the highest scoring NPS categories are Casual Dining, Cafés, and Clothes while the lowest is ISPs, Mobile Operators and Private Hospitals.

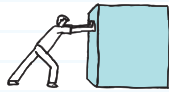


Industry comparison with other markets

In comparison with other national satisfaction indexes, notably the American ACSI (which has been running since 1996), we note that UAE is roughly at the same level as the Kuwait and US CSI. The Singapore domestic index has a lower score than all three countries being compared.

Category	UAE Service Hero CSI	Kuwait Service Hero CSI	US ACSI Index	Singapore CSI Index
Café	80.3	82.6	79.0	70.7
Car Service	70.4	73.2	82.0	73.1
Casual Dining	78.9	80.9	81.0	69.8
Clothes	79.5	80.3	79.0	71.9
Electronics	79.7	72.9	77.0	71.5
Fast Food	77.7	76.8	79.0	70.7
Fine Dining	N/A	76.3	N/A	N/A
Health Clubs	N/A	72.7	N/A	N/A
Home Furniture	79.2	79.6	N/A	71.5
Islamic Banks	70.9	76.9	80.0	71.1**
ISPs	N/A	66.4	64.0	67
Mobile Operators	65.5	70.4	71.0	69
New Car Sales	79.9	77.8	82.0	73.1
Private Hospitals	72.7	70.7	75.0	72*
Regional Arab Airlines	79.2	74.9	72.0	73.5
Retail Banks	68.1	74.4	80.0	71.1**
Supermarkets	78.4	75.8	73.0	71.5
Overall Score	75.7	75.4	75.4	70.2

Note: Some categories measured by the UAE & Kuwait Service Hero CSI cannot be directly compared to categories in the US and Singapore as they are defined and measured differently on those indexes.



Factors affecting the UAE Index

Which factors affect service excellence in the Emirates across industries?



In the 1st year of the Service Hero CSI measuring consumer satisfaction in the UAE, it has collected scores on a number of factors: the eight service dimensions in terms of expectations, satisfaction and gaps, customer demographic profiles, loyalty, industry categories, and comparisons to Kuwait. A review of the data allows us to understand which factors improve satisfaction and which impede it.

Strategic implications for UAE

Three foundations for service excellence exist: understanding customer expectations, delivering on them in a satisfactory manner, and understanding what it takes to build loyalty. No matter the industry category, all brands need to keep their eye on these three.

Expectations

Customers have high expectations as the index for the UAE is 80.1 across all industries. Expectations are highest for Product Quality and Reliability. Customers with the highest expectations of service are those aged 30-39 Females, Non Arabs, and mid-level educated consumers. The highest expectations by industries are for Airlines and New Car Sales. The lowest expectations (and therefore image or reputation) are for Mobile Operators and the Banking category (Islamic & Retail).

- **Recommendation:** Understand what customers expect from you by collecting as much information on this regularly using qualitative research as well as quantitative data such as a Customer Satisfaction Index.

Satisfaction

Because satisfaction for UAE is 75.7, the gap between customer expectations and satisfaction is -4.4, which is a significant gap. This means that anticipation of brand service is higher in the eyes of consumers in the UAE than what they get. The largest gaps by dimensions are for Call Center, Speed of Service, and Value for Money and for categories it is Mobile Operators, Retail Banks, and Car Service. Satisfaction is highest for Location, Reliability, and Product Quality and by category Cafes, New Car Sales, and Electronics seem to have been able to satisfy customers the most.

- **Recommendation:** Understand which service dimensions are most important from the perspective of the customer. Service Hero runs a correlation model to identify factors driving satisfaction and has identified that, overall, Reliability has a 26% impact on satisfaction and Product or Service Quality has a 25% impact on a national level. These drivers differ by brand and by category, so understand which ones are relevant to your customers.

Loyalty

Since the Net Promoter Score for UAE is at 34% (which means 34% of customers are promoters), some customer profiles have lower loyalty. These are namely Arabs, Masters or PHD holders, those aged over 60 years and Males. Categories that have strong loyalty are New Car Sales, Cafes, and Casual Dining. No category is in the negatives, but Mobile Operators is close with 3% NPS score.

- **Recommendation:** Train your staff on empathy and focusing on the customers' needs.
- **Recommendation:** Measure your staff satisfaction with you using an Employee Satisfaction Index as only happy staff will provide good service.



Service Hero's benefits

Service Hero taps into an unexploited market niche



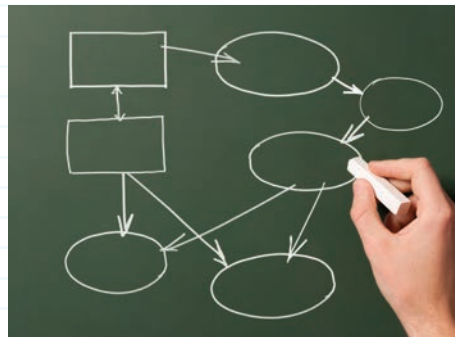
People powered

Determines market standards using the mechanism of a popular online poll by real consumers regarding the companies they deal with.



Empirical

Robust sample sizes across industry categories and sub-categories with built in checks to ensure data validity. Study across 8 dimensions for before and after assessment.



Actionable

Provides companies with an understanding of their strengths and weaknesses relative to their competitors so that action plans can be made.



Helps UAE

UAE is the second Arab nation to have a benchmark study on its service standards that can be used for analysis and trending.

4

UAE
Awards 2016



Nominees



Tim Hortons



Restaurants: Cafés

- Defined as: Informal restaurants offering a range of desserts and made-to-order sandwiches in addition to hot and cold beverages
- A total of 24 brands were evaluated

homedepot



Home furniture

- Defined as: Any store focused on the sale of durable furniture as well as decorative items
- A total of 22 brands were evaluated



Restaurant: Fast food

- Defined as: Typical fast food restaurants that offers burgers and other types of value meals
- A total of 26 brands were evaluated



Health care: Private hospitals

- Defined as: Any private health care provider offering inpatient and outpatient services
- A total of 33 brands were evaluated



Restaurant: Casual dining

- Defined as: Restaurants that serve moderately-priced food in a relaxed atmosphere where visitors can dress casually
- A total of 42 brands were evaluated

FOREVER 21

Splash



Clothes & accessories

- Defined as: Retail outlets that sell clothes excluding stores solely selling accessories and shoes
- A total of 61 brands were evaluated



Specialty Store: Electronics

- Defined as: Any stores focused on the sale of durable and nondurable electronic items
- A total of 19 brands were evaluated



Autos: New Car Sales

- Defined as: The purchase of a new car directly from an authorized car dealer
- A total of 28 brands were evaluated

Nominees



Autos: Car service

- Defined as: The service or maintenance of a car from an authorized car dealer
- A total of 28 brands were evaluated



Airlines

- Defined as: Any airline using Kuwait as its main headquarter
- A total of 19 brands were evaluated



Communications: Mobile operators

- Defined as: Any domestic company focused on offering mobile phone packages and services
- A total of 2 brands were evaluated



Financial: Islamic banks

- Defined as: Any domestic Islamic non-commercial bank
- A total of 8 brands were evaluated



Financial: Commercial banks



- Defined as: Any domestic commercial non-Islamic bank
- A total of 16 brands were evaluated



Specialty Store: Supermarkets

- Defined as: Any large self-service store retailing food, perishables and household supplies
- A total of 15 brands were evaluated

Overall UAE winner 2016

First Place



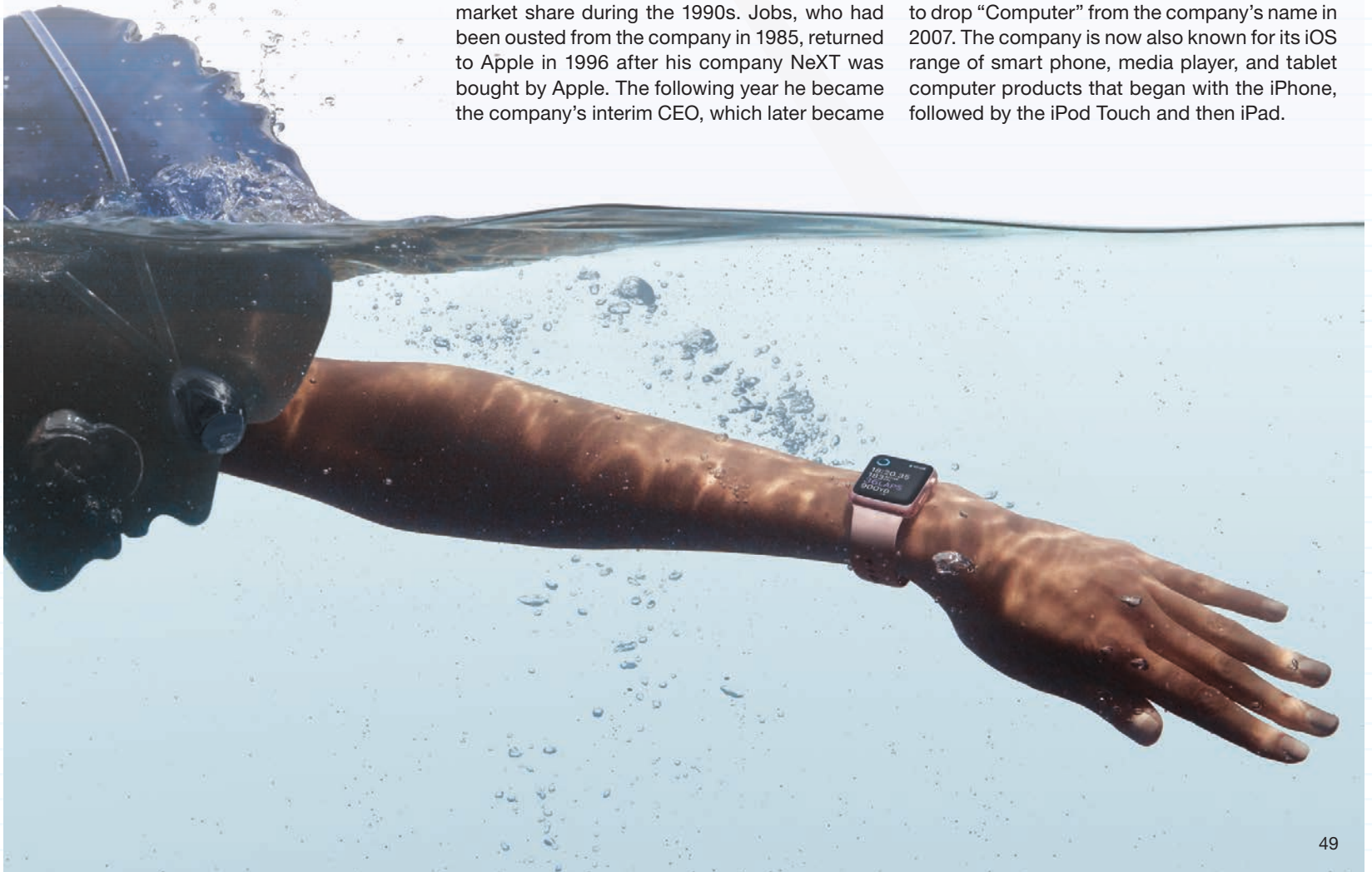
FROM THEIR WEBSITE

Founders Steve Jobs and Steve Wozniak created Apple Computer on April 1, 1976, and incorporated the company on January 3, 1977, in Cupertino, California.

For more than three decades, Apple Computer was predominantly a manufacturer of personal computers, including the Apple II, Macintosh, and Power Mac lines, but it faced rocky sales and low market share during the 1990s. Jobs, who had been ousted from the company in 1985, returned to Apple in 1996 after his company NeXT was bought by Apple. The following year he became the company's interim CEO, which later became

permanent. Jobs subsequently instilled a new corporate philosophy of recognizable products and simple design, starting with the original iMac in 1998.

With the introduction of the successful iPod music player in 2001 and iTunes Music Store in 2003, Apple established itself as a leader in the consumer electronics and media sales industries, leading it to drop "Computer" from the company's name in 2007. The company is now also known for its iOS range of smart phone, media player, and tablet computer products that began with the iPhone, followed by the iPod Touch and then iPad.



Overall UAE winner 2016

Second Place



FROM THEIR WEBSITE

Emirates, wholly owned by the government of Dubai, is an airline based at Dubai International Airport in Dubai, UAE. It is the largest airline in the Middle East, operating over 2,500 flights per week, to 122 cities in 74 countries across six continents. The airline ranks amongst the top 10 carriers worldwide in terms of revenue and passenger kilometres, and has become the largest airline in the Middle East in terms of revenue, fleet size, and passengers. In 2011 the airline was the fourth-largest airline in the world.

Emirates has built up a strong brand name as a leader in the aviation industry, particularly in terms of service excellence, its very rapid growth, coupled with consistent profitability. In 2011, It was awarded the title of “Airline of the Year” for 2011. The award has been given based on recognition of its commitment to safety and operational excellence, along with customer service trendsetters, financial condition including a 22-year consecutive annual profit.



Overall UAE winner 2016

Third Place

The
Cheesecake Factory

FROM THEIR WEBSITE

The Cheesecake Factory story begins in Detroit, Michigan in the 1940's. Evelyn Overton found a recipe in the local newspaper that would inspire her "Original" Cheesecake. Everyone loved her recipe so much that she decided to open a small Cheesecake shop, but she eventually gave up her dream of owning her own business in order to raise her two small children, David and Renee. She moved her baking equipment to a kitchen in her basement and continued to supply cakes to several of the best restaurants in town while raising her family.

In 1972, with their children grown, Evelyn and her husband Oscar decided to pack up all of their belongings and move to Los Angeles to make

one last attempt at owning their own business. With the last of their savings, they opened The Cheesecake Factory Bakery and began selling Evelyn's cheesecakes to restaurants throughout Los Angeles. Through hard work and determination their business grew to a modest size and Evelyn was soon baking more than 20 varieties of cheesecakes and other desserts.

With great foresight and intuition, their son David decided to open a restaurant to showcase his mother's selection of cheesecakes. Somehow he just knew that guests would enjoy a restaurant with an extensive dessert menu. It was 1978 and he opened the first The Cheesecake Factory restaurant in Beverly Hills, CA.



Category Winners 2016



Restaurants: Cafés
Starbucks



Restaurants: Casual dining
The Cheesecake Factory



Restaurants: Fast Food
Subway



Clothes & accessories
Debenhams



Home furniture
IKEA



Autos: New Car Sales
Honda



Specialty Store: Electronics
Apple



Healthcare: Private hospitals
Burjeel Hospital

Category Winners 2016



Communications: Mobile operators
Du



Specialty: Supermarkets
Union Coop



Autos: Car service
Honda



Financial: Retail banks
Abu Dhabi Commercial Bank



Airlines
Emirates



Financial: Islamic banks
Emirates Islamic Bank

Before visit

Your expectations before your visit

☹️

1 2 3 4 5 6 7 8 **9** 10 N/A

1 2 3 4 5 6 7 **8** 9 10 N/A

1 2 3 4 **5** 6 7 8 9 10 N/A

1 2 3 **4** 5 6 7 8 9 10 N/A

4 5 **6** 7 8 9 10 N/A

4 5 6 **7** 8 9 10 N/A

4 5 6 7 8 9 10 N/A

1 2 3 4 5 6 7 **8** 9 10 N/A

1 **2** 3 4 5 6 7 8 9 10 N/A

5
Methodology

Rate brand

How would you rate

☹️

Staff attitude, knowledge & competence 1 2 **3** 4 5 6

Location convenience, parking, operating hours & attractiveness 1 2 3 **4** 5 6

Value for money of the product/service 1 **2** 3 4 5

Product/service quality 1 2 3 4

Service speed 1 2 3 4

Reliability & accuracy of the product/service 1 2 3

Their call center **1** 2

Their website 1 2

Your overall satisfaction with the company or brand 1

Likelihood of recommending this brand to family or friends

How did the product/service compare with your ideal offering

What would it take for this brand to improve its service?



Overview

High-level overview of the Service Hero index approach.

Methodology

Service Hero is an online survey where respondents voted directly on www.servicehero.com regarding the quality of service they receive in private sector companies in UAE. The survey was live January 1 - December 31st 2016.

Sample

The index aimed to collect a total sample of 10,000 valid votes for UAE distributed over 14 category industries included in the assessment. Each category had a quota of 350 votes. The confidence level is 95% with an $\pm 2\%$ error margin.

Rating assessment

Respondents rated each company on a scale of 1-10 where ten is the highest score. Eight uniform assessment questions were asked covering the key service dimensions. However for 4 industries: Cafe, Supermarkets, and Clothes Clubs assessment for Call center and Website were excluded. Respondents were also asked if they would recommend a brand to a friend or relative, how a brand compares to an ideal, what the overall satisfaction is and if there are any other comments they would like to provide.

Security

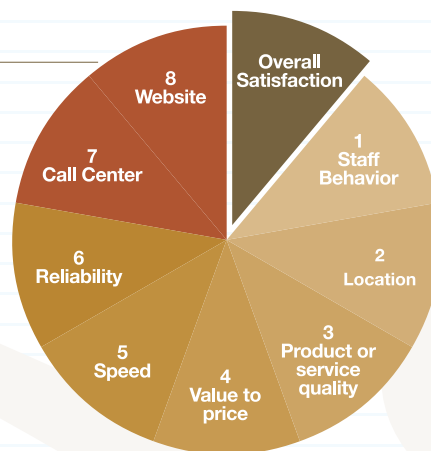
A number of security measures were deployed of either technical nature to verify the authenticity of the voter, or later, at the data cleansing stage, to remove any suspicious data.

Rigor

We follow the research protocols of the American Customer Satisfaction Index as well as ESOMAR (European Society for Opinion and Market Research) to ensure adherence to international market research standards.

The overall assessment of a service provider is based on these 8 dimensions

Note: 11 categories assess all 8 service dimensions, while 3 categories assess 6 service dimensions.





Service Hero Partners with the ACSI

The gold standard in national customer satisfaction measurement

In 2013, Service Hero partnered with the American Customer Satisfaction Index (ACSI), granting Kuwait's only annual customer satisfaction index worldwide recognition and expanding its presence through this strategic affiliation. The ACSI is the only national cross-industry benchmark of customer satisfaction that represents the U.S. economy. It also runs an index in 18 countries, namely across the South American, European and Asian continents.

The partnership stands as testament to the quality service presented by Service Hero to participating companies and consumers, and reinforces the value of it. The affiliation allows Service Hero to apply ACSI's global benchmark system that allows companies a comparison to other similar brands in different markets around the world, hence; increasing the benefits of this exercise to participating companies. Also under the affiliation, all scores that are produced by Service Hero adhere to and are validated by the American Satisfaction Index. Below: to international market research standards.



The questionnaire

What respondents actually voted on.

Note The Call center and Website dimension questions were asked only for the Aviation, Mobile Operator, ISP, Conventional and Islamic bank service categories.

Before Your expectations before your visit	How would you rate	After Your expectations after your visit
1 2 3 4 5 6 7 8 9 10 NA	Staff attitude, knowledge and competence	1 2 3 4 5 6 7 8 9 10 NA
1 2 3 4 5 6 7 8 9 10 NA	Location attractiveness and convenience	1 2 3 4 5 6 7 8 9 10 NA
1 2 3 4 5 6 7 8 9 10 NA	Value for money (price compared to quality) of the product or service	1 2 3 4 5 6 7 8 9 10 NA
1 2 3 4 5 6 7 8 9 10 NA	Product or service quality	1 2 3 4 5 6 7 8 9 10 NA
1 2 3 4 5 6 7 8 9 10 NA	Service speed	1 2 3 4 5 6 7 8 9 10 NA
1 2 3 4 5 6 7 8 9 10 NA	Reliability and accuracy of the product or service	1 2 3 4 5 6 7 8 9 10 NA
1 2 3 4 5 6 7 8 9 10 NA	Their call center	1 2 3 4 5 6 7 8 9 10 NA
1 2 3 4 5 6 7 8 9 10 NA	Their website	1 2 3 4 5 6 7 8 9 10 NA
1 2 3 4 5 6 7 8 9 10 NA	Your overall satisfaction with the company or brand	1 2 3 4 5 6 7 8 9 10 NA
Likelihood of recommending this company to family or friends 1 2 3 4 5 6 7 8 9 10 NA		
How well did the service compare with your ideal offering 1 2 3 4 5 6 7 8 9 10 NA		
Do you have any comments or suggestions?		

Respondents voted on 2 levels:

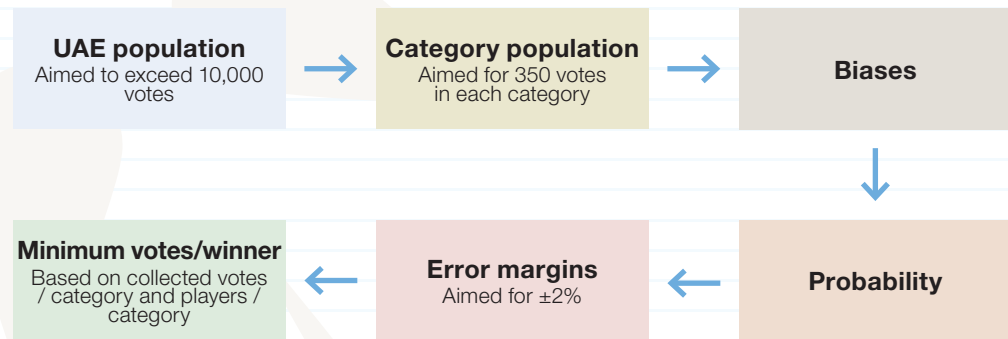
1. What they expected **before** receiving the service
2. What they actually experienced **after** being served

Note: Respondents were also given the opportunity to provide any comments that they wanted to share.



Sampling approach

Critical factors for a robust category sample and minimum vote requirements by industry category.



To ensure that Service Hero enjoys statistical integrity, a few statistical elements were examined to determine sample size and accuracy levels.

Category population.

The population of individuals which is eligible to vote in the UAE is **3,367,000**.

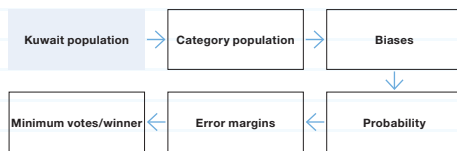
This figures **includes**:

- Males and females
- Emirati and non-Emirati nationalities

It **excludes** (around 4,897,000 individuals):

- Anyone under 16 years
- Laborers

Note: These figures are based off of our estimates from official government figures.





Sampling approach (continued)

Minimum sample sizes and error margins for all categories.

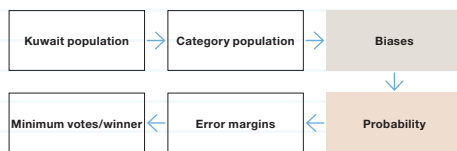
Confidence level: 95%

Sector	Sample @ 5%	Total Votes
Airlines	350	2,500
New Car Sales	350	458
Car Service	350	348
Clothing	350	1,024
Mobile Operator	350	1,730
Café	350	589
Fast Food	350	1,136
Casual Dining	350	1,342
Electronics	350	1,136
Commercial banks	350	934
Islamic banks	350	673
Furniture	350	1,454
Private Hospital	350	909
Supermarkets	350	3,237

This table shows the 14 categories included in the 2016 index. It shows:

- Minimum sample needed for an error margin at a 95% confidence level
- Total votes obtained

The roles that bias and probability play on the sample.



1. Probability of choice is:

- Based on the total population of consumers per category as well as the number of brands in a category
- An example is the clothes category where around 80 brands were evaluated and the probability of choice is 2%, while in the mobile sector only three competitors exist, which means each one has a 33% chance of obtaining votes from the total category sample

2. Voting bias:

- Refers to the likelihood of obtaining positive votes for a brand because the respondents who chose to participate in the survey are the types of individuals who want to praise a brand
- Because they may be affected by the term “service hero”, voting bias may have taken place

Note: A review of both these factors was made. The **probability of choice** factor has been accounted for. Moreover, the **voting bias** review found some statistically significant bias that was identified and removed in the data cleansing stage.

The 8 categories included in the Service Hero assessment.

- The survey covered only commercial or private non-government institutions
- Each category can be further broken down into sub categories



Regional Arab Airlines



Automotive: Sales + Service



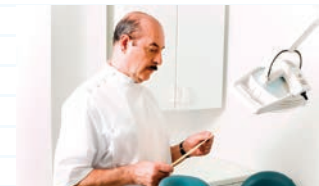
Banks: Conventional + Islamic



Communications: Mobile



Restaurants: Café + Fast food
Casual dining

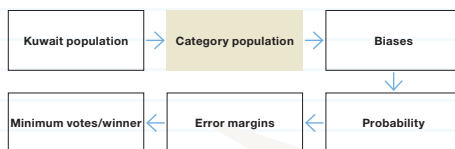


Health care: Private Hospitals



Specialty Stores: Electronics
Supermarkets + Furniture + Clothes

Category population.

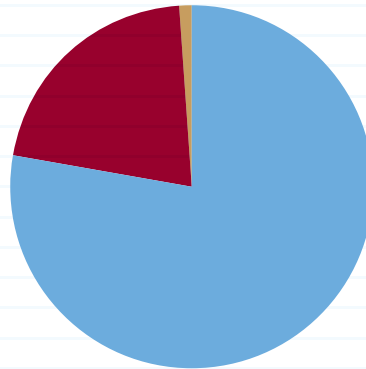


1. To ensure statistical relevance, we looked at the **category population** – this is the proportion of UAE's total population that is most likely to be a user of the category
2. For example – to compute the size of the Mobile Operator market, the assumption made is that 90% of the UAE population is a mobile phone user
3. For some categories the **% user population** was smaller e.g. for Car Service, the assumption made is that 50% of the market may use/visit them
4. A second factor to look at in determining the category population size is looking at **population bias**, because:
 - Service Hero is not a random sample (people were not randomly contacted for feedback)
 - This means of the total population of UAE, only X% will actually be inclined to vote
 - We have assumed 5% for UAE overall is the population bias - in other words, this is the percent of UAE's population who will be inclined to vote online



Source of votes and platforms used to vote from

Since the Service Hero CSI is fully online, we deploy a digital promotion plan. Digital advertising on leading news, search engines, and social media sites, comprised the bulk of our advertising. A selection of private companies also encouraged their customers to vote for them. Thus, consumers could directly search for the name 'service hero' to reach our voting engine, or click on an online banner, or click on a company banner.



SH Source	77%
Direct Traffic	21%
Private Co.	1%



Security measures and rules for valid votes

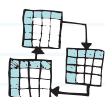
To ensure that each visitor is a legitimate customer, a number of security measures have been put in place.

Servicehero.com security measures

- Implements 256-bit SSL encryption on all pages of the website
- Uses a high performance firewall
- Utilizes advanced data integrity procedures at the database level for the highest security and reliability

Data review measures

- All voters are asked to submit a correct email upon registration
- No votes were tabulated unless this email address is authenticated by the user via an automated trigger
- No single user can vote for the same company more than once
- IP address monitoring which statistically measures incoming connections against usage anomalies was made
- All eligible voters were requested to enter a UAE mobile number to provide an additional layer for validating user identification



Rules applied to ensure data integrity

In the planning stages of the survey, a number of rules had been set to ensure the highest vote accuracy. These were implemented resulting in the removal 4,709 votes. Other investigations were also conducted that did not result in the removal of any votes as seen in the table. The final vote count used in the analysis is **18,510** votes.

Our rules that have been implemented (Automated & Manual)	Votes removed
1 Respondent did not confirm his/her email	yes
2 Respondent less than 16 years	yes
3 Respondent unable to vote more than once for the same brand	yes
4 Respondent with the same mobile number but different email and voted twice for the same brand	yes
Total votes removed	3,717
Data Cleansing (Automated & Manual)	Votes removed
1 Remove votes that are NA across all dimensions in the after evaluation	yes
2 Remove votes that are only made for before assessment and NA votes for after evaluation	yes
3 Respondent voted for brands that should not be in the assessment	yes
4 Votes exhibited suspicious behavior patterns which raised alarms regarding the authenticity of the assessment.	yes
Total votes removed	(4,709)
Total votes obtained	23,219
Total votes assessed	18,510



Advisory Council members

The Advisory Council is comprised of **academic and independent members** whom are selected on the basis of being **neutral, respected** in their industry and the market, and having **no commercial interests in the findings**.

The Advisory Council helps oversee the findings to ensure adherence to procedures, and that the findings are fair and empirical. They also play an advisory role with the ability to suggest improvements in our approach. Advisory Council members were asked to vote on major decisions regarding sampling methods used.

Independent Advisors



Dr. Forrest V. Morgeson

Director of Research at the American Customer Satisfaction Index (ACSI)

Forrest V. Morgeson III (Ph.D., University of Pittsburgh) is Director of Research at the American Customer Satisfaction Index (ACSI) in Ann Arbor, Michigan. As Director of Research, Dr. Morgeson is responsible for managing ACSI's academic research, statistical analysis, and its international licensing program (Global CSITM).

Dr. Morgeson's research focuses on citizen satisfaction with:

- government services
- cross-national citizen
- consumer satisfaction
- financial impact of customer satisfaction in the private sector.

His research has been published in the leading journals in both administration and marketing, including Public Administration Review, Journal of Public Administration Research & Theory, International Review of Administrative Sciences, Electronic Government, Journal of Marketing, Marketing Science, Journal of the Academy of Marketing Science, and the International Journal of Research in Marketing. Dr. Morgeson's first book, *Citizen Satisfaction: Improving Government Performance, Efficiency, and Citizen Trust* (Palgrave Macmillan), is scheduled for publication in May of 2014. In addition, over the past decade Dr. Morgeson has consulted with dozens of government agencies and corporations on citizen and consumer satisfaction, and has delivered lectures and presentations in dozens of countries around the world.

Dr. Reinhold Leichtfuss

Senior Partner and Managing Director, Boston Consulting Group



Dr. Leichtfuss possesses 24 years of experience in consulting financial services companies in all areas of expertise.

Dr. Leichtfuss has carried out numerous projects in the following:

- Corporate strategy; leadership organization and controlling
- Marketing and sales including market positioning, development of value propositions based on customer insights and customer feedback
- Distribution-channel design for single channels
- Process optimization in many product areas and businesses as well as cost reduction in sales and back office and corporate center functions
- Risk management in both market and credit risk
- Capital markets, investment banking and asset management strategies, performance improvements in sales and cost positions
- Regional expansion strategies and post merger programs
- Insurance multichannel management, campaign management, MIS, regional strategies, processes

Having worked in the Middle East since 2002, Dr. Leichtfuss has developed numerous concepts and is the lead author and editor of “Achieving Excellence in Retail Banking” as well as the BCG report “The Future of Retail Banking”.

Dr. Raed Safadi

Chief Economic Adviser at Dubai’s Department of Economic Development



Raed Safadi is the Chief Economic Adviser at Dubai’s Department of Economic Development where he leads a team of experts entrusted with the implementation of Dubai’s Strategic Plan 2021, and promoting the diversification and sustainable growth of Dubai’s economy.

Dr. Raed is a leading expert on development economics and has extensive experience advising governments on economic policy and management. He has published an extensive array of books and articles covering such areas as economic development, regional trading arrangements and the world trading system, tariffs and non-tariff barriers, special and differential treatment, trade and environment, services trade, and global value chains. His most recent publication “Inclusive Global Value Chains” focuses on making GVCs more inclusive by overcoming participation constraints for SMEs and facilitating access for low income developing countries. Dr. Raed has previously worked for the OECD, World Bank, ESCWA.



Advisory Council members (continued)

Academic Advisors



Dr. Mouawiya Al Awad

Director of the Institute of Social & Economic Research

Dr. Al Awad has a Ph D in Economic and Master in Statistics from North Carolina State University. His publications and research interests focus on economic development, socioeconomic aspects of developments, macroeconomics, international finance, labor economics applied econometrics and statistics.

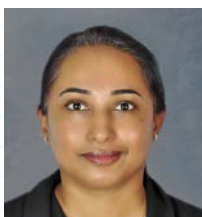
Dr. Mouawiya Al Awad currently serves as the Director of the Institute of Social & Economic Research (ISER) at Zayed University in Dubai. Previously he was:

- Economic Advisor at Dubai Economic Council
- Director of the Centre for Labor Market Research and Information at the National Human Resource Development & Employment Authority (Tanmia)
- Professor of economics and international finance at the American University of Technology (Lebanon) and the UAE University (UAE)

Dr. Al Awad has an extensive research experience in UAE and Gulf economies on macroeconomic and sectors levels as well as on related issues such as population, education, human development.

Dr. Shilpa Iyanna

Assistant Professor of Marketing CBA, Abu Dhabi University



Dr. Shilpa Iyanna is working as an Assistant Professor of Marketing at the College of Business Administration, Abu Dhabi University, United Arab Emirates. She has more than 16 years of research and teaching experience and was the Head of the Business Department prior to starting her PhD. Shilpa earned her PhD in Marketing from Nottingham University Business School, University of Nottingham, UK. Her research has been published in many international journals and conferences.

Her research interests are in the area of customer behaviour that interconnects with various other streams of research mainly:

- Customer value
- Value co-creation
- Consumer attitude and behaviour
- Consumer satisfaction and consumer goal

Shilpa is the recipient of several academic awards including the highly competitive Nottingham University Business School PhD Scholarship. She was recently the guest-editor for the “Renewable & Sustainable Energy Reviews - Special Issue on Sustainable Production and Consumption in the UAE”. She is also reviewer for several international journals and conferences.

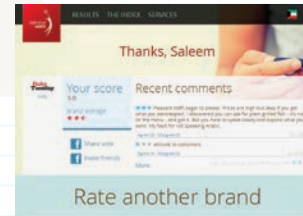


Process overview of the key survey steps

Shown here are the key 12 high-level steps followed prior to publically announcing the results.



1. Web banner / Social media promoting Service Hero



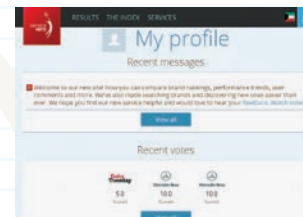
5. Respondent votes for other companies



9. Results in permanent database once confirmed



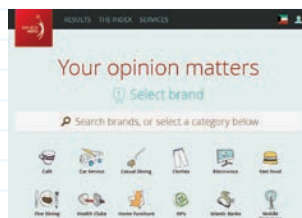
2. Directs to servicehero.com, Mobile App or facebook.com



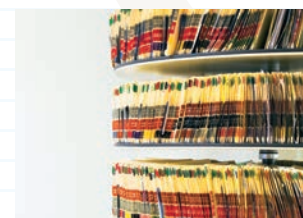
6. Respondent submits vote with personal data



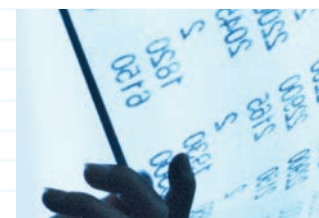
10. Data cleansing & verification procedures after close of votes



3. Respondent chooses category & brand



7. Responses stored in temporary database



11. High-level results shared with Advisory Council



4. Respondent votes for first company



8. Email sent to respondent to confirm identity



12. Service Hero winners announced publicly



Glossary of terms used

Term	Definition
Expectation Index	The score of the votes consumers made on their service expectation on the various service dimensions before they dealt with the brand being evaluated.
Actual Index	The score of the votes consumers made on their service assessment on the various service dimensions after they dealt with the brand being evaluated.
Positive Gap	Actual satisfaction after consumers experienced a brand was higher than their Expectation before they dealt with it.
Negative Gap	Actual satisfaction after consumers experienced or dealt with a brand was lower than their Expectation before they dealt with it.
Net Promoter Score	The proportion of consumers promoting a brand (giving scores 9 and 10) minus the proportion of consumers detracting a brand (scores of 1-6) shown as a percent.



Thank you!

Powered by



Member of



In partnership with the American Customer Satisfaction Index

6

About Khayal
Consultants



خيال للاستشارات
Khayal Consultants

A note about Khayal Consultants

Khayal Consultants was awarded Exclusive Licensee for Service Hero WLL due to its unique ability to deliver core competencies needed for the successful execution of Service Hero.

Khayal was responsible for:

Branding

Logo design and standards manual

Advertising

Campaign in traditional media (print and audio visual media)

Digital marketing

Campaign management and tracking

Social media

Communication on social networks

SEO

Search engine optimization

Website

Design, hosting and maintenance

Online survey engine

Questionnaire platform, security measures, tracking and reporting of results

Who is Khayal?

Khayal is a boutique firm specializing in distinct marketing communication fields to help companies maximize effectiveness. It provides complete corporate communication solutions of high quality and creativity.

Experience

Kuwaiti management - Established in 1996

Variety of Backgrounds

Retail, packaging, marketing, banking, design, and software development and integration

Dedication

Teams of committed professionals



Print

Annual Reports
Corporate Brochures
Marketing Collateral
Newsletters
Calendars
Greetings & Occasions
Articles & Guides

Branding

Logo Development
Usage Manuals
Stationary Design

Motion

Motion Graphics
Interactive

Websites & Portals

Design & Animation
Development

Consulting

Strategy & Planning
Benchmarking
Traffic & Performance
Analysis
Retail Analytics

Mobile Engagement

Mobile Optimized Websites
Mobile Apps

e-Marketing Services

SEO & SEM
Online Advertising
Digital Signage

Social Media

Development
Monitoring & Managing

Solutions & Support

Content Management
Hosting & Monitoring
Maintenance & Support

Consulting

Strategy Review
Business Model Review
Value Chain
Image / Brand Audit

Research

Focus Groups
In-Depth Interviews
Online Surveys
Phone Surveys
Mystery Shopping

Manpower Development

Service Quality ABC Training
Employee Morale

A selection of some of Khayal's clients



Prime Minister Diwan



بنك الكويت المركزي
Central Bank of Kuwait



KUFPEC
Kuwait Foreign Petroleum Exploration Co. K.S.C.
A Subsidiary of Kuwait Petroleum Corporation



NATIONAL
INVESTMENTS
COMPANY



مؤسسة الخليج للاستثمار
Gulf Investment Corporation



مصانع ايلام
alam STEEL



الأوسط
bkme



hayat
communications



مستشفى المواصلات الجديد
NEW MOWASAT HOSPITAL



مركز سلطان
THE SULTAN CENTER



بنك الخليج
GULF BANK



كيبكو
KIPCO
شركة مشاريع الكويت (القابضة)
Kuwait Projects Company (Holding)



IPE
A'Takamul



بنك بروجان
BURGAN BANK



ميسان
meysan
partners



الإمتياز
الإمتياز للاستثمار
ALIMTIAZ INVESTMENT



ASIYA
INVESTMENTS



ALARGAN
مركز خدمة العملاء
ALARGAN INTERNATIONAL REAL ESTATE CO.



أريف
AREF



A selection of some of Khayal's clients (continued)

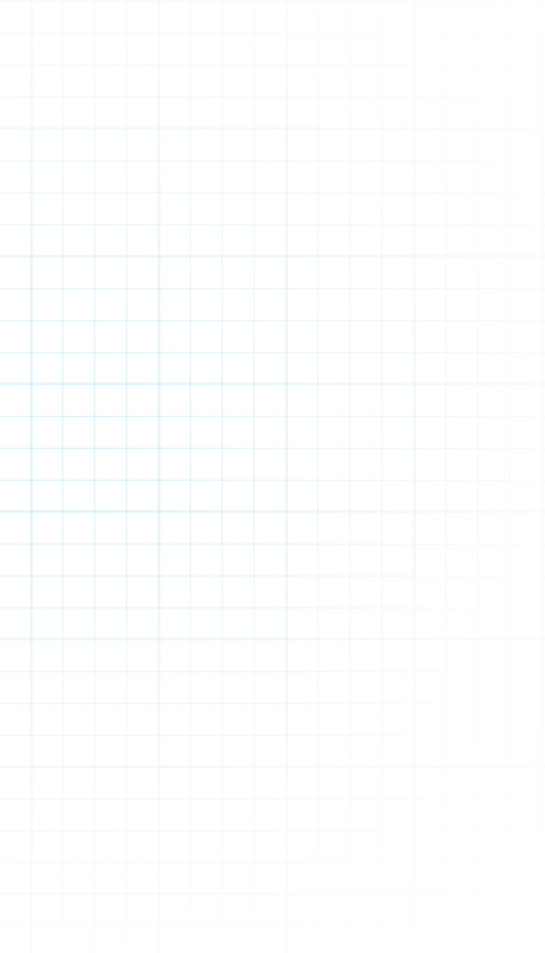


Disclaimer

Please note that the views and opinions expressed herein are solely those of the author(s)/Public Survey and do not necessarily reflect those of the company.

While Service Hero adheres to internationally recognized standard market research protocols, and has selected sample sizes to ensure accuracy, results may include a slight margin of error as is common in any sampling techniques. Therefore no warranties or assurances are made in relation to the utmost accuracy or comprehensiveness and content of this report and attachments.

Service Hero Co. wLL and all related and affiliated persons and entities accept no liability for any damage caused by direct or indirect use or misuse by or contained in this report and attachments. No liability is accepted for any consequences arising out of or emanating from this report and any express or implied content therein.



Powered by



Academic Advisors



Member of



In partnership with the American Customer Satisfaction Index

P.O. Box 4981 Safat, 13050 Kuwait
Tel: +965 2244 1646, Fax: +965 2244 5562
info@servicehero.com

servicehero.com