

Survey

Assessing Services in Lebanon

May 2018



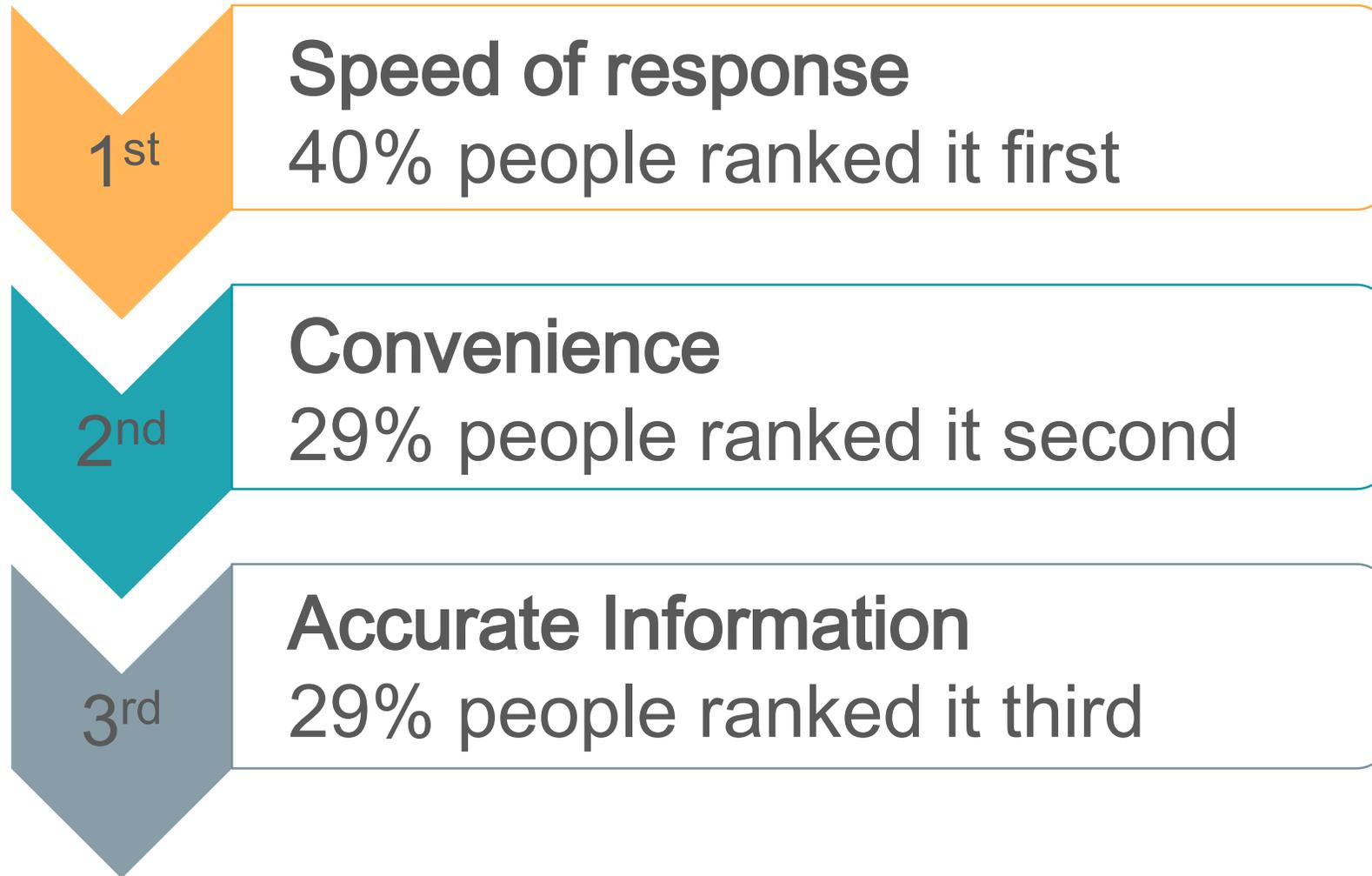


About the survey

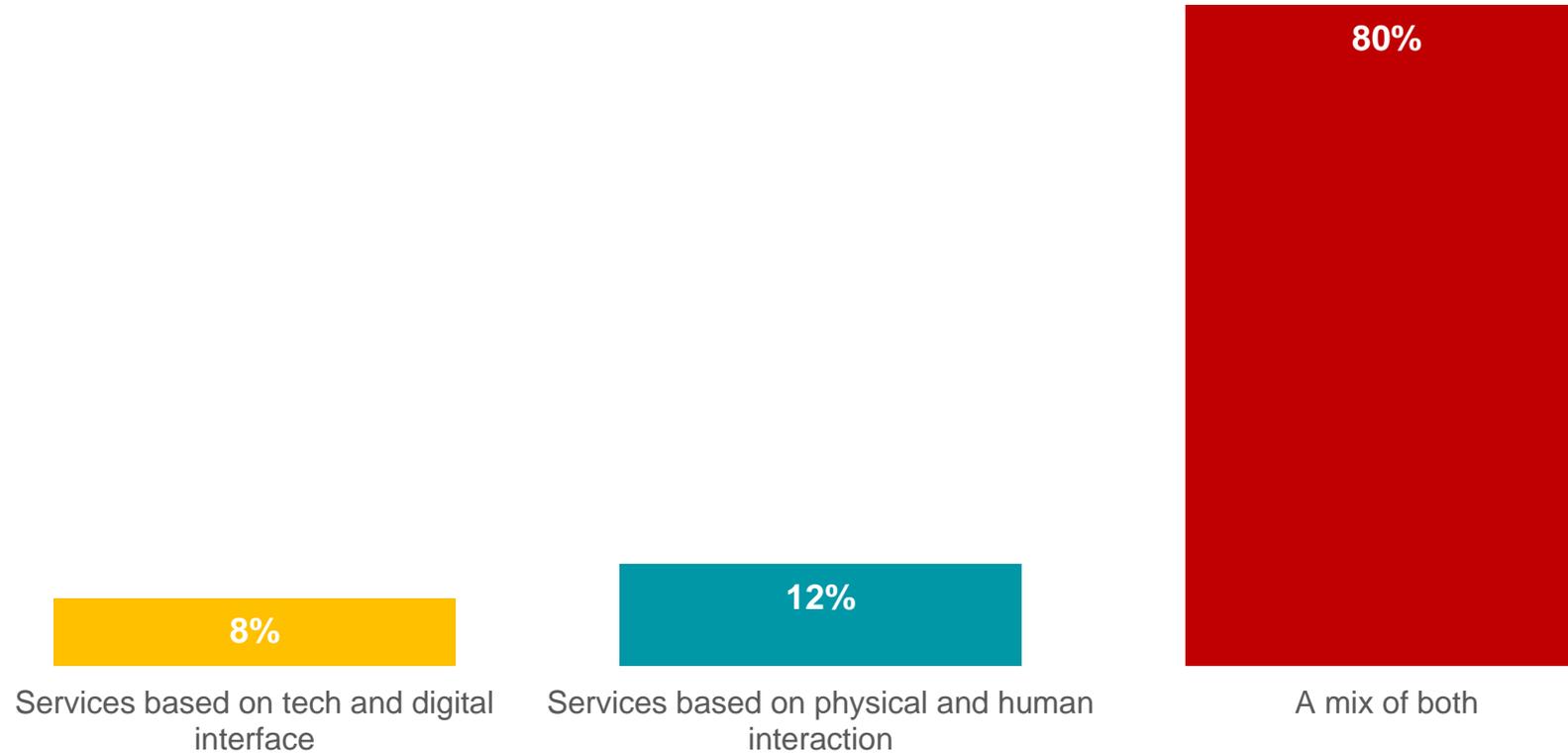
Brandcell Consulting has conducted a small survey to investigate how customers perceive the various services in Lebanon.

More than 50 people participated in the survey through a Survey Monkey online questionnaire. **This revealed the way the Lebanese crowd assesses the digital and the human aspects in services, along with the best and worst customer services in the country.**

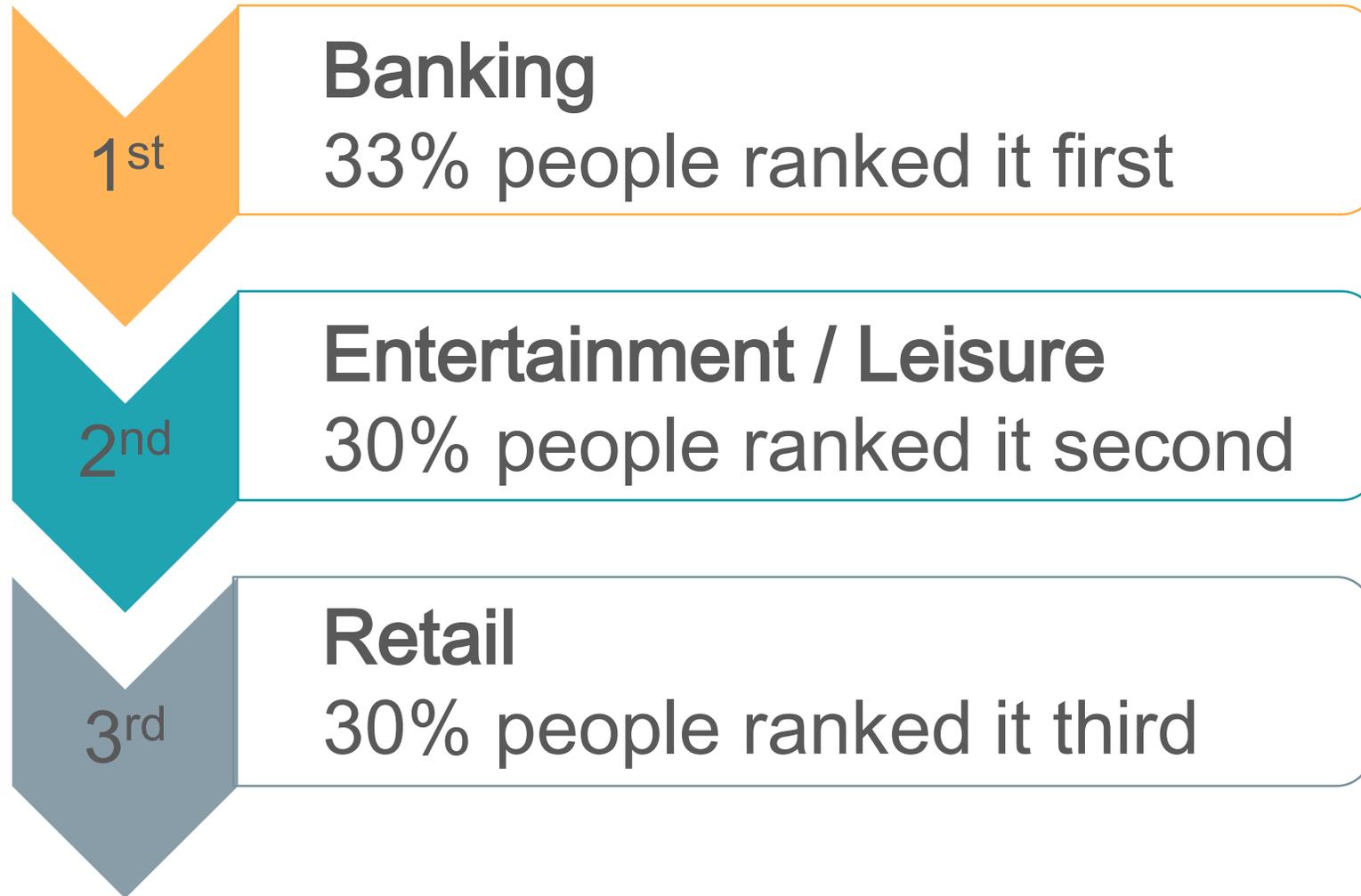
Q1 : When it comes to services, what do you value the most? (Only select and rank the top 3)



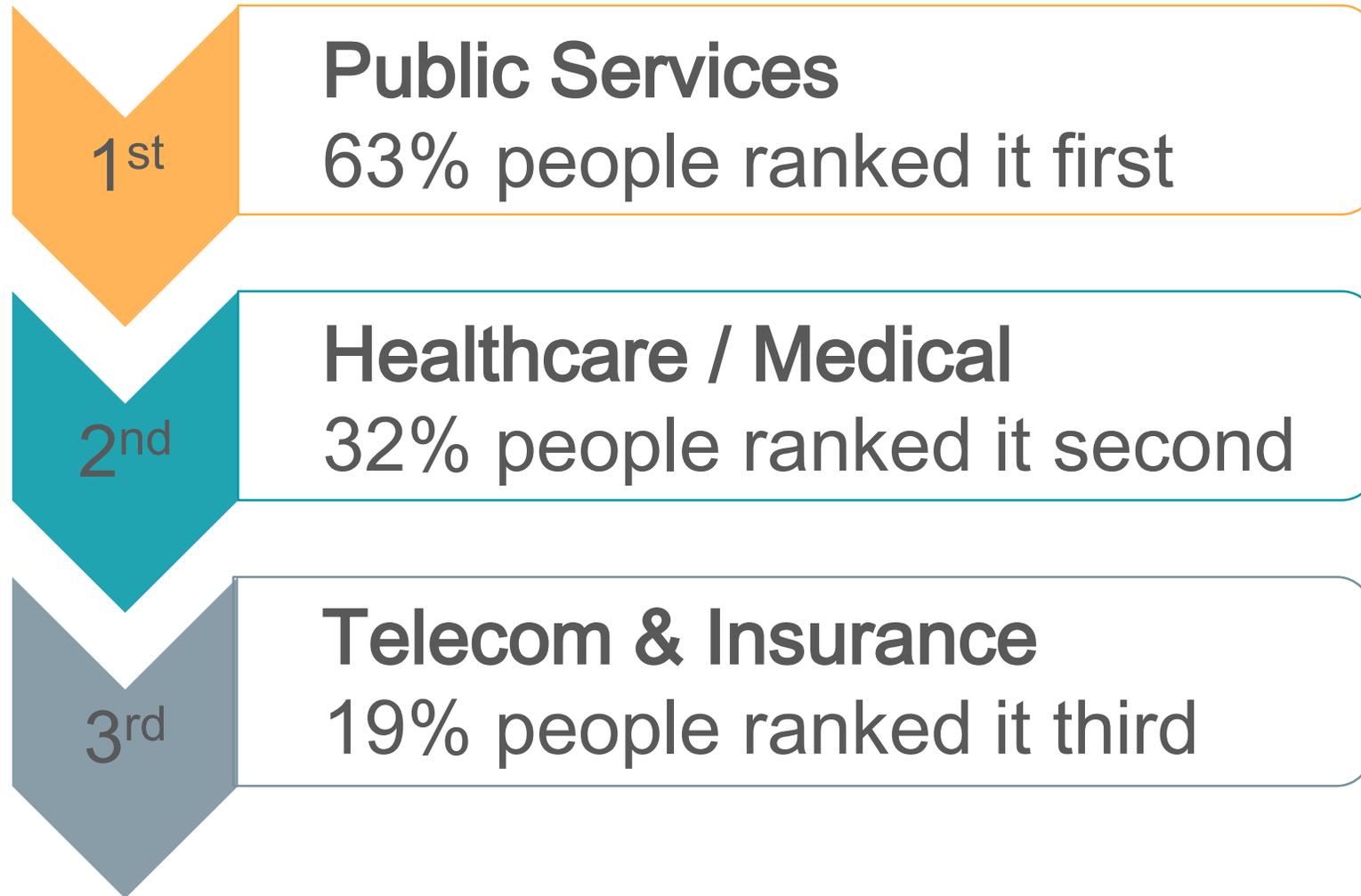
Q2 : What are your service delivery channel preferences?



Q3 : In your opinion which Lebanese sectors are offering the right mix of human and digital services (top 3)?



Q4 : In your opinion which Lebanese sectors are offering the worst/outdated mix of offering (top 3)?



Q5 : Why? Respondents Shared Experience



BANKS:

“Bank Audi utilize new digital interface to upgrade services + human interface”

“My bank App is a one stop shop for all kind of transactions”

RESTAURANTS:

“They have the know how to leverage digital products by offering digital journeys to their customers, they partner with Apps, software companies and start ups to provide faster services and better experiences.”



PUBLIC SECTOR

“The public sector is frustrating and disappointing with physical presence needed all the time”

MEA & IHJOZ:

“On line buying works 1/5!”

“No personal account on MEA, you are obliged to enter your personal data each time and the App is outdated”

HEALTHCARE & INSURANCE

“Purely no digital, still based on personal connections”

Q6 : To which extent the level and type of services impacts your choice of brands and/or companies?

80% said the level and type of service impacts **highly** the choice of brand/company



Q7 : In your opinion is the Lebanese service market ready for a digital integration/transformation?

63% YES

"It's time to evolve, It's ready as long as consumers are educated with a step-by-step guide. "

"Better access to internet, heavy traffic on the roads will lead people to buy more online to avoid wasting time. "

"I believe it is a need, and most of the people are in touch with technology, meaning they are ready for digital transformation. Nevertheless sectors need to invest a lot of resources to set up the infrastructure."

"I might consider moving back to Lebanon if we reach a good maturity level in digital transformation and digital services."

37% NO

"A Huge miss-understanding by the Mass on the digital Meaning (confusion by Social Media usage) the Lebanese do not trust the online payment, no Internet Infrastructure, Lebanese prefer being served."

"Internet service is too slow and too expensive."

Key Takeaways

Lebanese customers digital needs are driven by time efficiency more than autonomy and do it yourself features.

The preferred model for Lebanese customers is the Omni-channel one mixing digital and human (due mainly to Lebanese cultural behavior) therefore companies have to integrate seamlessly their on line and off line services. *“63% said time has come for the digital integration but simplicity of process and interface is a must”*

The main satisfactory sectors in service level are the ones focusing on customers like banking, entertainment and retail who have pioneered the digital transformation and therefore are the most dynamic sectors in the country.

On the opposite end, the public sector, healthcare and telecom sectors are still lagging behind in customer centricity and are in a inertia mode, therefore they are late to embrace digital in their offering.

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