



07. Leading sector

The main sector leading is non-grocery retail, with eight leading brands among the top 20 CEE rankings.

Retailers have accelerated their digital transformation during the pandemic to maintain and/or increase engagement with customers amid lockdowns and social distancing measures.

At the same time, an increasing number of customers have discovered the ease and convenience of getting anything, anywhere, anytime at their fingertips from the comfort of their homes. This has driven a higher rate of adoption and penetration of e-commerce in the UAE.

Despite the convenience of online shopping, customers are returning to physical stores now that restrictions have been eased and retailers have strictly committed to health and safety measures in the UAE. Shopping malls are also a part of Middle Eastern culture and provide an experience that cannot be replaced by digital means. The 2.5-day weekend introduced for certain residents at the beginning of 2022 has increased some customers' leisure time, which is likely to have benefited the entertainment and general retail sectors.

Customers are now increasingly using their mobile devices in stores to both research products (reviews, specifications, price) -






























webrooming - whilst still visiting stores to see, touch, feel and assess the products they intend to buy online - showrooming.






























These changes in customer behavior provide an opportunity for retailers to engage, transact and support customers across both digital and physical channels. However, achieving this requires retailers to establish and orchestrate strong omnichannel capabilities adopting a customer centric approach to deliver a seamless and differentiating experience.

In this context, it is hardly surprising that non-grocery retailers are focused on developing strong omnichannel capabilities leveraging digital capabilities supported by customer insight.





























The most successful retailers are providing multiple payment options including 'Buy Now and Pay Later' (in effect an interest free instalment plan), critical in order to address ongoing concern around inflation whilst increasing the accessibility of their products.

Industry scores across the six pillars

	Personalization 			Time and effort 		
	Score	Vs. market		Score	Vs. market	
 Entertainment and leisure	8.20	2%		8.35	4%	
 Financial services	8.01	0%		7.94	-1%	
 Grocery retail	7.92	-1%		7.98	-1%	
 Logistics	8.01	0%		7.93	-1%	
 Non-grocery retail	8.14	1%		8.21	2%	
 Restaurants and fast food	7.89	-2%		7.93	-1%	
 Telecoms	7.93	-1%		7.78	-3%	
 Travel and hotels	8.02	0%		8.01	0%	
 Utilities	8.23	2%		8.06	0%	

	Expectations 			Integrity 		
	Score	Vs. market		Score	Vs. market	
 Entertainment and leisure	8.21	4%		8.25	2%	
 Financial services	7.90	0%		8.17	1%	
 Grocery retail	7.81	-1%		8.00	-1%	
 Logistics	7.88	0%		8.06	0%	
 Non-grocery retail	7.99	1%		8.14	1%	
 Restaurants and fast food	7.85	-1%		7.93	-2%	
 Telecoms	7.77	-2%		7.88	-3%	
 Travel and hotels	7.90	0%		8.07	0%	
 Utilities	8.12	3%		8.31	3%	

Industry scores across the six pillars

	Resolution 			Empathy 		
	Score	Vs. market		Score	Vs. market	
 Entertainment & Leisure	8.12	3%		7.90	2%	
 Financial services	7.94	0%		7.76	0%	
 Grocery retail	7.81	-1%		7.70	-1%	
 Logistics	7.94	0%		7.73	-1%	
 Non-grocery retails	8.04	2%		7.88	1%	
 Restaurant and fast food	7.74	-2%		7.72	-1%	
 Telecoms	7.69	-3%		7.56	-3%	
 Travel and hotels	7.90	0%		7.76	0%	
 Utilities	8.05	2%		7.87	1%	