



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

Hotels: Restaurants: Gate

Leisure: Casual Dining

Restaurants: Fast Food

Specialty Stores: Electronics



service  
**Hero**

**UAE RESULTS**

*The voice of the consumer*

**2018**

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



10 Compulsive Behavior

9 Loss of control index

8 Digital index

7 Call center index

6 Falsification index

5 Adulteration index

4 Adulteration of price index

3 Product or service quality index

2 Location index

1 Stability behavior index

Service castigation

Restaurants: Fast food

Restaurants: Casual Dining

Restaurants: Cafeteria

Healthcare: Hospitals

Furniture: Home Furniture

Furniture: Leisure

Finances: Retail Banks

Commerce: Mopile Operators

Clothes & Accessories: Clothes

Automotive: New Car Sales

Automotive: Car Service

Airlines

Service Dimension

Credibility.  
Integrity.  
Relevance.



Powered by



Academic Advisors



Member of



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 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.

# Index

## 1. Executive Summary

## 2. The UAE Index

Sample composition.....	9	Category results: expected & actual.....	28
Interpreting the score.....	10	Interaction .....	30
UAE index: before and after .....	11	Frequency .....	31
UAE index by service dimension.....	12	Complaint resolution .....	32
UAE index by demographic factors .....	14	Building a Culture of Excellence .....	33
Recommend scores by demographic .....	25		

## 3. Summary & Strategic Implications

Market position of all 14 categories.....	35	Category NPS .....	45
Correlation of dimensions .....	36	NPS score changes .....	46
Net promoter score.....	37	Country comparison UAE vs. Kuwait .....	47
UAE overall score.....	40	Industry comparison with other markets...	54
Category Comparison 2016 to 2018.....	40	Factors affecting the UAE Index .....	55
Dimension Comparison 2016 to 2018.....	42	Service Hero's benefits .....	56
Demographic Comparison 2016 to 2018....	43		

## 4. UAE Award Winners

Nominees .....	58	Category winners 2018 .....	63
Overall country 2018 winners .....	60	Winners 2016 to 2018 .....	67

## 5. Methodology

Overview.....	69	Rules applied to ensure data integrity .....	75
The questionnaire .....	70	Advisory Council members .....	76
Sampling approach .....	71	Process overview of the key survey steps.	79
Source of Votes .....	74	Glossary of terms used .....	80
Security measures & rules for valid votes...	75		

## 6. About Khayal Consultants

Khayal Consultants .....	83
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# Word from the president



The Service Hero Customer Satisfaction Index is unique: it is the only independent national CSI which rates multiple industry categories using a uniform benchmark and rigorous research methods. This year reflects the ninth annual CSI in Kuwait and the third in the UAE. Our aim is to provide companies with relevant, impartial data collected from everyday consumers using best-practices research standards.

This year has seen a few milestones: over 250,000 assessments collected since inception, 24% increase in consumer assessments in Kuwait, 28% in the UAE, 60,000 ratings across both markets, and over 10,000 brand comments. It means that consumers are increasingly using Service Hero as a platform to make their voice heard and get information about brands. We are committed to being transparent and relevant to both brands and consumers by showing brand star ratings and customer comments on the website, so they benefit.

To ensure we maintain our impartiality we have appointed a respected Independent Advisory Council comprised of leading academics and professionals to oversee that we comply with our own impartiality standards and those of ESOMAR (the European Society for Opinions and Market Research). All the data we collect is vetted using a multi-layer algorithm to ensure its integrity. This allows us to confidently report to companies on their category findings, trends, demographics, loyalty and service dimensions.

The Service Hero CSI measures 17 categories in Kuwait with 300 brands and 14 categories in the UAE with 400 brands. We have seen service in Kuwait level at the 75-point range and the UAE trend upwards with a high national score of 79 points. Some categories have dramatically dropped in satisfaction in Kuwait since last year such as Islamic Banks (-11%) and Airlines (-7) and in the UAE Fast Food (-3%). But we have seen growth in satisfaction for Casual Dining (+3%) and Mobile Operators (+2%) in Kuwait and in the UAE, Car Service (+6%), and Banks (+4%).

We introduced three questions to the index this year. We learned that online interactions give the most satisfaction in the UAE with a strong score of 82.0 while interactions on the phone give the lowest satisfaction, 70.9 points. Consumers whom interact weekly with a brand are the most satisfied, 82.2 points in the UAE and those who interact every 3 to 6 months have the lowest satisfaction scores (78.7 and 78.1 respectively). Finally, satisfaction with complaint resolution is 77.1 in the UAE suggesting companies are managing complaints well.

Consumers are the pillar of the CSI; their assessments represent the country demographic groups and they take the time to rate brands because they want to have a voice. Companies are increasingly listening as market dynamics force them to compete more effectively. An independent, reliable and transparent benchmark such as the Service Hero CSI helps ensure sustainable national performance as the private sector in Kuwait and the UAE thrive and grow.



Faten Abu Ghazaleh  
President



# 1

## Executive summary



# Executive summary

1 of 2



**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](http://www.servicehero.com) from January 1- December 31<sup>st</sup> 2018. Consumers are aware of the survey via online ad banners and email shots. We adhere to the research protocols of ESOMAR. We also report 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 for the first time, we ask consumers to rate the brands complaint resolution. Most 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 36,839 assessments where cleaned to arrive at the final 29,057 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 83.9 on Expectation (before dealing with a brand) and 79.1 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 Reliability, Staff and Product while the lowest are Value and Call Center.

## Demographics

Females, Non Arabs, 50+ year olds, and consumers with a low education level have the highest satisfaction scores while Males, Emiratis, those aged 40-49, and customers with a high level of education have the lowest satisfaction scores.

## Loyalty

UAE scored 78.9 on the likelihood of recommending a brand (Loyalty). Females, Non Arabs, older consumers, 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 35%, Males, Emiratis and customers with a higher education or aged 50-59 are least loyal.

## **Categories**

Of the 14 categories assessed, 8 of them exceeded the UAE Index score. The highest are Electronics, Airlines and Casual Dining. The lowest scoring categories are Mobile Operators, Fast Food and Supermarkets.

The industries with the highest number of customers promoting them (loyalty) are New Car Sales, Cafes and Casual Dining, while the ones with the most detractors are Mobile Operators, Private Hospitals and the Banking categories (Islamic & Retail).

## **Interaction and visit frequency**

We introduced a question that asked consumers where they interacted with the brand (Over the phone, Online, In-store) and the Frequency of their interaction with the brand (weekly, monthly, 3 months, 6 months, annually). Consumers who interacted Online had the highest satisfaction (82.0), while interaction Over the Phone scored lowest (70.9). Weekly interaction with a brand scored highest (82.2) and Semi-Annual satisfaction scored lowest (78.1). This could be attributed to the frequent visits to that brand and having a fresh experience compared to semi-annual visits.

## **Comparison to Kuwait CSI**

Kuwait has a lower satisfaction score than the UAE in actual satisfaction and the difference is significant (3.8 points). Comparing categories, there are a few categories that perform well in both countries such as Cafes and Casual Dining. 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 Reliability, whereas in Kuwait Staff scored highest. The lowest scoring dimensions for UAE & Kuwait is Value which means that consumers feel this dimension is the weakest area of service for satisfying customers.

Comparing demographics, there are similar trends for most and least satisfied consumers. The most satisfied for both countries 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+ as more satisfied in the UAE compared to lower satisfaction scores in Kuwait.

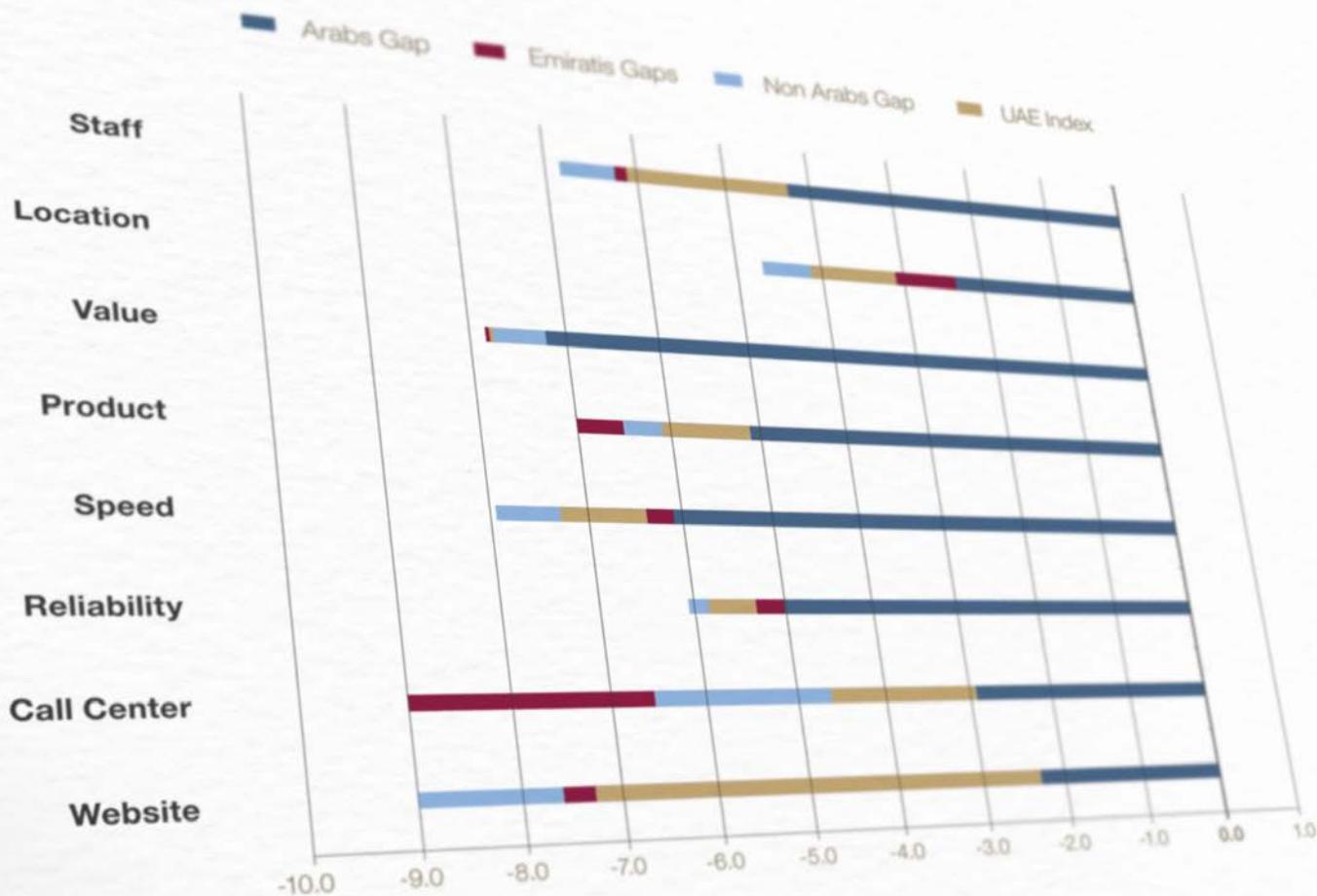
Looking at NPS scores, Kuwait posted a 30% score while UAE has a higher one at 35%. On average, consumers in Kuwait are less susceptible to promoting brands than in Kuwait.

## **Comparison to Kuwait, US, and Singapore CSI**

UAE & Kuwait have different satisfaction scores with the Kuwait Index scoring 75.4 in satisfaction, lower than UAE & ACSI but higher than the Singapore CSI, which scored 72.9.



## Gaps by nationality



2

The UAE Index

	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  $\pm 2$  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.**

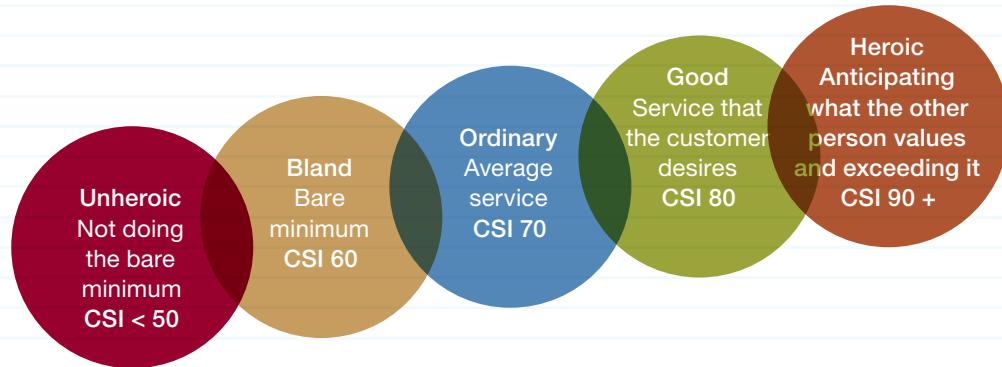
	<b>Votes 2018</b>	<b>Votes 2018 Distribution</b>
<b>Gender</b>		
Female	17,903	62%
Male	10,742	37%
<b>Nationality</b>		
Arabs	12,793	44%
Emiratis	805	3%
Non Arabs	14,779	51%
<b>Age Groups</b>		
16 to 17 Years	242	1%
18 to 29 Years	9,578	33%
30 to 39 Years	12,848	44%
40 to 49 Years	4,380	15%
50 to 59 Years	1,019	4%
More Than 60 Years	107	0.5%
<b>Education</b>		
Elementary or below	117	0.4%
High school	3,609	12%
Diploma	3,312	11%
University graduate	15,994	55%
Master or PHD	4,247	15%
<b>Total</b>	<b>29,057</b>	<b>100%</b>

**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



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.



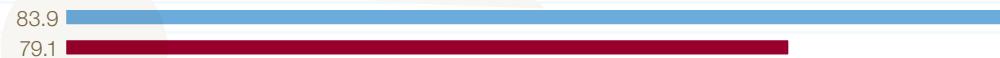
## UAE Index: Before and after

Service Hero Index - UAE 2018

■ Average of Expectation Index

■ Average of Actual Index

**Total**



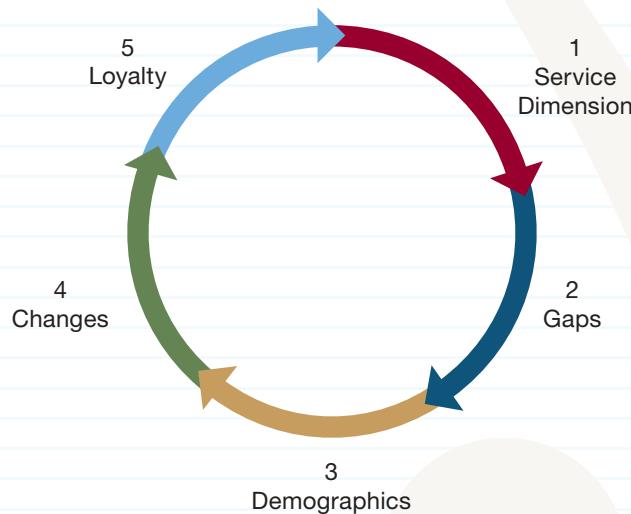
### A gap of -4.8 between expected and actual

Usually consumer expectations will be higher than actual service assessments. Consumers had higher expectations and lower satisfaction, meaning we are below expectations by a gap of -4.8 which is an unhealthy gap.

UAE scored 83.9 on average for **Expected** standards and it scored 79.1 on **Actual** service standards – placing it in the **Moderate** service level.



## How results will be displayed



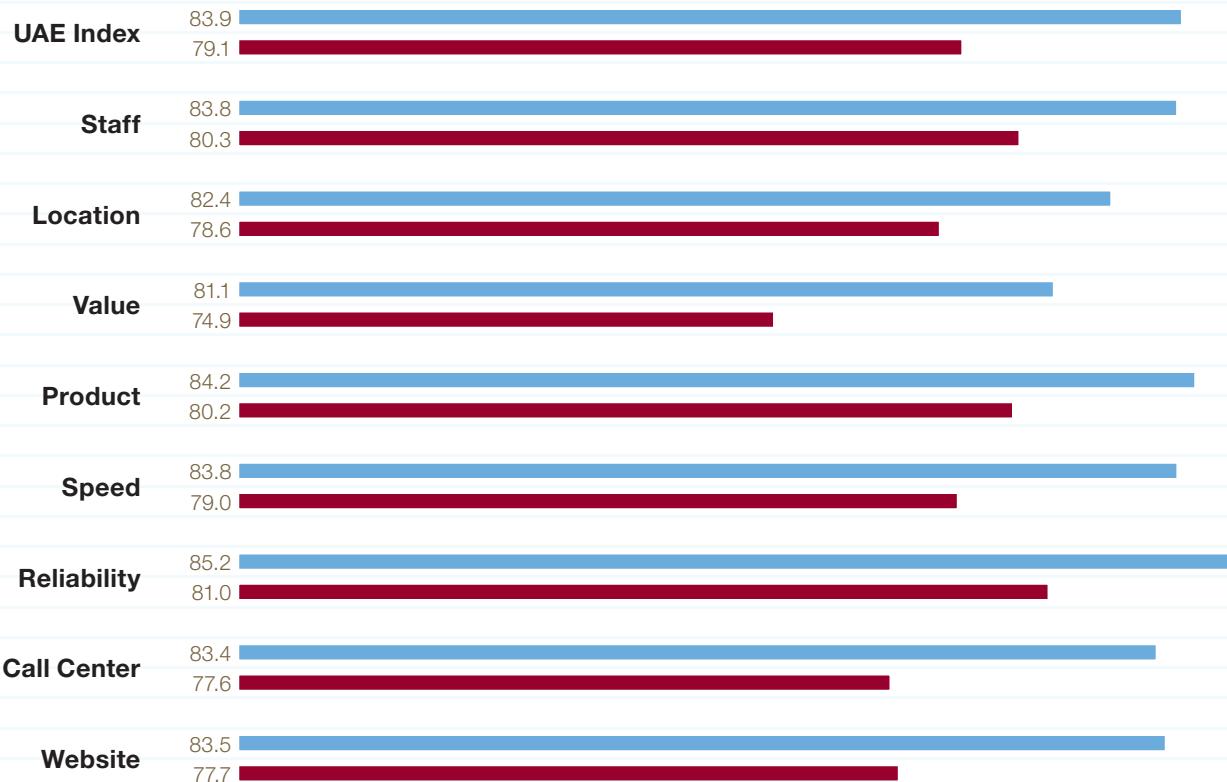
Results will be reported on five levels as seen in the chart.



# UAE Index by service dimension

UAE Index 2018 service dimension

■ Expected ■ Actual

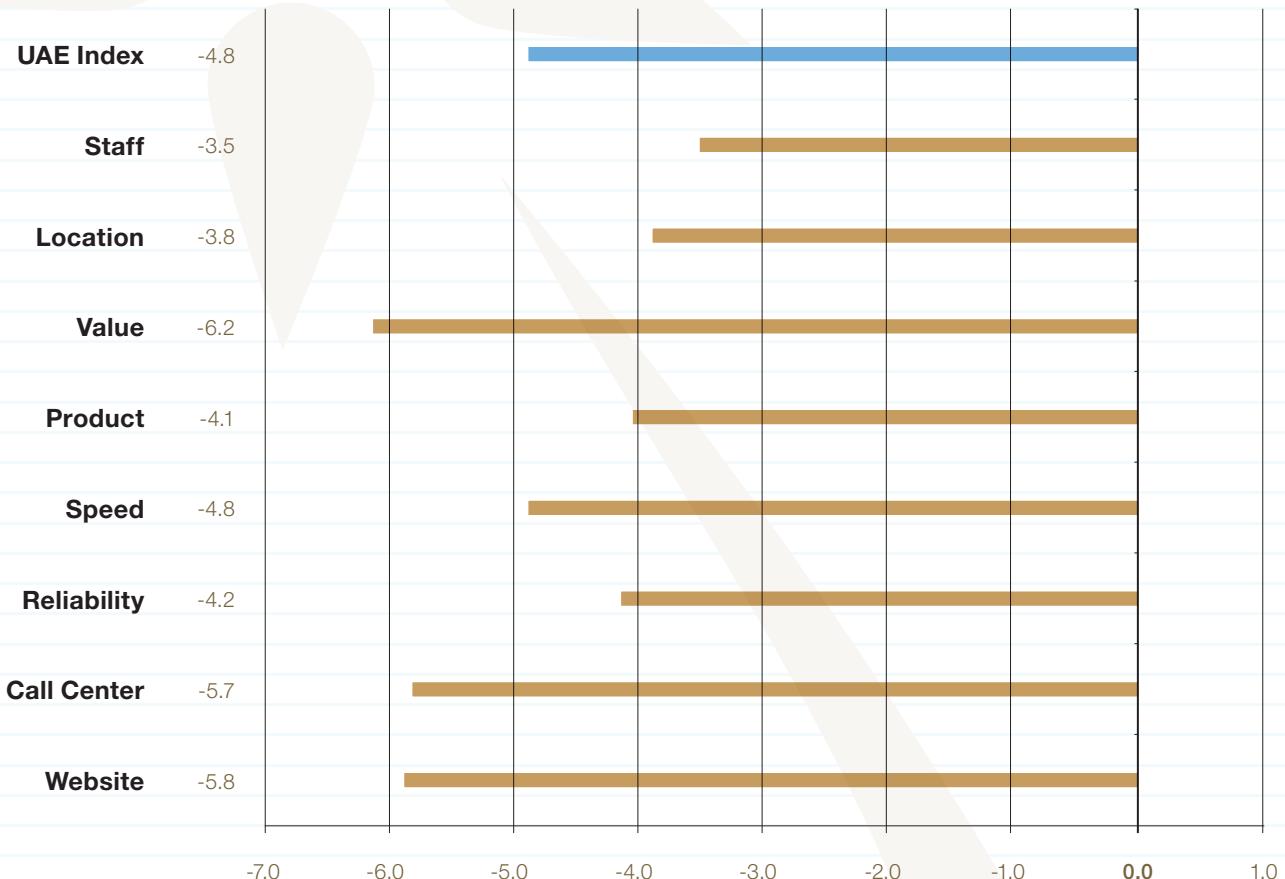


The highest score per dimension on an **Expected** level (before dealing with a brand) is for Reliability and the lowest is for Value.

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



## Gap analysis for UAE



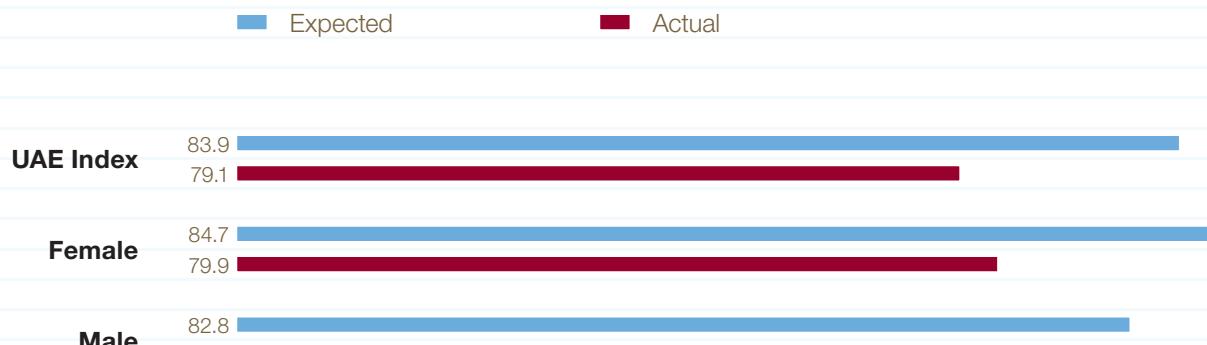
### Analysis of positive and negative gaps between Expected and Actual scores

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



## Index by demographic factors

### UAE Index results by gender

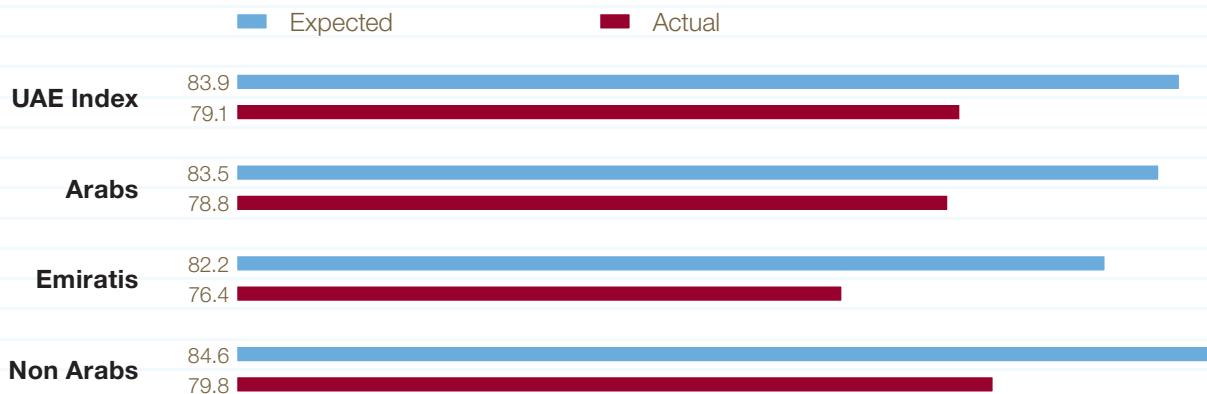


#### Gender

Females have a higher expectation and are slightly more satisfied than Males are.



## UAE Index results by nationality

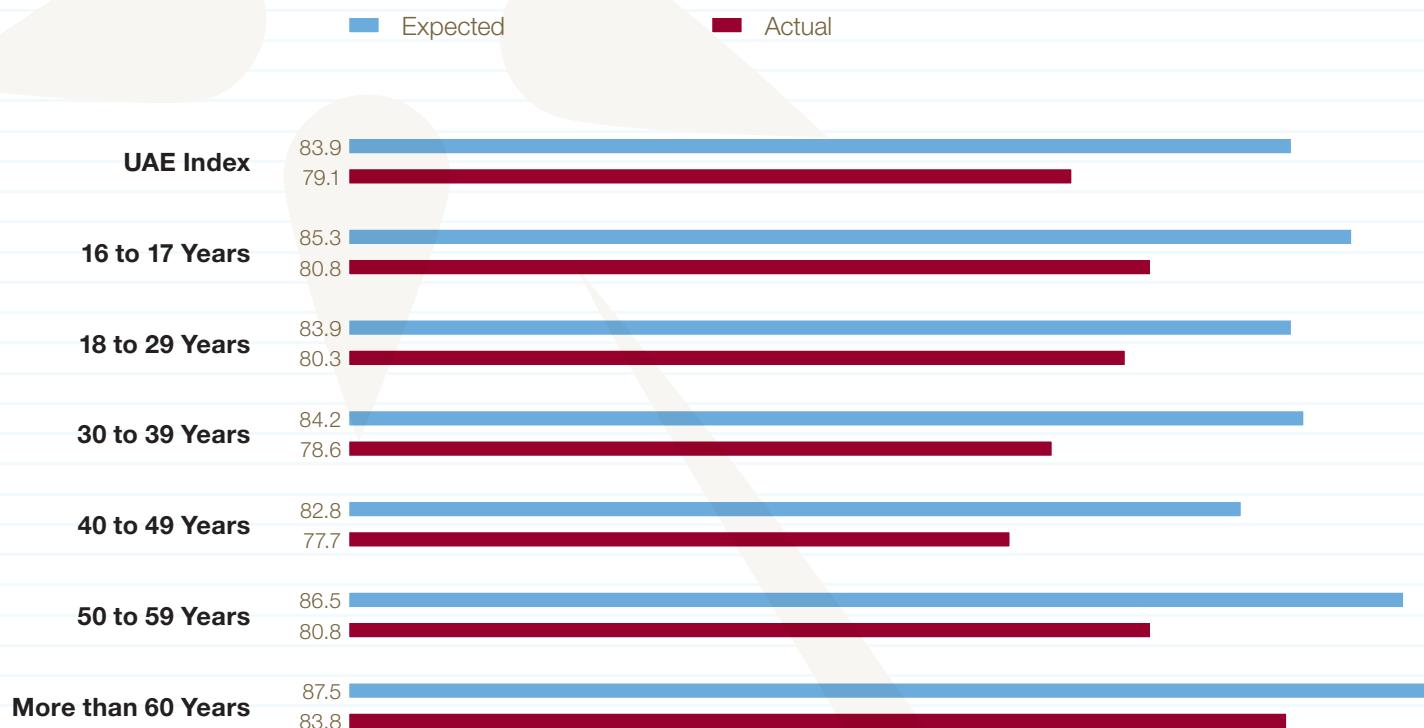


#### Nationality

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



## UAE Index results by age



### Age

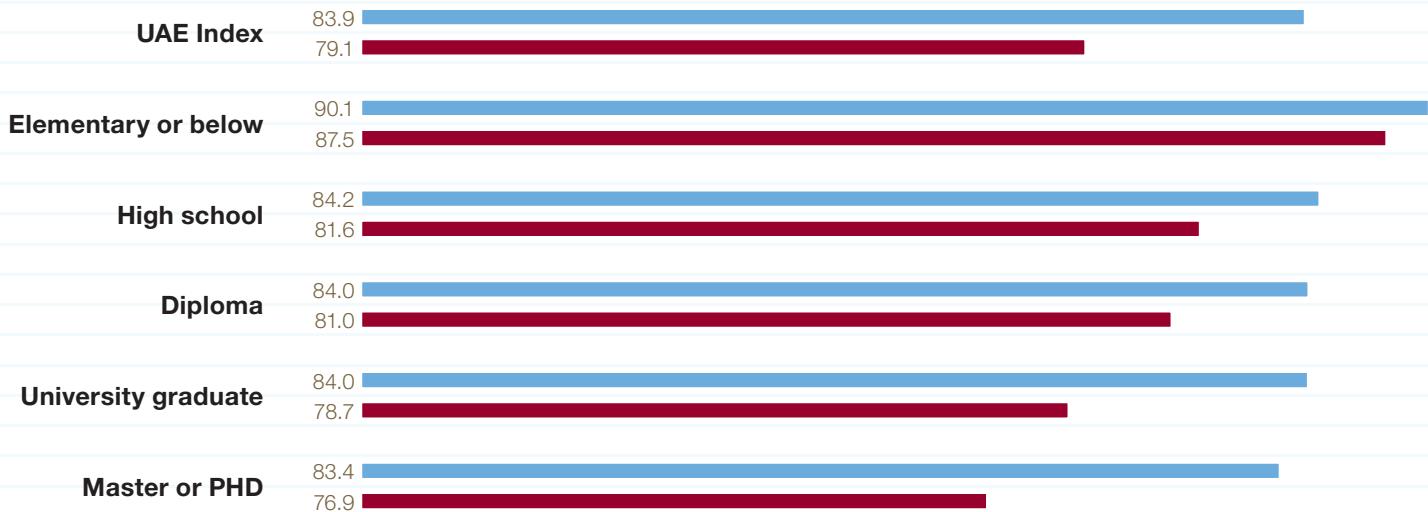
Actual satisfaction is highest amongst those aged 16 to 17 and 50+. Satisfaction is lowest for adults in the 40-49 age group. This is possibly due to the age group being comprised of adults who have a certain expectation and are less tolerant of poor service.



## Service dimension scores by education

Expected and Actual scores

■ Expected ■ Actual



### Education

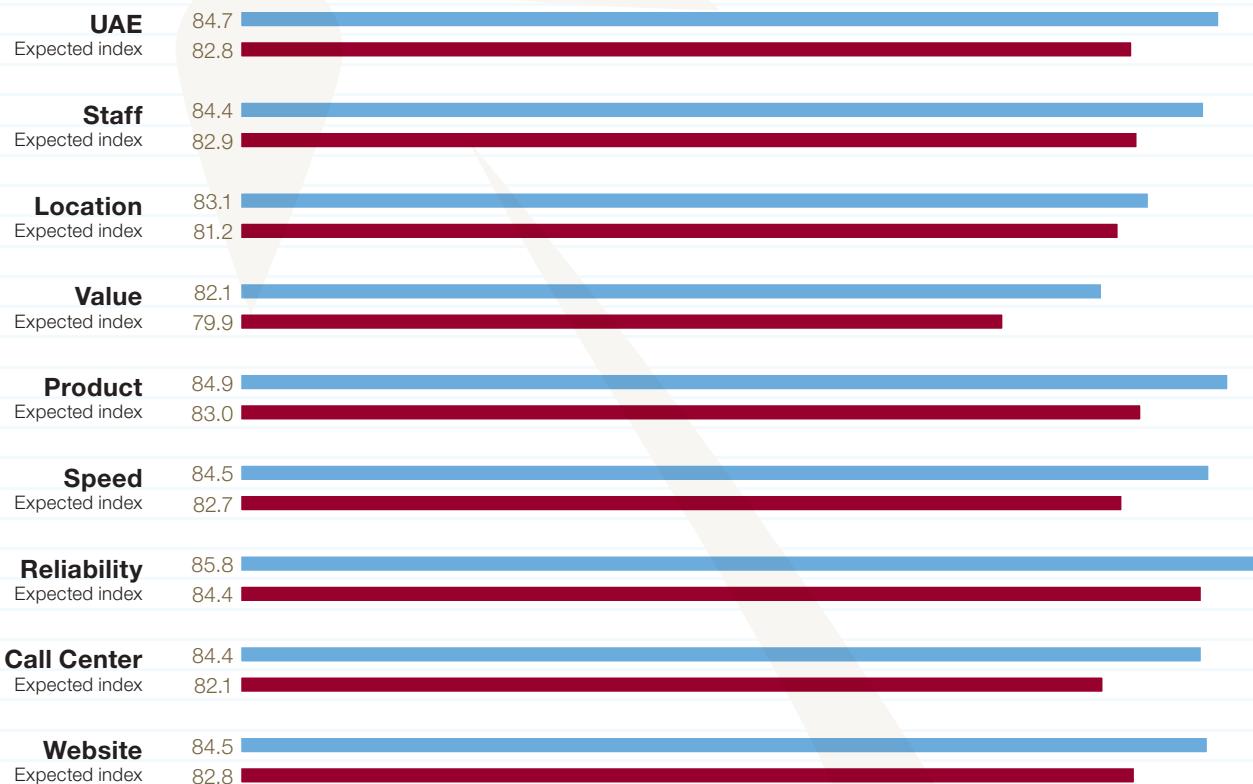
Actual satisfaction is highest amongst those with an Elementary or below and High School education, both scoring high. The lowest satisfaction level is among those with a Masters or PHD. This could be attributed to the fact that those with a higher education demand a higher level of service.



## Service dimension scores by gender

UAE Expected Index

■ Female ■ Male



### Female

Expectation: Overall Females' expectations exceed those of Males on every dimension. Highest expectation is Reliability and Product Quality and the lowest is Value for Money and Location.

### Male

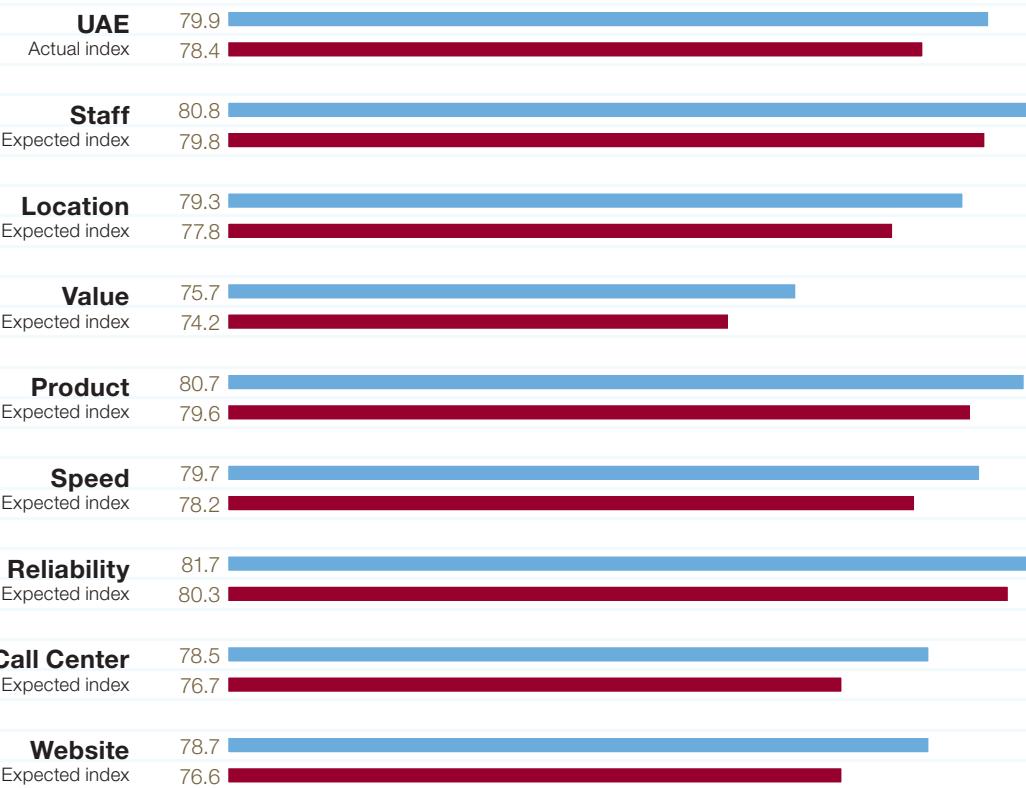
Expectation: Service expectations for Males fall below those of Females on every dimension, while the highest expectation for Males is similar to that of Females: Reliability and Product Quality. The lowest expectation is Value for Money and Call Center.



# Service dimension scores by gender

UAE Actual Index

■ Female ■ Male



## Female

Actual: Females are more satisfied than Males in all of the service dimensions. Their highest satisfaction score is Reliability and Staff. Their lowest is Value for Money and Website.

## Male

Actual: Similar to Females, Males are most satisfied with Reliability and Staff and least satisfied with Value for Money and Website.



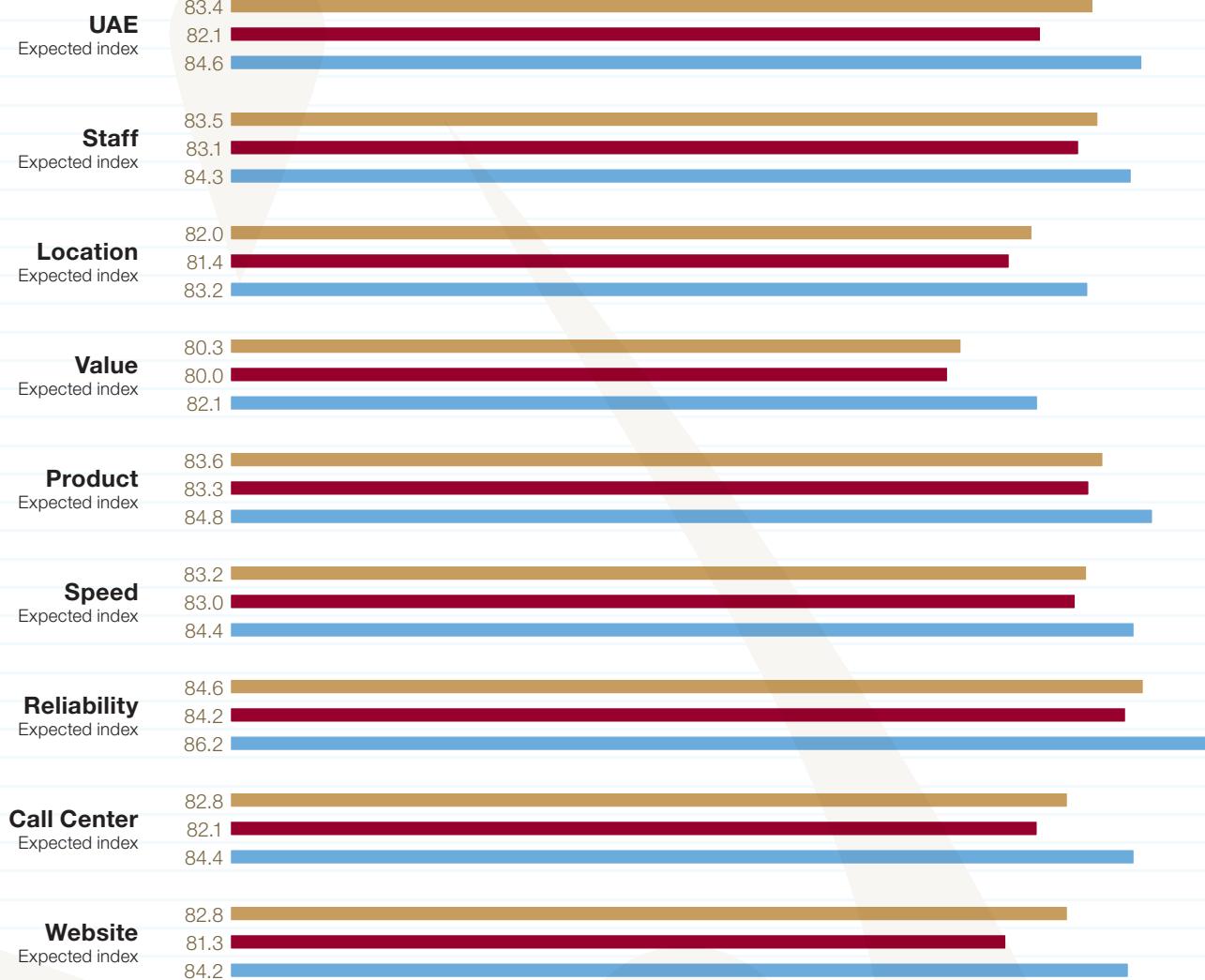
## Dimension scores by nationality

Expectations before dealing with a brand

■ Arabs

■ Emiratis

■ Non Arabs



### Lowest

Arabs, Emiratis and Non Arabs all scored lowest on Value for Money.

### Highest

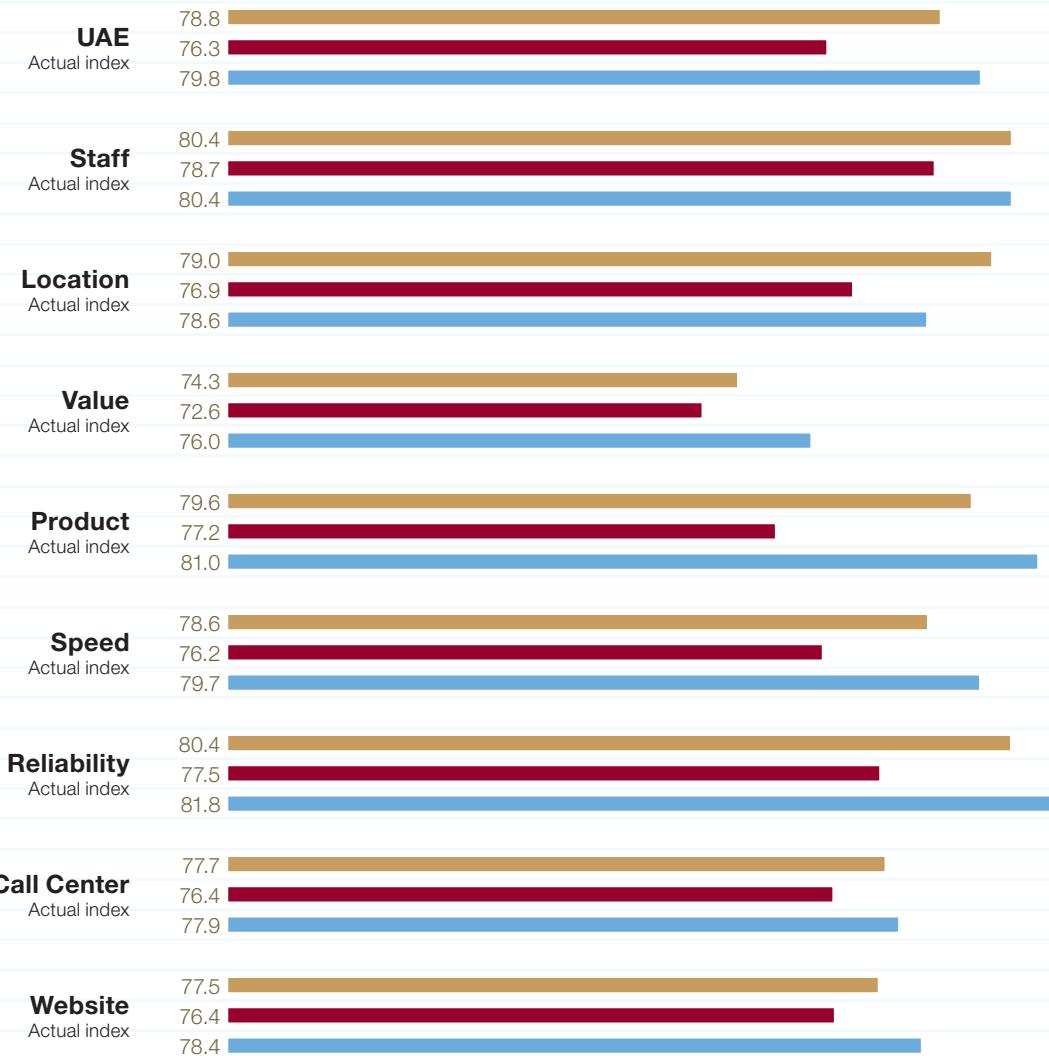
Arabs, Emiratis and Non Arabs all scored highest on Reliability.



# Dimension scores by nationality

Actual satisfaction after dealing with a brand

Arabs      Emiratis      Non Arabs



## Lowest

Arabs, Emiratis and Non Arabs all scored lowest on Value for Money.

## Highest

Arabs scored highest on Staff and Reliability, Emiratis in Staff and Non Arabs in Reliability.



## Dimension scores by age group

Actual scores and gaps between actual and expected scores

	16-17	18-29	30-39	40-49	50-59	60+	UAE Index
<b>Actual</b>	<b>16-17</b>	<b>18-29</b>	<b>30-39</b>	<b>40-49</b>	<b>50-59</b>	<b>60+</b>	<b>UAE Index</b>
Staff	87.1	81.1	79.8	79.2	82.8	85.4	<b>80.3</b>
Location	80.5	78.8	78.5	77.9	80.8	83.4	<b>78.6</b>
Value	75.6	75.4	74.5	74.2	77.7	79.2	<b>74.9</b>
Product	82.5	80.8	79.9	78.8	82.1	86.6	<b>80.1</b>
Speed	86.5	79.7	78.6	77.9	80.8	83.9	<b>79.0</b>
Reliability	84.7	81.9	80.5	79.5	82.0	87.9	<b>81.0</b>
Call Center	83.7	78.4	77.0	77.1	79.8	79.8	<b>77.6</b>
Website	82.8	78.4	77.3	76.8	80.9	79.1	<b>77.7</b>
<b>Overall</b>	<b>80.8</b>	<b>80.2</b>	<b>78.6</b>	<b>77.8</b>	<b>80.8</b>	<b>83.8</b>	<b>79.1</b>
<b>Gap</b>							
Staff	-0.6	-2.7	-4.2	-3.0	-3.9	0.0	<b>-3.5</b>
Location	-4.1	-3.1	-4.2	-3.8	-4.5	-2.1	<b>-3.7</b>
Value	-4.7	-5.4	-6.8	-6.3	-6.8	-5.2	<b>-6.2</b>
Product	-3.4	-3.1	-4.5	-4.3	-5.3	-0.6	<b>-4.0</b>
Speed	-0.4	-4.0	-5.5	-4.6	-6.2	-5.5	<b>-4.8</b>
Reliability	-3.3	-3.4	-4.8	-4.4	-5.4	-1.7	<b>-4.2</b>
Call Center	-3.8	-4.6	-6.8	-5.2	-6.2	-2.9	<b>-5.7</b>
Website	-1.4	-5.1	-6.6	-5.7	-5.1	-3.7	<b>-5.8</b>
<b>Overall Gap</b>	<b>-4.5</b>	<b>-3.6</b>	<b>-5.6</b>	<b>-5.1</b>	<b>-5.7</b>	<b>-3.7</b>	<b>-4.8</b>
Best							
Worst							

### Satisfaction

Value for Money is the **lowest** dimension for all age groups except for 60+, where it is Website. The **highest** is Reliability for all age groups other than 16-17 and 50-59 years, where it is Staff.

### Gaps

All age groups had **negative** gaps except 60+ years, where actual scores matched expectations for Staff.



# 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	87.7	82.6	81.7	80.0	78.4	<b>80.3</b>
Location	86.4	80.6	79.2	78.4	77.2	<b>78.6</b>
Value	84.0	77.6	76.5	74.5	73.0	<b>74.9</b>
Product	87.8	82.0	81.4	79.8	78.4	<b>80.1</b>
Speed	87.3	81.4	80.3	78.6	77.2	<b>79.0</b>
Reliability	89.3	82.6	82.3	80.7	79.5	<b>81.0</b>
Call Center	87.2	80.5	80.2	77.3	74.5	<b>77.6</b>
Website	87.5	80.2	80.1	77.5	75.2	<b>77.7</b>
<b>Overall</b>	<b>87.5</b>	<b>81.6</b>	<b>81.0</b>	<b>78.7</b>	<b>76.9</b>	<b>79.1</b>
<b>Gap</b>						
Staff	-1.4	-1.1	-2.1	-3.8	-5.0	<b>-3.5</b>
Location	0.2	-2.4	-2.5	-4.1	-4.8	<b>-3.7</b>
Value	-3.5	-3.7	-4.5	-6.7	-7.9	<b>-6.2</b>
Product	-3.4	-2.3	-2.5	-4.4	-5.5	<b>-4.0</b>
Speed	-2.1	-2.8	-3.1	-5.2	-6.1	<b>-4.8</b>
Reliability	-2.2	-2.7	-2.5	-4.6	-5.5	<b>-4.2</b>
Call Center	-4.0	-2.8	-3.1	-6.1	-8.6	<b>-5.7</b>
Website	-3.0	-3.6	-4.1	-6.1	-7.9	<b>-5.8</b>
<b>Overall Gap</b>	<b>-2.6</b>	<b>-2.6</b>	<b>-3.0</b>	<b>-5.2</b>	<b>-6.5</b>	<b>-4.8</b>
Best						
Worst						

## Satisfaction

Elementary or below had the highest satisfaction across all dimensions, while those with a Master or PHD had the lowest satisfaction in all dimensions. Among most education levels Reliability had the highest average satisfaction, while those with a High School education had the highest satisfaction in both Reliability and Staff. The lowest satisfaction across the board was Value for Money.

## Gaps

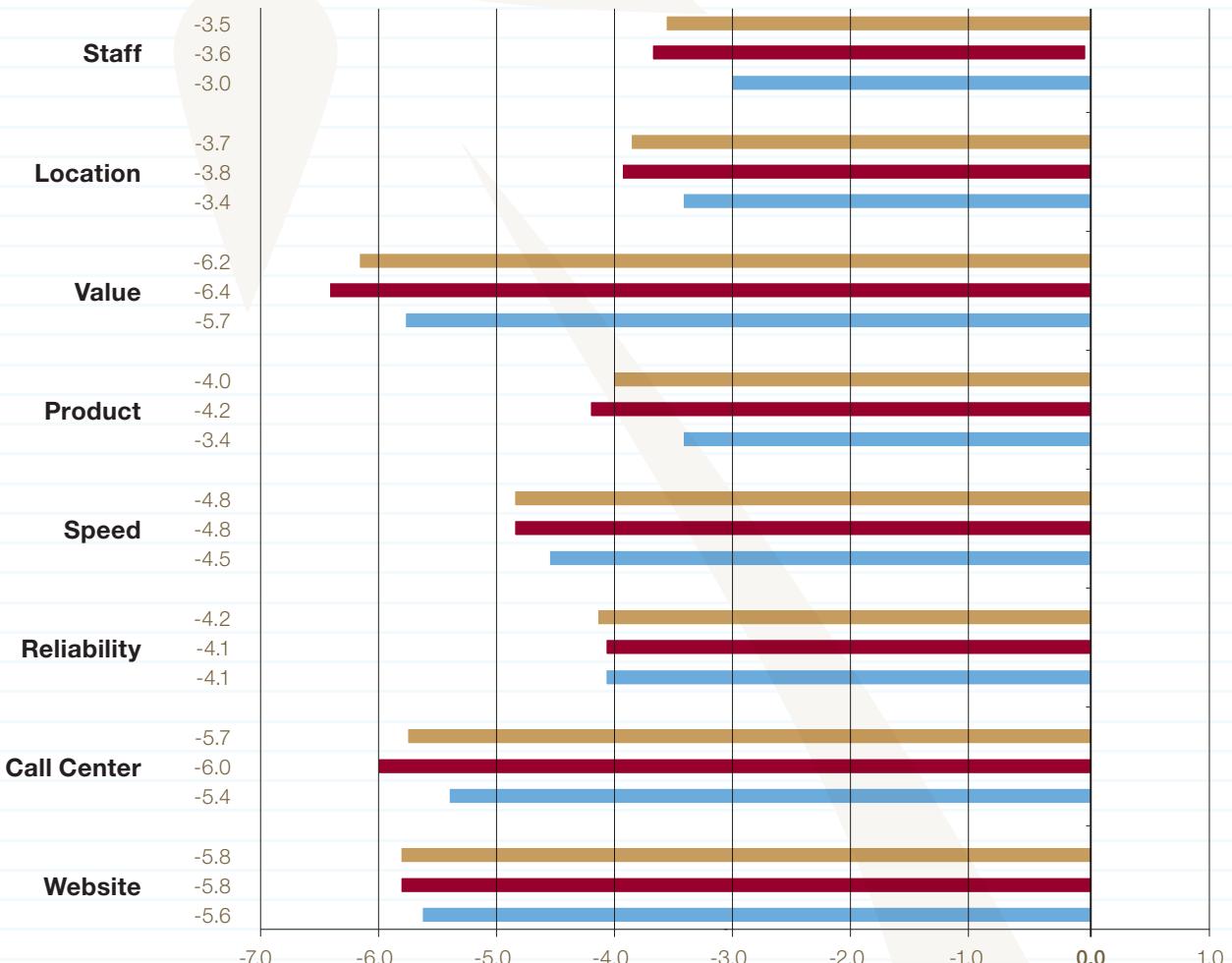
Consumers with a degree of Elementary or below showed a positive gap in Location while all other dimensions had negative gaps for all education levels. The group where expectations were not met the most is Master or PHD.



# Gaps by gender

UAE Index 2018 - Gap Analysis

■ UAE Gap ■ Gap Female ■ Gap Male



## Females

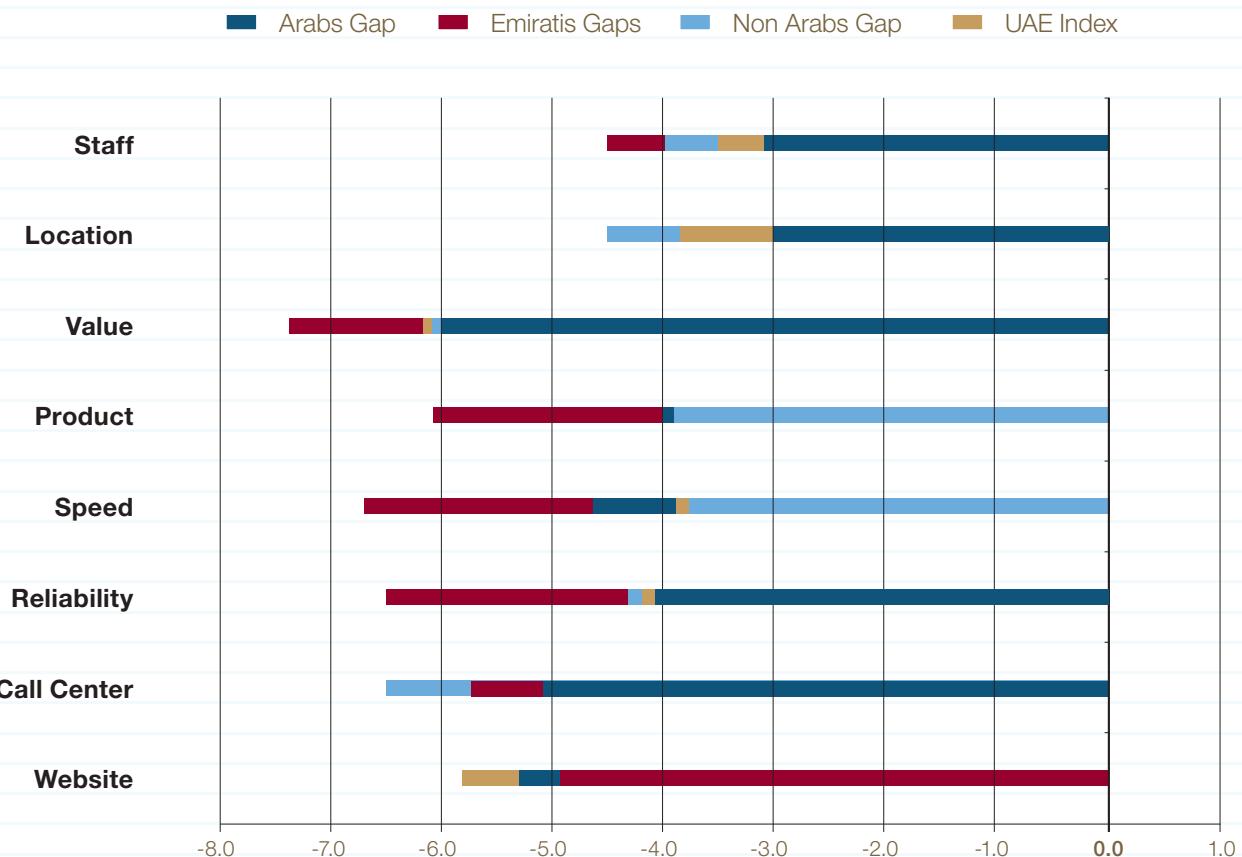
There are no positive gaps for Females on any dimension. The largest gaps for Females are for Value for Money, Call Center and Website.

## Males

Males also showed negative gaps across all dimensions. Similar to Females, the highest gaps for Males are in Value for Money, Website and Call Center.



## Gaps by nationality



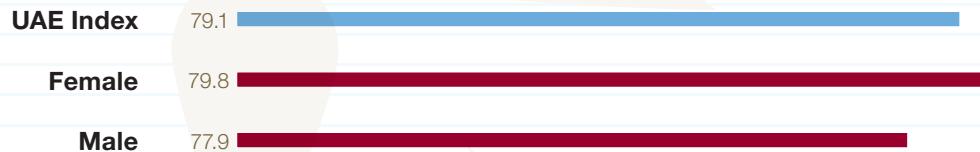
	Staff	Location	Value	Product	Speed	Reliability	Call Center	Website
<b>Arab Gap</b>	-3.1	-3.0	-6.0	-4.0	-4.6	-4.1	-5.1	-5.3
<b>Emiratis Gap</b>	-4.5	-4.5	-7.4	-6.1	-6.7	-6.6	-5.7	-4.9
<b>Non Arabs Gap</b>	-3.9	-4.5	-6.1	-3.8	-4.7	-4.3	-6.5	-5.8
<b>UAE Index</b>	-3.5	-3.7	-6.2	-4.0	-4.8	-4.2	-5.7	-5.8

No service dimension exceeded expectations for any nationality group as they all fell below expectations. Non Arabs had the largest gaps in Call Center and Website while Emiratis had larger gaps in the rest of the dimensions with their largest gap being in Value for Money. Arabs had the highest gap in Value for Money as well.



## Loyalty

UAE Index recommend scores 2018



Loyalty examines the likelihood of a consumer recommending a brand.

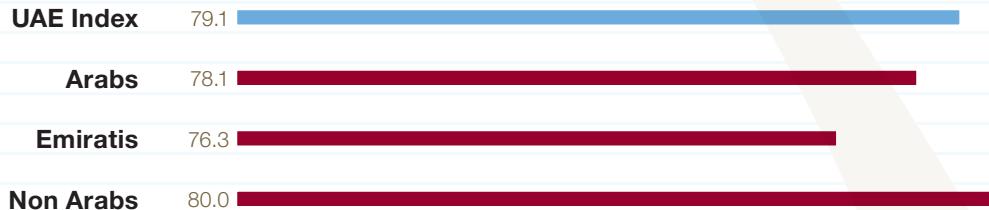
The UAE scored 79.1 on the **loyalty**, or the recommendation score.

The scores show that Females are more likely to recommend a brand than Males.



## Recommend scores by nationality

UAE Index recommend scores 2018



The least likely nationality to recommend a brand is Emiratis, while the most likely to recommend a brand is Non Arabs. Non Arabs had a strong score.



## Recommend scores by age group

UAE Index recommend scores 2018

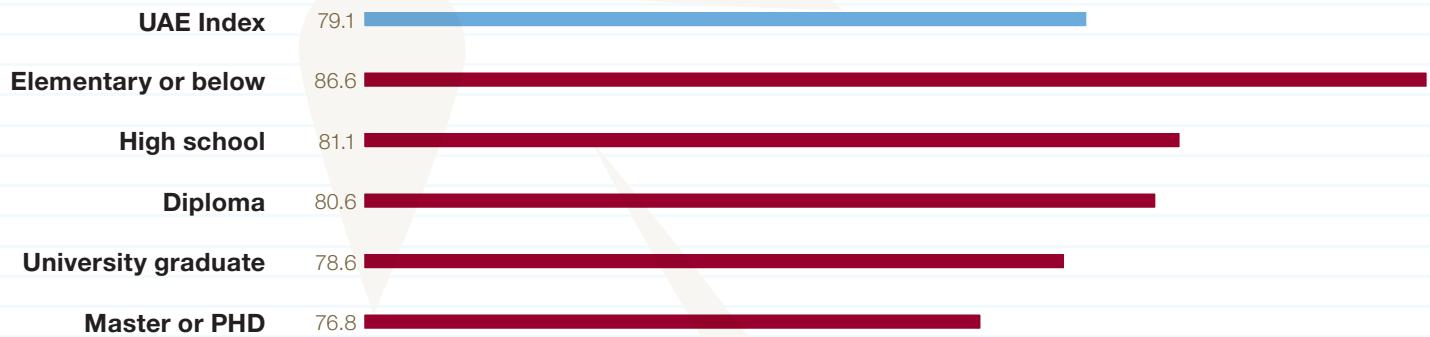


The two age groups that are more likely to recommend a brand are the 16-17 and 60+ age groups. Typically, very young consumers as well as older groups are more likely to recommend brands to their peers. The least likely to recommend a brand is the 40-49 group.



## Recommend scores by education level

UAE Index recommend scores 2018



Those with the highest education levels are the least likely to recommend a brand, while those with an Elementary education or below are the most likely to do so.



## The UAE expected index across all 14 categories

Expected Index



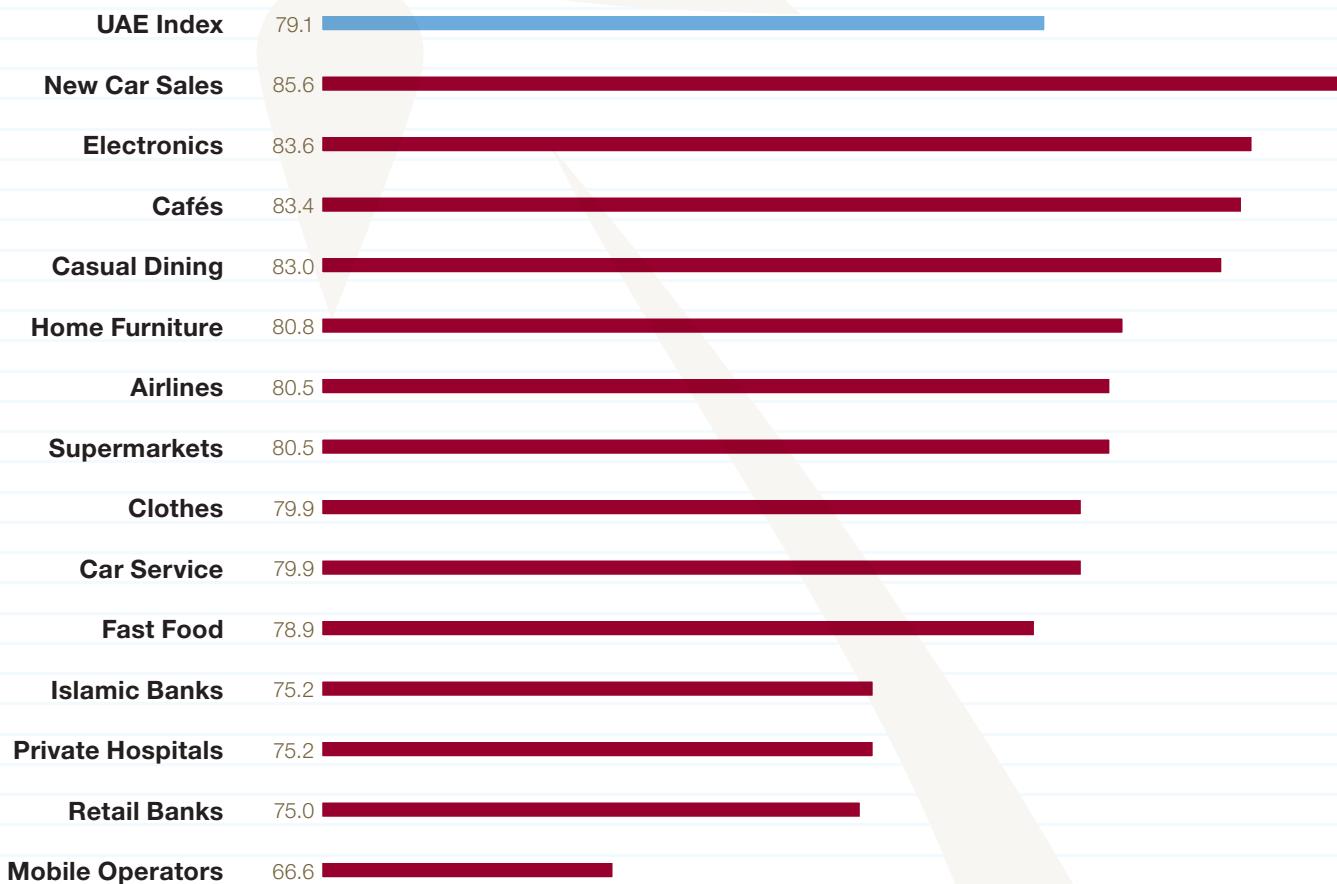
Seven industry categories exceeded the UAE Index score for the average of all 8 dimensions on a “before” basis.

The top expectations are for Electronics, Airlines and Casual Dining. The lowest expectations are for Mobile Operators, Fast Foods and Supermarkets.



## The UAE actual index across all 14 categories

Actual Index



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 Retail Banks.



	In store / branch	On the phone	Online
<b>UAE Index</b>	<b>79.7</b>	<b>70.9</b>	<b>82.0</b>
Cafe	83.4	79.6	80.0
Car Service	79.5	84.7	92.6
Casual Dining	83.1	80.6	84.8
Clothes	79.4	77.8	86.0
Electronics	83.4	87.7	85.6
Fast Food	79.8	77.2	81.4
Home Furniture	82.5	88.9	82.3
Islamic Banks	76.0	69.0	79.3
Mobile Operators	67.1	64.5	70.3
New Car Sales	85.4	83.5	88.2
Private Hospitals	74.9	84.4	82.1
Airlines	82.5	83.2	83.4
Retail Banks	78.9	68.9	81.9
Supermarkets	81.5	75.9	82.9
Best			
Worst			

**Note:** This is a new question that was added in 2018 for the first time.

On a country level, Online interactions scored highest with 82.0 points. On the phone interactions scored the lowest with 70.9 points.

New Car Sales scored highest among all industries for in store/ branch interactions, while Mobile Operators scored the lowest. Car Service had a heroic 92.6 score for their Online interactions. Mobile Operators scored lowest in every point of interaction, meeting a 'bland' score in 2 of the 3 points of interaction.



## Frequency

Frequency of Visits

	Week	Monthly	3 months	6 months	Year
<b>UAE Index</b>	<b>82.2</b>	<b>79.8</b>	<b>78.7</b>	<b>78.1</b>	<b>78.9</b>
Cafe	87.5	83.0	80.4	73.0	70.4
Car Service	78.5	82.1	79.3	78.3	73.4
Casual Dining	86.0	84.1	83.5	80.4	73.6
Clothes	82.5	80.7	78.3	77.9	73.1
Electronics	85.1	83.4	83.3	84.6	82.6
Fast Food	84.5	79.7	76.4	69.7	52.4
Home Furniture	84.1	85.4	81.9	82.2	80.8
Islamic Banks	77.6	79.0	75.1	75.5	62.4
Mobile Operators	64.3	67.0	69.3	65.2	62.1
New Car Sales	83.6	87.3	82.9	83.7	86.3
Private Hospitals	79.1	77.7	74.9	75.0	71.8
Airlines	86.1	83.5	83.5	83.4	82.2
Retail Banks	79.5	77.7	79.6	77.3	68.6
Supermarkets	83.7	80.4	78.0	72.9	72.8
Best					
Worst					

**Note:** This is a new question that was added in 2018 for the first time.

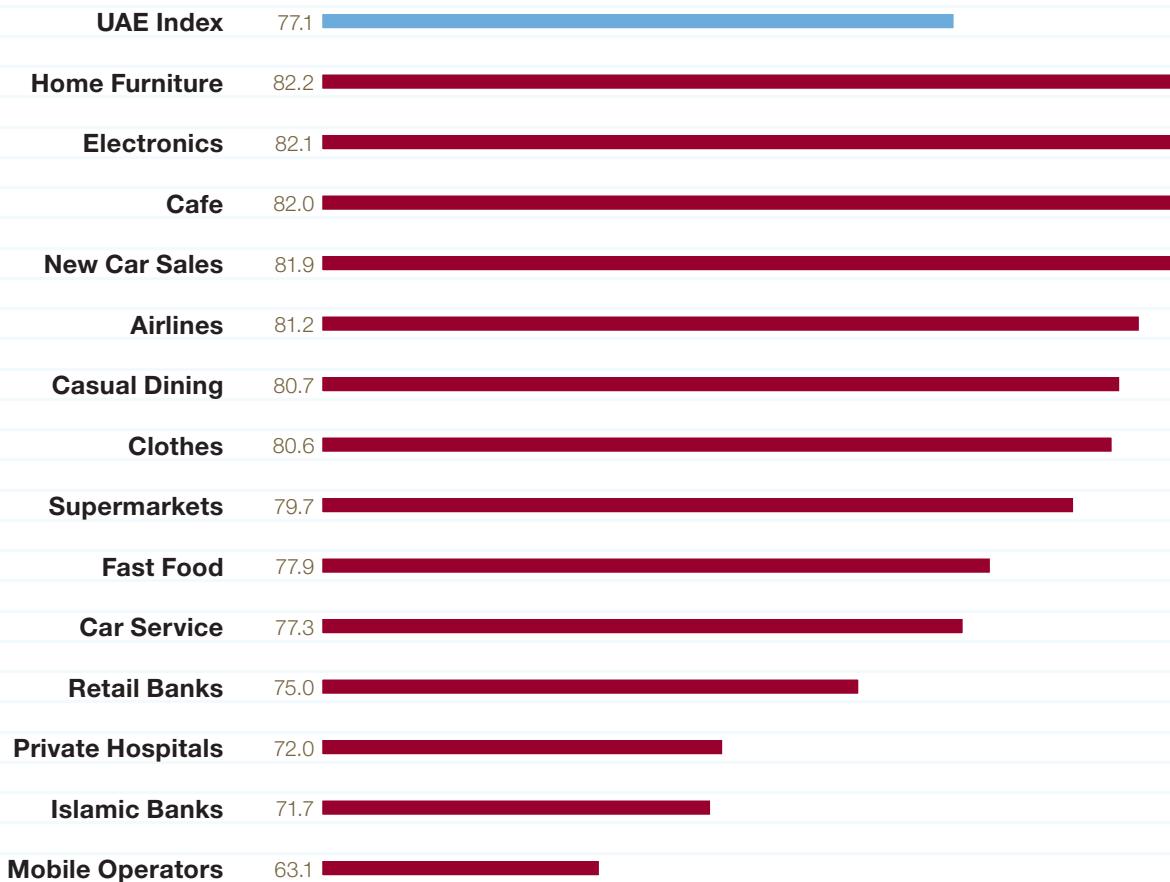
Weekly interactions with a brand scored highest with a Good score of 82.2. Semi-Annual interactions scored lowest with 78.1.

On a category level, that trend seems to continue with the majority of categories frequented weekly scoring high. Annual scores are on average the lowest scoring.



## Complaint resolution

UAE Index complaint average score 2018



**Note:** This is a new question that was added in 2018 for the first time.

Consumers in UAE scored an average score of 77.1 on how brands deal with complaints. This score is on the higher side of Ordinary using our 5-level scale. 10 of the 14 categories met or exceeded the UAE score, with Mobile Operators, Islamic Banks and Private Hospitals bringing the score down.



# Building a Culture of Excellence

**64.1 points Culture of Excellence score 2018**

The Culture of Excellence Index is our second benchmark and was recently introduced to compliment the CSI by measuring internal cultural alignment to excellence by collecting staff feedback. So far we have collected 1500 assessments in the CEI which uses an excellence framework based on three pillars: lead (set the direction and inspire), win hearts (engage, manage the people element, reward) and convince the mind (measure, introduce the right processes, allocate resources).

We have seen that staff evaluate their companies more critically than consumers as on average the CEI is 64.1 points and is 11 points lower than the CSI. Within the framework we have seen that companies exert more effort on process factors (indicated in blue in the chart) than with emotional factors (highlighted in red) which have a stronger impact on driving customer satisfaction higher.

The CEI helps companies to diagnose problems and prescribe solutions based on the strong belief that internal customers and culture are critical to overall customer satisfaction.



**Note:** Grey indicates factors under winning hearts, Blue indicates factors to do with the mind. Red indicates Leadership as a pillar.

**Note:** The graph above represents Kuwait data.



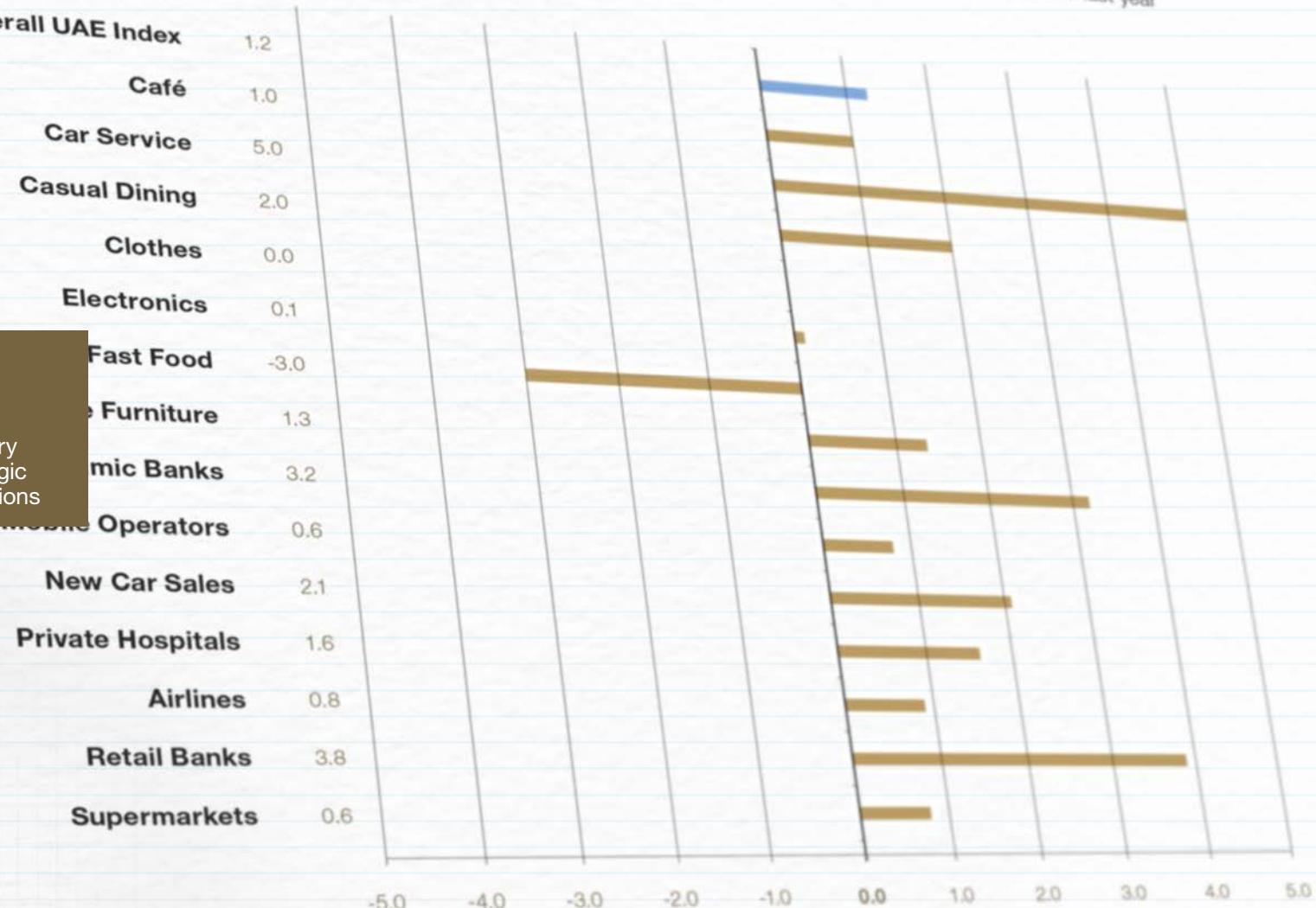
## Category Growth 2017 vs. 2018

Notable improvements with consumer satisfaction are seen in Car Service, Retail Banks, New Car Sales and Islamic Banks. The only category with negative growth since last year is Fast Food.

### Overall UAE Index

3

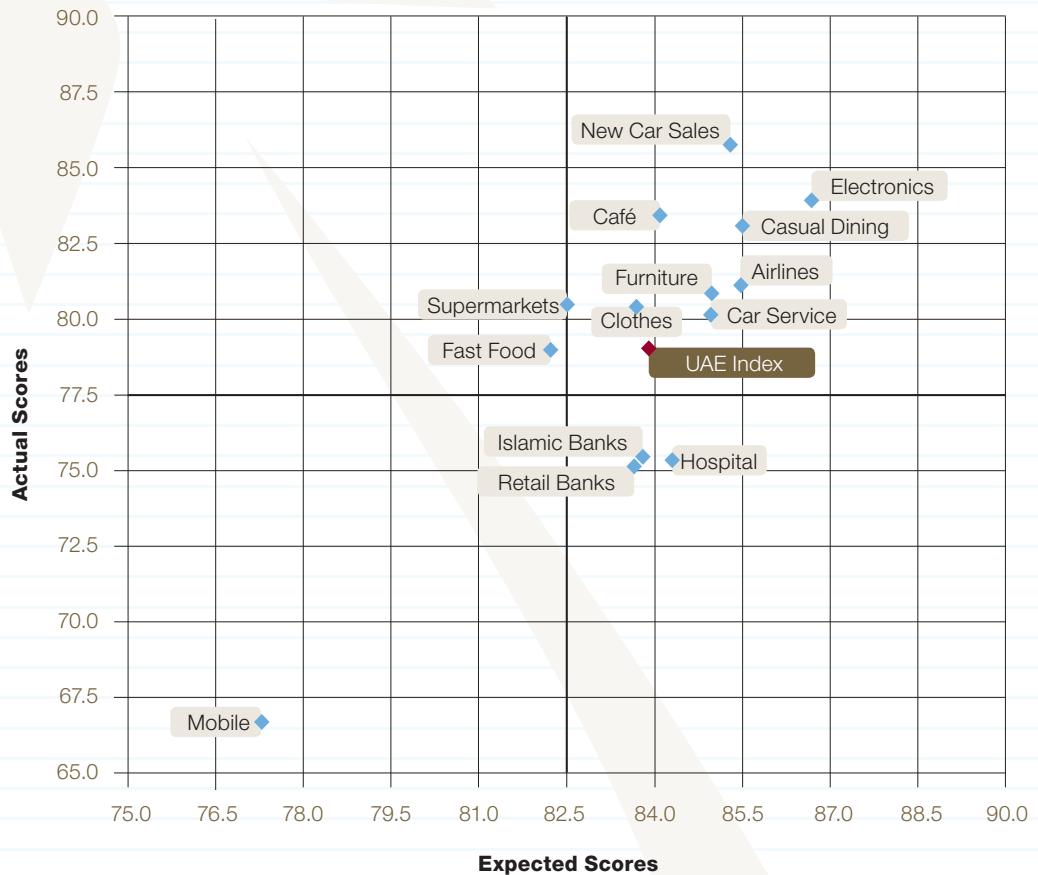
Summary  
& strategic  
implications





## Market position of all 14 categories

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



The only industry to exceed expectations was New Car Sales. This is the best position for an industry to be in and it needs to be sustained over time.

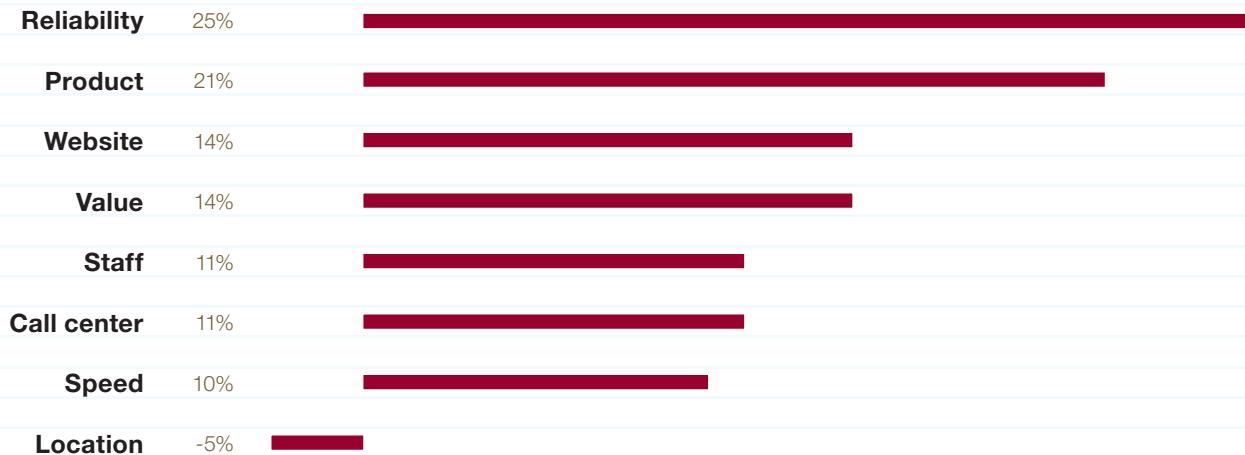
Industry categories in the top left quadrant need to improve their image and overall performance, as a small gap exists between expectation and actual scores.

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%, 29,057 sample)



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

Based on the model, only two dimensions have a critical role in influencing overall satisfaction: Reliability and Accuracy (25% impact) and Product or Service Quality (21% 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**

Negative word of mouth  
(score 0-6)

#### **Passives**

Satisfied but unenthusiastic  
(score 7-8)

#### **Promoters**

Enthusiasts  
(score 9-10)

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

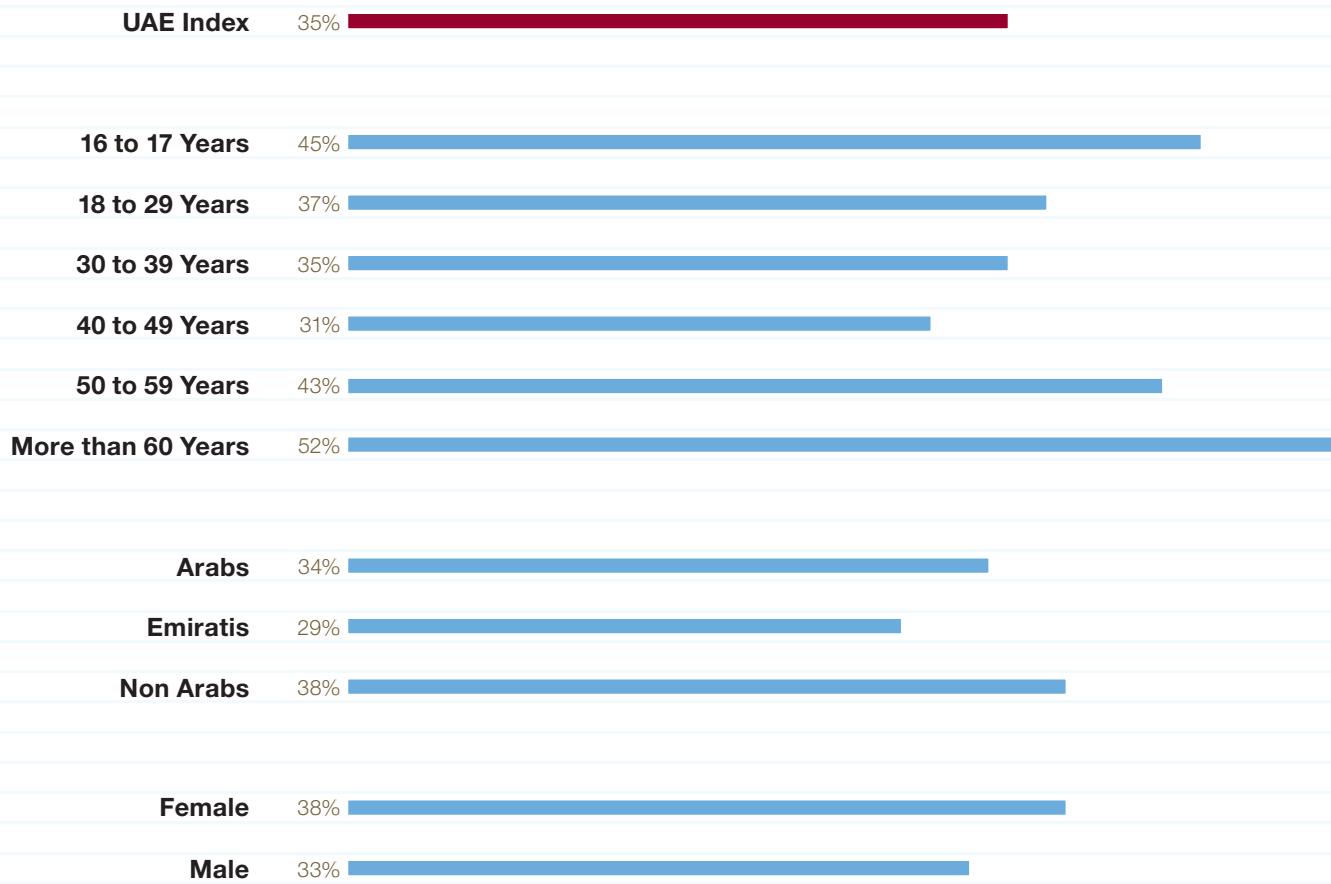
**Passives** (score 7-8) are satisfied but unenthusiastic customers who are vulnerable to competitive offerings.

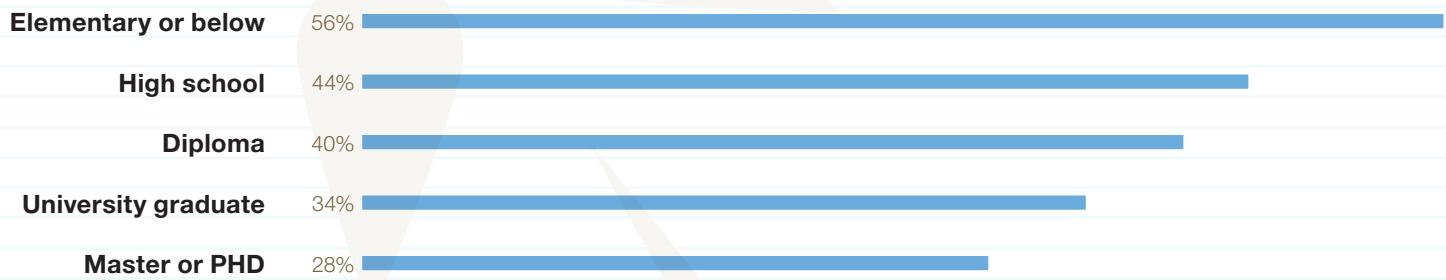
**Detractors** (score 0-6) are unhappy customers who can damage your brand and impede growth through negative word-of-mouth.



# The net promoter score for UAE is 35%

Net promoter score - Service Hero Index 2018





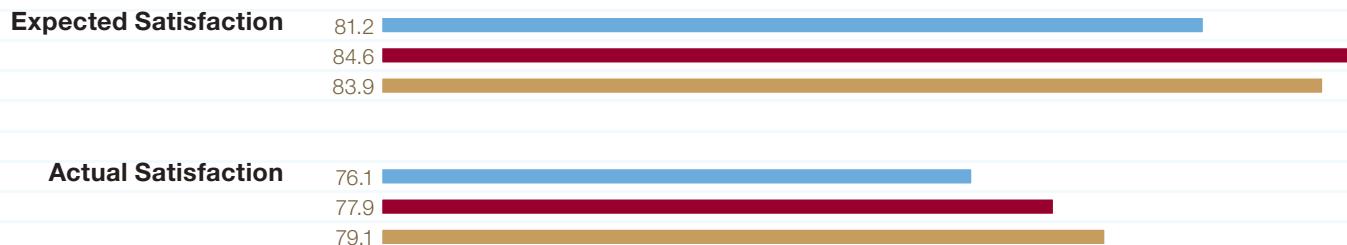
While the country average is 35%, demographic groups vary on being either Promoters or Detractors. The largest concentration of promoters seems to be all age groups except for those aged 40-49. Females score higher than males, while Non Arabs score the highest among all nationality groups. Those with a lower education level are likely to be 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 ■ 2018



Since last year, the average Actual Satisfaction increased 2.2 points, or 3%.



## Category Comparison 2016 to 2018

Actual Satisfaction

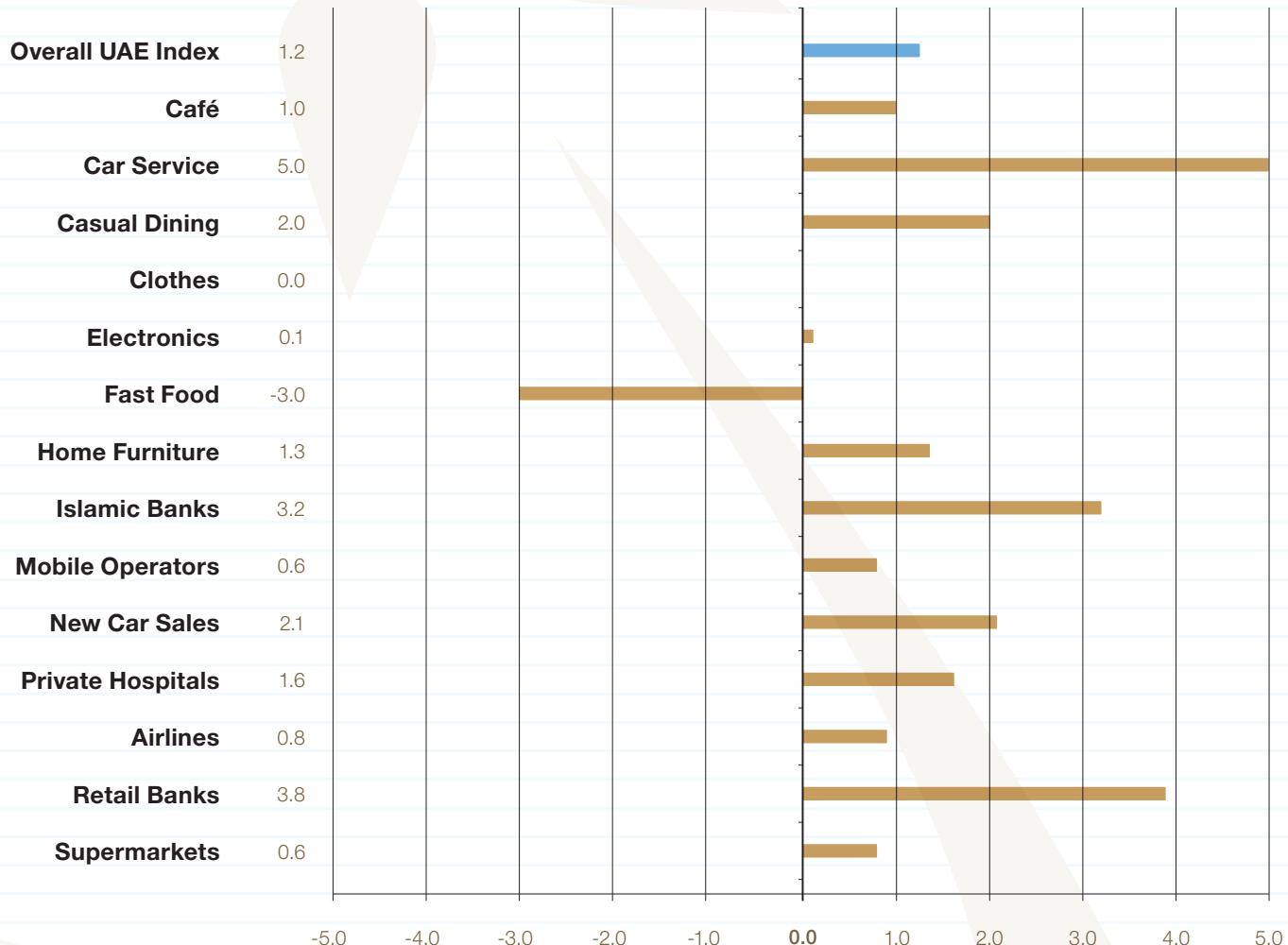
Satisfaction for UAE in 2018 increased from 2017. The top scoring categories in 2018 are similar to last year with Cafe, Electronics, New Car Sales and, more recently, Casual Dining scoring high. Notable improvements since last year are shown in Car Service, Casual Dining and Retail Banks, which all had a significantly higher satisfaction than they did in 2017.

	2016	2017	2018
<b>UAE Index</b>	<b>76.1</b>	<b>77.9</b>	<b>79.1</b>
Café	81.9	82.5	83.4
Car Service	69.5	75.4	79.9
Casual dining	80.2	81.1	83.0
Clothes	80.3	79.8	79.9
Electronics	81.4	83.5	83.6
Fast Food	79.3	81.6	78.9
Home Furniture	80.8	79.6	80.8
Islamic Banks	70.5	72.4	75.2
Mobile Operators	63.9	66.1	66.6
New Car Sales	81.2	83.6	85.6
Private Hospitals	71.6	73.8	75.2
Airlines	78.6	79.7	80.5
Retail Banks	66.5	71.8	75.0
Supermarkets	79.3	80.0	80.5



## Category Growth 2017 vs. 2018

Notable improvements with consumer satisfaction are seen in Car Service, Retail Banks, New Car Sales and Islamic Banks. The only category with negative growth since last year is Fast Food.





## Dimension Comparisons 2016 to 2018

Actual Satisfaction

	2016	2017	2018
Staff	76.0	78.3	80.3
Location	78.4	79.7	78.6
Value	74.2	75.3	74.9
Product	76.5	78.4	80.1
Speed	74.6	76.9	79.0
Reliability	76.8	78.8	81.0
Call Center	73.2	77.8	77.6
Website	76.0	74.5	77.7

Overall, there are improvements in some dimensions, with Reliability, Staff, Website, Product, and Speed showing the most growth. Location, Call Center and Value had negative growth from last year.



# Demographic Comparisons 2016 to 2018

Actual Satisfaction

	2016	2017	2018
Female	77.8	78.1	79.9
Male	74.5	78.2	78.4
Arabs	74.2	76.8	78.8
Emirati	77.0	76.6	76.3
Non Arabs	77.5	78.6	79.8
16 to 17 years	81.9	85.3	80.8
18 to 29 years	77.0	77.7	80.2
30 to 39 years	75.8	77.8	78.6
40 to 49 years	75.8	78.4	77.8
50 to 59 years	78.0	82.6	80.8
More than 60 years	74.1	88.1	83.8
Elementary or below	71.8	91.1	87.5
High school	81.9	81.3	81.6
Diploma	80.7	80.3	81.0
University graduate	75.5	76.9	78.7
Master or PHD	72.1	75.7	76.9

While Males and Females saw an increase in satisfaction since last year, Females increased their satisfaction more since 2017. Arabs saw the largest growth in satisfaction since last year.

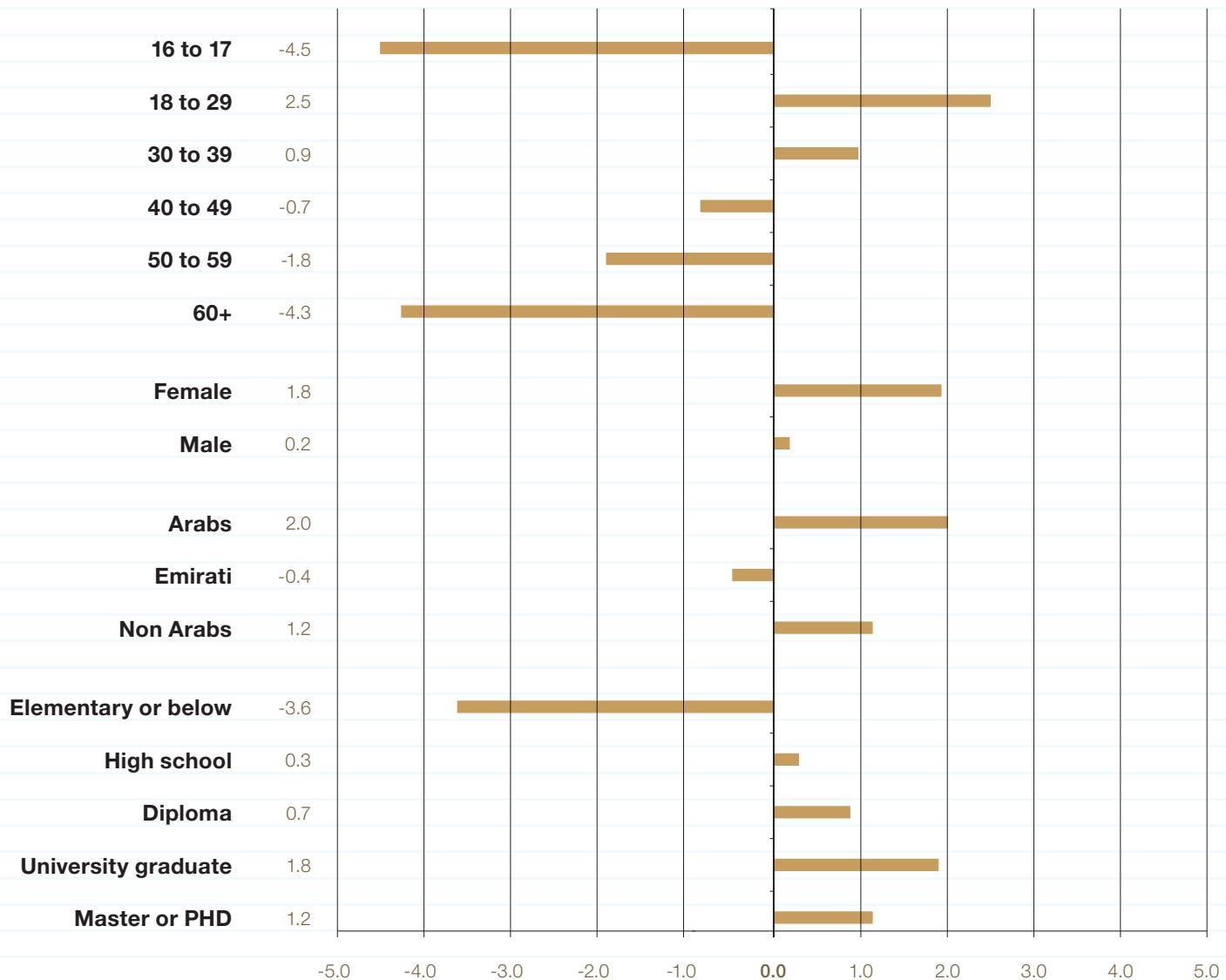
Both the 18-29 and 30-39 age groups were the only groups to see an increase in satisfaction this year. The rest all had lower satisfaction than they did in 2017.

By education, those with an education level of Elementary or below decreased the most in satisfaction. The lowest positive growth in satisfaction was for those with a High School education level.



# Demographic growth 2017 vs. 2018

Actual Satisfaction



18-29 years, Females, Arabs, and University Graduates had the largest growth since 2017. The 18-29 year group showed the largest growth among all groups.



## Category NPS

Service Hero CSI Category 2018 Net Promoter Score

	2016	2017	2018
<b>UAE Index</b>	<b>34%</b>	<b>31%</b>	<b>35%</b>
Café	47%	46%	46%
Car Service	24%	12%	37%
Casual Dining	45%	44%	46%
Clothes	43%	37%	39%
Electronics	46%	47%	44%
Fast Food	38%	45%	34%
Home Furniture	48%	32%	36%
Islamic Banks	17%	17%	23%
Mobile Operators	3%	2%	2%
New Care Sales	51%	52%	60%
Private Hospitals	20%	14%	21%
Airlines	42%	40%	39%
Retail Banks	13%	11%	25%
Supermarkets	39%	34%	38%

The UAE NPS national score increased since last year. Fast Food, Electronics and Airlines had more detractors in 2018 than in 2017, while Car Service had the largest gain of promoters in 2018 compared to 2017.



## Net Promoter Score by demographic group and changes over the years

		2016 NPS	2017 NPS	2018 NPS
<b>UAE Index</b>		<b>34%</b>	<b>31%</b>	<b>35%</b>
Female		40%	31%	38%
Male		28%	32%	33%
Arabs		26%	27%	34%
Emirati		34%	31%	30%
Non Arabs		39%	33%	38%
16 to 17 years		55%	50%	45%
18 to 29 years		36%	29%	37%
30 to 39 years		34%	31%	35%
40 to 49 years		33%	34%	31%
50 to 59 years		44%	50%	43%
More than 60 years		18%	61%	52%
Elementary or below		8%	69%	56%
High school		51%	40%	43%
Diploma		46%	39%	40%
University graduate		32%	28%	34%
Master or PHD		23%	24%	28%

The NPS score increased since last year.

The demographic groups showing the strongest increase in NPS since last year are those aged 18 to 29, University Graduates and Females.



## Country Comparison - UAE vs. Kuwait

UAE with a slight edge in satisfaction

UAE

Kuwait

Expected

UAE	83.9
Kuwait	81.6

Actual

UAE	79.1
Kuwait	75.4

The UAE & Kuwait actual satisfaction scores are being compared. The UAE index score was 79.1 and the Kuwait index score was 75.4, giving a marginal 3.7 difference between both countries.

The close satisfaction scores between UAE & Kuwait reveals that consumers in both countries may have identical needs when it comes to service.

This country comparison will look into dimension, demographic, and category scores, and will also reveal 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 and Kuwait share high satisfaction scores in a few categories 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, Electronics and Cafes. The highest scoring categories in Kuwait are Casual Dining, Cafes and Home Furniture. In both markets, Mobile Operators is the lowest scoring category.

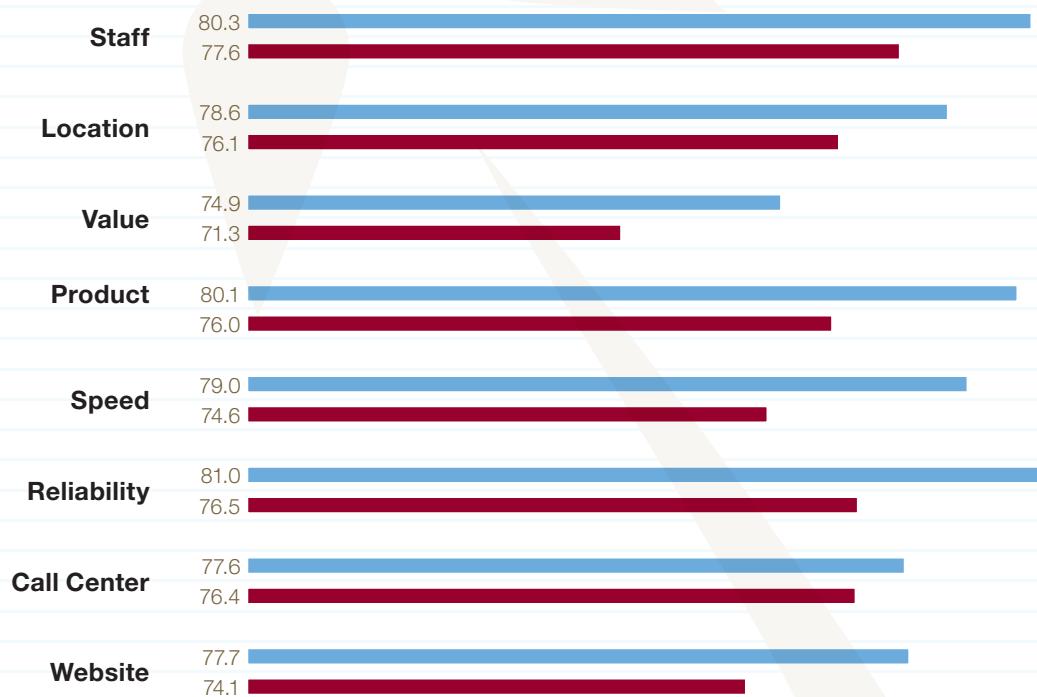
Country Index	UAE	Kuwait	Difference
Café	83.4	80.5	2.9
Car Service	79.9	73.7	6.2
Casual Dining	83.0	81.0	2.0
Clothes	79.9	78.4	1.5
Electronics	83.6	77.5	6.1
Fast Food	78.9	75.4	3.5
Fine Dining	N/A	78.7	N/A
Health Clubs	N/A	74.3	N/A
Home Furniture	80.8	79.4	1.4
Islamic Banks	75.2	73.3	1.9
ISPs	N/A	63.3	N/A
Mobile Operators	66.6	69.0	-2.4
New Car Sales	85.6	78.1	7.5
Private Hospitals	75.2	73.9	1.3
Airlines	80.5	73.3	7.2
Retail Banks	75.0	73.4	1.6
Supermarkets	80.5	78.6	1.9

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



## Dimension Comparison - UAE vs. Kuwait

■ UAE ■ Kuwait



The UAE scored higher than Kuwait in all dimensions. For the UAE, Reliability, Product Quality and Staff Attitude are the highest scoring dimensions and for Kuwait they are Staff Attitude, Reliability and Call Center.



# Demographic Comparisons UAE vs. Kuwait

Actual Satisfaction

Demographics	UAE	Kuwait	Difference
Female	79.9	77.5	2.4
Male	78.4	74.1	4.3
Arabs	78.8	76.2	2.6
Emiratis	76.3	73.7	2.6
Non Arabs	79.8	76.4	3.4
16 to 17 years	80.8	87.8	-7.0
18 to 29 years	80.2	77.4	2.9
30 to 39 years	78.6	74.3	4.3
40 to 49 years	77.8	74.2	3.6
50 to 59 years	80.8	74.6	6.2
More than 60 years	83.8	79.7	4.1
Elementary or below	87.5	89.1	-1.6
High school	81.6	80.4	1.2
Diploma	81.0	76.9	4.1
University graduate	78.7	75.3	3.4
Master or PHD	76.9	71.1	5.8

## Demographic comparison

Females are more satisfied than Males in both the UAE & Kuwait.

The age group with the lowest satisfaction in the UAE & Kuwait is 40-49, while the age group with the lowest satisfaction in the UAE is 60+. For Kuwait, it is the 16-17 age group that had the highest satisfaction.

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

In both Kuwait and the UAE, the higher the education level, the lower the satisfaction score. The highest satisfaction in both countries is for the Elementary or below education level.

## Gap

Looking at the difference, most demographics do not have a significant difference between countries. The major differences are for those aged 16 to 17 years old and 50+, and the Master or PHD group.



## Net Promoter Score by demographic group

Demographics	UAE	Kuwait
Female	35%	30%
Male	38%	38%
Arabs	33%	25%
Emirati/Kuwaiti	34%	28%
Non Arabs	30%	32%
16 to 17 years	38%	33%
18 to 29 years	45%	34%
30 to 39 years	37%	32%
40 to 49 years	35%	30%
50 to 59 years	31%	27%
More than 60 years	43%	25%
Elementary or below	52%	41%
High school	45%	34%
Diploma	43%	32%
University graduate	40%	30%
Master or PHD	34%	18%

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

The demographic groups show that those aged more than 60+, Females, Elementary or Below and Non Arabs have the highest NPS score.



## Category NPS UAE vs. Kuwait

Service Hero CSI Category 2018 Net Promoter Score

	<b>UAE</b>	<b>Kuwait</b>
<b>National Index</b>	<b>35%</b>	<b>30%</b>
Café	46%	42%
Car Service	37%	31%
Casual Dining	46%	44%
Clothes	39%	36%
Electronics	44%	33%
Fast Food	35%	26%
Fine Dining	N/A	36%
Health Clubs	N/A	21%
Home Furniture	36%	40%
Islamic Banks	23%	29%
ISPs	N/A	2%
Mobile Operators	2%	17%
New Car Sales	60%	35%
Private Hospitals	21%	26%
Airlines	39%	27%
Retail Banks	25%	28%
Supermarkets	38%	39%

The overall NPS score for UAE is 35%, which is higher than Kuwait's score of 30%. This means that, overall, the UAE has a higher number of brand ambassadors than detractors. The highest NPS scores for UAE are New Car Sales, Casual Dining and Cafes. The lowest are Mobile Operators, Private Hospitals and Islamic Banks.

For Kuwait, the highest scoring NPS categories are Cafe, Home Furniture and Supermarkets. The lowest NPS scores in Kuwait are ISPs, Mobile Operators and Health Clubs.



# Complaint Resolution UAE vs. Kuwait

Service Hero CSI Complaint Resolution per Category 2018

<b>UAE Index</b>	<b>UAE</b>	<b>Kuwait</b>
Café	82.0	81.4
Car Service	77.3	64.0
Casual Dining	80.7	81.8
Clothes	80.6	78.5
Electronics	82.1	71.9
Fast Food	77.9	75.3
Fine Dining	N/A	78.1
Health Clubs	N/A	75.3
Home Furniture	82.2	80.0
Islamic Banks	71.7	73.9
ISPs	N/A	58.2
Mobile Operators	63.1	62.7
New Car Sales	81.9	73.3
Private Hospitals	72.0	74.0
Airlines	81.2	72.3
Retail Banks	75.0	72.0
Supermarkets	79.7	79.5

The overall score for UAE is slightly above 'Ordinary' in our scale and the Kuwait score is on the lower side of 'Ordinary'.

The categories in the UAE where consumers are most satisfied with how brands resolve complaints are Home Furniture, Electronics and Cafes. For Kuwait they are Casual Dining, Cafes and Home Furniture.

The categories in the UAE where consumers are least satisfied with complaint resolutions are Mobile Operators, Islamic Banks and Private Hospitals. In Kuwait they are ISPs, Mobile Operators and Car Service.



## Industry comparison with other markets

In comparing our CSI scores with other national customer satisfaction indexes, notably the American ACSI (which has been running since 1996), we note that UAE has the highest index among all the indexes.

Category	UAE Service Hero CSI	Kuwait Service Hero CSI	US ACSI Index	Singapore CSI Index
Café	83.4	80.5	80.0	73.9
Car Service	79.9	73.7	82.0	N/A
Casual Dining	83.0	81.0	81.0	74.4
Clothes	80.2	78.4	79.0	72.8
Electronics	83.6	77.5	79.0	71.8
Fast Food	78.9	75.4	80.0	73.6
Fine Dining	N/A	78.7	N/A	N/A
Health Clubs	N/A	N/A	N/A	N/A
Home Furniture	80.8	79.4	N/A	N/A
Islamic Banks	75.2	73.3	81.0	74.1**
ISPs	N/A	63.3	62.0	68.9
Mobile Operators	66.6	69.0	74.0	71.1
New Car Sales	85.6	78.1	82.0	N/A
Private Hospitals	75.2	73.9	76.0	N/A
Airlines	80.5	73.3	73.0	74.5
Retail Banks	75.0	73.4	81.0	74.1**
Supermarkets	80.5	78.6	79.0	72.9
<b>Overall Score</b>	<b>79.1</b>	<b>75.4</b>	<b>77.0*</b>	<b>72.9**</b>

\* Q3 2018

\*\* Scores are from 2017

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



# Factors affecting the UAE Index

Which factors affect service excellence in the Emirates across industries?



In the 3rd 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 83.9 across all industries. Expectations are highest for Reliability, Product, Speed and Staff. Customers with the highest expectations of service are those aged 60+, Females, and lower level education. The highest expectations by industries are for Electronics and Airlines. The lowest expectations (and therefore image or reputation) are for Mobile Operators and Fast food.

- **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 79.1, the gap between customer expectations and satisfaction is -4.8, 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, Call Center and Website and for categories it is Mobile Operators, Private Hospitals and Retail Banks. Satisfaction is highest for Location, Product Quality and Reliability. Category wise New Car Sales, Cafes and Casual Dining 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 35% (which means 35% of customers are promoters) some customer profiles have lower loyalty. These are namely Emiratis, Masters or PHD holders, those aged 40-49 and Males. Categories that have strong loyalty are New Car Sales, Cafes and Casual Dining. There are no category in the negatives, but Mobile Operators is close with a 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.



# Service Hero's benefits

Service Hero taps into an unexploited market niche

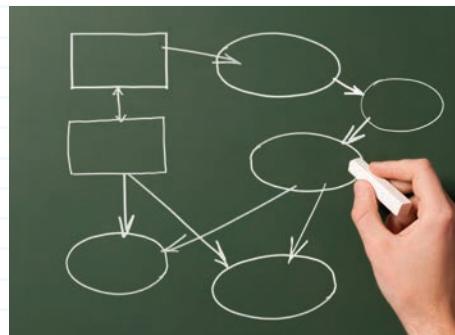


## People powered

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

## Empirical

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



## Actionable

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

## Helps UAE

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



4

UAE  
Awards 2018

# 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 31 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 39 brands were evaluated



## Specialty Store: Electronics

- Defined as: Any stores focused on the sale of durable and nondurable electronic items
- A total of 17 brands were evaluated



## Home furniture

## Home furniture

- Defined as: Any store focused on the sale of durable furniture as well as decorative items
- A total of 21 brands were evaluated

## Health care: Private hospitals

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

## Clothes & accessories

### MANGO



### Mercedes-Benz

## Clothes & accessories

- Defined as: Retail outlets that sell clothes excluding stores solely selling accessories and shoes
- A total of 70 brands were evaluated

## Autos: New Car Sales

- Defined as: The purchase of a new car directly from an authorized car dealer
- A total of 48 brands were evaluated



## Autos: Car service

- Defined as: The service or maintenance of a car from an authorized car dealer
- A total of 50 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 17 brands were evaluated



## Specialty Store: Supermarkets

- Defined as: Any large self-service store retailing food, perishables and household supplies
- A total of 14 brands were evaluated

Overall UAE winner 2018

# First 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.



# Second Place



## FROM THEIR WEBSITE

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

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

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

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



Overall UAE winner 2018

# Third Place



## FROM THEIR WEBSITE

Honda Motor Co., Ltd. is established with co-founders Soichiro Honda and Takeo Fujisawa and introduces (in 1949) its first original designed and engineered product which Mr. Honda appropriately names the "Dream" D-type motorcycle.

For nearly four decades Honda has challenged to exceed government requirements - as the first automaker to meet the Clean Air Act standards in the 1970s, then demonstrating low-emissions vehicle technology that led the state of California to adopt new, more stringent emissions regulations. Honda delivers to customers in over 150 countries and regions, over 6 million power products annually, spanning its general-purpose engines, and products powered by

them, including tillers, generators, snow blowers to lawnmowers, pumps and outboard engines. Ever since its foundation, Honda has continued taking on challenges to create new value at the forefront of the times based on our Fundamental Beliefs, consisting of "Respect for the Individual" - which reflects the three key points of Initiative, Equality and Trust, and "The Three Joys" - composed of The Joy of Buying, The Joy of Selling and The Joy of Creating. By taking on such new challenges, Honda has grown as a mobility company that delivers products to over 30 million customers around the world each year. In 2017, in the midst of rapid change in their business environment, they formulated the 2030 Vision, which outlines new challenges they will take on toward the next era.



# Category Winners 2018



Restaurants: Cafés  
**Pappa Roti**



Restaurants: Casual Dining  
**The Cheesecake Factory**



Restaurants: Fast Food  
**Hardee's**



Clothes & Accessories  
**GAP**

# Category Winners 2018



Home Furniture  
**IKEA**



Autos: New Car Sales  
**Honda**



Specialty Store: Electronics  
**Apple**



Healthcare: Private Hospitals  
**Medcare Hospital**



Communications: Mobile Operators  
**Etisalat**



Specialty: Supermarkets  
**Carrefour**



Autos: Car Service  
**BMW**



Financial: Retail Banks  
**Abu Dhabi Commercial Bank**

# Category Winners 2018



Airlines  
**Emirates**



Financial: Islamic Banks  
**Dubai Islamic Bank**



## Comparing the winners of 2016 to 2018

The Service Hero CSI awarded 15 category winners in 2018, of which 7 were consecutive winners in the 2018 assessment. This suggests that leading companies do implement 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 2018**

Service Hero Category	2018 Winner	2017	2016
Car Sales	<b>Honda</b>	No	Yes
Car Servicing	<b>BMW</b>	No	No
Airlines	<b>Emirates</b>	Yes	Yes
Clothes	<b>American Eagle</b>	No	No
Mobile Operators	<b>Etisalat</b>	No	No
Islamic Banks	<b>Dubai Islamic Bank</b>	No	No
Retail Banks	<b>ADCB</b>	No	Yes
Private Hospitals	<b>Medcare Hospital</b>	Yes	No
Cafés	<b>Pappa Roti</b>	No	No
Fast Food	<b>Hardee's</b>	Yes	No
Casual Dining	<b>The Cheesecake Factory</b>	Yes	Yes
Electronics	<b>Apple</b>	Yes	Yes
Home Furniture	<b>IKEA</b>	Yes	Yes
Supermarkets	<b>Carrefour</b>	Yes	No

4  
of 4

## Rate brand

## How would you rate

## Before visit

Your expectations before your visit



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

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

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

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

5

Methodology

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

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

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

After

Your experience after y



Staff attitude, knowledge &amp; competence

1 2 3 4 5 6 7 8 9

Location convenience, parking, operating hours &amp; attractiveness

1 2 3 4 5 6 7 8

Value for money of the product/service

1 2 3 4 5 6 7 8

Product/service quality

1 2 3 4 5 6 7 8

Service speed

1 2 3 4 5 6 7 8

Reliability, consistency &amp; accuracy of the product/service

1 2 3 4 5 6 7 8

Call center or any phone based interaction

1 2 3 4 5 6 7 8

App, social media and website

1 2 3 4 5 6 7 8

Your overall satisfaction with the company or brand

1 2 3 4 5 6 7 8

Likelihood of recommending this brand to family or friends

1 2 3 4 5 6 7 8

How well did the brand fix any issues you faced?

1 2 3 4 5 6 7 8

Sub



# 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](http://www.servicehero.com) regarding the quality of service they receive in private sector companies in UAE. The survey was live January 1 - December 31<sup>st</sup> 2018.

### Sample

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

### Rating assessment

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

### Security

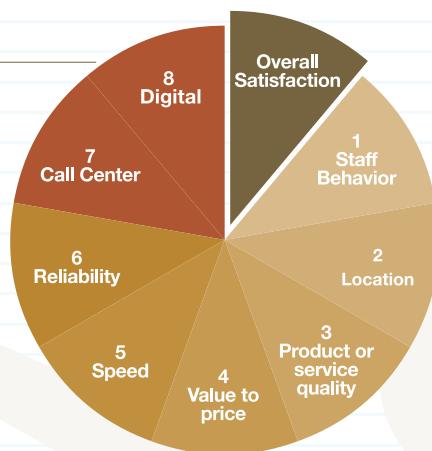
A number of security measures were deployed of either technical nature to verify the authenticity of the voter, or later, at the data cleansing stage, to remove any suspicious data.

### Rigor

We follow the research protocols of 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.





# The questionnaire

## What respondents actually voted on.

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

Before										How would you rate										After												
Your expectations before your visit										Your rating										Your expectations after your visit												
Bad					Good					Bad					Good					Bad					Good							
1	2	3	4	5	6	7	8	9	10	NA	1	2	3	4	5	6	7	8	9	10	NA	1	2	3	4	5	6	7	8	9	10	NA
1	2	3	4	5	6	7	8	9	10	NA	1	2	3	4	5	6	7	8	9	10	NA	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 <b>recommending</b> 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 <b>ideal</b> offering										1	2	3	4	5	6	7	8	9	10	NA												
Do you have any <b>comments or suggestions?</b>																																

## **Respondents voted on 2 levels:**

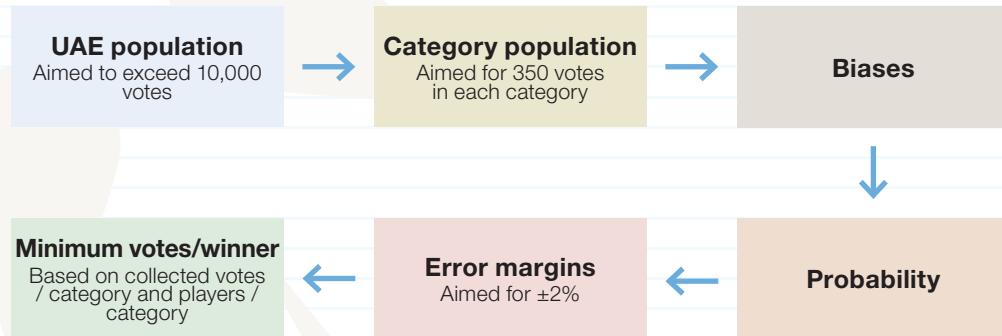
1. What they expected **before** receiving the service
2. What they actually experienced **after** being served

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



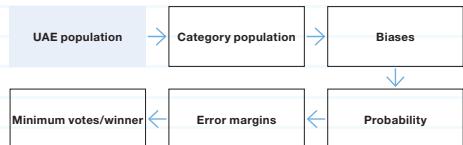
# Sampling approach

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



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

### Category population.



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

This figures **includes**:

- Males and Females
- Emirati and Non-Emirati nationalities

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

- Anyone under 16 years
- Laborers

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



# Sampling approach (continued)

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

Confidence level: 95%

Sector	Sample @ 5%	Total Votes
Airlines	350	1,973
New Car Sales	350	1,538
Car Service	350	1,490
Clothing	350	1,405
Mobile Operator	350	2,304
Café	350	1,813
Fast Food	350	1,875
Casual Dining	350	1,795
Electronics	350	1,968
Retail banks	350	2,312
Islamic banks	350	1,331
Home Furniture	350	2,480
Private Hospital	350	3,459
Supermarkets	350	3,314

This table shows the 14 categories included in the 2018 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



Airlines



Automotive: Sales + Service



Banks: Conventional + Islamic



Communications: Mobile



Restaurants: Café + Fast Food Casual Dining

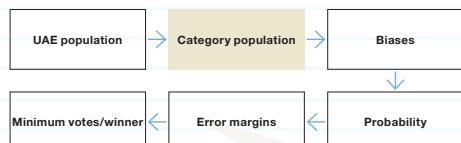


Health care: Private Hospitals



Specialty Stores: Electronics  
Supermarkets + Furniture + Clothes

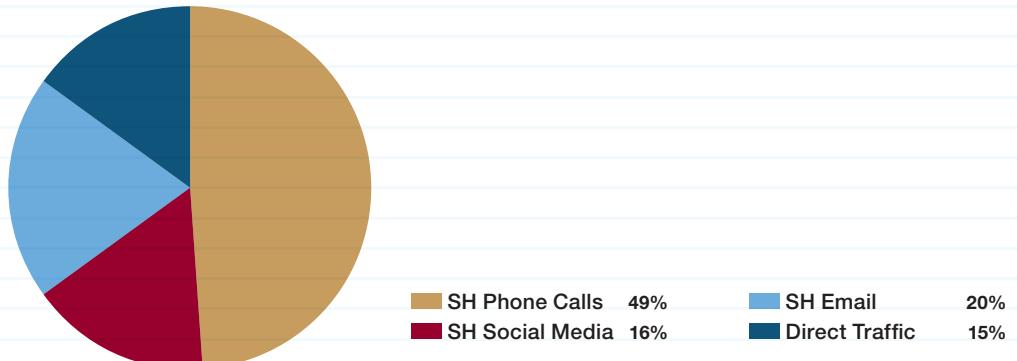
## Category population.



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

## Source of votes and platforms used to vote from

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





# Security measures and rules for valid votes

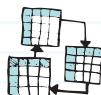
**To ensure that each visitor is a legitimate customer, a number of security measures have been put in place.**

## 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 7,782 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 **36,839** 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** 3,480

### **Data Cleansing (Automated & Manual)      Votes removed**

1	Remove votes that are NA across all dimensions in the <b>after</b> evaluation	yes
2	Remove votes that are only made for <b>before</b> assessment and NA votes for <b>after</b> 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** (4,302)

**Total votes obtained** 36,839

**Total votes assessed** 29,057



## Advisory Council members

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

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

### Independent Advisors

#### Dr. Forrest V. Morgeson

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



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

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

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

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

## Dr. Reinhold Leichtfuss

Senior Partner and Managing Director, Boston Consulting Group



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

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

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

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

## Dr. Raed Safadi

Chief Economic Adviser at Dubai's Department of Economic Development



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

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



## Advisory Council members (continued)

### Academic Advisors



#### Dr. Mouawiya Al Awad

Director of the Institute of Social & Economic Research

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

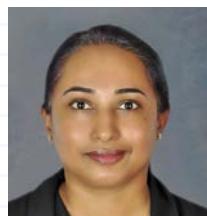
Dr. Mouawiya Al Awad currently serves as the Director of the Institute of Social & Economic Research (ISER) at Zayed University in Dubai. Previously he was:

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

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

#### Dr. Shilpa Iyanna

Assistant Professor of Marketing CBA, Abu Dhabi University

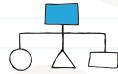


Dr. Shilpa Iyanna is working as an Assistant Professor of Marketing at the College of Business Administration, Abu Dhabi University, United Arab Emirates. She has more than 16 years of research and teaching experience and was the Head of the Business Department prior to starting her PhD. Shilpa earned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

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

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

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

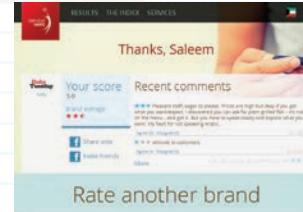


# Process overview of the key survey steps

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



1. Web banner / Social media promoting Service Hero



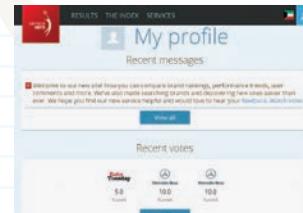
5. Respondent votes for other companies



9. Results in permanent database once confirmed



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



6. Respondent submits vote with personal data



10. Data cleansing & verification procedures after close of votes



3. Respondent chooses category & brand



7. Responses stored in temporary database



11. High-level results shared with Advisory Council



4. Respondent votes for first company



8. Email sent to respondent to confirm identity



12. Service Hero winners announced publicly



# Glossary of terms used

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



# Thank you!

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# 6

About Khayal  
Consultants



خَيَالْ كُلَّا سْتُشْنَاتْ  
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



Design	Web	Marketing
<b>Print</b> Annual Reports Corporate Brochures Marketing Collateral Newsletters Calendars Greetings & Occasions Articles & Guides	<b>Consulting</b> Strategy & Planning Benchmarking Traffic & Performance Analysis  <b>Sites &amp; Portals</b> UX & UI Design Development	<b>Consulting</b> Strategy Review Business Model Review Value Chain Image / Brand Audit  <b>Research</b> Focus Groups In-Depth Interviews Online Surveys Phone Surveys Mystery Shopping
<b>Branding</b> Logo Development Usage Manuals Stationary Design	<b>Mobile Engagement</b> Mobile Optimized Websites Mobile Apps Mobile Messaging	<b>Manpower Development</b> Service Quality ABC Training Employee Morale
<b>Motion</b> Motion Graphics Interactive	<b>xReality</b> Virtual Reality Augmented Reality Mixed Reality	
	<b>Social Media</b> Development Monitoring & Analytics	
	<b>e-Marketing Services</b> SEO & SEM Online Advertising	
	<b>Solutions &amp; Support</b> Content Management Digital Signage & Way Finding Hosting & Monitoring Maintenance & Support	

## A selection of some of Khayal's clients



Prime Minister Diwan



Central Bank of Kuwait



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



SIEMENS

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



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Member of



P.O. Box 4981 Safat, 13050 Kuwait  
Tel: +965 2226 0710, Fax: +965 2244 5562  
[info@servicehero.com](mailto:info@servicehero.com)

[servicehero.com](http://servicehero.com)