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Spotlight on the UAE's top 10 CX champions

#1



Spotlight on Emirates Airline

Sector: Travel and hotels

As consumer demand for air travel drives the industry's recovery from the pandemic, Emirates Airline has been recognized as the travelers' choice, ranking first on the top 10 2022 UAE CX champions list. Its survey results show that it is leading across all six pillars.



Customers have particularly acknowledged the capability of staff to provide the right level of assistance everywhere (on the ground and on-board). This applies throughout the entire customer journey from research (providing route recommendations, price suggestions, a mobile application and website), ticketing (being able to quickly and easily addressing issues related to flight reschedule mainly due to Covid-19), check-in (assisting customers with check-in), lounge and dining, in-flight (e.g. creating memorable moments by taking photos) and post-flight experience, and baggage services.

Recognizing the value of customer loyalty, Emirates extended their rebooking waivers for all customers as the world started to open up post-Covid - a move that seems to have boosted the Trust and Integrity pillars.


The airline also introduced new ways for loyal customers to earn air miles while extending the expiry date of the air miles that customers had already banked.

Customers have also highlighted key areas of improvement including price and food. Many customers mentioned that Emirates' tickets are more expensive than its competitors, but most of them appear to be willing to pay that premium as long as their experience does not change.

Although customers opined that the in-flight food is better than most of the competition, many highlighted its decreasing quality and the fact that their menu lacks inclusivity of vegan options. It seems that Emirates is listening to its customers as it has planned to address the quality of its in-flight dining and has recently launched chef inspired menus (to be released progressively from first class to economy) and healthy plant-based vegan choices as part of a USD 2bn investment in customer experience

While already being one of the leaders in staff hospitality in the sector, Emirates is planning to further develop specialized hospitality training for cabin crew in partnership with Ecole Hôtelière de Lausanne, one of the world's leading hospitality management schools.

#2



Spotlight on IKEA

Sector: Non-grocery retail

The Swedish company, IKEA, was established in 1943 and is now one of the leading home furnishing businesses in the industry according to the top 10 2022 UAE CX champions list. It has regained its 2017 top CX excellence position (#3) that was lost in 2020 (#22).

IKEA is known for its good value for money, including efficient long-lasting furniture designs and quality food provided at their restaurants. This was reflected in their high Value score in the survey.

Contrary to 2020's results, IKEA has regained a CX top ranking driven by customers' progressive return to in-person shopping over the past year after Covid restrictions have been lifted. Although a lot of customers have used and appreciate IKEA's website and mobile application, the dominant channel of interaction remains their physical store. Shopping malls are a part of the Middle Eastern culture and provide an experience that cannot be replaced by online shopping. Customers ranked in-store shopping at IKEA as excellent (in the fields of staff assistance and knowledge, design inspiration, restaurants).

The main elements driving positive customer sentiment, according to customers, include a wide range of product categories available at a one stop-shop, as well as the convenience of

IKEA's home delivery service featuring real time updates on the status and progress of orders.

Another key component for customer satisfaction is the friendliness, professionalism, and availability of knowledgeable staff to answer customers' queries. Their facilitated exchange and refund policies and furniture assembly services also contribute to IKEA's CX score.

In the UAE, IKEA has launched numerous initiatives over the past few years to improve products' accessibility in alignment with the increasing need for contact-less shopping. These include – but are not limited to – home planning and interior design services, as well as click and collect items available to customers from the comfort of their cars.

IKEA's partnership with a fintech firm, Tabby, provides customers with flexible interest-free instalments payment plans for both online and offline purchases which is particularly important for customer in the current inflationary context.

IKEA also encourages sustainable living by focusing on energy-saving solutions. The business aims to become climate positive and only source renewable or recycled material by 2030. IKEA's famous 'FRAKTA bag for life concept' is also designed and promoted on their website to be reused as a beach tote, for doing laundry, grocery shopping or packing and storage.

#3



Spotlight on Carrefour

Sector: Grocery retail

The UAE is home to hundreds of global retail stores including Carrefour, which was ranked first by customers in our survey in this sector for its commitment to customer satisfaction. It was established in 1995. In 2005, Carrefour opened the largest hypermarket in the Middle East and the world's first sail-thru supermarket in 2018, tackling a gap in the market and catering to people on beaches, yachts, and jet-skis.

Respectively #4 in 2017 and #5 in 2020, Carrefour made it to the top three this year.

Customer rating was mainly driven by the accessibility of Carrefour stores which benefit from a large distribution footprint. The giant grocery retailer is also known for its wide range of products across multiple food and non-food categories, including electronics and clothes, with frequent and attractive deals.

According to our survey, respondents seem appreciative of the quality of customer service provided in stores by Carrefour staff, as well as its loyalty program app, Share, which enables them to earn and redeem points across multiple Majid Al Futtaim (MAF) brands across groceries (Carrefour), shopping malls (all stores and restaurants), leisure and entertainment (cinemas, Ski Dubai),

hotels, restaurants, and lifestyle brands (LEGO, Lululemon, Crate & Barrel).

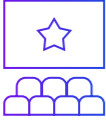
Over the past two years, MAF Group - which owns and operates Carrefour - has leveraged digital technologies to enhance its omnichannel capabilities, cater for contact-less ordering, payments, and delivery during the pandemic; and improve in-store convenience – physical stores remain the customers' preferred channel of interaction.

Customers have pointed out that the online buying experience as well as the offering consistency across stores and channels could be improved.

In 2022, Carrefour declared it would fixate the prices of 200 everyday essential goods until the end of the year while reducing the margins on over 300 products. To differentiate themselves from competition, the company launched a new rebranding concept in June 2022 by opening 13 Carrefour market stores in Dubai and three stores in Sharjah. The shops sell fresh fruits and vegetables and employ experienced butchers and fishmongers. This concept aligns with Carrefour's focus on high-quality goods, competitive pricing, a variety of choice and an improved customer experience.

The group is pursuing its digital and innovation agenda through investment and partnerships into Web 3.0 (Binance), smart technologies (self-driving capabilities with Yadex to address last mile delivery) and circular economies (single-use plastic ban, eco-friendly delivery fleet, warehouse management with sustainable materials).

#4



Spotlight on Vox Cinemas

Sector: Entertainment and leisure

Vox Cinemas has 57 locations and 573 screens across the UAE, Lebanon, Oman, Bahrain, Egypt, Saudi Arabia and Kuwait. It has made it to the 4th place in the UAE while recording high scores in time and effort, expectations, and integrity.

The high score from a time and effort perspective seems to have been driven by a combination of factors across the journey starting from the booking. To avoid the frustration of crowds and queues, customers can conveniently book their tickets online and choose their preferred seats. Upon arrival, they can head directly to the concession stand to collect their snacks and beverages or head seamlessly to their theater. Once in the cinema, customers also appreciate the support of available, caring, and knowledgeable staff to address their query quickly.

Vox invests in digital solutions to provide their customers with an immersive guest experience.

This includes upgrading their visual communications platform to enhance scheduling flexibility, adding professional video syncing capabilities inside the cinema theatre and expanding the external layout of the cinema screens to showcase new releases.

The expectations pillar is highly rated by customers. Vox Cinemas customize their services in each location according to customer expectations and offers varied ways to watch a movie with different layouts/settings provided in each cinema hall. This includes Vox Theater, Gold, IMAX, 4DX, Max, Kids and Outdoor. It offers differentiated experiences including the region's first Snow Cinema at Ski Dubai, Mall of the Emirates. The open-air cinema also comes back every season in time for Dubai's cool winter where guests can remain outdoors and order food and drinks from their seats.

For customers who prefer watching movies at home, Vox also home delivers their cinema snacks including popcorn and nachos.

Vox has developed partnerships with multiple banks which enables cardholders to access a wide range of offers on movie tickets to avail which contributes to the high loyalty score.

As bright lights and loud sounds can sometimes be overwhelming, Vox launched sensory friendly screening across the UAE in collaboration with the Dubai Autism Centre. Sensory friendly screens are designed to reduce overstimulation by decreasing audio volume, dimming lights, removing trailers and limiting the number of guests in the auditorium.

#5



Spotlight on Abu Dhabi Commercial Bank

Sector: Financial services

Formed in 1985, Abu Dhabi Commercial Bank (ADCB) has seen the biggest positive move over the last two years and now holds the #5 position in the 2022, CEE ranking.

ADCB has accelerated its digital transformation by improving its front-end digital experience mainly through a mobile app (Hayaak), and developing its loyalty program, "Touchpoints", during the pandemic.

These front-end improvements have been supported by back-end banking interfaces that use straight-through processing and automation to accelerate operations including account opening and loan applications. Apart from these digital transformation initiatives, ADCB enables its clients to easily access customer service agents. As banking interactions become ever more digitized, maintaining human touchpoints to support, help and guide customers is a key differentiator.

Our respondents viewed the overall banking experience with ADCB as easy, fast, convenient, secure and rewarding. This has been a key contributor to increasing the resolution and

expectations pillar which has risen the most compared to the 2020 results.

ADCB recorded a net profit of AED 1.591 billion for the third quarter of 2022, marking a 25% growth compared to last year's results. It was voted as the employer of choice in the GCC region according to Forbes' World's best employers 2022 survey conducted across 57 countries.



#6

Spotlight on Amazon

Sector: Non-grocery retail

Amazon.ae was formed from the acquisition of Dubai based Souq.com marketplace in 2017, that was subsequently merged and rebranded as Amazon(.ae) in 2019.

Since its establishment in the region, Amazon has continuously invested to improve its delivery capabilities and network. The local Amazon network comprises two fulfilment centers, three sort centers, nine delivery stations and a network of delivery service partners covering the cities of Abu Dhabi, Dubai, and Al Ain, with a plan for additional new site launches in 2022-2024.

Based in Abu Dhabi and spread over an area of 4,700 square meters, Amazon opened its second largest delivery station in the UAE providing same-day and next-day delivery to customers across the country.

As per survey findings, the online retailer's ranking is driven by its ability to provide customers with access to a wide selection of products – beyond what is usually available locally – through an easy and convenient website, at competitive prices, delivered with the efficiency that has made Amazon well-known globally.

It is supported by real-time delivery tracking, an accessible and responsive customer service, and a return policy that allows customers to be refunded in a few days.

With a strong internal innovation culture, Amazon has frequently introduced features that has improved the overall experience for its customers. The "1-Click" ordering button enables customers to enter their billing, shipping and payment information just once and then simply click a button to buy something. This saves them having to select or enter these settings manually repeatedly.

Amazon leverages AI tools, data-driven insight, and analytics to predict similar products – e.g. recommending the next book in the readers' area of interest once one is finished on Kindle.

The combination of all these elements contributes to Amazon's high score across the "Time & Effort", "Resolution", and "Personalization" pillars.

Over the past year, Amazon launched the Intellectual Property (IP) Accelerator program in the UAE, making it easier and more cost effective for small and medium-sized businesses (SMBs) to obtain trademarks, protect their brands, and tackle infringing goods on Amazon.ae.

This enables more retailers to distribute their products through the marketplace and protect their brands, whilst enabling customers to access a wide selection of authentic goods.

#7

Spotlight on Etihad Airways

Sector: Travel and hotels

Established in 2003, Etihad is the second-largest airline in the UAE after Emirates. Etihad Airways made it to the top 10 this year having climbed +11 positions compared to the last study.

As per our survey, customers appreciate the convenient online booking and ticketing system, the seamless check-in process, in-flight comfort - across all classes, and the flexibility of changing tickets without bearing additional charges during the pandemic.

Their customer service representatives also ensure that customers are well informed at every step of their reservation process.

Etihad Airways is partnering with the global Italian luxury fashion brand, Armani/Casa, for an upgraded inflight dining experience featuring branded furnishing. Etihad's planes host a variety of entertainment options including E-BOX, with curated content based on the destination, special features e.g. live games during the World Cup, Bluetooth headset pairing, device holding tables and wireless device charging.

Our survey found that customers were particularly appreciative of Etihad's employees.

They praised the staff's positive attitude and capacity to be available to find a solution, and provide accurate and useful information (e.g. health requirements, flight details etc.).

The airline's crew members are taken through an extensive training process which focuses on safety, service, and hospitality, before flying. Etihad has won multiple awards for its cabin crew service.

Etihad's focus on sustainability is another key differentiation point: it aims to drive improvements for both the airline itself and the industry. The airline is working on a series of initiatives to reduce waste and achieving zero net carbon emissions by 2050.

Earlier this year, Etihad Airways has launched a green loyalty program, "Conscious Choices by Etihad," to attract customers that are committed to mitigating their environmental impact. It enables members to earn miles for more environmentally friendly practices such as carrying less baggage and offsetting carbon emissions using Etihad Guest Miles with approved organizations. Members are also rewarded on a daily basis – when not flying – when they adopt sustainable choices.

#8

Spotlight on Marks & Spencer

Sector: Non-grocery retail

M&S is a British retailer with a chain of 16 stores along with their online shopping website. It operates in the UAE in partnership with Al-Futtaim Retail. Their products cover clothing lines for women, men and children, as well as homeware and food.

M&S was not ranked in our 2020 CEE report but made it to eighth place this time leading in three pillars: time and effort, integrity, and personalization.

Four years ago, M&S initiated a global transformation program that aimed to revitalize its brand perception. M&S has just completed the first phase – fixing the basics – of its ambitious program.

“Fixing the basics” was mainly aimed at simplifying clothing ranges, developing food categories by focusing on quality and innovation, establishing competitive e-commerce capabilities (i.e. website and online fulfillment), modernizing their legacy store estate to make it fit for both the future and new ways of shopping, and driving internal cultural and organizational changes to drive ownership and put data and the customer at the center of the business.

In the region, customers’ high rating of M&S seems to be driven by the range and quality of products (food and clothing), the support of their employees when shopping, and the layout of their revamped stores (including M&S café) that provides them with a convenient and differentiating experience.

During the economic downturn brought about by the pandemic, M&S reduced their prices for food, beverages and clothes.

M&S also introduced its first modest designs in the UAE, reacting to customer feedback and demand for longer hemlines, high neck tops, dresses and long-line tunics. It offers plus sizing amongst all its collections and accommodates for special diets in its food and beverages. Its selection includes products that are gluten-wheat- and dairy-free.

As M&S enters its second transformation phase – “Shaping the future” – it plans to expand even further with investments in additional stores and digital technology in the coming years.

#9

Spotlight on Noon

Sector: Non-grocery retail

Noon.com is a relatively newly established online marketplace that caters to the Middle East. In six years, the online retailer became one of the most significant competitors to Amazon in the region and earned 9th place in the UAE for CX, with time-and-effort and personalization as the top pillars.

Noon’s customers particularly praised product delivery across food and non-food categories. Noon offers 15-minute delivery services (without a minimum order), 20-minute delivery with Noon daily, which delivers groceries, and same day or 24-hour delivery for the rest of the products lines. Besides, customers have also indicated that when they were facing issues, customer service staff are empowered to make decisions such as waiving the delivery fee in case of any reported delays.

Noon plans to further strengthen its delivery infrastructure in the region. Indeed, it has recently announced that it will build the UAE’s largest fulfilment center – introducing new automation technologies – in partnership with the Abu Dhabi Investment Office (ADIO) to improve delivery services and create new opportunities for small businesses to sell their products online through the Noon platform.

In parallel, Noon is investing in its regional talent by supporting shoppers and local businesses. This is illustrated by Noon’s partnership with Khalifa Funds to empower SMEs, in line with the ‘Noon Mahali’ initiative supporting Emirati micro-businesses and local food producers on Noon daily.

Noon also plans to further expand its local footprint and offerings through the announced acquisition of the online retailer Namshi, which offers footwear and apparel fashion brands. It is worth noting that Namshi is one of the brands which has seen a particularly meteoric rise in the CEE rankings, progressing from #40 in 2020 to #15 in 2022.

Originally, Namshi faced some challenges, e.g. suspicion of fake products and mistrust of online payments (e.g. providing credit card details). Namshi overcame these barriers by creating a strong customer base through both online – social media – and offline – special events – communications, by providing multiple payments options – such as cash on delivery, Buy Now Pay Later (Tabby), Apple Pay, Paypal, interest free instalments plans (Postpay), mobile apps, and flexible and convenient exchange/return/refund policies. Additionally, Namshi’s e-commerce platform has convenient online ordering features, and fast delivery capabilities (one to two days).

#10 Spotlight on Lulu Hypermarket

Sector: Grocery retail

As part of the Abu Dhabi-based Lulu Group, Lulu Hypermarket is one of the largest food and grocery chains across the GCC with more than 240 supermarkets and hypermarkets.

This year, Lulu Hypermarket overachieved its 2020 CEE ranking by 13 places to rise to number ten in the UAE. Our research shows that Lulu's customers appreciate the retailer's frequent special offers and wide range of products available across multiple categories.

Lulu aims to be one of the top e-commerce platforms in the UAE and the Gulf – it has heavily invested in developing its online and logistics capabilities to move from being a brick-and-mortar store and become an omnichannel retailer.

Lulu Group is also working on improving customer access by increasing its store footprint and opening new stores, including a 72,000-squarefoot hypermarket in Dubai Mall Zabeel expected to launch in April 2023.

From a personalization perspective, Lulu Hypermarket provides family-friendly entertainment to create a sense of loyalty and attachment by bringing people together. Lulu stores have widely laid out counters, sprawling parking spaces, play territories for children, food courts, cash trade and bank counters. Besides, customer engagement is well-maintained through Lulu's loyalty programs and regular raffle draws offering a variety of prizes and vouchers.

Lulu also hosts festivals to celebrate with its customers. One example is the food fiesta where families and friends gather to try out different cuisines from food counters while watching an exciting cooking competition live at the mall. Furthermore, Lulu offers tailored product offerings including food, decorations and accessories to its customers on special occasions such as Ramadan or Diwali.

Lulu recently launched an innovative hypermarket in Sharjah where robots deliver food to customers. This is the world's first AI-powered robot delivering food at a hypermarket.

