Service Dimensions
Airlines
Automotive: Car Service
Automotive: New Car Sales
Clothes & Accessories: Clothes
Communication: Mobile Operators
Communication: ISPs
Financial: Retail Banks
Financial: Islamic Banks
Furniture: Speciality
Healthcare: Hospitals
Hypermarkets
Restaurants: Casual Dining
Restaurants: Fast Food
Restaurants: Fine Dining
Specialty Stores: Electronics

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 Digital index
9 Loyalty index
10 Complaints Resolution

service Hero

UAE RESULTS

The voice of the consumer

2020

Credibility.
Integrity.
Relevance.

service
Hero

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

Our Services

Understand

STARTUPS:
- ✓ CSI dashboard subscription
- ✓ Mystery shopping
- ✓ In-depth interviews
- ✓ Culture of Excellence Index
- ✓ Executive in-depth interviews
- ✓ Focus groups
- ✓ Team focus groups
- ✓ Social media tracking
- ✓ Team Engagement Index

Strategize

ESTABLISHED:
'STARTUPS' SERVICES
PLUS:
- ✓ Customer journey map
- ✓ Service level target
- ✓ Trinity of excellence workshop
- ✓ Team engagement program
- ✓ Eliminate, Reduce, Raise, Create grid
- ✓ Strategy map
- ✓ Service slogan
- ✓ Value Chain assessment

Build

CORPORATE:
'ESTABLISHED' SERVICES
PLUS:
- ✓ Vision, mission & values
- ✓ Training
- ✓ Ideation platform
- ✓ Service standards
- ✓ Internal communication
- ✓ Innovation programs
- ✓ Training
- ✓ Staff rewards

Recalibrate

ESTABLISHED:
'CORPORATE' SERVICES
PLUS:
- ✓ Mystery shopping
- ✓ Customer promise by segment
- ✓ Focus groups
- ✓ Annual CEI
- ✓ Standards audits

Index

Word from the president

Last year was extraordinary. As the world came to a stop, we went through a collective experience which taught us a lot about ourselves as people, as companies, as well as governments.

For people, they may have felt fear, anxiety, being confined and often alone. It forced us learn how to shop online in a way that was unprecedented and delivery of everything became commonplace.

Brands faced an existential crisis: will we be able to survive and how will the future affect our operations? How do we deal with our teams in lockdown, and in-store service with social distancing rules? Can we transform our systems to e-commerce or virtual service offerings?

For us at Service Hero, the crisis made us more agile. We introduced assessments for 50 coops overnight in the supermarket category as they became critical for our daily needs. We added questions for rating satisfaction with delivery services and apps as brands transitioned to e-commerce. Finally, we launched a new category to rate Delivery Apps which is one of our most popular destinations.

We also tracked how people in Kuwait assessed the national response to Covid-19 in a survey we ran between June through September. Nearly 5000 respondents told us in two waves that their top concerns were healthcare and finances and that satisfaction dropped from June to August from 66 to 62 points out of 100. The hope was that the data would be used to improve the situation for us all.

That is our hope with the Customer Satisfaction Index. In this remarkable year, our results are based on 20,800 validated assessments in Kuwait and 8,200 in the UAE. Kuwait saw a significant 6% drop in satisfaction now at 70.6 on a 100-point scale since last year. To put this into KD value, the service sectors listed in our index represent KD 3.2 billion of GDP. Can you imagine the toll it takes on a country or company when spending shrinks? In the UAE, satisfaction increased between by 1% and is now 77.7. This raises the questions on how economic policy and regulation can spur performance.

How people interact with brands shifted. We saw a -19% drop in store visits in both Kuwait and the UAE. Online services grew +93% in the UAE and +40% in Kuwait. Online service now comprises 35% and 27% of interactions in Kuwait and the UAE. For some categories, more than 60% of their transactions are on an app such as banks, ISPs, telecoms, and delivery apps.

Across the 11 key dimensions, Reliability maintained its impact on overall satisfaction at 32%. But for the first time, digital service is significant with a 25% impact in overall satisfaction. Both factors together suggest that brands can no longer afford not having robust digital platforms with reliable delivery as branches increasingly shrink in importance and volume.

We've noted that the more companies address service holistically, the more they can become heroes to their customers with scores in the high 80's and possibly the 90's. Only 5% of brands have consistently scored in the high 80's over the past 11 years. Our data also suggests the more volatility in scores the lower overall satisfaction is on a 100-point scale. Brands that are consistent tend to score highest.

Looking forward, we are excited about a few things. We simplified our survey to ensure our users have a better experience. We added links to brands' pages on servicehero.com so customers can go straight to interact with a brand based on seeing its star rating and reviews. And we launched our 20 Key CSI Metrics Dashboard subscription to allow companies instant access to data which allows them to connect the dots between customer satisfaction and performance.

Customer satisfaction matters more in times of crisis than in times of plenty when brands face a shrinking pie from lower consumer consumption. During a crisis, people are more likely to stay loyal to brands with good service. The challenge for brands is being service centric during COVID-19 and beyond.
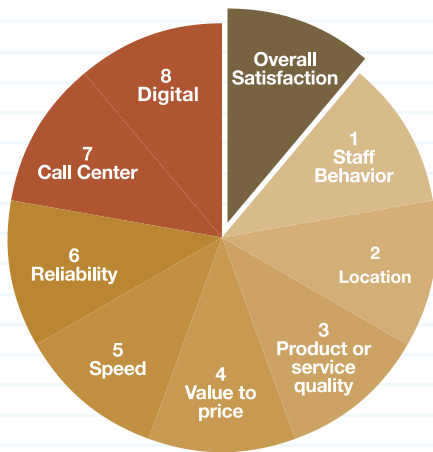
Faten Abu Ghazaleh
President

1
Executive
summary

Note: 14 categories assessed all 8 service dimensions, while 3 categories assessed 6 service dimensions.

Methodology
Service Hero is predominantly an online survey where respondents vote directly on www. servicehero.com from January 1st - December 31st 2020. Consumers are aware of the survey via online ad banners, phone calls and email shots. We adhere to the research protocols of ESOMAR. We report scores and findings on a 100 point scale. Our reporting uses the single question, "your overall satisfaction" as the basis for the index instead of using an equally weighted average.

Rating assessment
Respondents rate each industry on a scale of 1-10 where 10 is the best and 1 is the worst score on 8 service dimensions. Respondents also assess their satisfaction and complaint resolution. All questions asked are on an Actual satisfaction basis.

Security
A number of security measures are deployed to verify the authenticity of the voter and monitor suspicious data to ensure data integrity.

Sample
A total sample size of 12,466 assessments were cleaned to arrive at the final 8,224 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
UAE scored 77.0 on Expectation (before dealing with a brand) and a 77.7 for Actual Satisfaction (after dealing with it). Actual Satisfaction is higher by 0.7, this means consumers received higher satisfaction than they expected. The highest service dimensions are Location (80.4), Product (79.9), and Staff (79.3), while the lowest are for Value (73.8), Call Center (76.5), and Digital (77.3).

Demographics
Non Arabs, Females, consumers aged 50-59, and customers with a low education level have the highest satisfaction while Arabs, Males, Customers with a high education and those aged 60+ have the lowest satisfaction scores.

Loyalty and NPS
UAE scored 78.9 on the likelihood of recommending a brand (Loyalty). Females, Non Arabs, customers aged 50-59, 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 scores 37%, with Non Arabs, Females, those aged 50-59, and customers with a lower eduction the most loyal.

Categories
Of the 15 categories assessed, 8 of them exceeded the UAE Index score. These were mostly with Restaurants, Home Furniture, Electronics, and Clothes. The lowest scoring categories are Mobile Operators and Islamic and Retail Banks.

Interaction and visit frequency
Based on where consumers interacted with the brand (Over the phone, Online, App, and In Store), consumers who interacted through Applications had the highest satisfaction (79.6), while interaction over the phone scored lowest (74.8).

We found that weekly interactions scored highest (79.6) and annually scored the lowest (71.7). This suggests that consumers visit the brands they are satisfied with more than those that do not satisfy them, which they visit less frequently.

Changes since last year
UAE increased slightly by 1.0 points or 1.3% since last year.

Most dimensions increased in satisfaction from the previous year with Digital the only dimension to not increase since 2019.

In the industry category, Car Service and Hospitals increased in satisfaction from last year, while Islamic Banks, Electronics, and Casual Dining declined the most.

Comparison to Kuwait, US, & Singapore
The US Index scored 74.4 for their national index, putting them below the UAE index. UAE scored 77.7, higher than the Kuwait Index by a significant 7.1 points.

The Singapore CSI stands at 74.3, lower than the UAE Index.

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 11 dimensions for assessment to compare to the service benchmark.
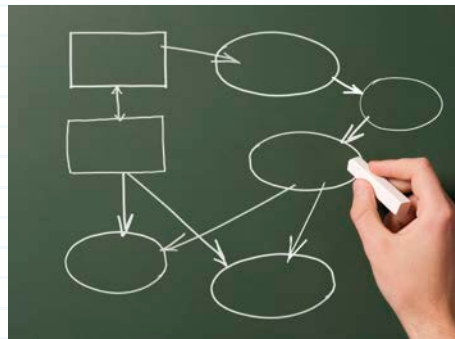
Actionable

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

Helps UAE

The objective service benchmark for across categories and time helps drive brand performance which fuels the economy.
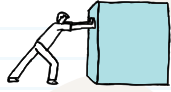
Factors affecting the UAE Index
Which factors affect service excellence in Emirates across industries?
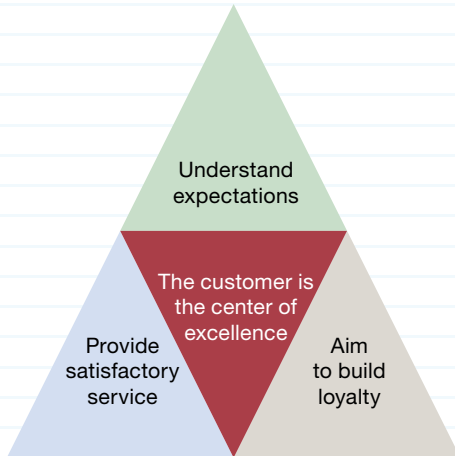
The Service Hero CSI measures satisfaction by collecting scores on a number of factors: the eight service dimensions in terms of expectations, satisfaction and gaps, customer demographic profiles, loyalty, industry categories, and changes over time. A review of the data allows us to understand which factors improve satisfaction and which impede it.

Strategic implications for UAE

Three foundations for service excellence exist: understanding customer exceptions, 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 lower expectations for services as the index for UAE is 77.0 across all industries. The highest expectations of service amongst demographics are lower educated, those aged 18-29, Females, and Non Arabs. The highest expectations by industry are for Casual Dining, Home Furniture, and Clothes. The lowest expectations (and therefore image or reputation) are for Mobile Operators and Islamic and Retail Banks.
- **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 in UAE is 77.7, the gap between customer expectations and satisfaction is 0.7, which is not significant. Despite a pandemic, scores increased since last year.
- **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, Product has a 16% impact on satisfaction and Value has 12% 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 37% (which means 37% of customers are promoters), most customer profiles have high loyalty. These are namely Arabs, Males, and those with a high education. Categories that have strong loyalty are Airlines, Electronics, and Clothes. The ones with the lowest (negative) NPS are Mobile Operators and Retail and Islamic Banks, which means a significant number of their consumers are detractors rather than promoters.
- **Recommendation:** Train your staff on empathy and focusing on the customers' needs.
- **Recommendation:** Measure your staff satisfaction using an Employee Satisfaction Index as only happy staff will provide good service.

Understand expectations

Provide satisfactory service

The customer is the center of excellence

Aim to build loyalty
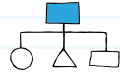
Process overview of the key survey steps

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

1. Web banner / Social media promoting Service Hero
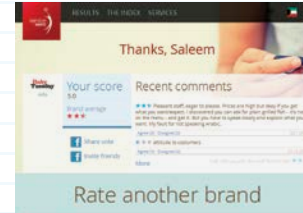
5. Respondent votes for other companies

9. Results in permanent database once confirmed

2. Directs to servicehero.com, Mobile App or facebook.com
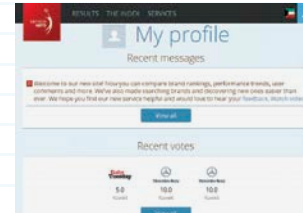
6. Respondent submits vote with personal data
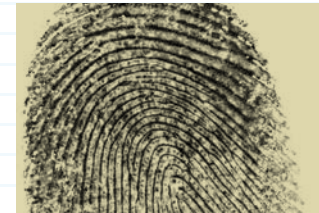
10. Data cleansing & verification procedures after close of votes
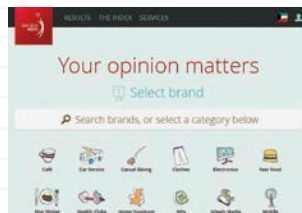
3. Respondent chooses category & brand

7. Responses stored in temporary database

11. High-level results shared with Advisory Council

4. Respondent votes for first company
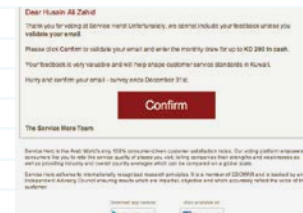
8. Email sent to respondent to confirm identity

12. Service Hero winners announced publicly

Complaint resolution category
UAE Index complaint average score 2020
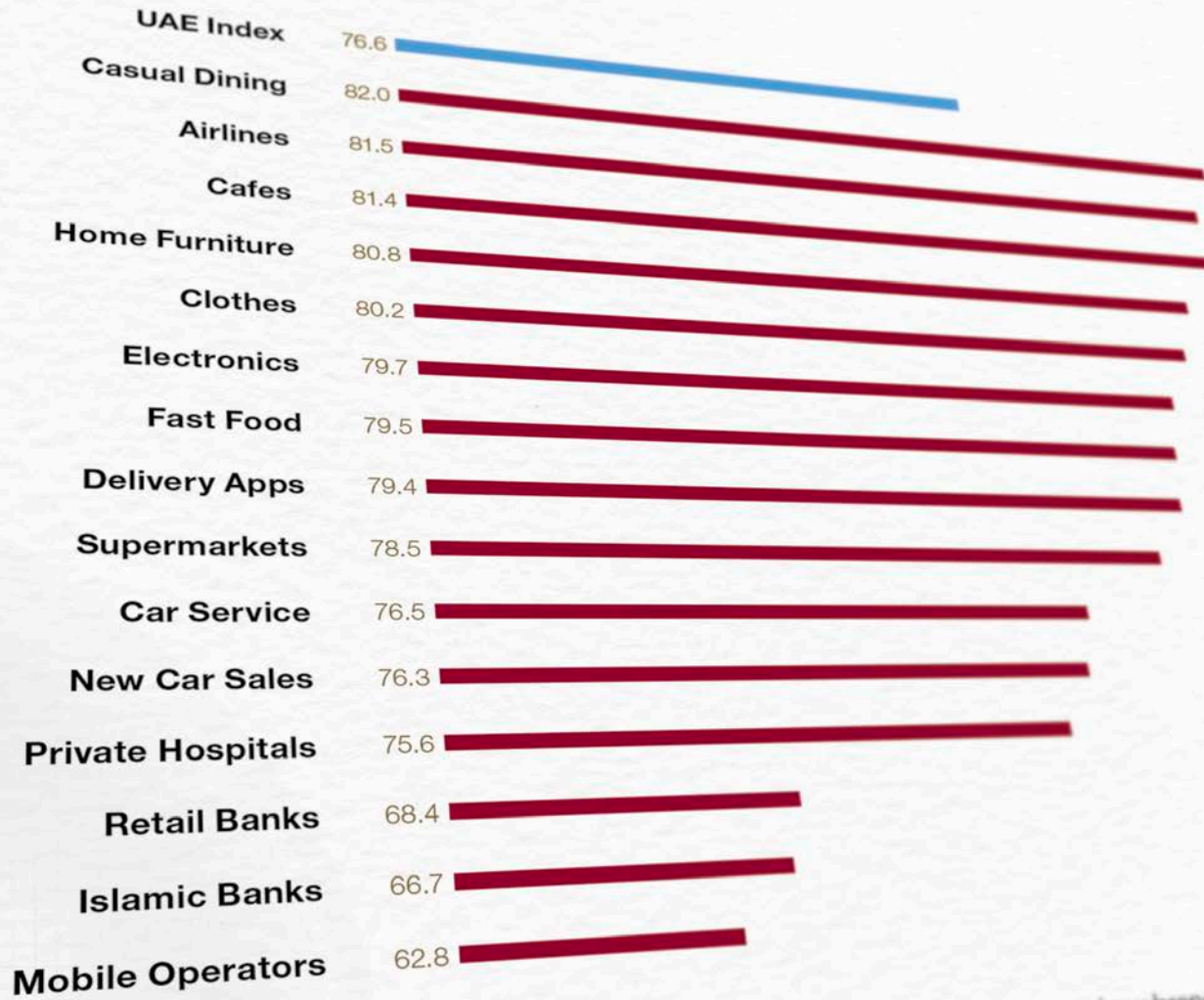
Category	Score
UAE Index	76.6
Casual Dining	82.0
Airlines	81.5
Cafes	81.4
Home Furniture	80.8
Clothes	80.2
Electronics	79.7
Fast Food	79.5
Delivery Apps	79.4
Supermarkets	78.5
Car Service	76.5
New Car Sales	76.3
Private Hospitals	75.6
Retail Banks	68.4
Islamic Banks	66.7
Mobile Operators	62.8

Consumers in the UAE scored an average score of 76.6 on how brands deal with complaints. The scores vary from 'Good' to 'Bland' between the categories, with Casual Dining, Airlines, and Cafes having the highest 'Good' scores.

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.

Gender	2019	Distribution	2020	Distribution
Female	3770	54%	4701	57%
Male	3027	43%	3357	40%
Nationality				
Arabs	2281	32%	1829	22%
Emirati	189	2%	197	2%
Non Arabs	4244	60%	6007	73%
Age Groups				
16 to 17 Years	92	1%	34	0%
18 to 29 Years	2212	31%	2072	25%
30 to 39 Years	2957	42%	3593	43%
40 to 49 Years	1071	15%	1739	21%
50 to 59 Years	325	4%	376	4%
More Than 60 Years	42	0%	122	1%
Education				
Elementary or below	17	0%	67	0%
High school	939	13%	1365	16%
Diploma	870	12%	1359	16%
University graduate	4022	57%	4114	50%
Master or PHD	706	10%	849	10%
Total	**6,979**	**100%**	**8,224**	**100%**

Note 1: Data on education distribution is not available.

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 9% of votes.

Interpreting the score

Unheroic Not doing the bare minimum **CSI ≤ 50**

Bland Bare minimum **CSI 60**

Ordinary Average service **CSI 70**

Good Service that the customer desires **CSI 80**

Heroic Anticipating what the other person values and exceeding it **CSI 90 +**
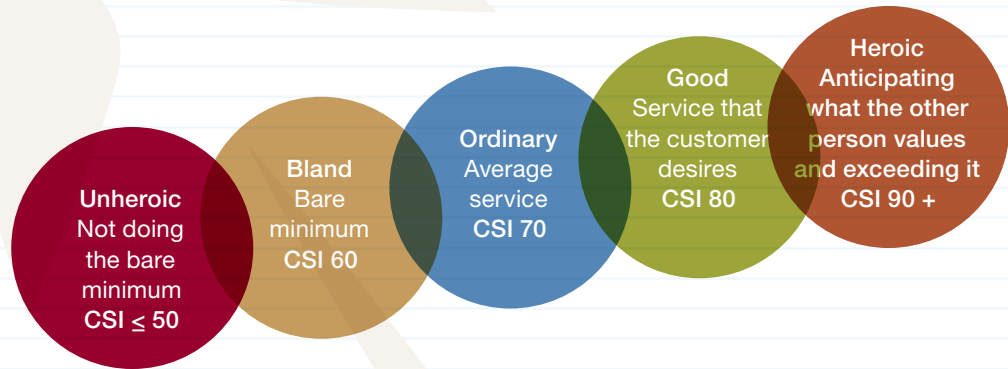
Companies fall into one of the **five groups** regarding the strength of service based on the score that they obtain. On the country level, the same legend is applied. For example, if the score for UAE is a 70, it is then placed at the bottom of the **"Ordinary"** category.

UAE Index: Before and after

Service Hero Index - UAE 2019 & 2020

■ 2019 Satisfaction   ■ 2020 Satisfaction

Total   76.7
             77.7
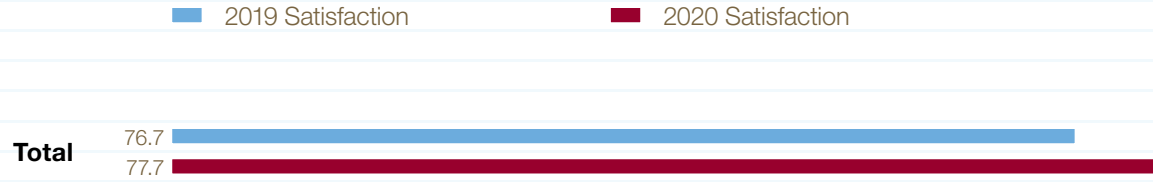
A change of 1.0 point between the years
Although 2020 saw us adapt to a pandemic, satisfaction scores in UAE increased by 1.0 point from 2019.

This could be because brands adapted to meet the requirements of consumers during this pandemic.

How results will be displayed

8 Trends

1 NPS

7 International benchmark

2 Demographics

6 Dimensions

3 Category

5 Complaints

4 Place & frequency
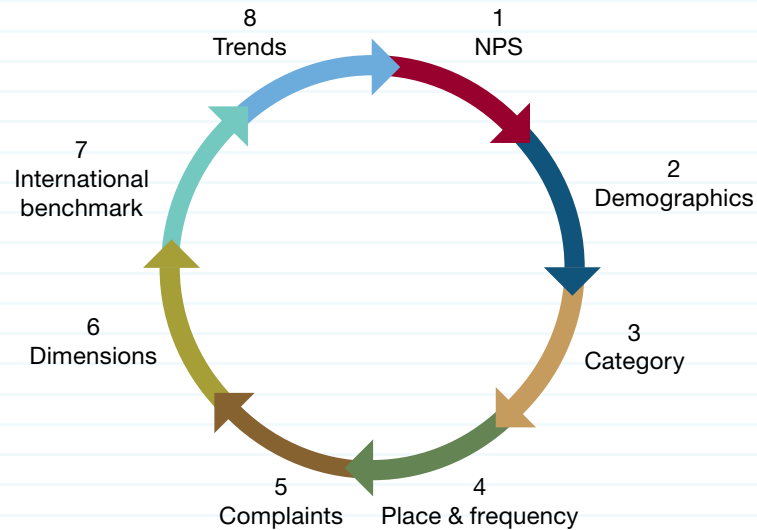
Results will be reported on levels as seen in the chart.

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 method 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

Detractors	**Passives**	**Promoters**
Negative word of mouth	Satisfied but unenthusiastic	Enthusiasts
(score 1-6)	(score 7-8)	(score 9-10)
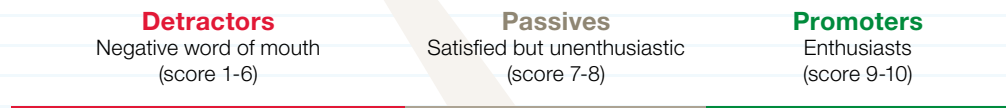
Promoters (score 9-10) are loyal enthusiasts who will keep buying and refer others, fueling growth.

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

Detractors (score 1-6) are unhappy customers who can damage your brand and impede growth through negative word-of-mouth.

The net promoter score for UAE

Net promoter score - Service Hero Index 2019 & 2020

	2019	2020
UAE Index	**34%**	**37%**
Female	42%	38%
Male	28%	36%
Arabs	24%	26%
Emirati	27%	33%
Non Arabs	42%	40%
18 to 29 years	37%	42%
30 to 39 years	34%	33%
40 to 49 years	33%	37%
50 to 59 years	34%	51%
More than 60 years	57%	12%
Elementary or below	83%	46%
High school	50%	49%
Diploma	49%	44%
University graduate	30%	33%
Master or PHD	17%	25%
Highest		
Lowest		

The country average is 37%, increasing by 3% since last year. Demographics groups vary on being either Ambassadors or Detractors. The largest concentration of Ambassadors are Females, Non Arabs, 50 to 59 year olds and those with a lower education. The largest concentration of Detractors are Males, Arabs, those aged over 60, and those with a higher education.

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).

Index by demographic factors

	2019	2020	Gap
UAE Index	**76.7**	**77.7**	**1.0**
Female	78.7	77.9	-0.8
Male	75.3	77.5	2.2
Arabs	74.0	73.4	-0.6
Emirati	74.6	73.9	-0.7
Non Arabs	78.7	79.1	0.4
18 to 29 years	77.5	79.2	1.7
30 to 39 years	76.0	76.7	0.7
40 to 49 years	76.9	77.2	0.3
50 to 59 years	77.3	80.5	3.2
More than 60 years	83.8	74.2	-9.6
Elementary or below	87.0	77.4	-9.6
High school	82.0	82.5	0.5
Diploma	81.0	79.7	-1.3
University graduate	75.6	76.7	1.1
Master or PHD	73.0	73.9	0.9
Highest			
Lowest			

Females are more satisfied than Males in both years, with minimal change occuring since last year.

Arabs are the least satisfied nationality in both years, while Non Arabs have the highest satisfaction.

Those aged 60+ has the highest satisfaction in 2019. with those aged 50-59 scored highest in 2020. Those aged 30-39 scored lowest in 2019 with those aged 50 to 59 scoring highest in 2020.

Those with a higher education tend to be less satisfied than those with lower education.

Overall satisfaction scores scored higher than the previous year, despite the pandemic. We have seen an increase in satisfaction from various demographic groups, most notably Males, those aged 18 to 29 and 50 to 59 years.

Image and loyalty

UAE Index demographics recommend scores 2019 & 2020

	2019	2020
Female	80.2	79.8
Male	75.7	78.1
Arabs	74.3	74.5
Emirati	74.0	77.3
Non Arabs	80.3	80.4
18 to 29 years	78.7	80.8
30 to 39 years	77.5	77.9
40 to 49 years	77.9	78.2
50 to 59 years	77.9	82.0
More than 60 years	84.4	70.7
Elementary or below	91.3	82.4
High school	83.1	82.4
Diploma	81.3	81.0
University graduate	76.9	78.1
Master or PHD	72.7	74.9
Highest		
Lowest		

The age groups that are more likely to recommend a brand are the 50 to 59 year olds. Typically, younger consumers tend to recommend a brand to their peers while the same applies to older groups. The least likely age group to recommend a brand are those aged 60 and over.

Females are more likely to recommend a brand than Males. Arabs are the least likely nationality to recommend a brand. Those with a higher education tend to have lower recommendation scores.

Demographic comparisons 2016 vs. 2020

Actual Satisfaction

	'16	'17	'18	'19	2020
Female	77.8	78.1	79.9	78.7	77.9
Male	74.5	78.2	78.4	75.3	77.5
Arabs	74.2	76.8	78.8	74.0	73.4
Emirati	77.0	76.6	76.3	74.6	73.9
Non Arabs	77.5	78.6	79.8	78.7	79.1
16 to 17 years	81.9	85.3	80.8	83.9	89.6
18 to 29 years	77.0	77.7	80.2	77.5	79.2
30 to 39 years	75.8	77.8	78.6	76.0	76.7
40 to 49 years	75.8	78.4	77.8	76.9	77.2
50 to 59 years	78.0	82.6	80.8	77.3	80.5
More than 60 years	74.1	88.1	83.8	83.8	74.2
Elementary or below	71.8	91.1	87.5	87.0	77.4
High school	81.9	81.3	81.6	82.0	82.5
Diploma	80.7	80.3	81.0	81.0	79.7
University graduate	75.5	76.9	78.7	75.6	76.7
Master or PHD	72.1	75.7	76.9	73.0	73.9
Highest					
Lowest					

Most demographic groups experienced an increase in satisfaction since last year. This increase, especially during a pandemic, can be attributed to to companies adapting their services in time to meet consumer needs.

The groups with the largest decrease in satisfaction are Females, those aged 60+. Emiratis, and those with a lower education.

Category NPS

Service Hero CSI Category 2019 & 2020 Net Promoter Score

	2019	2020
UAE Index	**34%**	**37%**
Delivery Apps	N/A	50%
Cafes	50%	49%
Fast Food	51%	49%
Casual Dining	52%	48%
Supermarkets	39%	42%
Electronics	50%	51%
Home Furniture	44%	49%
Clothes	49%	50%
Private Hospitals	24%	34%
Mobile Operators	-13%	-7%
Retail Banks	20%	18%
Islamic Banks	7%	16%
Airlines	43%	53%
New Car Sales	40%	34%
Car Service	23%	19%
Highest		
Lowest		

With the country average at 37%, above last years NPS by 3%. a number of categories fell above the average with Airlines, Electronics, and Delivery Apps showing healthy NPS scores, meaning they have more Ambassadors than Detractors. The lowest NPS scores are ISPs, Islamic and Retail Banks, and Car Service.

The UAE expected index across all 15 categories

Expected Index

	2019	2020
UAE Index	**81.9**	**77.0**
Casual Dining	86.4	82.5
Fast Food	85.5	80.4
Airlines	84.9	81.3
Cafes	84.9	81.7
Clothes	84.7	82.1
Electronics	84.6	81.3
Home Furniture	84.1	82.3
Retail Banks	81.7	69.4
Private Hospitals	81.3	76.4
Supermarkets	81.3	79.7
Islamic Banks	80.8	67.9
New Car Sales	77.1	74.8
Mobile Operators	76.3	61.6
Car Service	72.9	73.2
Delivery Apps	N/A	80.6

The top expectations are for Casual Dining, Home Furniture, and Airlines. The lowest expectations are for Mobile Operators, Islamic and Retail Banks, and Hospitals.

Compared to last year, expectations decreased overall, with many categories showing negative growth in expectations from 2019. This could be because consumer expectations during the pandemic was lowered.

The UAE actual index across all 15 categories
Actual Index

	2019	2020	Gap
UAE Index	**76.7**	**77.7**	**1.0**
Electronics	83.5	82.2	-1.4
Casual Dining	83.2	81.9	-1.3
Cafes	83.1	82.3	-0.8
Clothes	82.7	82.8	0.1
Fast Food	81.9	81.5	-0.4
Airlines	79.5	81.6	2.1
Home Furniture	79.3	82.2	2.9
Supermarkets	79.2	80.2	1.0
New Car Sales	77.0	76.0	-1.0
Private Hospitals	72.4	76.5	4.1
Retail Banks	72.1	72.0	-0.1
Car Service	70.3	74.7	4.4
Islamic Banks	69.9	68.4	-1.4
Mobile Operators	59.6	63.0	3.4
Delivery Apps	N/A	80.5	N/A

The top 3 scoring industries are Clothes, Cafes, Electronics and Home Furniture. The lowest scoring industries on Actual Satisfaction are Mobile Operators, Islamic and Retail Banks, and Car Service.
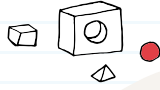
Interaction category

Point of Interaction

	In store / branch	Website	Phone	Mobile App
UAE Index	**76.7**	**78.9**	**74.8**	**79.6**
Delivery Apps	66.7	80.1	81.7	80.4
Cafes	82.1	88.9	72.2	86.0
Fast Food	81.9	80.6	82.9	80.1
Casual Dining	82.4	N/A	74.7	79.0
Supermarkets	80.2	81.8	84.0	78.1
Electronics	82.9	75.3	83.6	85.9
Home Furniture	82.8	73.3	94.4	87.0
Clothes	83.0	87.2	82.2	78.2
Private Hospitals	76.1	88.0	66.7	94.4
Mobile Operators	67.9	62.8	60.7	62.4
Retail Banks	65.0	73.8	65.8	76.6
Islamic Banks	64.9	66.9	67.7	70.3
Airlines	82.7	80.8	74.0	88.6
New Car Sales	77.6	88.0	55.6	66.7
Car Service	74.2	77.8	76.4	N/A
Highest				
Lowest				

On a country level, Application interaction scored highest while Over the phone scored lowest with 74.8. Companies shifting their services to digital channels during the pandemic have been meeting the needs of consumers.

Clothes scored highest for In store interaction, with Cafes scoring highest for Website. Home Furniture had the highest Phone interaction score, with Hospitals scoring highest for Application interaction. Mobile Operators scored lowest for Website and Mobile App interaction, the only category to have two low scoring satisfaction. Islamic Banks had the lowest satisfaction for In Store, while New Car Sales had lowest for Phone interaction.

Frequency category
Frequency of Visits

	Week	Monthly	3 months	6 months	Yearly
UAE Index	**79.6**	**76.5**	**76.1**	**75.5**	**71.7**
Delivery Apps	81.0	82.2	74.5	75.6	71.8
Cafes	84.0	84.3	78.9	75.6	73.2
Fast Food	84.6	82.1	78.6	70.0	61.8
Casual Dining	80.9	84.9	81.5	81.6	72.7
Supermarkets	83.5	77.7	74.1	58.5	59.0
Electronics	87.8	81.7	84.7	82.0	78.4
Home Furniture	86.1	81.4	81.3	81.4	78.7
Clothes	86.9	82.1	81.4	82.9	80.4
Private Hospitals	76.5	75.8	76.5	85.3	69.9
Mobile Operators	69.2	66.8	62.2	61.7	57.1
Retail Banks	75.5	72.3	66.9	71.6	72.5
Islamic Banks	60.5	74.0	65.7	72.5	69.3
Airlines	71.5	74.4	79.7	82.6	82.3
New Car Sales	85.7	44.4	83.7	76.2	75.8
Car Service	79.6	82.8	72.0	74.9	72.2
Highest					
Lowest					

Weekly interactions scored highest with a score of 79.6. Annual interactions scored lowest with 71.7 score.
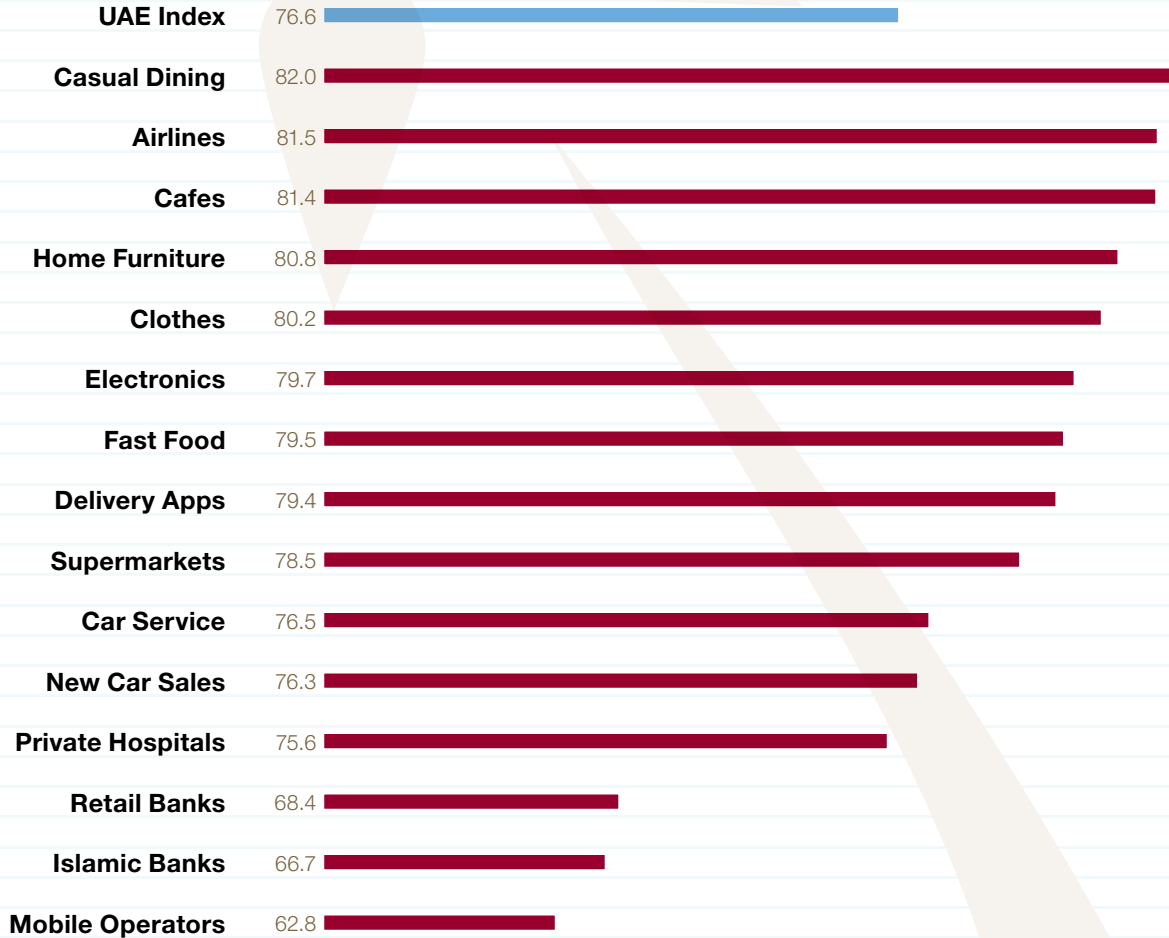
On a category level, that trends seems to continue with a majority of categories frequented weekly scoring high. Annual scores are, on average, the lowest scoring.

Complaint resolution category

UAE Index complaint average score 2020

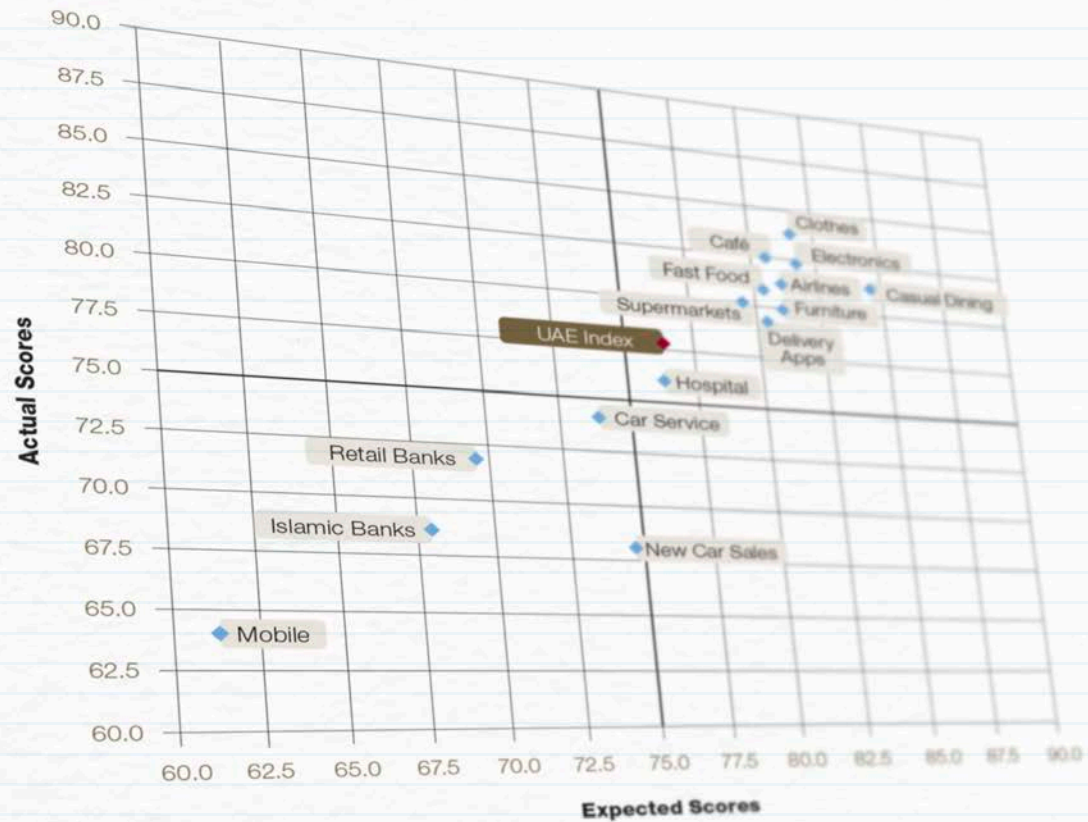| Category	Score
UAE Index	76.6
Casual Dining	82.0
Airlines	81.5
Cafes	81.4
Home Furniture	80.8
Clothes	80.2
Electronics	79.7
Fast Food	79.5
Delivery Apps	79.4
Supermarkets	78.5
Car Service	76.5
New Car Sales	76.3
Private Hospitals	75.6
Retail Banks	68.4
Islamic Banks	66.7
Mobile Operators	62.8

Consumers in the UAE scored an average score of 76.6 on how brands deal with complaints. The scores vary from 'Good' to 'Bland' between the categories, with Casual Dining, Airlines, and Cafes having the highest 'Good' scores.

3

Summary
& strategic
implications

Chart: Market position of all 15 categories

Y-axis: Actual Scores (60.0 to 90.0)
X-axis: Expected Scores (60.0 to 90.0)

Categories plotted:
- Clothes
- Cafe
- Electronics
- Fast Food
- Airlines
- Casual Dining
- Supermarkets
- Furniture
- UAE Index
- Delivery Apps
- Hospital
- Car Service
- Retail Banks
- Islamic Banks
- New Car Sales
- Mobile

Industry categories in the top right quadrant such as Casual Dining, Electronics, and Clothes are in the best position as their actual scores match their expected scores. They need to sustain this position over time.
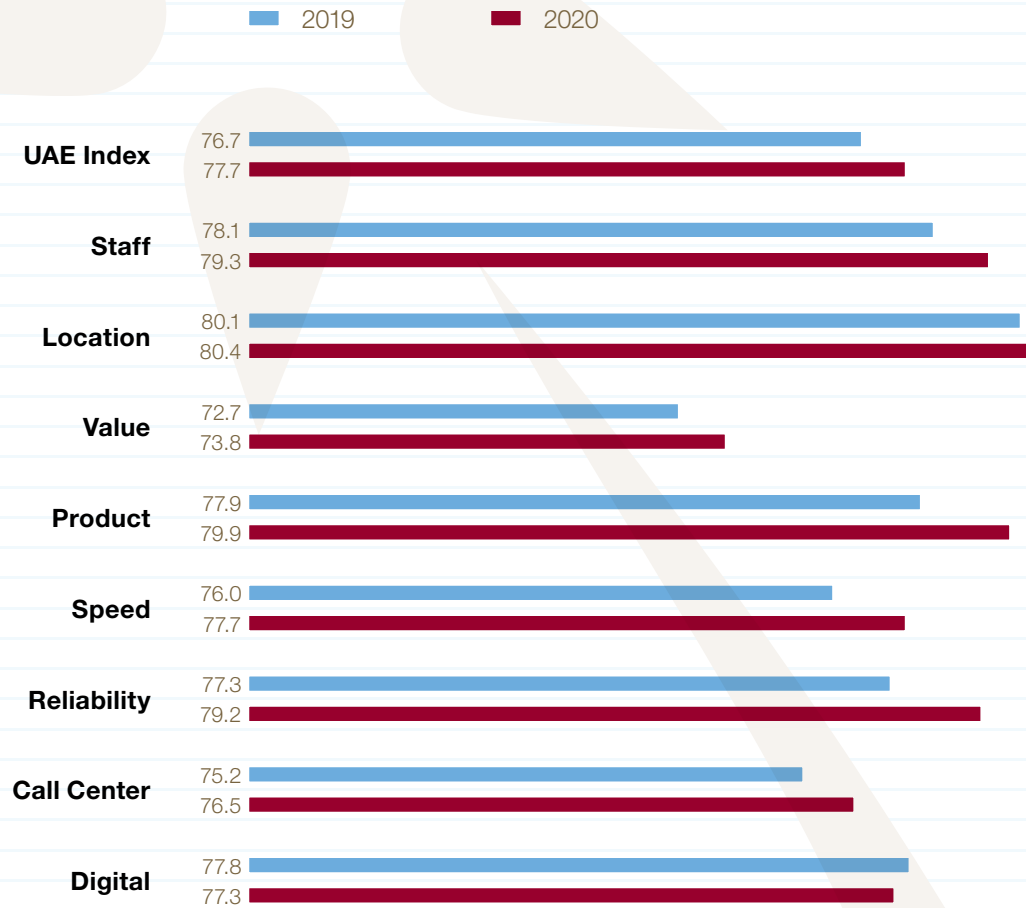
Industry categories in the top left quadrant need to improve their image and overall performance as a small gap exists between expectation and actual scores.

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

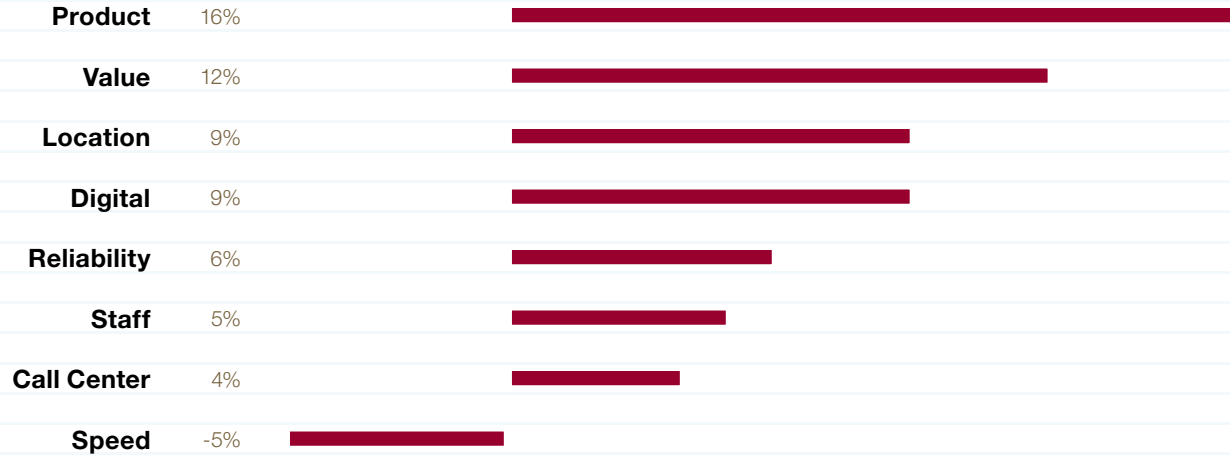# UAE Index by service dimension

UAE Index 2019 & 2020 service dimension

■ 2019　　■ 2020

Dimension	2019	2020
UAE Index	76.7	77.7
Staff	78.1	79.3
Location	80.1	80.4
Value	72.7	73.8
Product	77.9	79.9
Speed	76.0	77.7
Reliability	77.3	79.2
Call Center	75.2	76.5
Digital	77.8	77.3

When we look at dimension scores, Location, Product, and Staff scored highest and Value for Money, Call Center, and Digital scored lowest.

Note: Conventional categories are evaluated on satisfaction with their Call Center and Digital Service with the exclusion of Fine Dining, Cafe, and Clothes.
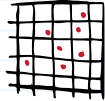
Correlation of dimensions to overall satisfaction

Service dimensions most influential to overall satisfaction (R Square 85%, 8,224 sample)

Dimension	Impact
Product	16%
Value	12%
Location	9%
Digital	9%
Reliability	6%
Staff	5%
Call Center	4%
Speed	-5%

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 one dimension has a critical role in influencing satisfaction: Product Quality (16% impact). If companies prioritize their effort on only this dimension it would help the improve satisfaction.

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

Comparing Kuwait & UAE
Kuwait & UAE scores 2020

■ Kuwaitis   ■ UAE

Kuwait   70.6 ▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬

**UAE**   77.7 ▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬
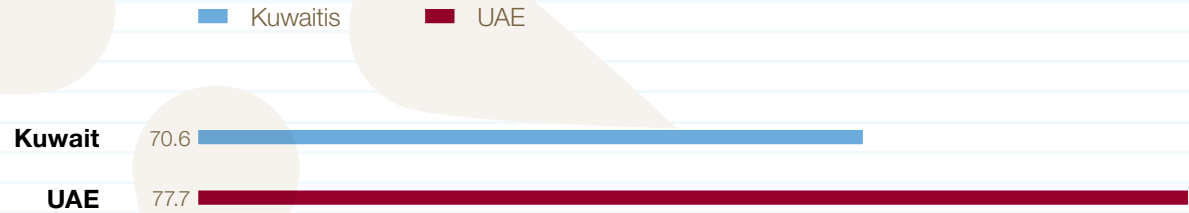
Kuwait has a much lower score than the UAE in actual satisfaction and a (-7.1) difference, which is significant. Comparing categories, there are a few categories that perform well in both countries such as Casual Dining, Cafes, and Clothes. They also share some low scoring categories such as Mobile Operators.

Investigating dimensions between UAE & Kuwait shows similarities as well as differences. The highest scoring dimensions for UAE is Location, whereas in Kuwait Reliability scored highest. The lowest scoring dimensions for UAE & Kuwait is Value, which means that consumers feel that this dimension is the weakest area of service for satisfying consumers.

Comparing demographics, there are similar trends for most and least satisfied consumers. The most satisfied for both countries is Females, Non Arabs, and those with a lower education. The demographic differences in satisfaction between the countries comes with age where we see those aged 50+ more satisfied in the UAE compared to lower satisfaction scores in Kuwait.

Looking at NPS scores, Kuwait posted a 13% score while UAE has a higher one at 37%. On average, consumers in Kuwait are less likely to promote a brand than in the UAE.
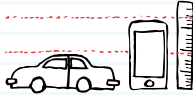
Category CSI comparison to other markets

In comparing with other national customer satisfaction indexes, notably the American ACSI (which has been running since 1996), we note that UAE is higher than all other CSI indexes.

| Category	Kuwait Service Hero CSI	UAE Service Hero CSI	US ACSI Index	Singapore CSI Index
Airlines	70.7	81.6	75.0	77.0
Cafes	79.1	82.3	79.0	73.6
Car Service	64.5	74.7	78.0	N/A
Casual Dining	77.6	81.9	79.0	73.8
Clothes	74.5	82.8	79.0	72.1
Electronics	69.3	82.2	78.0*	71.2
Fast Food	76.3	81.5	78.0	73.1
Fine Dining	72.8	N/A	N/A	N/A
Health Clubs	73.4	N/A	N/A	N/A
Home Furniture	68.2	82.2	N/A	71.2
Islamic Banks	72.2	68.4	80.0	75.3*
ISPs	56.2	N/A	65.0	70.1
Local Brands	80.8	N/A	N/A	N/A
Mobile Operators	61.2	63.0	74.0	71.7
New Car Sales	73.0	76.0	78.0	N/A
Private Hospitals	64.9	76.5	69.0	75.2*
Retail Banks	70.6	72.0	80.0	75.3*
Supermarkets	67.8	80.2	78.0*	69.9
Overall Score	**70.6**	**77.7**	**74.4**	**74.3***

* Q3 2020

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

Market position of all 15 categories

Mapping categories on expectation and actual scores to understand their market position
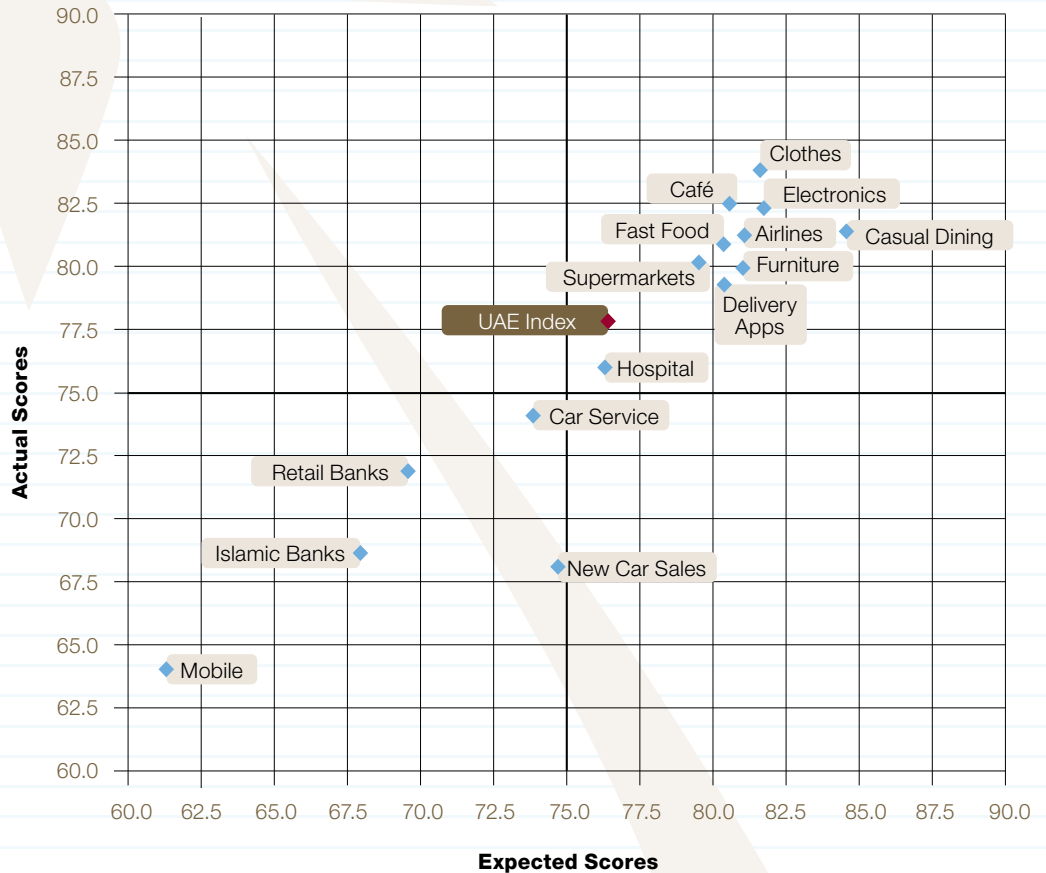
Industry categories in the top right quadrant such as Casual Dining, Electronics, and Clothes are in the best position as their actual scores match their expected scores. They need to sustain this position over time.

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 ISPs and Mobile Operators are in a weak position as they are scoring low on expected and actual scores. Their challenge is improving actual service standards and the market perception of these standards.
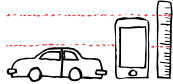
Category comparison 2016 vs 2020
Actual Satisfaction

Despite the pandemic, satisfaction for UAE in 2020 increased from 2020. The top scoring categories throughout the years have traditionally been New Car Sales, Electronics, and Clothes, with Cafes scoring highest in 2016. Notable improvements in consumer satisfaction is shown with Retail Banks, Mobile Operators, Car Service.
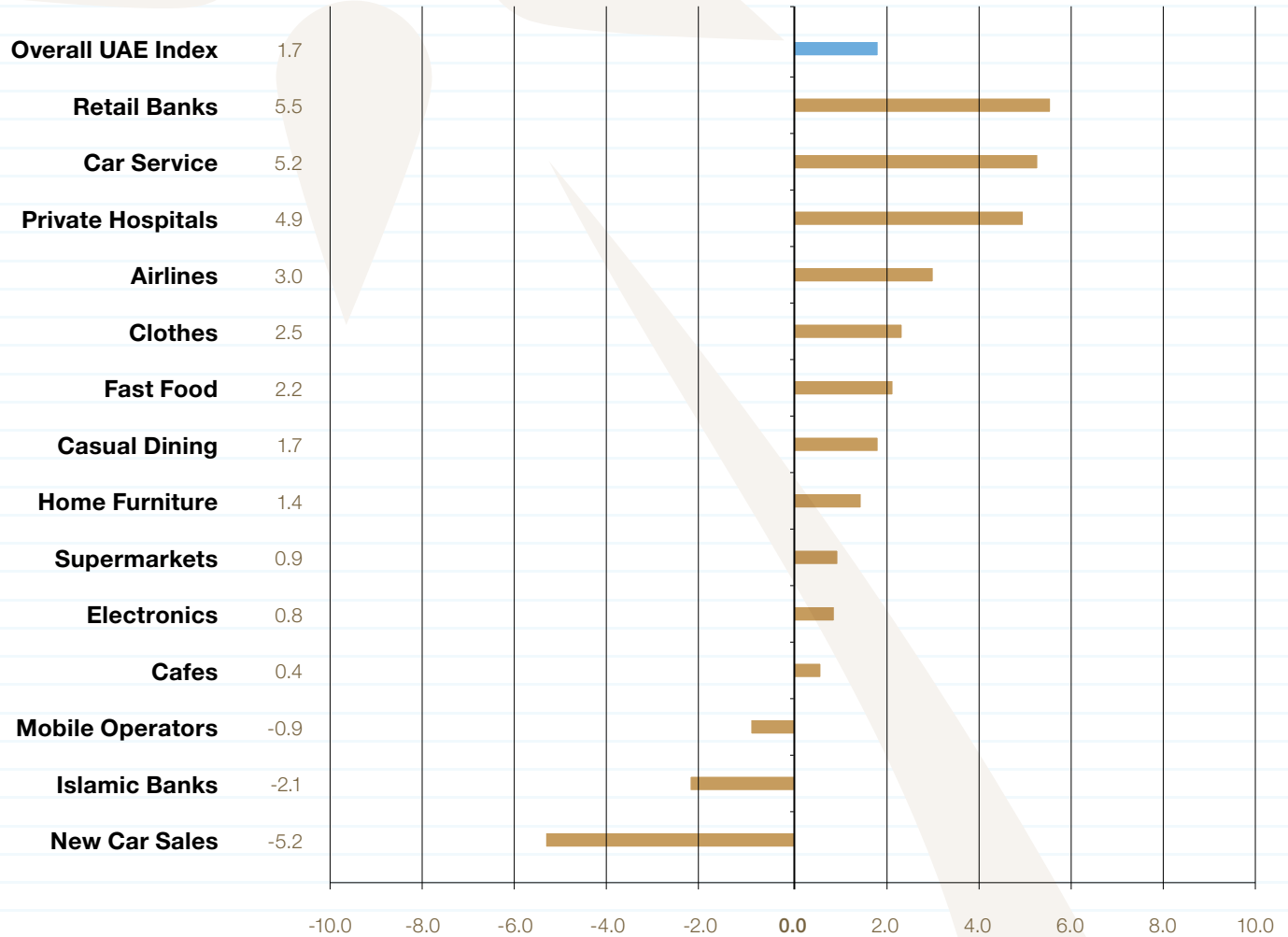
	'16	'17	'18	'19	2020
UAE Index	**76.1**	**77.9**	**79.1**	**76.7**	**77.7**
Delivery Apps	N/A	N/A	N/A	N/A	80.5
Cafes	81.9	82.5	83.4	83.1	82.3
Fast Food	79.3	81.6	78.9	81.9	81.5
Casual Dining	80.2	81.1	83.0	83.2	81.9
Supermarkets	79.3	80.0	80.5	79.2	80.2
Electronics	81.4	83.5	83.6	83.5	82.2
Home Furniture	80.8	79.6	80.8	79.3	82.2
Clothes	80.3	79.8	79.9	82.7	82.8
Private Hospitals	71.6	73.8	75.2	72.4	76.5
Mobile Operators	63.9	66.1	66.6	59.6	63.0
Retail Banks	66.5	71.8	75.0	72.1	72.0
Islamic Banks	70.5	72.4	75.2	69.9	68.4
Airlines	78.6	79.7	80.5	79.5	81.6
New Car Sales	81.2	83.6	85.6	77.0	76.0
Car Service	69.5	75.4	79.9	70.3	74.7
Highest					
Lowest					

Note: Local brands was added in 2019. Delivery Apps was included in 2020.

Category Growth 2019 vs. 2020

Notable improvements with consumer satisfaction are seen in Mobile Operators, Hospitals, and Car Service.

Category	Value
Overall UAE Index	1.7
Retail Banks	5.5
Car Service	5.2
Private Hospitals	4.9
Airlines	3.0
Clothes	2.5
Fast Food	2.2
Casual Dining	1.7
Home Furniture	1.4
Supermarkets	0.9
Electronics	0.8
Cafes	0.4
Mobile Operators	-0.9
Islamic Banks	-2.1
New Car Sales	-5.2

The Delivery Apps category was added in 2020, therefore they have been excluded from this comparison chart.

Top three country winners

From their website

FIRST PLACE

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.

SECOND PLACE

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.

THIRD PLACE

Nike, Inc., is an American sportswear company headquartered in Beaverton, Oregon. It was founded in 1964 as Blue Ribbon Sports by Bill Bowerman, a track-and-field coach at the University of Oregon, and his former student Phil Knight. They opened their first retail outlet in 1966 and launched the Nike brand shoe in 1972.

The company was renamed Nike, Inc., in 1978 and went public two years later. By the early 21st century, Nike had retail outlets and distributors in more than 170 countries, and its logo—a curved check mark called the "swoosh"—was recognized throughout the world.
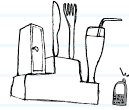
Comparing the winners of 2016 to 2020

The Service Hero CSI awarded 15 category winners in 2020, of which 4 were 5 time consecutive winners in the 2020 assessment. This suggests that leading companies do have in place programs to ensure customer satisfaction is achieved. In the categories that witnessed a change, much of that was due to heightened competition as different companies jostled for better positions and focused more attention on meeting customer satisfaction needs.

Table 1 Comparison of SH CSI winners 2016 to 2020

Service Hero Category	2020 Winner	'19	'18	'17	'16
Airlines	**Emirates**	Yes	Yes	Yes	Yes
Clothes	**Nike**	Yes	No	No	No
Mobile Operators	**Etisalat**	Yes	Yes	No	No
Islamic Banks	**Emirates Islamic Bank**	No	No	No	No
Retail Banks	**Emirates NBD**	Yes	No	No	No
Cafes	**Krispy Kreme**	Yes	No	No	No
Fast Food	**Jollibee**	No	No	No	No
Casual Dining	**Texas Roadhouse**	No	No	No	No
Electronics	**Apple**	Yes	Yes	Yes	Yes
Home Furniture	**Ikea**	Yes	Yes	Yes	Yes
Supermarkets	**Carrefour**	Yes	Yes	Yes	No
Delivery Apps*	**Carrefour Now**	N/A	N/A	N/A	N/A

* Category added in SH CSI 2020

How would you rate

	😞									😊

How well did the brand meet your **expectations**

1 2 3 4 5 **6** 7 8 9 10

Your overall **satisfaction** with this company

1 2 3 4 5 6 **7** 8 9 10

Likelihood of **recommending** this brand

1 **2** 3 4 5 6 7 8 9 10

How well the brand **fixed** any issues

1 2 3 4 5 **6** 7

Staff attitude, knowledge & competence

1 2 3 **4** 5 6 7

Reliability and consistency

1 2 3 4 5 6 7

Quality of product or service

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

Service **speed**

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

Value for money

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

What suggestions do you have?

Submit rating

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 1st - December 31st 2020.

Sample

The index aimed to collect a total sample of 10,000 valid votes for UAE distributed over 15 category industries included in the assessment. Each category had a quota of 350 votes. The confidence level is 95% with an ± 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. Respondents were also asked if they would recommend a brand to a friend or relative, what the overall satisfaction is, how did the brand resolve complaints and if there are any other comments they would like to provide.
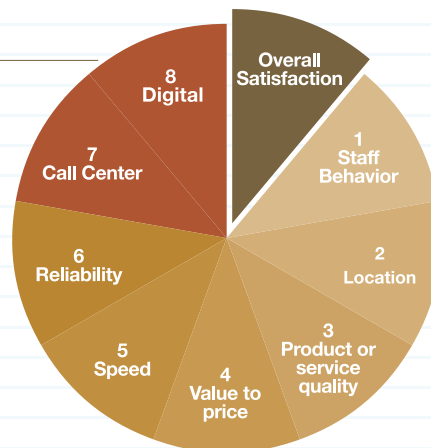
Security

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 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: 14 categories assess all 8 service dimensions, while 3 categories only assess 6 service dimensions.

Pie chart dimensions: Overall Satisfaction, 1 Staff Behavior, 2 Location, 3 Product or service quality, 4 Value to price, 5 Speed, 6 Reliability, 7 Call Center, 8 Digital

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 Emirati mobile number to provide an additional layer for validating user identification
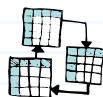
Rules applied to ensure data integrity

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 4,817 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 **8,224** 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	597
	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	(4,817)
	Total votes obtained	12,466
	Total votes assessed	**8,224**
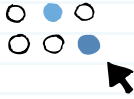
The questionnaire

What respondents actually voted on.

Before	How would you rate	After
Your expectations before your visit		Your expectations after your visit

Before		Rate	After
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 **Digital**	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?**

Note The Call center and Digital dimension questions were exempt from Cafes, Clothes, and Fine Dining service categories.
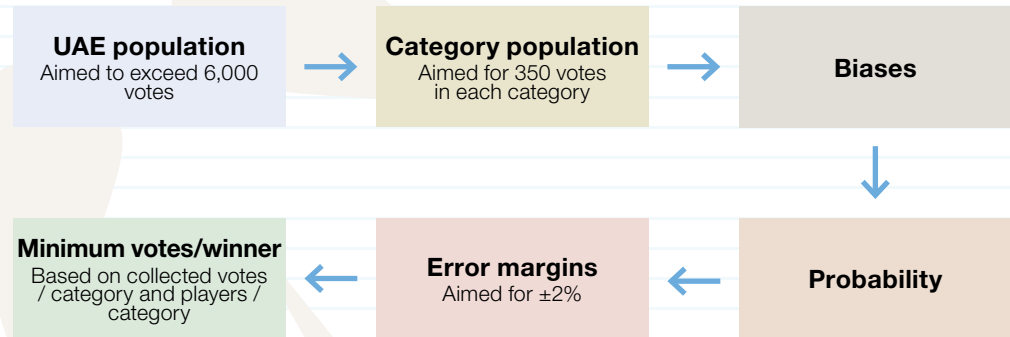
Respondents voted on 2 levels:
1. What they expected **before** receiving the service
2. What they actually experienced **after** being served

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.

UAE population	Category population	Biases
Aimed to exceed 6,000 votes	Aimed for 350 votes in each category	

Minimum votes/winner	Error margins	Probability
Based on collected votes / category and players / category	Aimed for ±2%	

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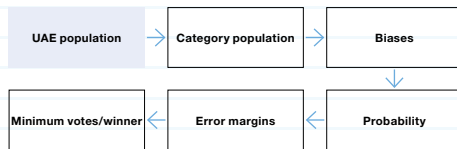
Category population.

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

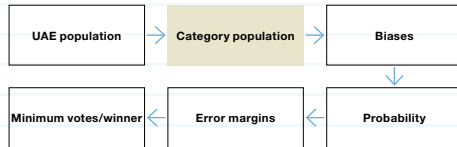It **excludes** (around 4,897,000 individuals):
• Anyone under 16 years
• Laborers

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

Category population.

UAE population	→ Category population →	Biases
Minimum votes/winner ←	Error margins ←	Probability

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

The roles that bias and probability play on the sample.

UAE population	→ Category population →	Biases
Minimum votes/winner ←	Error margins ←	Probability
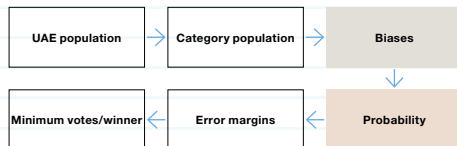
1. Probability of choice is:
   - Based on the total population of consumers per category as well as the number of brands in a category
   - An example is the clothes category where around 80 brands were evaluated and the probability of choice is 2%, while in the mobile sector only three competitors 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 categories included in the Service Hero assessment.

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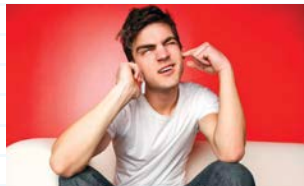- Each category can be further broken down into sub categories

Airlines

Automotive: Sales + Service

Banks: Retail + Islamic

Communications: Mobile

Restaurants: Café + Fast food
Casual dining

Health care: Private Hospitals

Specialty Stores: Electronics
Supermarkets + Furniture + Clothes

Delivery app

Sampling approach (continued)

**Minimum sample sizes and error margins for all categories.**

Confidence level: 95%

Sector	Biased Population	Sample @ 5%	Total Votes
Airlines	88,186	293	437
New Car Sales	88,186	293	95
Car Service	88,186	293	93
Clothing	88,186	293	832
Mobile Operator	88,186	293	898
Café	88,186	293	797
Fast Food	88,186	293	1,452
Casual Dining	88,186	293	410
Electronics	88,186	293	339
Retail banks	68,505	273	504
Islamic banks	30,833	196	255
Furniture	58,791	259	263
Private Hospital	37,421	216	218
Supermarkets	88,186	293	1,075
Delivery Apps	88,186	293	556

This table shows the 15 categories included in the 2020 index. It shows:
- Minimum sample needed for an error margin at a 95% confidence level
- Total votes obtained

Source of ratings and platforms used to rate from

Service Hero CSI is mostly online (60% of assessments), we deploy a promotion plan that utilizes digital marketing. After assessments go through a validation process, the source of ratings is indicated below. Digital advertising on leading websites and social media platforms, comprised the bulk of our advertising. A selection of private companies also encouraged their customers to rate for them. Thus, consumers could directly search for the name 'Service Hero' to reach our rating engine, or click on an online banner, or click on a company banner.

SH Phone Calls	8%		Direct Traffic	31%
SH Advertising	26%		SH Other	1%
SH Email	34%			
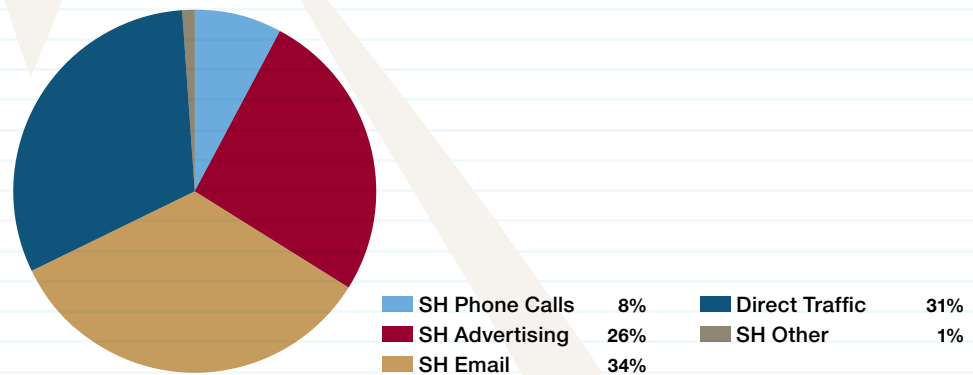
The phone based assessments were collected using our proprietary database of consumers to ensure all demographic groups and categories were well represented.

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

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

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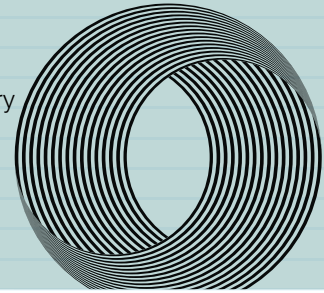
Khayal Consultants

working ideas

CREATE

Full range of services for creating a brand.

Branding: Logo Development | Usage Manuals | Stationary Design
Print: Annual Reports | Corporate Brochures | Marketing Collateral Newsletters | Calendars & Occasions | Articles & Guides
Motion: Motion Graphics

CONNECT

Full service digital capabilities from end to end.

Consulting: Strategy & Planning | Benchmarking
Websites & Mobile: UI& UX Design | Development | Responsive Websites | Mobile Apps | SEO & SEM | Traffic & Performance Analysis
xReality: Virtual Reality | Augmented Reality | Mixed Reality
Solutions & Support: Content Management | Digital Signage & Way Finding | Hosting & Monitoring | Maintenance & Support | Mobile Engagement
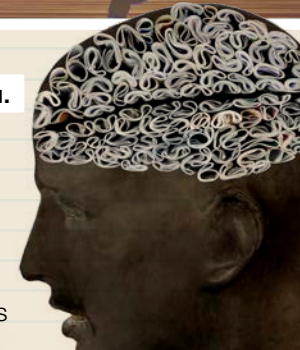
TRANSFORM

Be relevant. Be smart. Be where customers will find you.

Consulting: Strategy review | Brand audit | Culture of excellence Customer experience
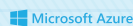**Market Research:** Focus groups | In-depth Interviews Employee engagement | Phone surveys | Mystery shopping
Manpower Development: Service excellence training Coaching & mentoring | Shadow coaching | Presentation skills

CLIENTS

service Hero | KUFPEC | MARKAZ المركز | IKEA | AlghanIm INDUSTRIES | GULF BANK بنك الخليج | GUST

zain | KFAS | | CENTRAL BANK OF KUWAIT بنك الكويت المركزي | KIPCO كيبكو | KNPC شركة البترول الوطنية الكويتية | DGCA

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Disclaimer

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