Service Dimensions

Airlines

Automotive: Car Service

Automotive: New Car Sales

Clothes & Accessories: Clothes

Communication: Mobile Operators

Financial: Retail Banks

Financial: Islamic Banks

Home

Restaurants: Cafe

Restaurants: Casual Dining

Restaurants: Fast Food

Specialty Stores: Electronics

service Hero

UAE RESULTS

The voice of the consumer

2017

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 Staff Behavior index
2 Location index
3 Product or service quality index
4 Value & price index
5 Speed index
6 Reliability index
7 Call center index
8 Website index
9 Loyalty index
10 Ideal index

Credibility.
Integrity.
Relevance.

service **Hero**

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:

- Customer Satisfaction Index (CSI)
- Annual & Quarterly Customer Satisfaction Index (CSI)
- Customer Satisfaction Index (CSI) with customized questions
- Drivers of Satisfaction (based on the CSI)
- Engagement Dashboard
- Culture of Excellence Index (CEI)
- Employee Satisfaction Index (ESI)
- Citizen Happiness Index (CHI)

Qualitative research

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

Consultancy & education

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

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Word from the president

We started the Arab world's first national Customer Satisfaction Index (CSI) nine years ago, with a simple aim: to provide companies with relevant, impartial data collected from everyday consumers using best-practices research standards.

Over the years, consumers have always asked if brands care about their ratings. The Kuwait Index from 2010 has been trending up, implying that consumer assessments were being heard. But we also understand that we have an obligation to consumers who form the backbone of our CSI. As a result, in 2016 we introduced a significant change to provide consumers with insight about brands by introducing a Scoreboard for each category. The Scoreboard on our website transparently displays the 3-star ratings of brands as well as customer comments. It allows consumers to search for brands, see the Brand Info page for a particular company which displays its star rating, the 12-month performance trends as well as all comments left by consumers so they can agree, disagree and share other them. It helps consumers make informed decisions before deciding to deal with a brand. We also offer companies wishing to engage with their customers the ability to directly address customer feedback or concerns using our Engagement Dashboard which shows all comments, their star rating and sentiment score and trends over time.
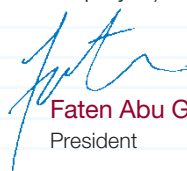
In 2016 we launched the CSI in the United Arab Emirates measuring over 300 companies across 14 categories in addition to 17 categories and 300 brands in Kuwait. To date we have collected 150,000 customer assessments for brands in both markets. Companies operating in both countries can now compare their results to similar brands in both markets, as can consumers. All data collected is vetted for accuracy and validity.

In 2017 we introduced a second benchmark, the Culture of Excellence Index. It allows companies to determine how aligned their internal cultures are to excellence by having their internal team evaluate them. It covers an excellence framework to ensure the eco-system for excellence is addressed and is both a diagnostic and prescriptive solution.

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

Since our journey began 9 years ago, we 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, how to satisfy them, and importantly, how to connect to build loyalty.

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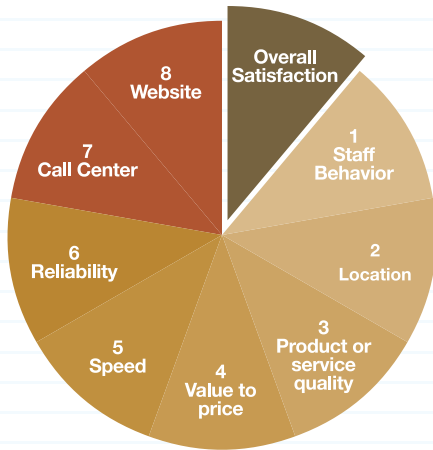
Faten Abu Ghazaleh
President

1
Executive
summary

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

Methodology
Service Hero is an online survey where respondents vote directly on www.servicehero.com from January 1- December 31st 2017. 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 28,460 assessments where cleaned to arrive at the final 24,074 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 84.6 on Expectation (before dealing with a brand) and 77.9 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 Website and Value for Money.

Demographics
Males, Non Arabs, 50+ year olds, and customers with a low education level have the highest satisfaction scores while Females, Emiratis, those aged 18-39, and customers with a high level of education have the lowest satisfaction scores.

Loyalty and Ideal
UAE scored 77.3 on the likelihood of recommending a brand (Loyalty). Females, Non Arabs, customers aged 16 to 17 and 50+ and those with a lower education tend to be most loyal. Looking at Net Promoter Score (ratio of customers promoting the brand versus being detractors) we see that UAE overall scores 31%, with Arabs, Females, and customers with a higher education or aged 18-29 are least loyal.

Ideal satisfaction scored a 76.3. This represents customers' perception of how they have been serviced, and how close it is to ideal service.

Because this score is marginally lower than the Actual Average satisfaction score, it suggests that brands are not meeting consumers service requirements, meaning there is room for improvement.

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

The industries with the highest number of customers promoting them (loyalty) are New Car Sales, Electronics, 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 (1.4 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 have for UAE & Kuwait are Value for Money and Website which means that consumers feel 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. The demographic differences in satisfaction between countries comes with age where we see those aged 50+ as more satisfied in the UAE compared to lower satisfaction scores in Kuwait.

Looking at NPS scores, UAE posted a 31% score while Kuwait has a lower one at 33%. s that, on average, consumers in the Kuwait are more susceptible to promoting brands than in Kuwait.

Comparison to Kuwait, US, and Singapore CSI
UAE and Kuwait have different satisfaction scores with the Kuwait Index scoring 76.5 in satisfaction, an almost similar score to ACSI (76.7) compared to 77.9 for UAE satisfaction.

The Singapore CSI scored 71.8, making it the lowest national satisfaction score.

Gaps by nationality

Legend: Arabs Gap, Emiratis Gaps, Non Arabs Gap, UAE Index

Categories (top to bottom): Staff, Location, Value, Product, Speed, Reliability, Call Center, Website

X-axis: -10.0, -9.0, -8.0, -7.0, -6.0, -5.0, -4.0, -3.0, -2.0, -1.0, 0.0, 1.0

	Staff	Location	Value	Product	Speed	Reliability	Call Center	Website
Arab Gap	-4.3	-2.5	-7.3	-5.1	-6.1	-5.0	-2.9	-2.3
Emiratis Gap	-6.3	-3.1	-7.7	-7.0	-6.4	-5.4	-9.0	-7.7
Non Arabs Gap	-6.8	-4.7	-7.7	-6.5	-7.9	-6.1	-6.6	-9.0
UAE Index	-6.1	-4.1	-7.7	-6.1	-7.3	-5.8	-4.6	-7.3

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.

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	Votes 2017	Votes 2017 Distribution
Female	14,707	61%
Male	8,826	37%
Nationality		
Arabs	7,442	31%
Emiratis	769	3%
Non Arabs	694	3%
Age Groups		
16 to 17 Years	420	2%
18 to 29 Years	9,530	40%
30 to 39 Years	9,910	41%
40 to 49 Years	2,382	10%
50 to 59 Years	761	3%
More Than 60 Years	189	1%
Education		
Elementary or below	200	1%
High school	3,196	13%
Diploma	3,063	13%
University graduate	13,202	55%
Master or PHD	2,931	12%
Total	**24,074**	**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

| Dreadful 10-30 | Weak 40-50 | Moderate 60-70 | Awesome 80-100 |
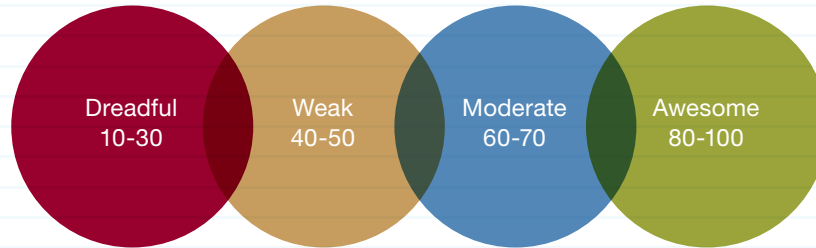
Since the Service Hero index measures companies on a 100 point scale, the overall index can be interpreted according to the legend above. Companies fall into one of the **four groups** regarding the strength of service based on the score that they obtain. On the country level, the same legend is applied. For example, if the score for UAE is a 60, it is then placed at the bottom of the **"Moderate"** category.

UAE Index: Before and after

Service Hero Index - UAE 2017

■ Average of Expectation Index   ■ Average of Actual Index

Total 84.6
77.9
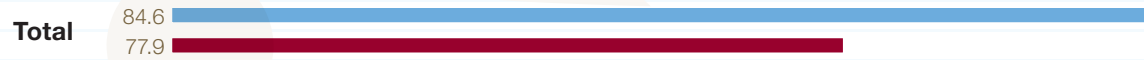
A gap of -6.7 between expected and actual
Usually consumer expectations will be higher than actual service assessments. Consumers had higher expectations and lower satisfaction, meaning we are below expectations by a gap of -6.7 which is an unhealthy gap.

UAE scored 84.6 on average for **Expected** standards and it scored 77.9 on **Actual** service standards – placing it in the **Moderate** service level.

How results will be displayed

5
Loyalty

1
Service
Dimension

4
Changes

2
Gaps

3
Demographics
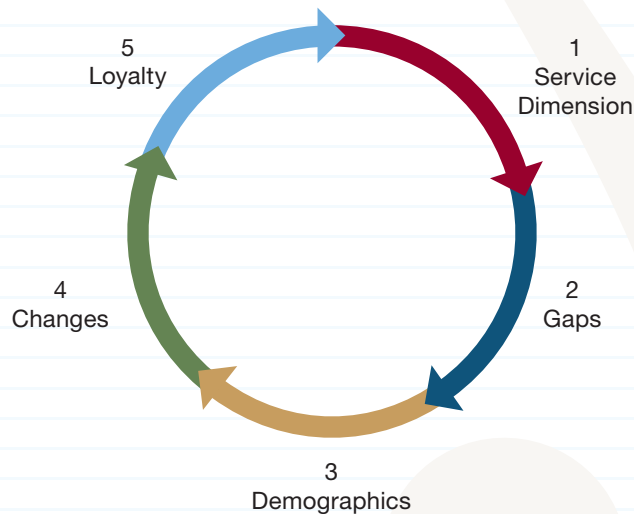
Results will be reported on five levels as seen in the chart.

UAE Index by service dimension

UAE Index 2017 service dimension

■ Expected ■ Actual

Dimension	Expected	Actual
UAE Index	84.6	77.9
Staff	84.4	78.3
Location	83.8	79.7
Value	83.0	75.3
Product	84.5	78.4
Speed	84.2	76.9
Reliability	84.6	78.8
Call Center	82.4	77.8
Website	81.8	74.5
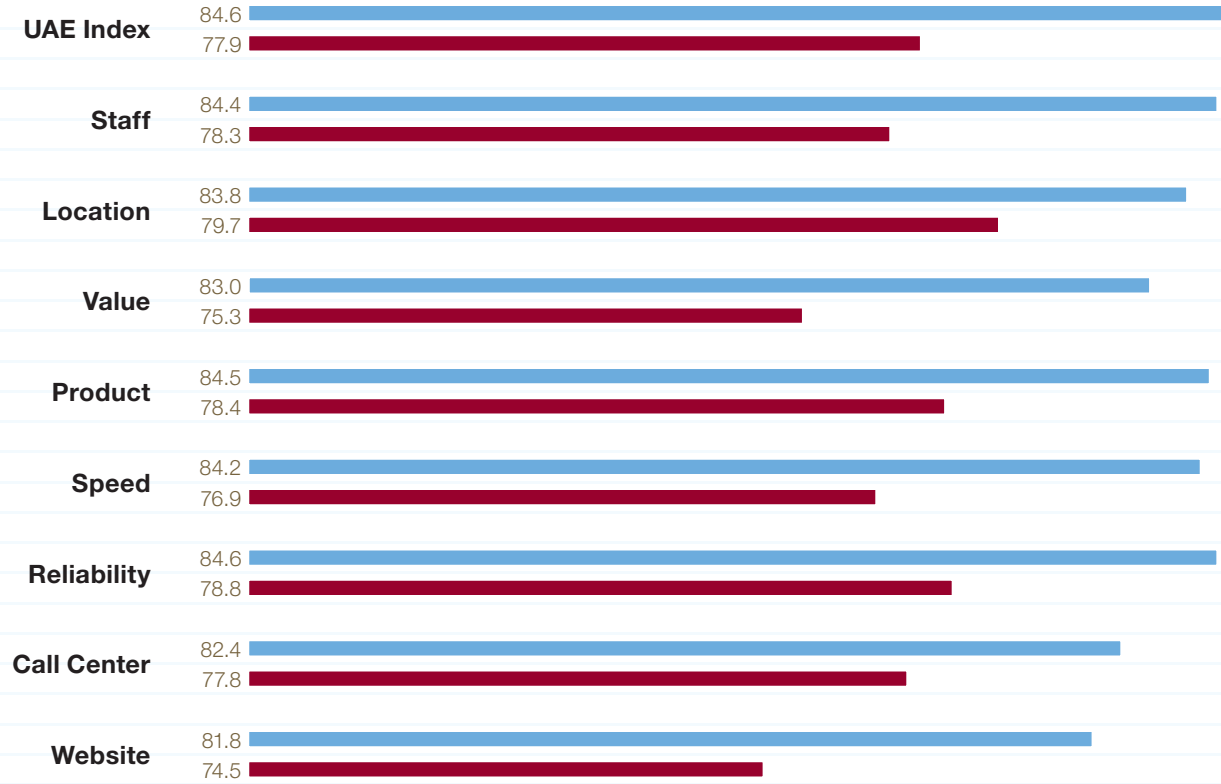
The highest score per dimension on an **Expected** level (before dealing with a brand) is for Reliability and Product Quality while the lowest is for Website.

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 Website.

Gap analysis for UAE

Dimension	Gap
UAE Index	-6.7
Staff	-6.1
Location	-4.1
Value	-7.7
Product	-6.1
Speed	-7.3
Reliability	-5.8
Call Center	-4.6
Website	-7.3

Axis: -8.0 -7.0 -6.0 -5.0 -4.0 -3.0 -2.0 -1.0 **0.0** 1.0
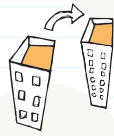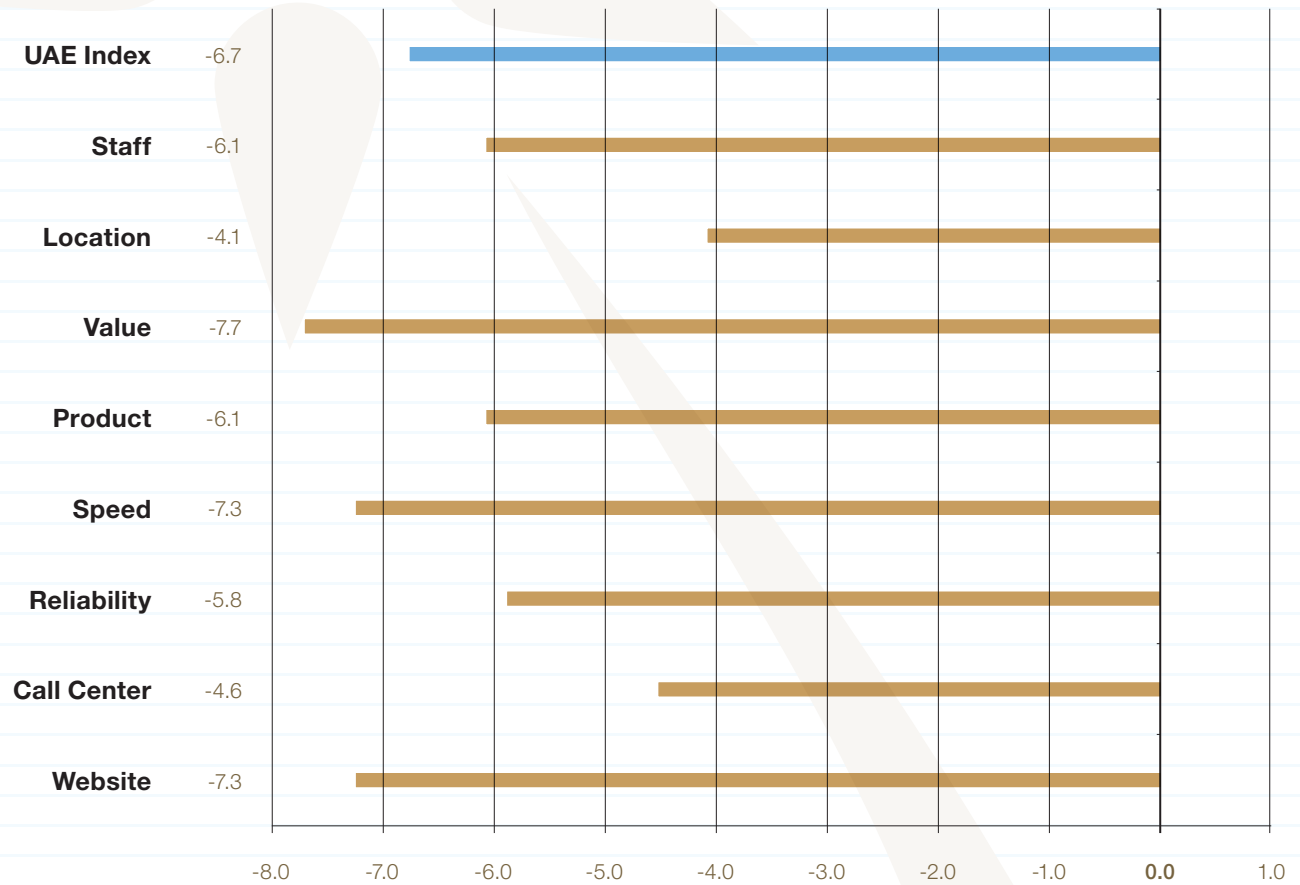
Analysis of positive and negative gaps between Expected and Actual scores
All dimensions obtained a Negative gap - i.e. Actual satisfaction after they experienced a brand was lower than their expectation before they dealt with it. However a negative gap is acceptable as long as it is above 3.00; therefore for all dimensions, companies are generally unable to meet customer expectations.

Index by demographic factors
UAE Index results by gender

■ Expected   ■ Actual

UAE Index 84.6
               77.9

Female   85.0
               78.1

Male   83.5
               78.2
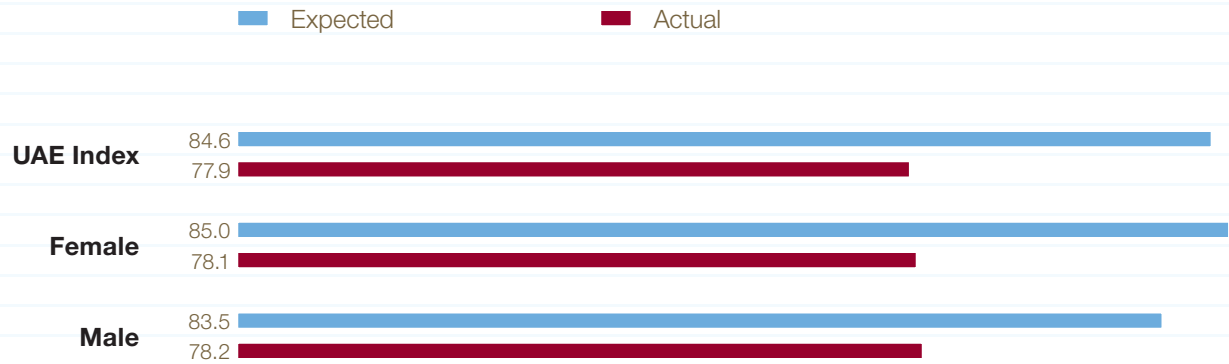
Gender
Women have a higher expectation however men are slightly more satisfied than women are.

UAE Index results by nationality

■ Expected   ■ Actual

UAE Index 84.6
               77.9

Arabs   82.9
               76.8

Emiratis   83.8
               76.6
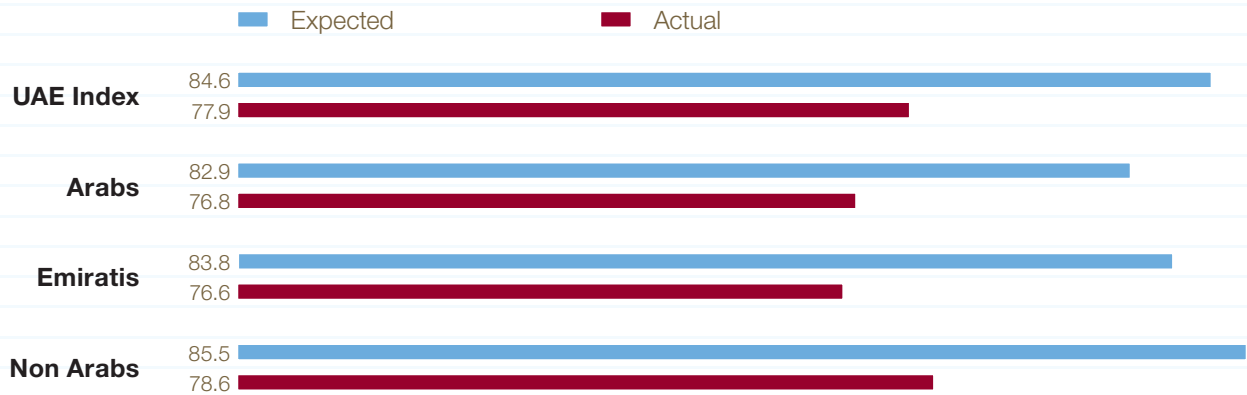
Non Arabs 85.5
               78.6

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

UAE Index results by age

Expected   **Actual**

Category	Expected	Actual
UAE Index	84.6	77.9
16 to 17 Years	90.0	85.3
18 to 29 Years	83.6	77.7
30 to 39 Years	85.2	77.8
40 to 49 Years	85.1	78.4
50 to 59 Years	85.7	82.6
More than 60 Years	93.4	88.1

Age
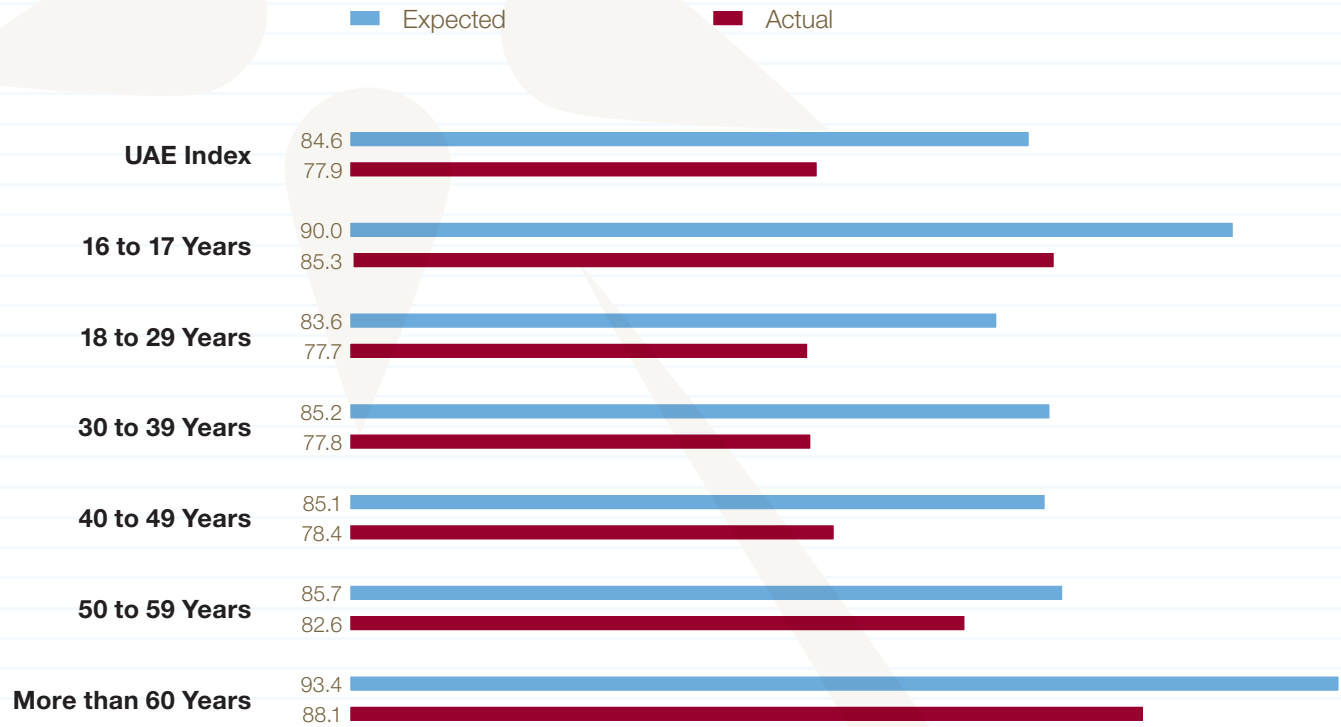
Actual satisfaction is highest amongst teenagers and those aged 50+ years. Satisfaction is lowest for adults in the 18-29 age group. This is possibly due to the age group being comprised of young adults who have a certain expectation and are less tolerant of poor service.

Service dimension scores by education
Expected and Actual scores

■ Expected   ■ Actual

	Expected	Actual
UAE Index	84.6	77.9
Elementary or below	95.3	91.1
High school	85.2	81.3
Diploma	84.5	80.3
University graduate	84.0	76.9
Master or PHD	85.1	75.7
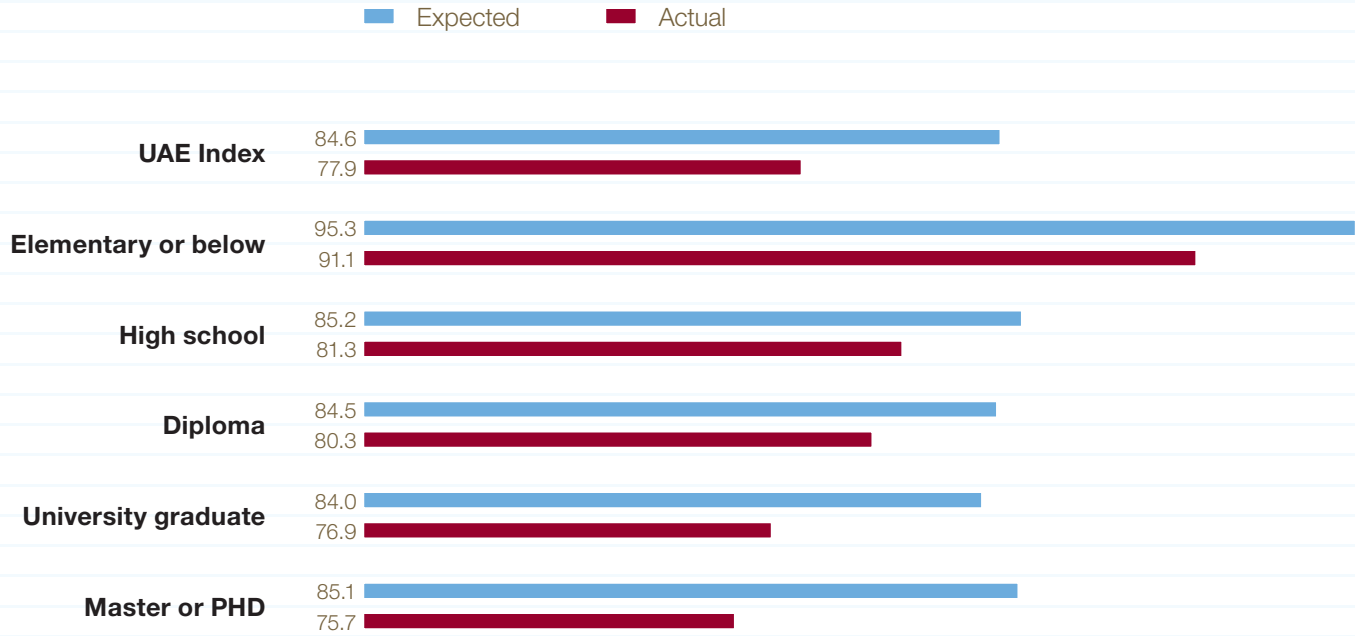
Education
Actual satisfaction is highest amongst those with a Elementary or below and High School education, both rating a strong score. The lowest satisfaction level is among those with a Masters or PHD. This could be attributed to the fact that those with a higher education demand a higher level of service.

Service dimension scores by gender

UAE Expected Index

■ Female   ■ Male

Dimension	Female	Male
UAE Expected index	85.0	83.5
Staff Expected index	84.7	83.4
Location Expected index	84.2	82.5
Value Expected index	83.5	81.8
Product Expected index	84.7	83.5
Speed Expected index	84.7	83.2
Reliability Expected index	85.0	83.5
Call Center Expected index	82.0	81.9
Website Expected index	82.4	81.5
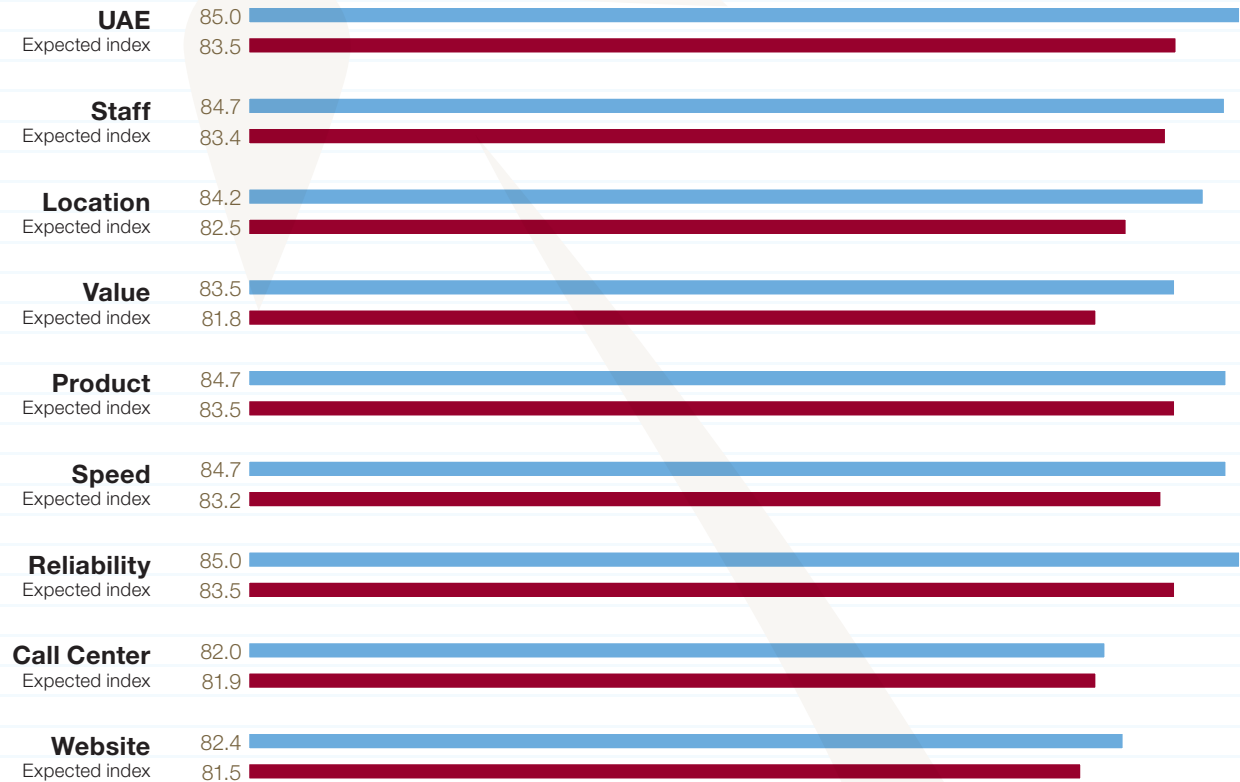
Female
Expectation: Overall women's expectations exceed those of males on every dimension. Highest is Product Quality and Reliability, lowest is Website and Value for Money.

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

Service dimension scores by gender
UAE Actual Index

■ Female ■ Male

	Female	Male
UAE Actual index	78.1	78.2
Staff Expected index	78.5	78.7
Location Expected index	80.2	79.7
Value Expected index	75.7	75.6
Product Expected index	78.4	79.0
Speed Expected index	76.9	77.2
Reliability Expected index	79.0	79.0
Call Center Expected index	76.0	78.2
Website Expected index	77.8	75.0
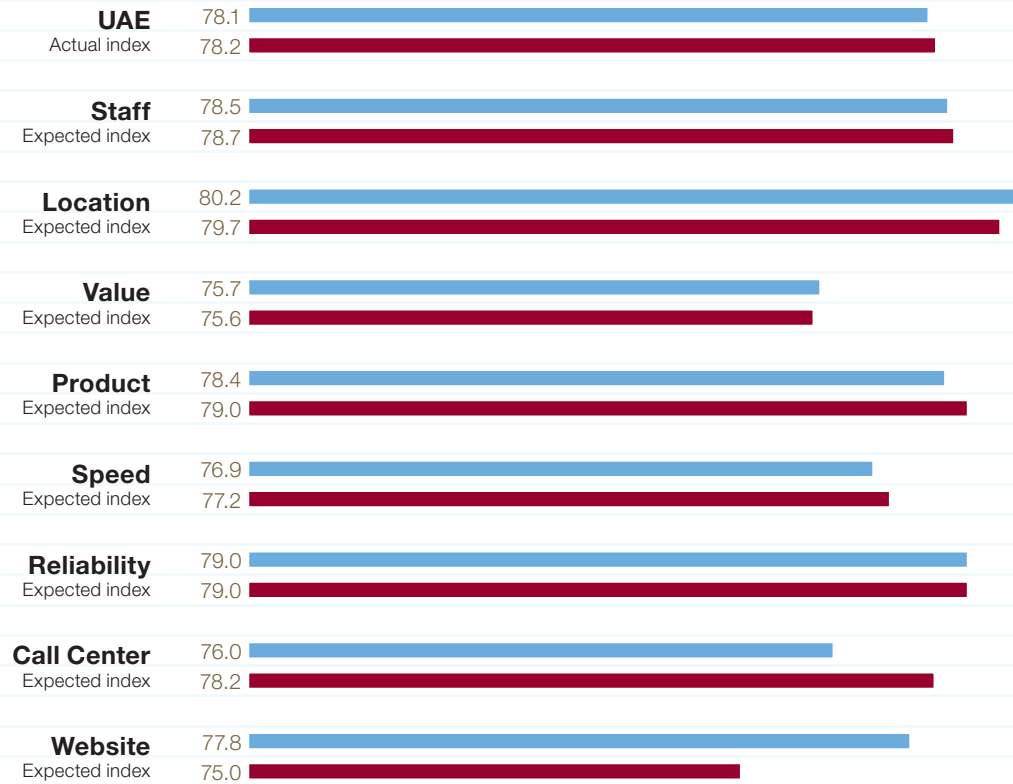
Female
Actual: Females are less satisfied than males in half of the service dimensions. Their highest satisfaction score is Location followed by Reliability and Product Quality. Their lowest is Value for Money and Website.

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

Dimension scores by nationality

Expectations before dealing with a brand

Arabs **Emiratis** **Non Arabs**

UAE
Expected index
- Arabs: 82.9
- Emiratis: 83.8
- Non Arabs: 85.5

Staff
Expected index
- Arabs: 83.0
- Emiratis: 84.3
- Non Arabs: 85.0

Location
Expected index
- Arabs: 82.4
- Emiratis: 82.3
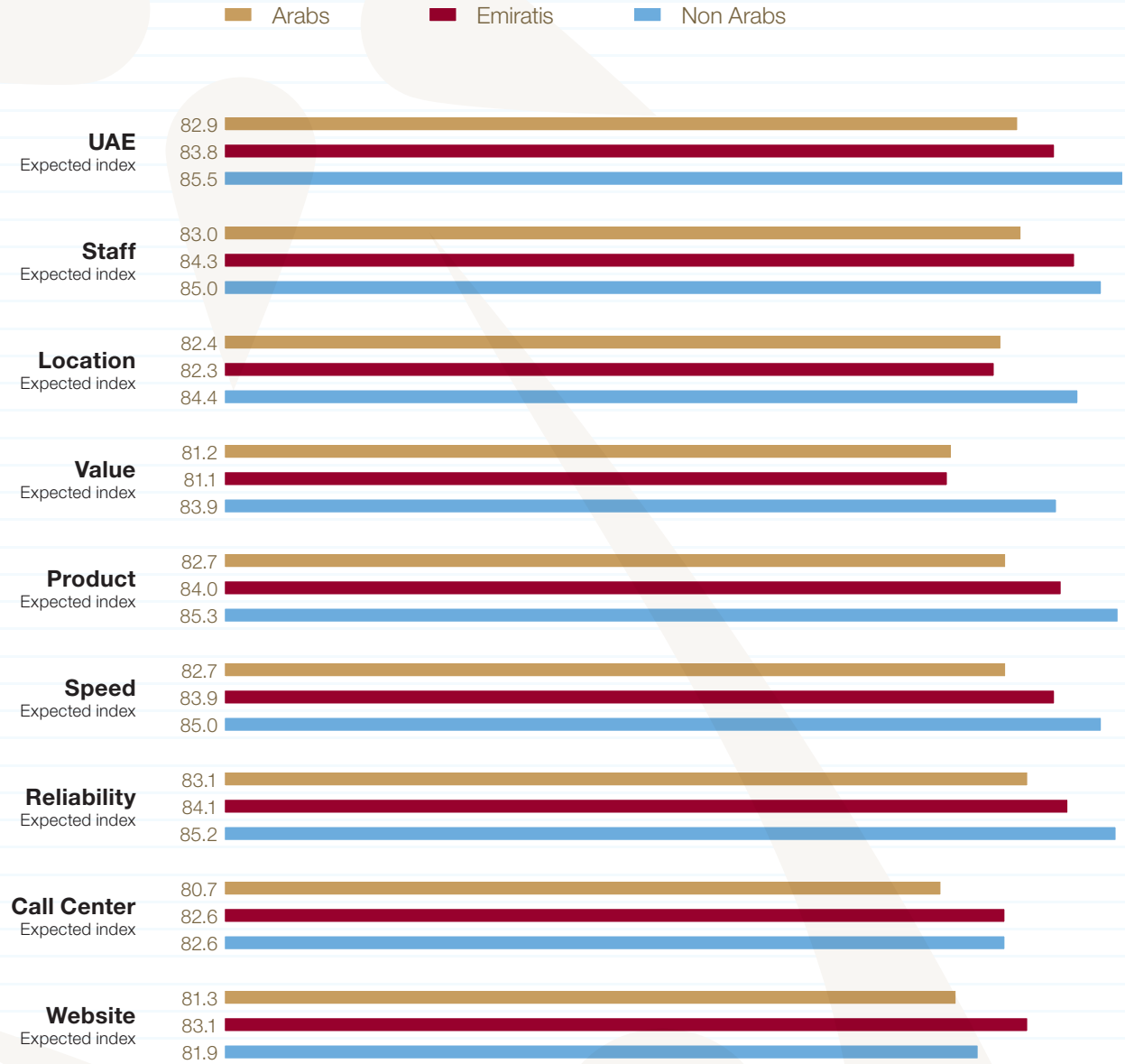- Non Arabs: 84.4

Value
Expected index
- Arabs: 81.2
- Emiratis: 81.1
- Non Arabs: 83.9

Product
Expected index
- Arabs: 82.7
- Emiratis: 84.0
- Non Arabs: 85.3

Speed
Expected index
- Arabs: 82.7
- Emiratis: 83.9
- Non Arabs: 85.0

Reliability
Expected index
- Arabs: 83.1
- Emiratis: 84.1
- Non Arabs: 85.2

Call Center
Expected index
- Arabs: 80.7
- Emiratis: 82.6
- Non Arabs: 82.6

Website
Expected index
- Arabs: 81.3
- Emiratis: 83.1
- Non Arabs: 81.9

Lowest
Arabs scored lowest on Call Center while Emiratis scored lowest on Value for Money. Non Arabs scored lowest on Call Center.
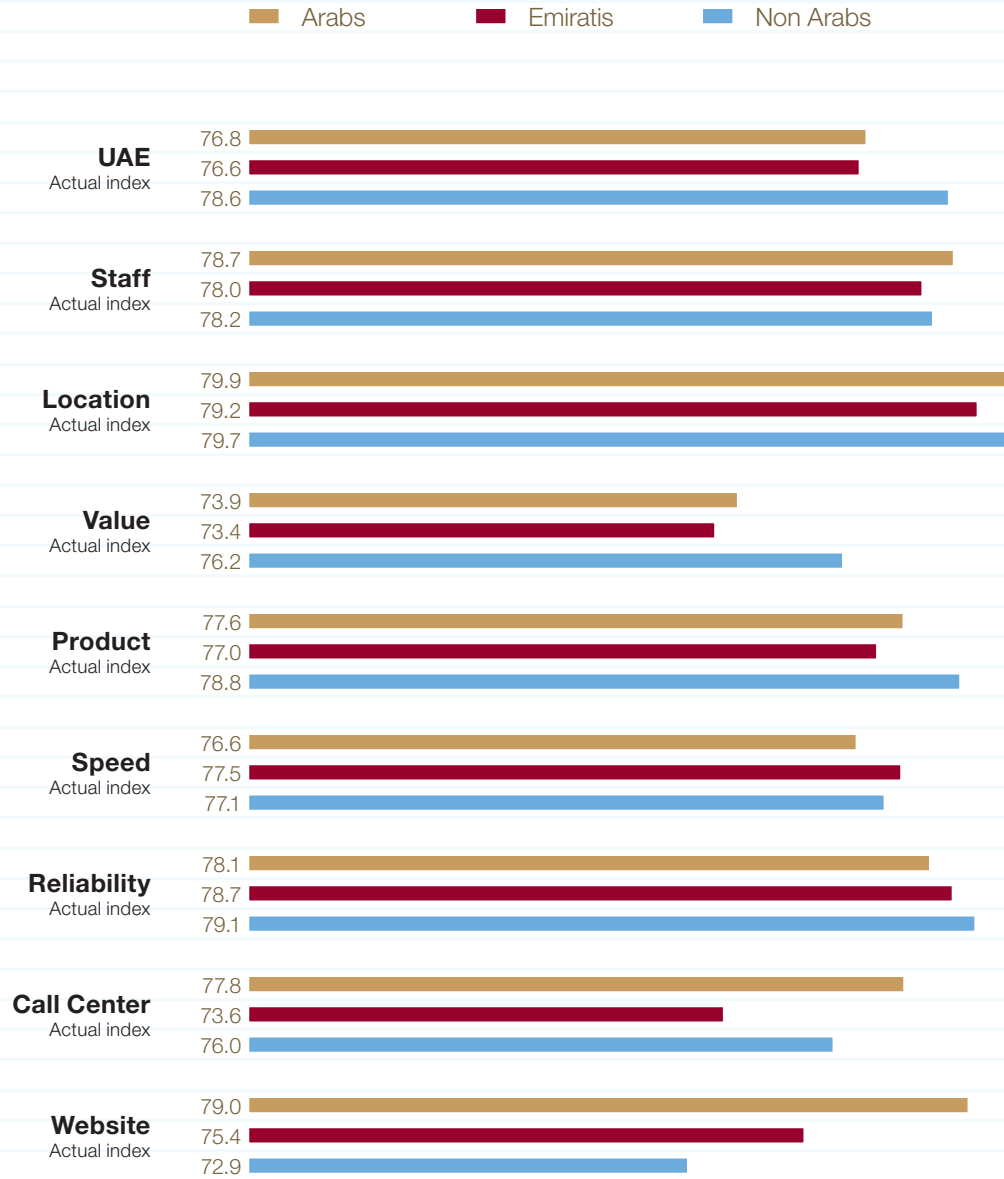
Highest
Arabs have the highest expectation for Reliability while Emiratis scored highest on Staff Attitude. Non Arabs have Product Quality scored highest on expectations.

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Dimension scores by nationality

Actual satisfaction after dealing with a brand

■ Arabs   ■ Emiratis   ■ Non Arabs

UAE
Actual index
- Arabs: 76.8
- Emiratis: 76.6
- Non Arabs: 78.6

Staff
Actual index
- Arabs: 78.7
- Emiratis: 78.0
- Non Arabs: 78.2

Location
Actual index
- Arabs: 79.9
- Emiratis: 79.2
- Non Arabs: 79.7

Value
Actual index
- Arabs: 73.9
- Emiratis: 73.4
- Non Arabs: 76.2

Product
Actual index
- Arabs: 77.6
- Emiratis: 77.0
- Non Arabs: 78.8

Speed
Actual index
- Arabs: 76.6
- Emiratis: 77.5
- Non Arabs: 77.1

Reliability
Actual index
- Arabs: 78.1
- Emiratis: 78.7
- Non Arabs: 79.1

Call Center
Actual index
- Arabs: 77.8
- Emiratis: 73.6
- Non Arabs: 76.0

Website
Actual index
- Arabs: 79.0
- Emiratis: 75.4
- Non Arabs: 72.9

Lowest
Arabs and Emiratis scored lowest on Value for Money while Non Arabs scored lowest on Website.

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

Actual	16-17	18-29	30-39	40-49	50-59	60+	UAE Index
Staff	83.3	78.3	78.2	79.2	80.8	88.4	**78.3**
Location	84.1	79.4	79.8	80.8	82.9	88.3	**79.7**
Value	81.6	74.8	75.4	76.2	80.3	85.6	**75.3**
Product	85.2	78.5	77.9	78.8	82.6	90.0	**78.4**
Speed	82.6	76.7	76.6	77.8	80.8	87.7	**76.9**
Reliability	84.6	78.9	78.2	79.7	82.9	90.7	**78.8**
Call Center	84.3	75.6	77.5	76.9	82.3	83.8	**77.8**
Website	87.0	76.8	80.2	73.4	84.2	89.7	**74.5**
Overall	**85.3**	**77.7**	**77.8**	**78.4**	**82.6**	**88.1**	**77.9**

Gap	16-17	18-29	30-39	40-49	50-59	60+	UAE Index
Staff	-5.4	-5.7	-6.5	-6.0	-1.3	-4.3	**-6.1**
Location	-3.2	-3.7	-4.3	-3.8	0.9	-3.8	**-4.1**
Value	-5.4	-7.4	-8.2	-7.5	-1.4	-7.2	**-7.7**
Product	-4.9	-5.3	-6.9	-6.3	-1.6	-3.5	**-6.1**
Speed	-5.8	-6.8	-8.0	-7.0	-3.1	-6.2	**-7.3**
Reliability	-3.3	-4.9	-6.6	-5.3	-1.9	-3.3	**-5.8**
Call Center	-0.3	-4.8	-5.4	-6.7	-2.7	-7.9	**-4.6**
Website	-1.3	-4.2	-3.5	-8.8	-0.3	-1.4	**-7.3**
Overall Gap	**-4.7**	**-5.9**	**-7.4**	**-6.7**	**-3.1**	**-5.3**	**-6.7**
Best							
Worst							

Satisfaction
Value for Money satisfaction is **lowest** for most age groups except for 40-49 year olds and 60+. The **highest** is scattered between Location, Website, and Reliability.

Gaps
In terms of **positive** gap scores by age group, only 40-49 year olds showed a positive gap in Location 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	93.0	80.7	79.6	77.7	76.9	**78.3**
Location	91.7	81.7	82.1	79.0	78.1	**79.7**
Value	88.4	78.6	77.8	74.4	73.1	**75.3**
Product	93.3	81.9	79.8	77.5	76.3	**78.4**
Speed	91.6	79.4	78.6	76.3	74.3	**76.9**
Reliability	93.2	81.6	80.3	78.0	77.0	**78.8**
Call Center	92.2	78.5	78.0	77.1	72.5	**77.8**
Website	92.4	81.2	80.5	79.0	69.8	**74.5**
Overall	**91.1**	**81.3**	**80.3**	**76.9**	**75.7**	**77.9**

Gap						
Staff	-3.0	-4.1	-3.1	-6.4	-8.6	**-6.1**
Location	-2.6	-2.2	-0.9	-4.5	-6.5	**-4.1**
Value	-5.6	-4.1	-4.2	-8.3	-10.8	**-7.7**
Product	-2.4	-3.4	-3.5	-6.5	-9.1	**-6.1**
Speed	-4.4	-5.0	-4.5	-7.5	-10.5	**-7.3**
Reliability	-1.6	-3.9	-3.3	-6.1	-8.5	**-5.8**
Call Center	-1.6	-3.2	-4.3	-4.7	-9.9	**-4.6**
Website	0.4	-2.4	-1.9	-3.4	-12.1	**-7.3**
Overall Gap	**-4.2**	**-3.9**	**-4.2**	**-7.1**	**-9.4**	**-6.7**
Best						
Worst						

Satisfaction

Elementary or below have the highest satisfaction across most dimensions, while those with a Master or PHD had the lowest satisfaction in all dimensions. Among most education levels, Location had the highest average satisfaction, with Product Quality and Website following. The lowest satisfaction is shown with Value for Money and Call Center for most education levels and Website scoring lowest for Master or PHD education level.

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.

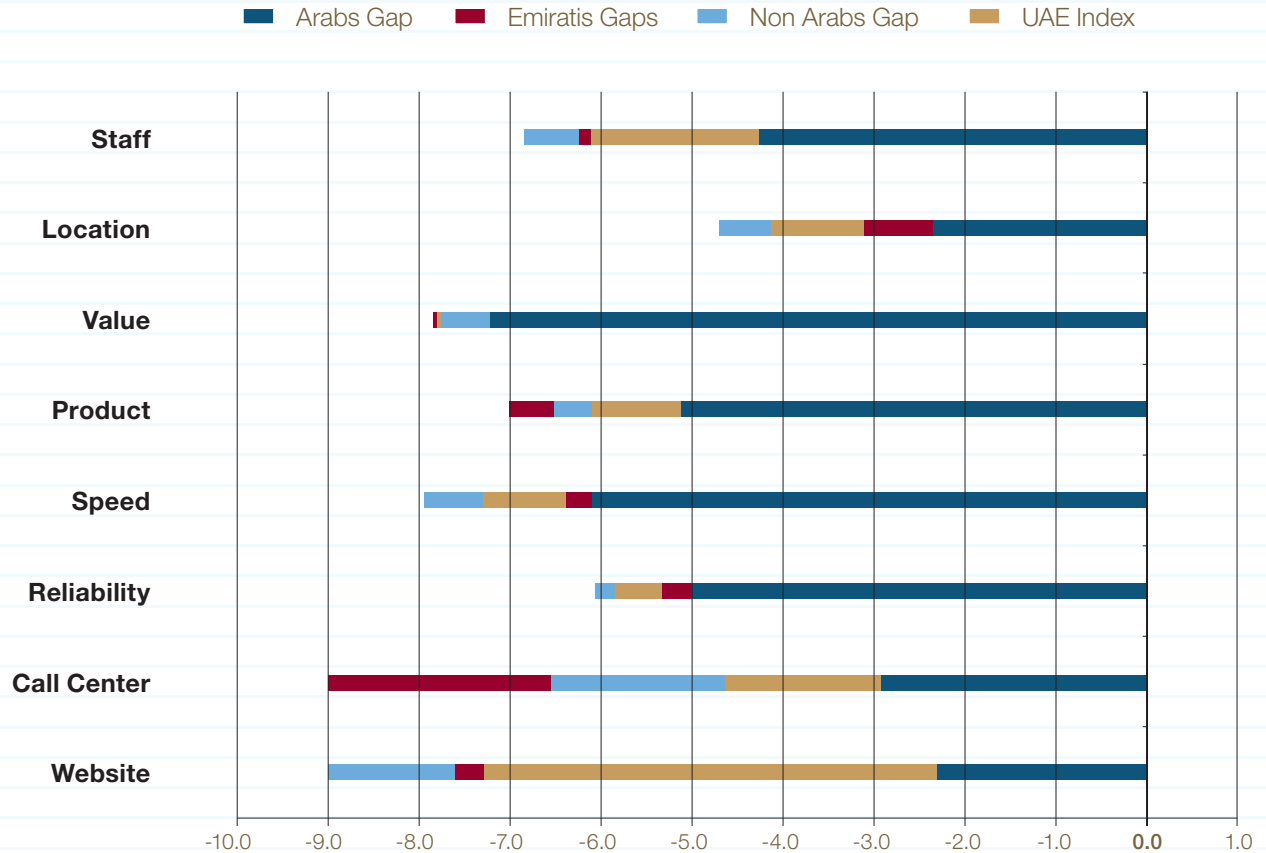# Gaps by gender
UAE Index 2017 - Gap Analysis

■ UAE Gap ■ Gap Female ■ Gap Male

Dimension	UAE Gap	Gap Female	Gap Male
Staff	-6.1	-6.2	-4.7
Location	-4.1	-4.0	-2.8
Value	-7.7	-7.8	-6.2
Product	-6.1	-6.3	-4.5
Speed	-7.3	-7.8	-6.0
Reliability	-5.8	-6.0	-4.5
Call Center	-4.6	-6.0	-3.7
Website	-6.7	-6.9	-5.3

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

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

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Gaps by nationality

	Staff	Location	Value	Product	Speed	Reliability	Call Center	Website
Arab Gap	-4.3	-2.5	-7.3	-5.1	-6.1	-5.0	-2.9	-2.3
Emiratis Gap	-6.3	-3.1	-7.7	-7.0	-6.4	-5.4	-9.0	-7.7
Non Arabs Gap	-6.8	-4.7	-7.7	-6.5	-7.9	-6.1	-6.6	-9.0
UAE Index	-6.1	-4.1	-7.7	-6.1	-7.3	-5.8	-4.6	-7.3

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.

Loyalty
UAE Index recommend scores 2017

UAE Index	77.3	
Female	77.8	
Male	77.2	
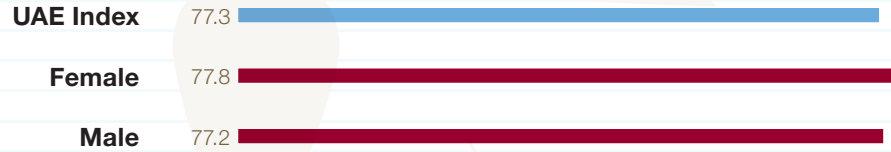
One question is examined here - the likelihood to recommend a brand.

UAE scored a 77.3 on the **loyalty**, or the recommendation score.

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

Recommend scores by nationality
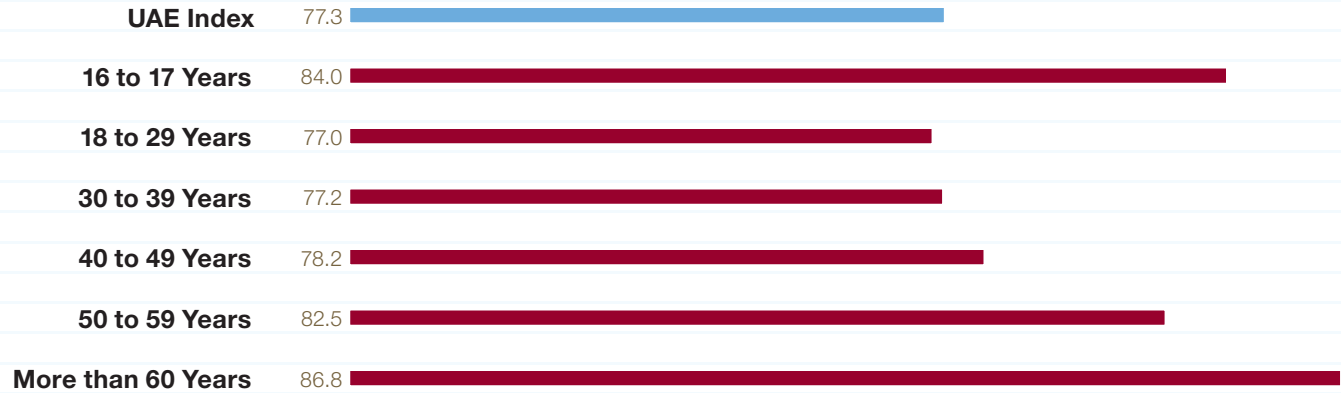UAE Index recommend scores 2017

UAE Index	77.3	
Arabs	75.4	
Emiratis	75.7	
Non Arabs	78.4	
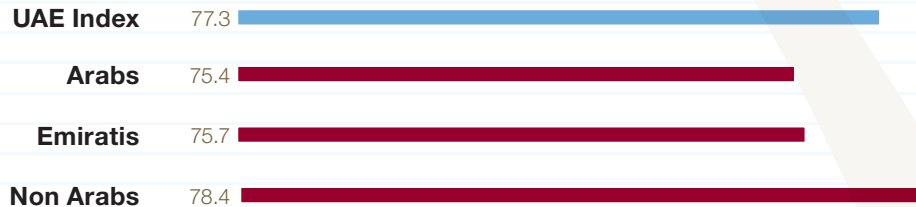
The least likely nationality to recommend a brand are Arabs, while the most likely to recommend a brand are Non Arabs. None of the nationalities had a 'strong' score.

Recommend scores by age group

UAE Index recommend scores 2017

Age Group	Score
UAE Index	77.3
16 to 17 Years	84.0
18 to 29 Years	77.0
30 to 39 Years	77.2
40 to 49 Years	78.2
50 to 59 Years	82.5
More than 60 Years	86.8

The two age groups that are more likely to recommend a brand are the 16-17 and 60+ age 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 18-39 age groups.

Recommend scores by education level

UAE Index recommend scores 2017

UAE Index	77.3
Elementary or below	87.2
High school	80.3
Diploma	79.8
University graduate	76.4
Master or PHD	75.6
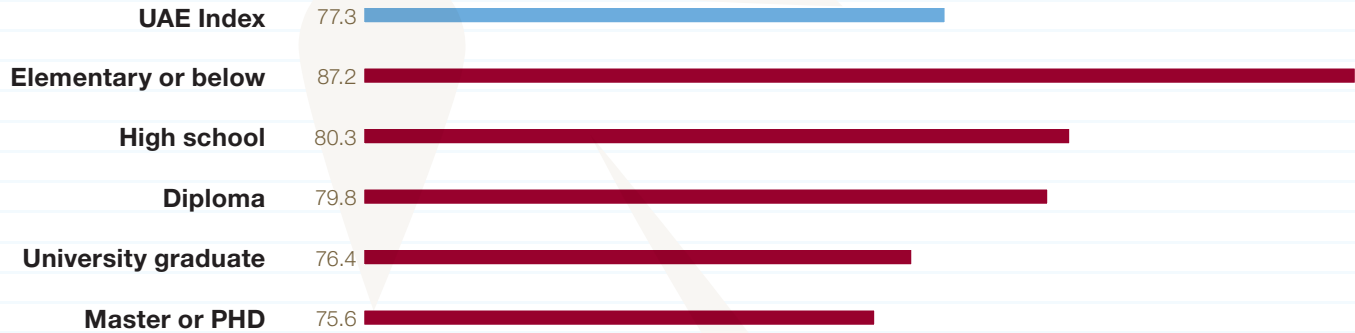
Those with the highest education levels are least likely to recommend a brand, while the most likely to recommend are those with an Elementary or below education.

Satisfaction & comparison to an ideal

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

Ideal	76.3
Overall satisfaction based on 1 question(*)	77.8
Actual satisfaction (average of 8 dimensions)	77.9

* Overall Satisfaction scored slightly less than the UAE Actual Satisfaction (the average of all eight dimensions). How a brand compares to it's Ideal Offering is below 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 near their expectations.

The UAE expected index across all 14 categories

Expected Index

Category	Score
UAE Index	84.6
Car Service	87.8
New Car Sales	86.6
Supermarkets	86.5
Electronics	86.4
Private Hospitals	85.6
Home Furniture	85.1
Fast Food	84.5
Islamic Banks	84.2
Retail Banks	84.2
Cafés	84.1
Airlines	83.6
Casual Dining	83.4
Clothes	82.3
Mobile Operators	80.7

Six industry categories exceeded the UAE Index score for the average of all 8 dimensions on a "before" basis.

The top expectations are for Car Service, New Car Sales, and Supermarkets. The lowest expectations are with Mobile Operators, Clothes, and Casual Dining.

The UAE actual index across all 14 categories

Actual Index

Category	Score
UAE Index	77.9
New Car Sales	83.6
Electronics	83.5
Cafés	82.4
Fast Food	81.6
Casual Dining	81.0
Supermarkets	79.9
Clothes	79.8
Airlines	79.7
Home Furniture	79.5
Car Service	75.3
Private Hospitals	73.7
Islamic Banks	72.4
Retail Banks	71.7
Mobile Operators	66.1
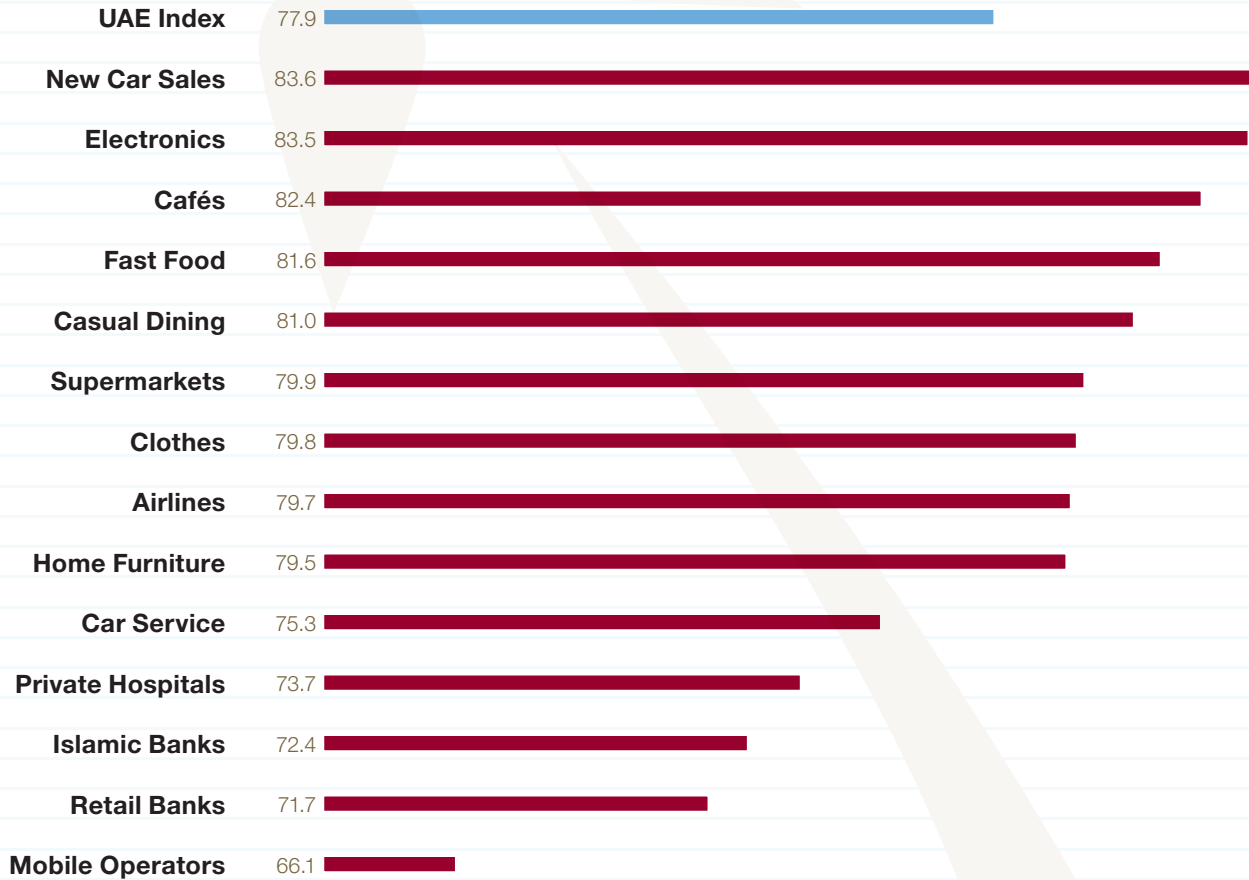
Nine industries exceeded the UAE Index for the average of all 8 dimensions on an "after" basis.

The top three scoring industries are New Car Sales, Electronics, and Cafes. The lowest scoring industries are Mobile Operators and the banks (Retail and Islamic).

Category Growth 2016 vs. 2017

Notable improvements with consumer satisfaction are seen in Car Service, Regional Arab Airlines, and Islamic Banks. Categories that saw a decrease in consumer satisfaction are ISPs, Fine Dining, and Casual Dining.

Category	Value
Overall UAE Index	1.6
Café	2.1
Car Service	4.9
Casual Dining	2.2
Clothes	0.3
Electronics	3.8
Fast Food	4.0
Home Furniture	0.4
Islamic Banks	1.5
Mobile Operators	0.6
New Car Sales	3.7
Private Hospitals	1.1
Regional Arab Airlines	0.5
Retail Banks	3.7
Supermarkets	1.6

-1.0   0.0   1.0   2.0   3.0   4.0   5.0

3
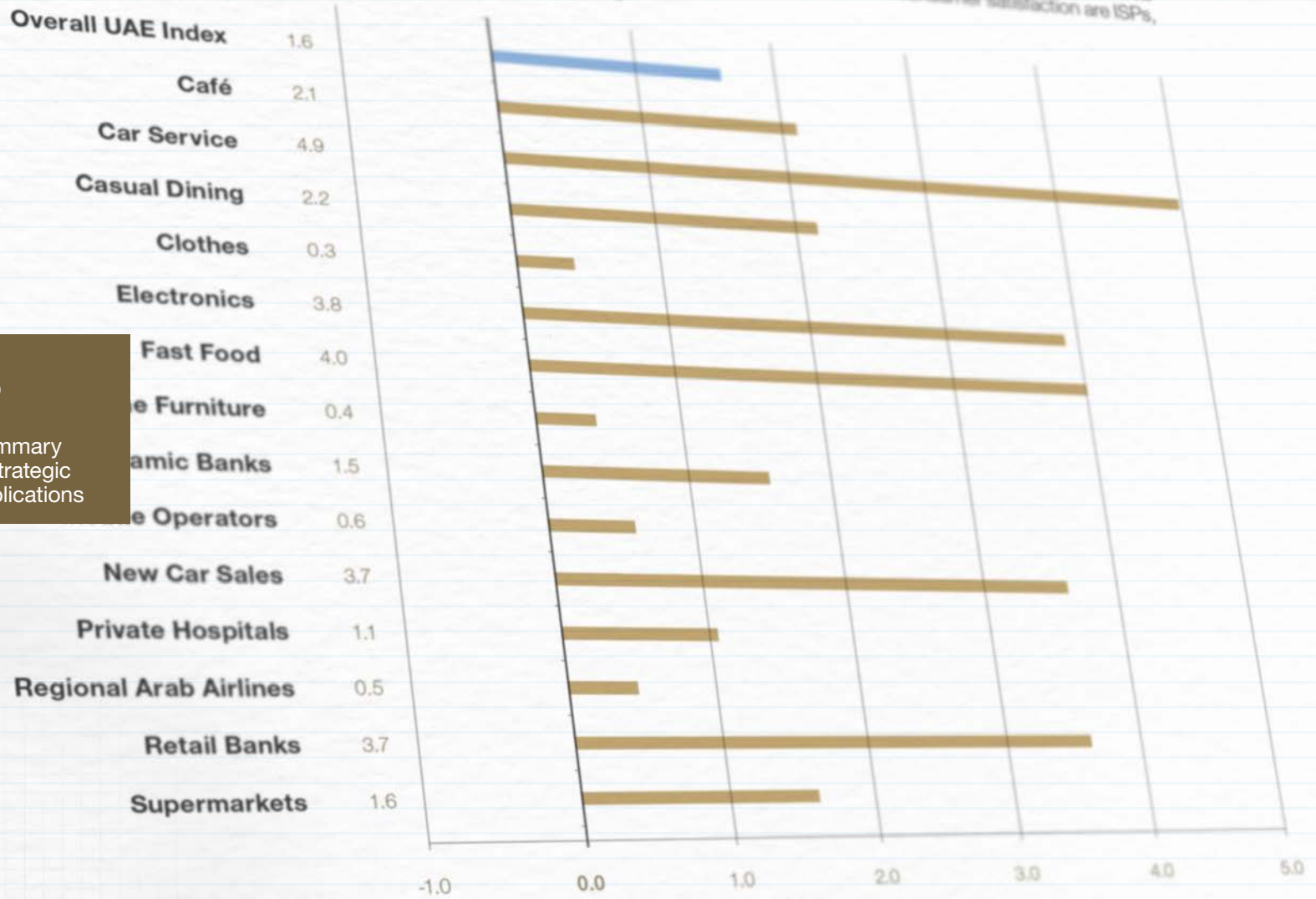
Summary & strategic implications

Note: Local Airlines has been changed to Regional Arab Airlines in 2011 which therefore increased the number of brands in the category. The increase in satisfaction in that category could be attributed to this change.

The Supermarkets category was added in 2011 and the Health Club category was included in the index in 2012. Therefore they have both been excluded from this 7 year comparison chart.

Market position of all 14 categories

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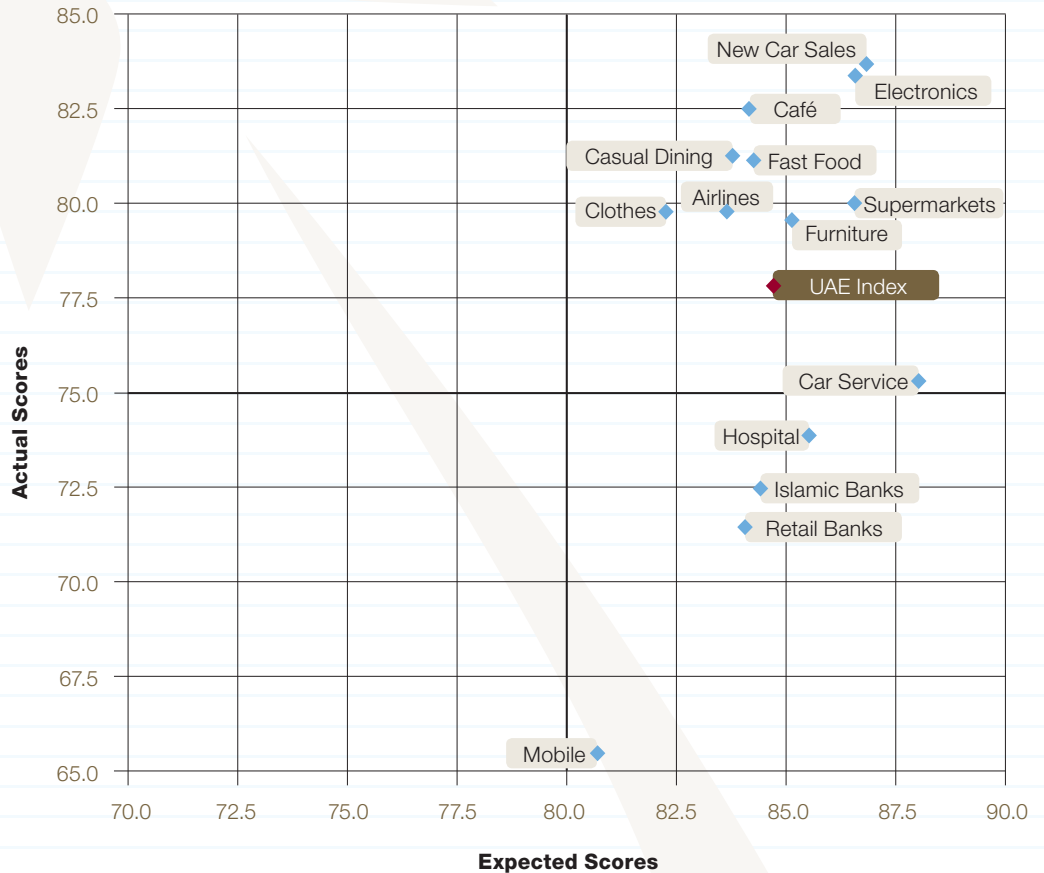
Industry categories in the top right quadrant such as New Car Sales, Home Furniture, and Electronics are in the best position as their actual scores exceed expected scores. They need to sustain this position over time.

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.
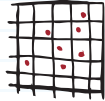
Correlation of dimensions to overall satisfaction

Service dimensions most influential to overall satisfaction (R Square 85%, 24,074 sample)

Dimension	Value
Reliability	28%
Product	25%
Website	13%
Staff	12%
Value	12%
Call center	10%
Speed	8%
Location	-3%
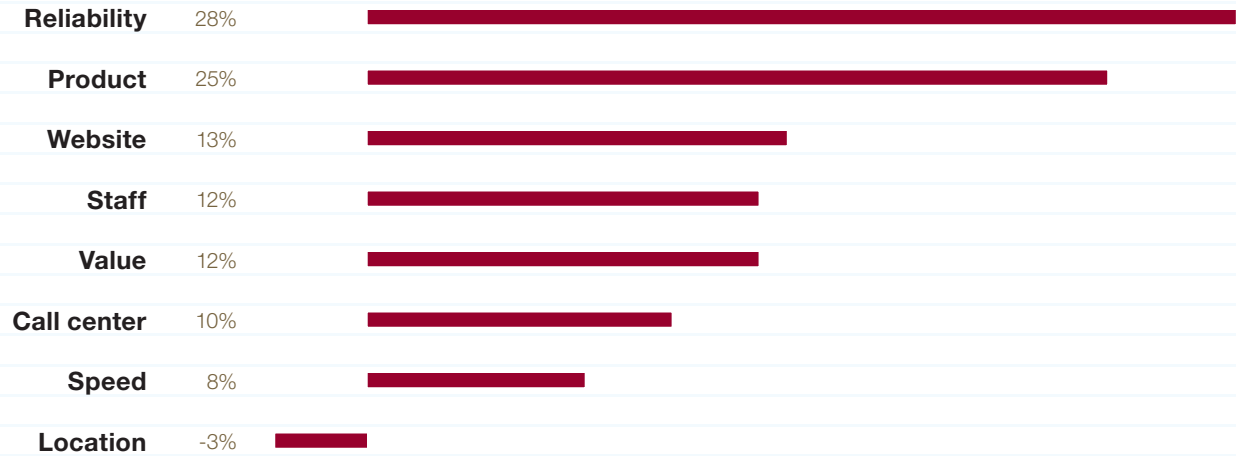
In order to help companies understand which service dimensions are most influential to overall satisfaction, correlation analysis on the entire dataset for all categories is conducted using standard statistical practices.

Based on the model, only two dimensions have a critical role in influencing overall satisfaction: Reliability and Accuracy (28% impact) and Product or Service Quality (25% 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 Speed and Call Center 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

Detractors	**Passives**	**Promoters**
Negative word of mouth	Satisfied but unenthusiastic	Enthusiasts
(score 0-6)	(score 7-8)	(score 9-10)
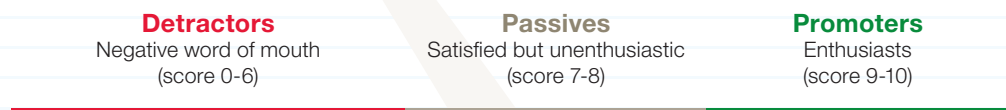
Promoters (score 9-10) are loyal enthusiasts who will keep buying and refer others, fueling growth.

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

Detractors (score 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 31%

Net promoter score - Service Hero Index 2017

UAE Index	31%
16 to 17 Years	50%
18 to 29 Years	29%
30 to 39 Years	31%
40 to 49 Years	34%
50 to 59 Years	50%
More than 60 Years	61%
Arabs	27%
Emiratis	31%
Non Arabs	33%
Female	31%
Male	32%
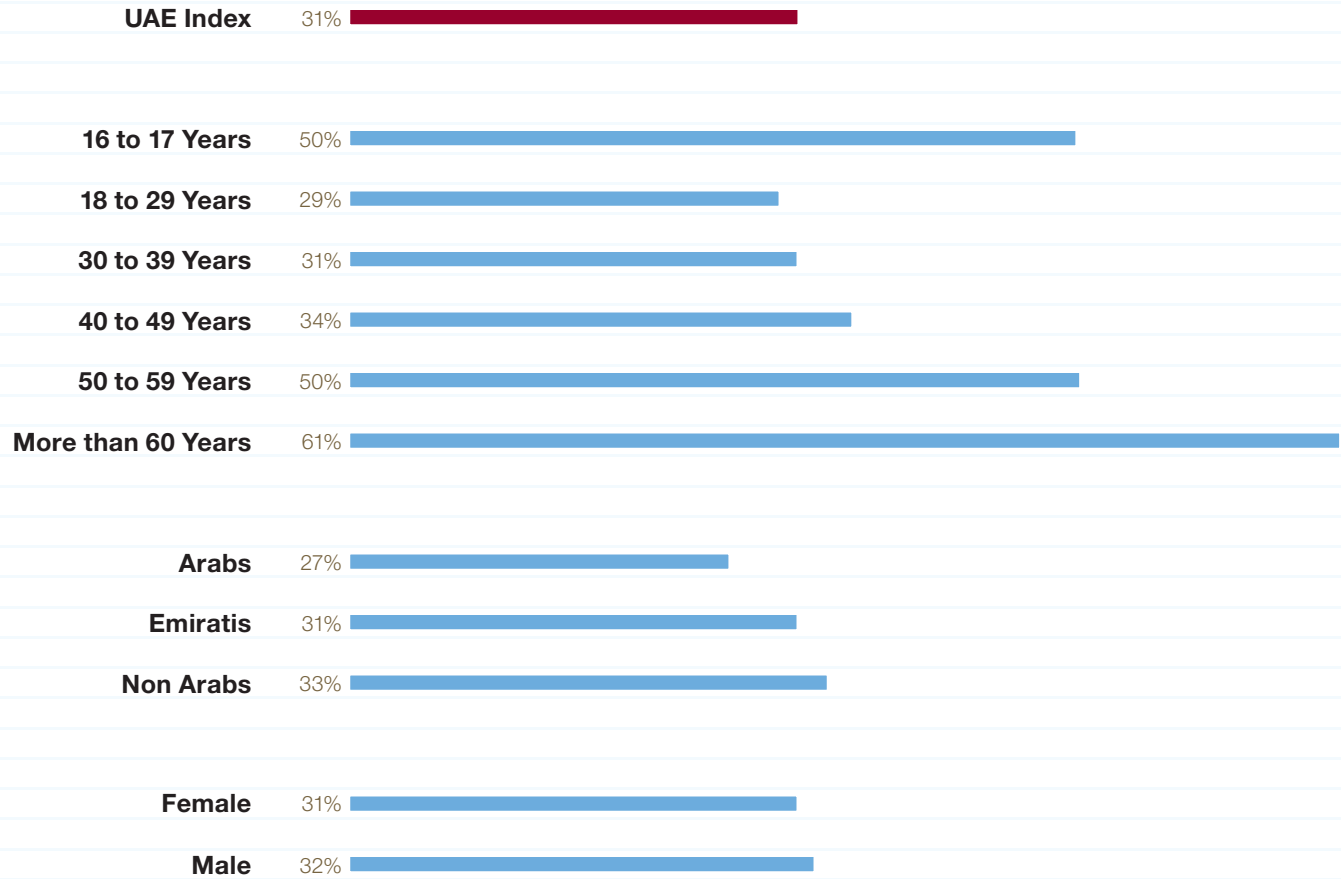
The net promoter score for UAE (continued)

Net promoter score - Service Hero Index 2017

Elementary or below	69%
High school	40%
Diploma	39%
University graduate	28%
Master or PHD	24%
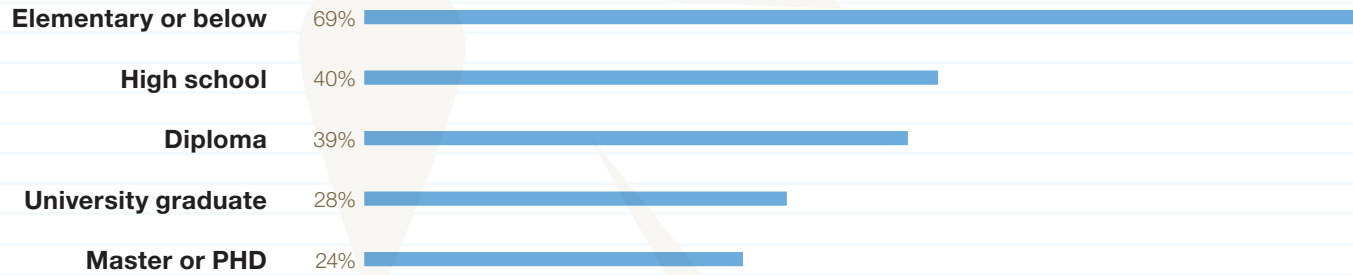
While the country average is 31%, demographic groups vary on being either Ambassadors or Detractors. The largest concentration of ambassadors seem to be all age groups except for those aged 18-29 who are the only age group with an NPS lower than 30%. Males and females have an almost identical score, while Non Arabs score the highest for nationalities. Those with a lower education are brand ambassadors while those with a higher education level are more likely to be detractors.

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).

UAE overall score remains in the moderate range

■ 2016   ■ 2017

Expected Satisfaction
81.2
84.6

Actual Satisfaction
76.1
77.9
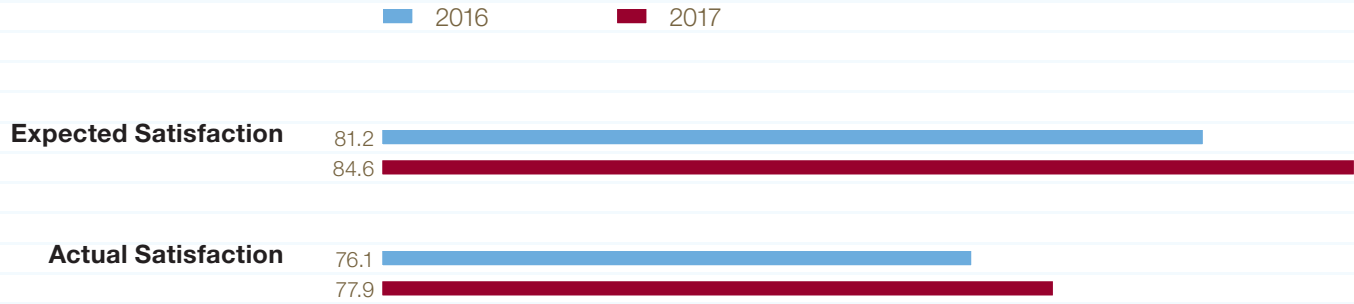
Since last year, the average Actual Satisfaction increased 2.2 points, or 3%.
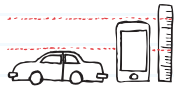
Category Comparison 2016 vs 2017
Actual Satisfaction

Satisfaction for UAE in 2017 increased from 2016. The top scoring categories in 2017 are similar to last year with Cafe, Electronics, New Car Sales and more recently Supermarkets scoring high. Notable improvements since last year are shown in Car Service, Fast Food, Retail Banks, Electronics and New Car Sales all increasing in satisfaction from 2016.

	2016	2017
UAE Index	76.1	77.9
Café	81.9	82.5
Car Service	69.5	75.4
Casual dining	80.2	81.1
Clothes	80.3	79.8
Electronics	81.4	83.5
Fast Food	79.3	81.6
Home Furniture	80.8	79.6
Islamic Banks	70.5	72.4
Mobile Operators	63.9	66.1
New Car Sales	81.2	83.6
Private Hospitals	71.6	73.8
Regional Arab Airlines	78.6	79.7
Retail Banks	66.5	71.8
Supermarkets	79.3	80.0

Category Growth 2016 vs. 2017

Notable improvements with consumer satisfaction are seen in Car Service, Retail Banks, and New Car Sales. The two categories with negative growth since last year are Home Furniture and Clothes.

Category	Value
Overall UAE Index	1.8
Café	0.6
Car Service	5.9
Casual Dining	0.9
Clothes	-0.5
Electronics	2.2
Fast Food	2.4
Home Furniture	-1.2
Islamic Banks	1.9
Mobile Operators	2.2
New Car Sales	2.4
Private Hospitals	2.1
Regional Arab Airlines	1.2
Retail Banks	5.3
Supermarkets	0.6
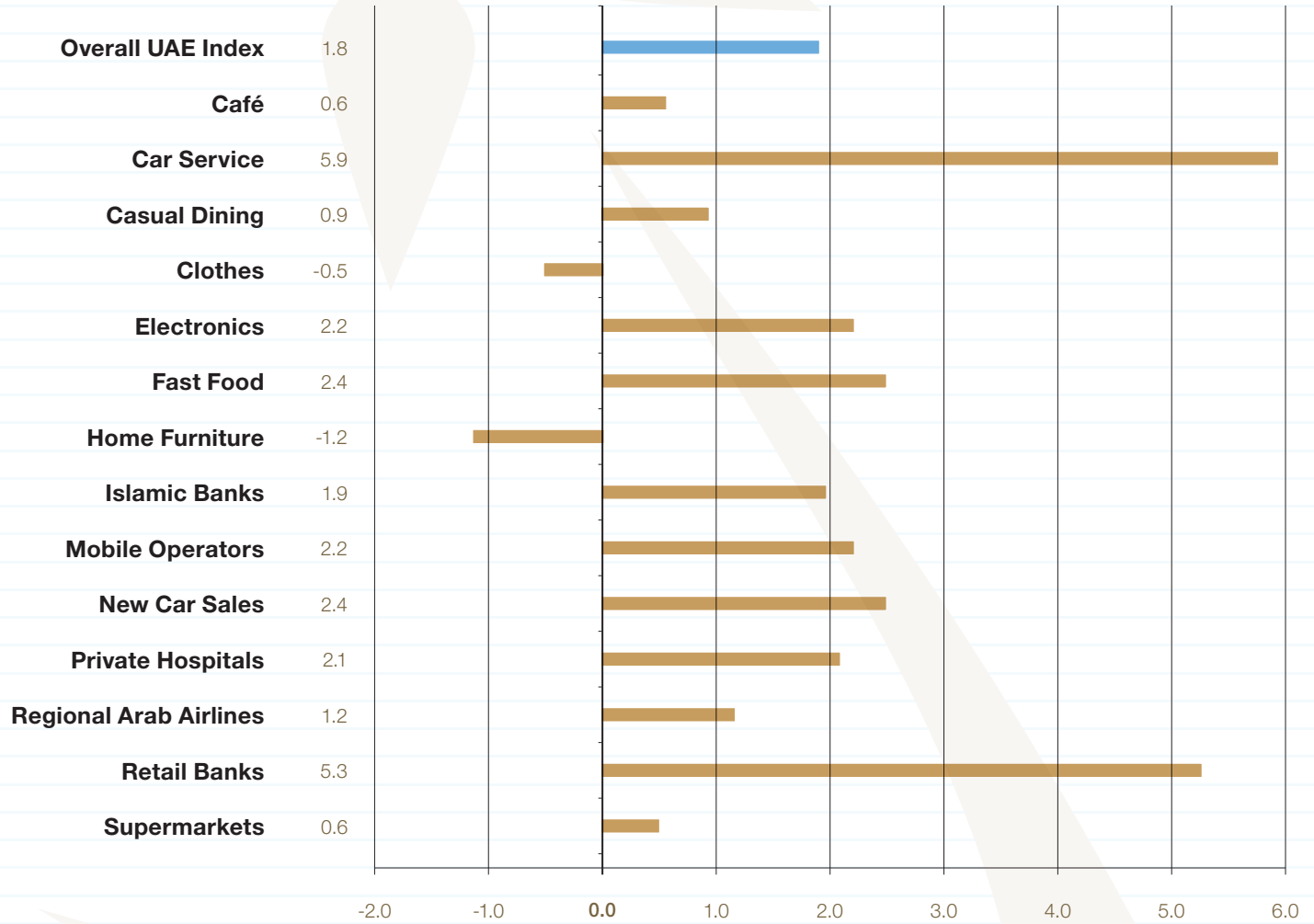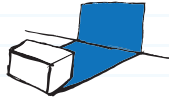
Dimension Comparisons 2016 vs. 2017

Actual Satisfaction

	2016	2017
Staff	76.0	78.3
Location	78.4	79.7
Value	74.2	75.3
Product	76.5	78.4
Speed	74.6	76.9
Reliability	76.8	78.8
Call Center	73.2	77.8
Website	76.0	74.5

Overall, there are improvements in most dimensions, with Call Center increasing the most since last year. Website is the only dimension with a negative growth since last year.

Demographic Comparisons 2016 vs. 2017

Actual Satisfaction

	2016	2017
Female	77.8	78.1
Male	74.5	78.2
Arabs	74.2	76.8
Emirati	77.0	76.6
Non Arabs	77.5	78.6
16 to 17 years	81.9	85.3
18 to 29 years	77.0	77.7
30 to 39 years	75.8	77.8
40 to 49 years	75.8	78.4
50 to 59 years	78.0	82.6
More than 60 years	74.1	88.1
Elementary or below	71.8	91.1
High school	81.9	81.3
Diploma	80.7	80.3
University graduate	75.5	76.9
Master or PHD	72.1	75.7

While Males and Females saw an increase in satisfaction since last year, Males increased their satisfaction significantly more since 2016. Arabs saw the largest growth in satisfaction since last year.

The age groups with the highest increases in satisfaction are those aged 60+ and teens. No age group had lower satisfaction since last year.

By education, Elementary increased the most in satisfaction. The lowest positive growth in satisfaction was for Diploma holders.

Demographic growth 2016 vs. 2017
Actual Satisfaction

16 to 17	3.4
18 to 29	0.7
30 to 39	2.0
40 to 49	2.6
50 to 59	4.6
60+	14.0
Female	0.3
Male	3.7
Arabs	2.6
Emariti	-0.4
Non Arabs	1.1
Elementary or below	19.3
High school	-0.6
Diploma	-0.4
University graduate	1.4
Master or PHD	3.6

-2.0 0.0 2.0 4.0 6.0 8.0 10.0 12.0 14.0 16.0 18.0 20.0
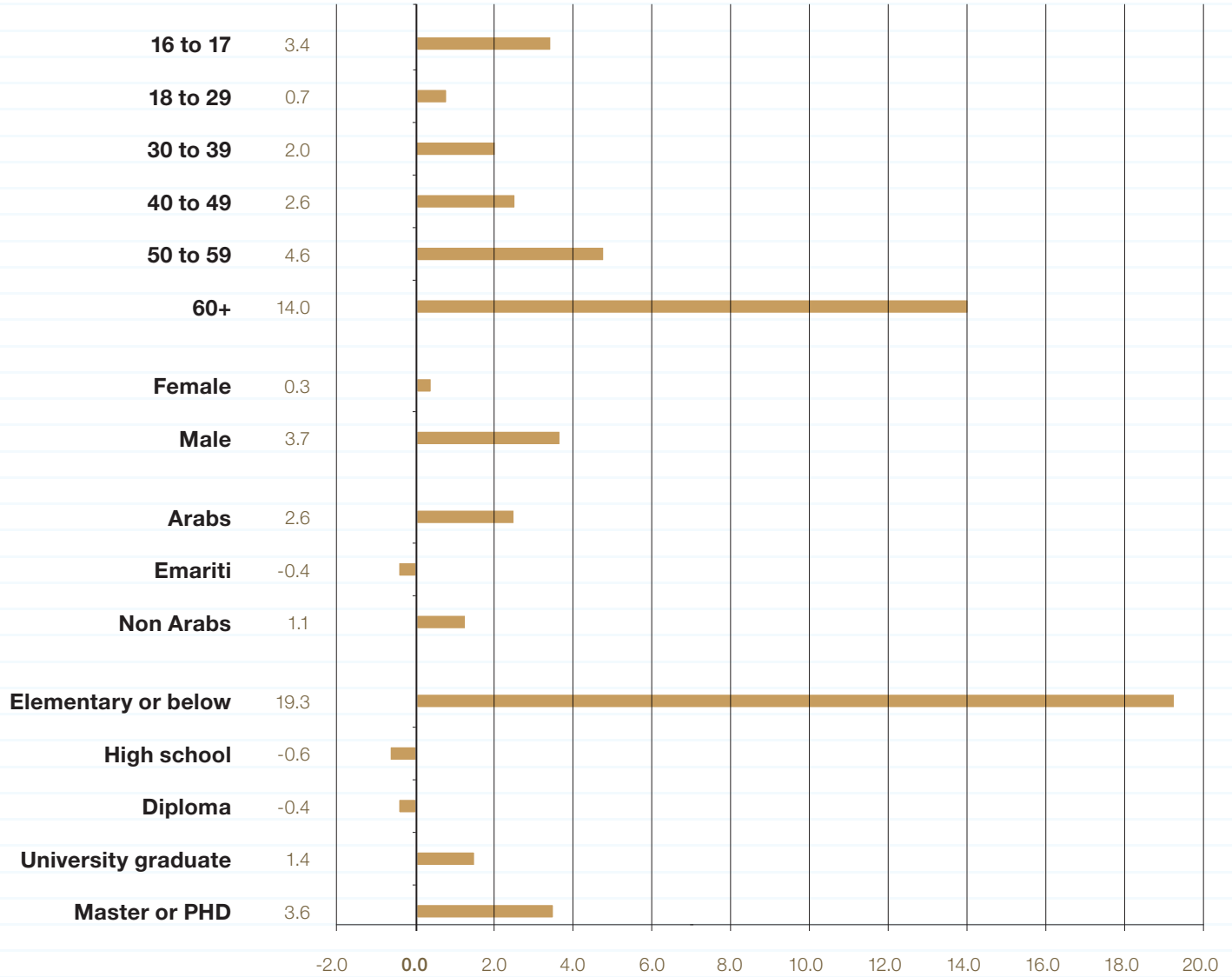
Elementary, 60+ year olds, Males, and Arabs had the largest growth since last year. Elementary has the most significant growth since 2016.

Category NPS
Service Hero CSI Category 2017 Net Promoter Score

	2016	2017
UAE Index	34%	31%
Café	47%	46%
Car Service	24%	12%
Casual Dining	45%	44%
Clothes	43%	37%
Electronics	46%	47%
Fast Food	38%	45%
Home Furniture	48%	32%
Islamic Banks	17%	17%
Mobile Operators	3%	2%
New Care Sales	51%	52%
Private Hospitals	20%	14%
Regional Arab Airlines	42%	40%
Retail Banks	13%	13%
Supermarkets	39%	34%

The UAE NPS national score decreased since last year. Home Furniture, Car Service, and Private Hospitals had more detractors in 2017 compared to last year, while Fast Food had the largest gain of promoters in 2017 compared to last year.

Net Promoter Score by demographic group and changes over the years

	2016 NPS	2017 NPS
UAE Index	34%	31%
Female	40%	31%
Male	28%	32%
Arabs	26%	27%
Emirati	34%	31%
Non Arabs	39%	33%
16 to 17 years	55%	50%
18 to 29 years	36%	29%
30 to 39 years	34%	31%
40 to 49 years	33%	34%
50 to 59 years	44%	50%
More than 60 years	18%	61%
Elementary or below	8%	69%
High school	51%	40%
Diploma	46%	39%
University graduate	32%	28%
Master or PHD	23%	24%

The NPS score decreased since last year.

The demographic groups showing the strongest increase in NPS since last year are those aged 60+, Elementary or below education level and Males.

Country Comparison - UAE vs. Kuwait

UAE with a slight edge in satisfaction

UAE | **Kuwait**

Expected	84.6
	82.9
Actual	77.9
	76.5
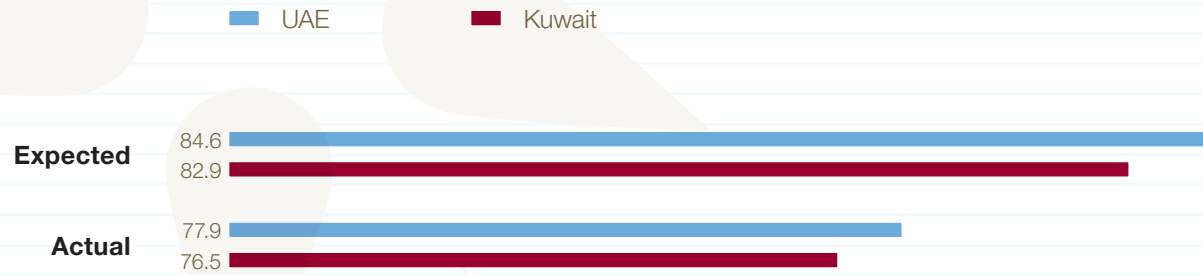
The UAE and Kuwait actual satisfaction scores are being compared. The UAE index scored 77.9 and the Kuwait index scored 76.5, giving it a marginal 1.4 difference between the countries.

The close 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.
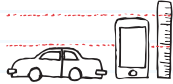
Category Comparison UAE vs. Kuwait
Actual Satisfaction

The overall satisfaction for UAE is above the Kuwait average. The UAE & Kuwait Share a few categories with high satisfaction such as Cafes, Clothes, and Casual Dining. However, the top 3 categories in each country differ. The highest scoring categories in UAE are New Car Sales, Cafes, and Electronics. For Kuwait, Cafes, Islamic Banks, and Clothes are the top 3 highest rated categories. In both markets, Mobile Operators are among the lowest. Retail & Islamic Banks is noticeably lower in UAE compared to Kuwait.

	UAE	Kuwait	Difference
Country Actual Index	77.9	76.5	1.4
Café	82.5	83.0	-0.5
Car Service	75.4	75.8	-0.4
Casual Dining	81.1	78.8	2.2
Clothes	79.8	79.5	0.3
Electronics	83.5	76.8	6.7
Fast Food	81.6	75.2	6.4
Fine Dining	N/A	78.5	N/A
Health Clubs	N/A	74.5	N/A
Home Furniture	79.6	78.8	0.8
Islamic Banks	72.4	82.4	-10.0
ISPs	N/A	62.2	N/A
Mobile Operators	66.1	67.6	-1.5
New Car Sales	83.6	79.4	4.2
Private Hospitals	73.8	73.4	0.4
Regional Arab Airlines	79.7	78.9	0.8
Retail Banks	71.8	75.9	-4.2
Supermarkets	80.0	79.4	0.6

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

Dimension Comparison - UAE vs. Kuwait

■ UAE   ■ Kuwait

Dimension	UAE	Kuwait
Staff	78.3	78.3
Location	79.7	77.5
Value	75.3	72.5
Product	78.4	77.1
Speed	76.9	75.5
Reliability	78.8	77.9
Call Center	77.8	74.9
Website	74.5	74.3
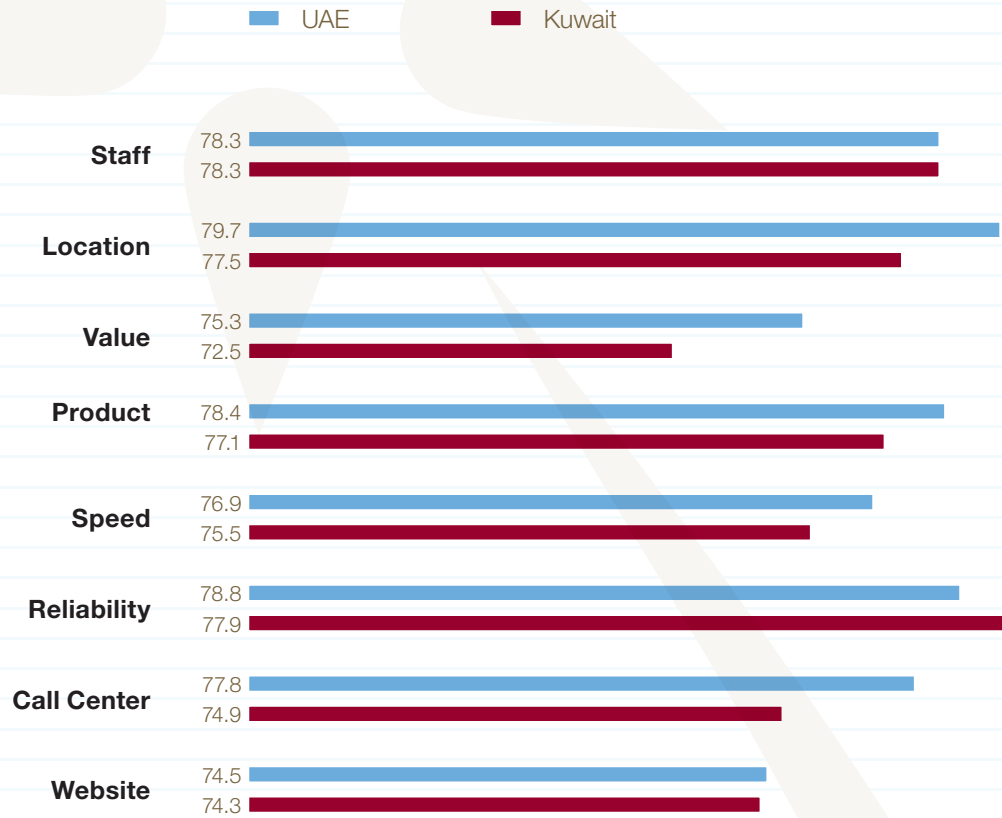
Patterns in service dimensions are similar in both markets as Location and Staff Attitude have high scores. For UAE, Location, Reliability, and Product Quality are the highest scoring and in Kuwait it's Staff Attitude, Reliability, and Location.

Demographic Comparisons UAE vs. Kuwait
Actual Satisfaction

Demographics	UAE	Kuwait	Difference
Female	78.1	78.3	-0.2
Male	78.2	75.4	2.8
Arabs	76.8	76.7	0.1
Emiratis	76.6	74.7	1.9
Non Arabs	78.6	77.5	1.1
16 to 17 years	85.3	80.9	4.4
18 to 29 years	77.7	77.5	0.2
30 to 39 years	77.8	75.5	2.3
40 to 49 years	78.4	76.4	2.0
50 to 59 years	82.6	74.2	8.4
More than 60 years	88.1	78.5	9.6
Elementary or below	91.1	77.2	13.9
High school	81.3	77.4	3.9
Diploma	80.3	78.1	2.2
University graduate	76.9	76.7	0.2
Master or PHD	75.7	72.5	3.2

Demographic comparison
Males are slightly more satisfied in the UAE than females while, in Kuwait, Females have higher satisfaction.

The age groups with the highest satisfaction in UAE and Kuwait are 16 to 17 year olds while the lowest scoring in UAE are 18 to 29 year olds. For Kuwait, it's the 50 to 59 year olds who score the lowest.

By nationality, Non Arabs have the highest in both countries while Kuwaitis & Emiratis had the lowest satisfaction.

With education levels, those witha higher level of education are least satisfied in both countries. Highest satisfaction in the UAE is with Elementary graduates while in Kuwait it's Diploma holders.

Gap
Looking at the difference, most demographics do not have a significant difference between countries. The major differences are with teens and those aged 50 or more, and the lowest and highest Education levels.

Net Promoter Score by demographic group

	UAE	Kuwait
Demographics	31%	33%
Female	31%	38%
Male	32%	29%
Arabs	27%	32%
Emirati/Kuwaiti	31%	28%
Non Arabs	33%	35%
16 to 17 years	50%	36%
18 to 29 years	29%	31%
30 to 39 years	31%	30%
40 to 49 years	34%	36%
50 to 59 years	50%	23%
More than 60 years	61%	42%
Elementary or below	69%	31%
High school	40%	39%
Diploma	39%	36%
University graduate	28%	33%
Master or PHD	24%	21%

The NPS for UAE is lower than Kuwait, meaning UAE has less brand promoters than detractors.

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

Category NPS UAE vs. Kuwait

Service Hero CSI Category 2017 Net Promoter Score

	UAE	Kuwait
National Index	31%	33%
Café	46%	53%
Car Service	12%	35%
Casual Dining	44%	40%
Clothes	37%	38%
Electronics	47%	33%
Fast Food	45%	28%
Fine Dining	N/A	31%
Health Clubs	N/A	17%
Home Furniture	32%	39%
Islamic Banks	17%	52%
ISPs	N/A	0%
Mobile Operators	2%	11%
New Car Sales	52%	47%
Private Hospitals	14%	20%
Regional Arab Airlines	40%	41%
Retail Banks	13%	30%
Supermarkets	34%	42%

The overall NPS score for UAE is 31%, which is lower than Kuwait which stands at 33%. This means that, overall, Kuwait has a higher amount of brand Ambassadors than they do detractors. The highest NPS scores for UAE is New Car Sales, Electronics, and Cafes. The lowest is Mobile Operators, Retail Banks and Private Hospitals.

For Kuwait, the highest scoring NPS categories are Cafe, Islamic Banks, and New Car Sales. The lowest NPS scores in Kuwait are 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	82.5	83.0	79.0	71.9
Car Service	75.4	75.8	81.0	73.1**
Casual Dining	81.1	78.8	78.0	71.5
Clothes	79.8	79.5	80.0	72.5
Electronics	83.5	76.8	80.0	71.5**
Fast Food	81.6	75.2	79.0	72.9
Fine Dining	N/A	78.5	N/A	N/
Health Clubs	N/A	74.5	N/A	N/A
Home Furniture	79.6	78.8	N/A	71.5**
Islamic Banks	72.4	82.4	N/A	N/A
ISPs	N/A	62.2	64.0	68.2
Mobile Operators	66.1	67.6	73.0	70.2
New Car Sales	83.6	79.4	81.0	73.1**
Private Hospitals	73.8	73.4	75.0	73.2**
Regional Arab Airlines	79.7	78.9	75.0	74.2
Retail Banks	71.8	75.9	81.0	72.9**
Supermarkets	80.0	79.4	78.0	72.4
Overall Score	**77.9**	**76.5**	**76.7**	**71.8**

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.
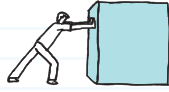
In the 2nd year of the Service Hero CSI measuring consumer satisfaction in the UAE, it has collected scores on a number of factors: the eight service dimensions in terms of expectations, satisfaction and gaps, customer demographic profiles, loyalty, industry categories, and comparisons to Kuwait. A review 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 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 high expectations as the index for the UAE is 84.6 across all industries. Expectations are highest for Product Quality and Reliability. Customers with the highest expectations of service are those aged 60+, Females, and lower level education. The highest expectations by industries are for Car Service & New Car Sales. The lowest expectations (and therefore image or reputation) are for Mobile Operators and the Banking categories (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 77.9, the gap between customer expectations and satisfaction is -6.7, 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 Value for Money, Speed of Service, and Website and for categories it is Mobile Operators, Car Service, and Retail Banks. Satisfaction is highest for Location, Reliability, and Product Quality and by category it's New Car Sales, Cafes, and Electronics seem 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 31% (which means 31% of customers are promoters) some customer profiles have lower loyalty. These are namely Arabs, Masters or PHD holders, those aged 18-29, and Females. Categories that have strong loyalty are New Car Sales, Electronics, and Cafes. Not category is in the negatives, but Mobile Operators is close with 2% 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.

Understand expectations

The customer is the center of excellence

Provide satisfactory service

Aim to build loyalty

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.
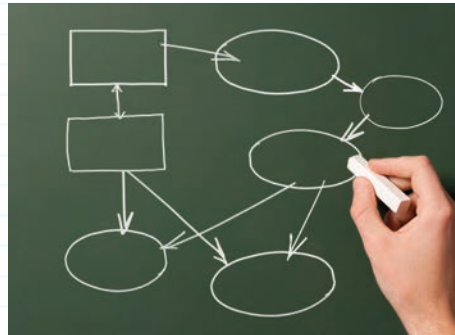
Actionable

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.

Nominees

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 35 brands were evaluated

Restaurant: Fast food

- Defined as: Typical fast food restaurants that offers burgers and other types of value meals
- A total of 30 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

Specialty Store: Electronics

- Defined as: Any stores focused on the sale of durable and nondurable electronic items
- A total of 21 brands were evaluated

Home furniture

- Defined as: Any store focused on the sale of durable furniture as well as decorative items
- A total of 16 brands were evaluated

Health care: Private hospitals

- Defined as: Any private health care provider offering inpatient and outpatient services
- A total of 29 brands were evaluated

Clothes & accessories

- Defined as: Retail outlets that sell clothes excluding stores solely selling accessories and shoes
- A total of 77 brands were evaluated

Autos: New Car Sales

- Defined as: The purchase of a new car directly from an authorized car dealer
- A total of 42 brands were evaluated

Nominees

Autos: Car service

- Defined as: The service or maintenance of a car from an authorized car dealer
- A total of 41 brands were evaluated

Airlines

- Defined as: Any major Airline operating in UAE.
- 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 15 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

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.
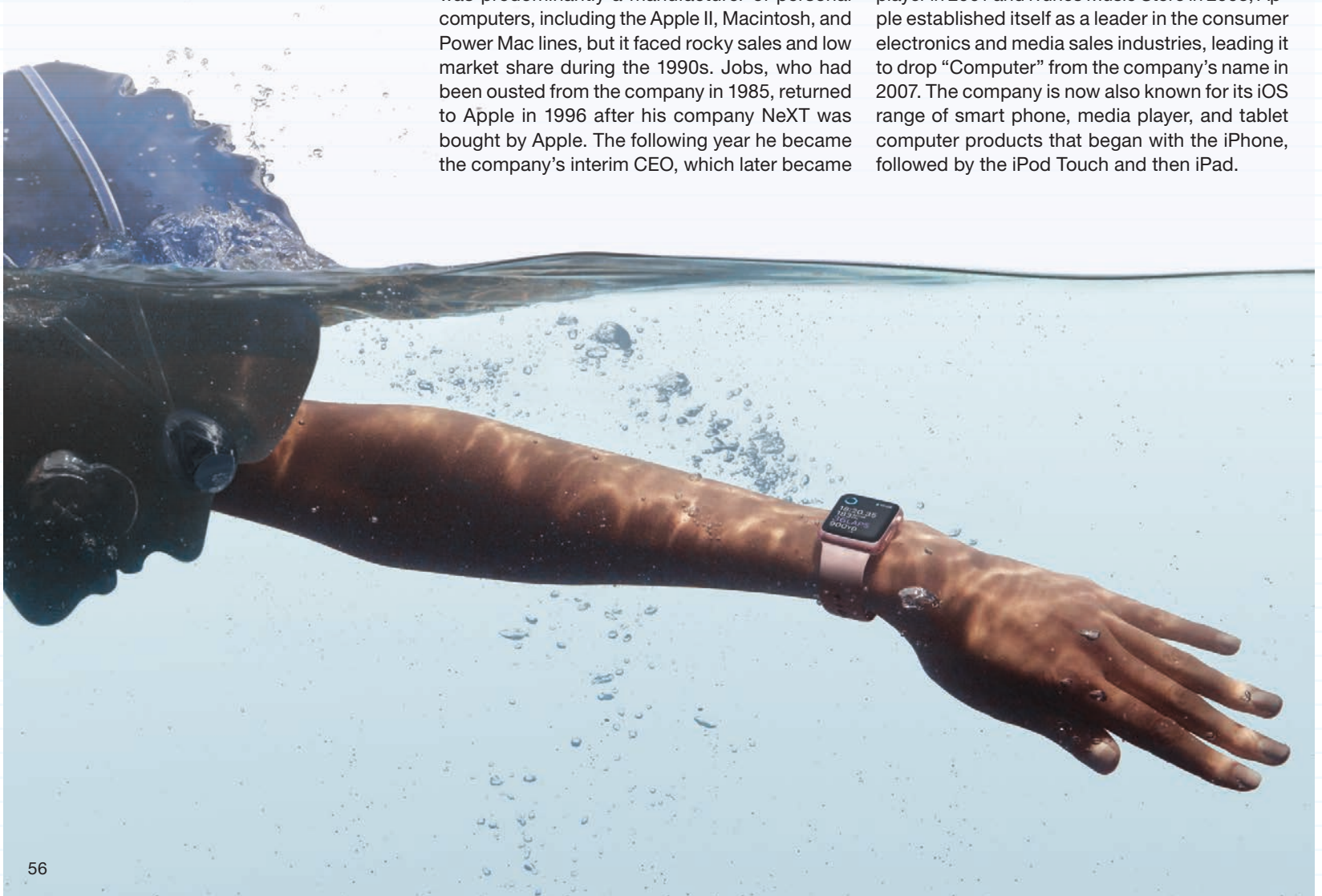
Second Place

FROM THEIR WEBSITE

Japan's contribution in building of the modern world is humungous. Making some of the very first and finest automobiles is one of their niche. Among the great automobile companies that were born in Japan, Nissan made some really great cars and trucks from the very beginning of the 19th century.

Nissan was established as Nihon Sangyo in the year 1928.It was renamed as Nissan, the name that was used in the Tokyo stock market in 1930. In the very beginning, when Yoshisuke Aikawa founded the company, it was not completely into automo-biles but instead made auto parts and consisted of Tobata Casting and Hitachi. Eventually, Nissan became a huge company that held 74 firms by the time of World War II to become Japan's fourth biggest industry.

Nissan Motor Company Ltd is today a reigning automobile company in the world, top third in Japan and top sixth in the world. It is the top-most seller of automobiles in the countries like China, Mexico and Russia. Along with its own name, the company also sells cars under the brand names Datsun, Nismo and Infiniti, all over the world.

Third 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.

Category Winners 2017

Restaurants: Cafés
Krispy Kreme

Restaurants: Casual dining
The Cheesecake Factory

Restaurants: Fast Food
Hardee's

Clothes & accessories
H&M

Category Winners 2017

Home furniture
IKEA

Autos: New Car Sales
Nissan

Specialty Store: Electronics
Apple

Healthcare: Private hospitals
Medcare Hospital

Communications: Mobile operators
Du

Specialty: Supermarkets
Carrefour

Autos: Car service
Ford

Financial: Retail banks
Emirates NBD

Category Winners 2017

Airlines
Emirates

Financial: Islamic banks
Abu Dhabi Islamic Bank

Comparing the winners of 2016 to 2017

The Service Hero CSI awarded 14 category winners in 2017, of which 5 were consecutive winners in the 2017 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 2017

Service Hero Category	2017 Winner	2016
Car Sales	**Nissan**	No
Car Servicing	**Ford**	No
Regional Arab Airlines	**Emirates**	Yes
Clothes	**H&M**	No
Mobile Operators	**Du**	Yes
Islamic Banks	**ADIB**	No
Retail Banks	**Emirates NBD**	No
Private Hospitals	**Medcare Hospital**	No
Cafés	**Krispy Kreme**	No
Fast Food	**Hardee's**	No
Casual Dining	**The Cheesecake Factory**	Yes
Electronics	**Apple**	Yes
Home Furniture	**IKEA**	Yes
Supermarkets	**Carrefour**	No

Before visit
Your expectations before your visit

3 Rate brand

How would you rate

Aft
Your experience

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

1 2 3 4 5 6 7 [8] 9 10 N/A **Location** convenience, parking, operating hours & attractiveness 1 2 [3] 4 5 6

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

1 2 3 4 5 6 [7] 8 9 10 N/A **Value** for money of the product/service 1 2 3 [4] 5 6

1 2 3 [4] 5 6 7 8 9 10 N/A Product/service quality 1 [2] 3 4 5

4 5 [6] 7 8 9 10 N/A Service speed 1 2 3 4

4 5 6 [7] 8 9 10 N/A **Reliability** & accuracy of the product/service 1 2 3

4 5 6 7 8 9 10 N/A Their **call center** [1] 2

1 2 3 4 5 6 7 [8] 9 10 N/A Their **website** 1 2

1 [2] 3 4 5 6 7 8 9 10 N/A 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 2017.

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 ± 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 where 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 asses all 8 service dimensions, while 3 categories asses 6 service dimensions.

Overall Satisfaction
8 Website
7 Call Center
6 Reliability
5 Speed
4 Value to price
1 Staff Behavior
2 Location
3 Product or service quality
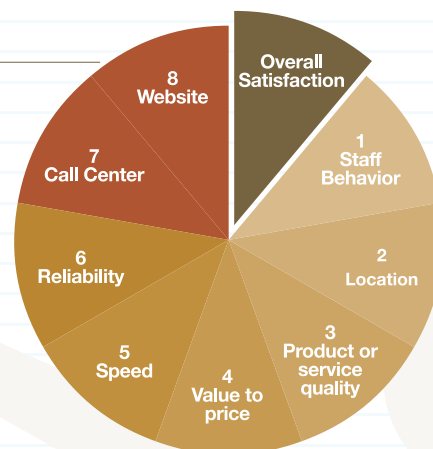
Service Hero Partners with the ACSI

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.
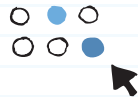
The questionnaire

What respondents actually voted on.

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

Before		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 **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?**

Note The Call center and Website dimension questions were asked only for the Aviation, Mobile Operator, ISP, Conventional and Islamic bank 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 Aimed to exceed 10,000 votes	**Category population** Aimed for 350 votes in each category	**Biases**

| **Minimum votes/winner** Based on collected votes / category and players / category | **Error margins** Aimed for ±2% | **Probability** |
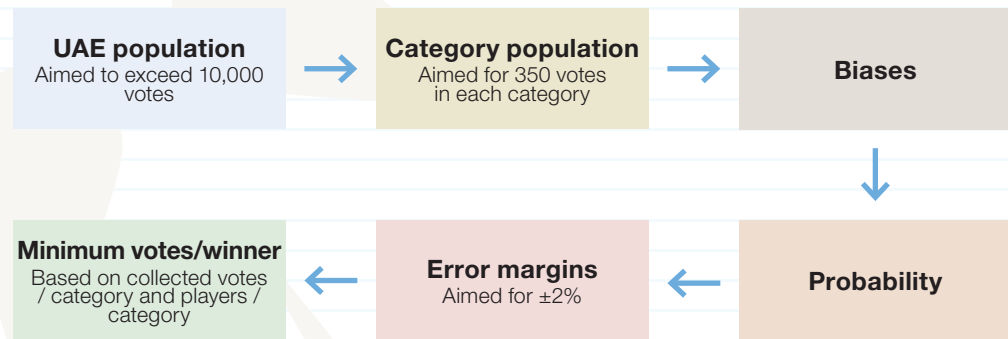
To ensure that Service Hero enjoys statistical integrity, a few statistical elements were examined to determine sample size and accuracy levels.
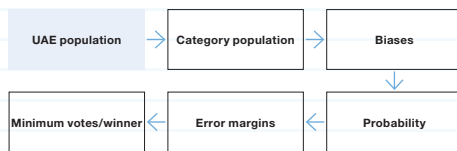
Category population.

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	1,940
New Car Sales	350	567
Car Service	350	554
Clothing	350	1,781
Mobile Operator	350	1,523
Café	350	1,906
Fast Food	350	3,084
Casual Dining	350	1,442
Electronics	350	2,250
Commercial banks	350	1,118
Islamic banks	350	642
Furniture	350	1,659
Private Hospital	350	1,664
Supermarkets	350	3,944

This table shows the 14 categories included in the 2017 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.
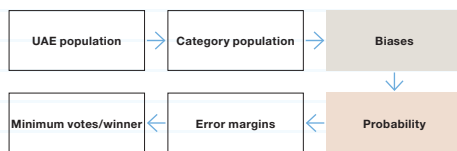
1. Probability of choice is:
- Based on the total population of consumers per category as well as the number of brands in a category
- An example is the clothes category where around 80 brands were evaluated and the probability of choice is 2%, while in the mobile sector only three competitors exist, 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
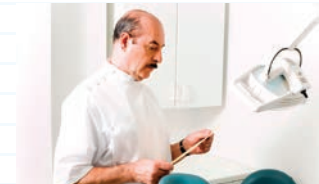
Health care: Private Hospitals

Specialty Stores: Electronics
Supermarkets + Furniture + Clothes

Category population.

UAE population	→	Category population	→	Biases
Minimum votes/winner	←	Error margins	←	Probability
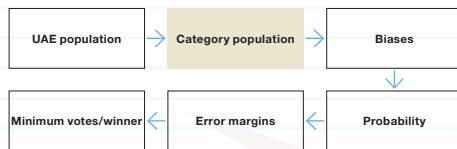
1. To ensure statistical relevance, we looked at the **category population** – this is the proportion of UAE's total population that is most likely to be a user of the category

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

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.

Legend	%	Legend	%
SH Email	24%	Direct Traffic	17%
SH Social Media	25%	Private Co.	0.1%
SH Phone Calls	33%		
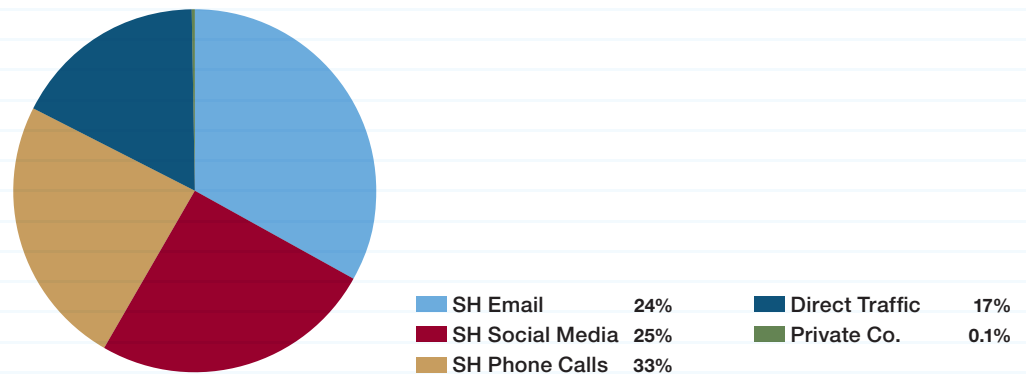
Security measures and rules for valid votes

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
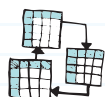
Rules applied to ensure data integrity

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 4,386 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 **24,074** 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	**3,898**
	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 obtained	**28,460**
	Total votes removed	**(4,386)**
	Total votes assessed	**24,074**

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.

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
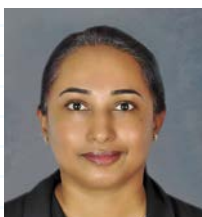
Dr. Shilpa Iyanna is working as an Assistant Professor of Marketing at the College of Business Administration, Abu Dhabi University, United Arab Emirates. She has more than 16 years of research and teaching experience and was the Head of the Business Department prior to starting her PhD. Shilpa earned 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

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

3. Respondent chooses category & brand

4. Respondent votes for first company
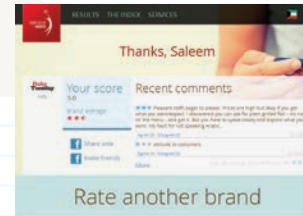
5. Respondent votes for other companies
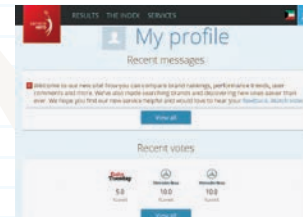
6. Respondent submits vote with personal data
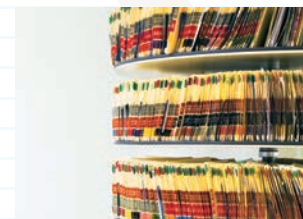
7. Responses stored in temporary database

8. Email sent to respondent to confirm identity

9. Results in permanent database once confirmed

10. Data cleansing & verification procedures after close of votes
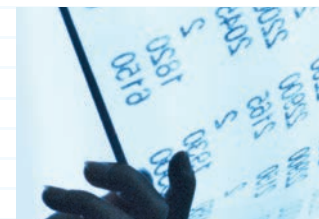
11. High-level results shared with Advisory Council

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.

service
Hero

Thank you!

6

About Khayal Consultants

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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

Khayal Consultants
working ideas

Design

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

Branding
Logo Development
Usage Manuals
Stationary Design

Motion
Motion Graphics
Interactive

Web

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

Marketing

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

Partners Technology

A selection of some of Khayal's clients

service
Hero

servicehero.com