

Service Dimensions

Airlines: Regional Arab Airlines

Automotive: Car Service

Automotive: New Car Sales

Clothes & Accessories: Clothes

Communication: Mobile Operators

Communication: ISPs

Financial: Banks

Financial: Insurance

Food & Beverage: Restaurants, Cafe

Food & Beverage: Restaurants, Casual Dining

Food & Beverage: Restaurants, Fast Food

Food & Beverage: Restaurants, Fine Dining

Food & Beverage: Restaurants, Specialty

Restaurants: Fine Dining

Specialty Stores: Electronics

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



KUWAIT RESULTS

The voice of the consumer

2018

10 Complaints Resolution
9 Loyalty index
8 Digital index
7 Call center index
6 Reliability index
5 Special index
4 Value for price index
3 Product or service quality index
2 Location index
1 Staff Behavior index
Service categories

Specialty Stores: Electronics
Restaurants: Fine Dining
Restaurants: Fast Food
Restaurants: Casual Dining
Restaurants: Café
Healthcare: Hospitals
Furniture: Home Furniture
Financial: Islamic Banks
Financial: Retail Banks
Communication: ISPs
Communication: Mobile Operators
Clothes & Accessories: Clothes
Automotive: New Car Sales
Automotive: Car Service
Airlines: Regional Arab Airlines
Service Dimensions

Credibility.
Integrity.
Relevance.



Powered by



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 and in line with ESOMAR standards:

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

Qualitative research

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

Consultancy & education

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

Index

1. Executive Summary

2. The Kuwait Index

Sample composition.....	9	Category results: expected & actual	28
Interpreting the scores	10	Interaction	30
Kuwait index: before and after	11	Frequency	31
Kuwait index by service dimension	12	Complaint resolution	32
Kuwait index by demographic factors.....	14	Kuwait vs. UAE comparison.....	33
Recommend scores by demographics	25		

3. Summary & Strategic Implications

Market position of all 17 categories.....	35	Category NPS	46
Correlation of dimensions	36	NPS score changes	47
Net promoter score.....	37	Building a Culture of Excellence.....	48
Kuwait overall score.....	40	Industry comparison with other markets...	49
Category Comparison 2010 vs. 2018	41	Factors affecting the Kuwait Index	50
Dimension Comparisons 2010 vs. 2018	43	Strategic implications for Kuwait	50
Demographic Comparison 2010 vs. 2018 ..	44	Service Hero's benefits.....	51

4. Country Award Winners

Nominees	53	Category winners 2018	58
Overall country 2018 winners	55	Winners 2010 vs. 2018.....	62

5. Methodology

Overview	64	Rules applied to ensure data integrity	71
The questionnaire	65	Advisory Council members	72
Sampling approach	66	Process overview of the key survey steps.	77
Source of Votes	70	Glossary of terms used	78
Security measures & rules for valid votes...	71		

6. About Khayal Consultants

Khayal Consultants	81
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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 in the region. 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, for their 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 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 in Kuwait face-to-face interactions give the most satisfaction with 77.5 points and interactions on the phone give the lowest satisfaction with 72.2 points. Consumers whom interact weekly with a brand are the most satisfied in Kuwait with 81.6 points and those who interact least frequently, every 6-months or a year, have the lowest satisfaction scoring 73.3 and 71.6 points. Finally, satisfaction with complaint resolution is 73.3, suggesting companies are unable to effectively regain customer trust when it is tested.

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.

A handwritten signature in blue ink, appearing to read "Faten", written over a light blue circular watermark.

Faten Abu Ghazaleh
President

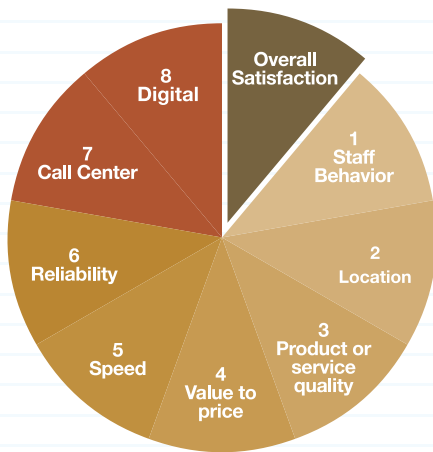


1
Executive
summary



Executive summary

1 of 2



Note: 14 categories assessed all 8 service dimensions, while 3 categories assessed 6 service dimensions.

Methodology

Service Hero is predominantly an online survey where respondents voted directly on www.servicehero.com from January 1- December 31st 2018. Consumers are aware of the survey via online ad banners, phone calls and email shots. We adhere to the research protocols of ESOMAR. We report scores and findings in a 100 point scale. Our reporting uses the single question, “your overall satisfaction” as the basis for the index instead of using an equally weighted average for all 8 dimensions.

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 and, for the first time, we ask consumers to rate the brands complaint resolution. All questions asked are on an Expected and Actual satisfaction basis. Respondents also gave free comments.

Security

A number of security measures are deployed of either a technical nature to verify the authenticity of the voter, or later after reviewing the results to remove suspicious data and ensure data integrity.

Sample

A total sample of 29,122 assessments were cleaned to arrive at the final 22,171 sample of valid votes for Kuwait with a minimum of 350 votes per category. This gives a confidence level of 95% with +/- 2% error margin. The sample reflects the demographic structure of Kuwait in terms of the non-labor market of eligible consumers aged over 16 years.

Findings

Kuwait scored 81.6 on Expectation (before dealing with a brand) and 75.4 for Actual Satisfaction (after dealing with it). Since the score for Actual Satisfaction is lower by 6.2, this means consumers have higher expectations than actual satisfaction. The highest service dimensions are Staff Attitude (77.6), Reliability (76.5), and Call Center (76.4), while the lowest are Value for Money (71.3) and Digital (74.1).

Demographics

Non Arabs, Females, younger customers, and customers with a low education level have the highest satisfaction scores while Kuwaitis, Males, customers with a high education level, and those aged 40-49 have the lowest satisfaction scores.

Loyalty and NPS

Kuwait scored 75.7 on the likelihood of recommending a brand (Loyalty). Females, Non Arabs, customers aged 60 or over and those with lower education tend to be most loyal. Looking at the Net Promoter Score (ratio of customers promoting the brand versus being detractors) we see that Kuwait overall scores 30%, with Arabs, Males, those aged 50-59, and customers with high education are least loyal.

Categories

Of the 17 categories assessed, 9 of them matched, or exceeded, the Kuwait Index score. These were mostly with the Restaurants, Home Furniture, Supermarkets, and Clothes. The lowest scoring categories are ISPs, Mobile Operators, and Airlines.

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 In-Store had the highest satisfaction (77.5), while interaction Over the Phone scored lowest (72.2). Weekly interaction with a brand scored highest (81.6) and Yearly satisfaction scored lowest (71.6). This could be attributed to the frequent visits to that brand and having a fresh experience compared to annual visits.

Changes since last year

Kuwait decreased by 1.1 points since last year, and many demographic groups declined in satisfaction. The consumers with the most improvement since 2017 are older consumers and those with a lower education. Those that dropped the most are 40-49 year olds, Males, and consumers with a higher education.

Most dimensions decreased in satisfaction from the previous year. Only Call Center showed positive growth. In the industry category, Casual Dining and Mobile Operators had positive growth while Islamic Banks and Airlines showed the largest negative growth. There was an overall NPS decrease of 3% compared to 2017, with 40-49 years olds, Males, and Arabs decreasing the most.

Changes from 2010

In the nine years since the index started in 2010, Kuwait has increased by 4% (2.6 points) in overall customer satisfaction. In demographic groups, 16-17 year olds, Females, Non Arabs, and those with an Elementary level education increased the most. The demographic groups that dropped in satisfaction since last 2010 are Males, the 40-49 age group, Non Arabs, and customers with a higher education.

Most dimensions increased in satisfaction over the nine year period, except for Location and Digital with a fall in satisfaction. The largest gains in satisfaction are Call Center and Value. By industry, Car Service and Home Furniture had significant growth while ISPs and Cafes declined the most.

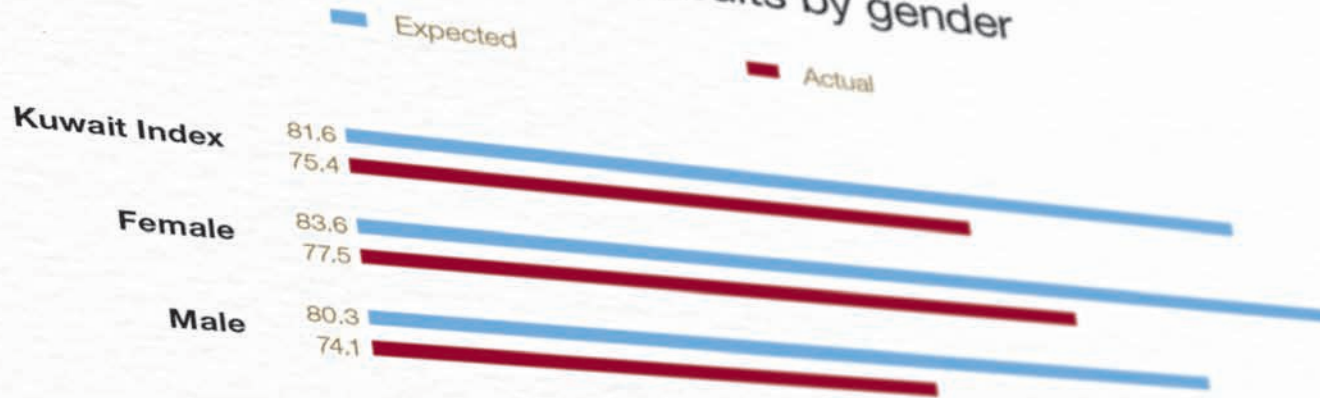
Comparison to UAE, US, & Singapore CSI

The US Index scored 77.0 for their national index, putting them above Kuwait. UAE scored 79.2, higher than the Kuwait Index by 3.8 points. This is a significant difference as consumers in the UAE are generally more satisfied than consumers in Kuwait.

The Singapore CSI stands at 72.9, much lower than all national indexes.



Index by demographic factors Kuwait Index results by gender



Gender

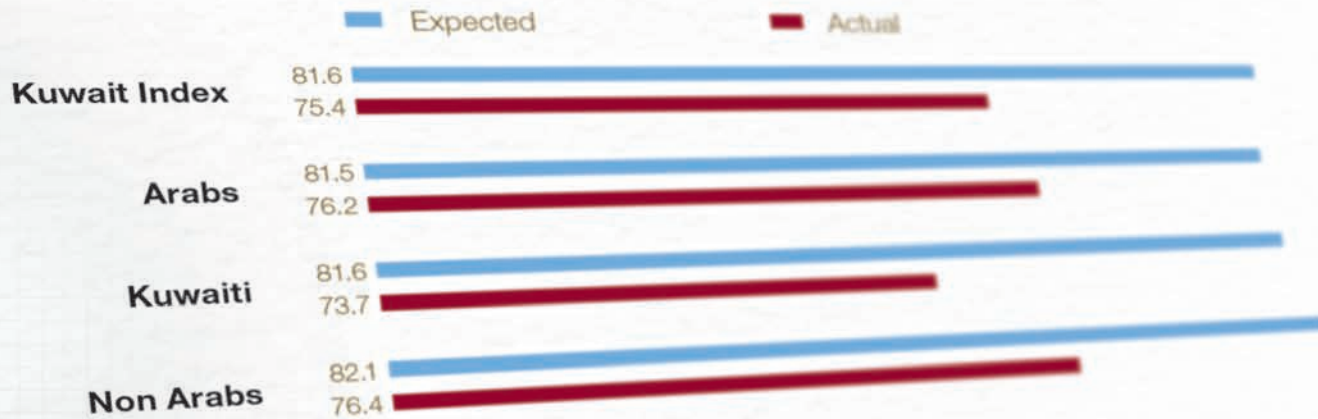
Women have both a higher expectation and higher assessment of standards on a before and after basis than men do.

2

The Kuwait Index



Kuwait Index results by nationality



Nationality

Non Arabs scored highest on expectation and actual satisfaction. Kuwaitis scored the lowest on actual satisfaction when dealing with a brand.



Sample composition

The national sample is accurate with a ± 2 error margin at a 95% confidence level. The sample is in line with the country composition for nationality, age and gender but reflects a slight bias towards higher educated consumers since the index is run online.

	Votes 2018	Votes 2018 Distribution	Kuwait eligible population distribution
Gender			
Female	8,114	37%	33%
Male	13,635	61%	67%
Nationality			
Arabs	11,300	51%	See note ¹
Kuwaiti	5,880	27%	32%
Non Arabs	4,383	20%	See note ¹
Age Groups			
16 to 17 Years	182	1%	10%
18 to 29 Years	6,103	28%	29%
30 to 39 Years	8,682	39%	29%
40 to 49 Years	4,443	20%	20%
50 to 59 Years	1,501	7%	10%
More Than 60 Years	294	1%	2%
Education			
Elementary or below	87	0%	See note ²
High school	3,195	14%	See note ²
Diploma	1,920	9%	See note ²
University graduate	12,649	57%	See note ²
Master or PHD	3,406	15%	See note ²
Total	22,171	100%	100%

From the 3 million overall population above 15 years, 3 million are eligible to vote. This includes their split by gender, age and as Kuwaiti or non-Kuwaitis. This does not include domestic workers or unemployed workers. In the last column the eligible population split is shown as a comparison to the sample obtained in the SH survey to demonstrate its representation of the population.

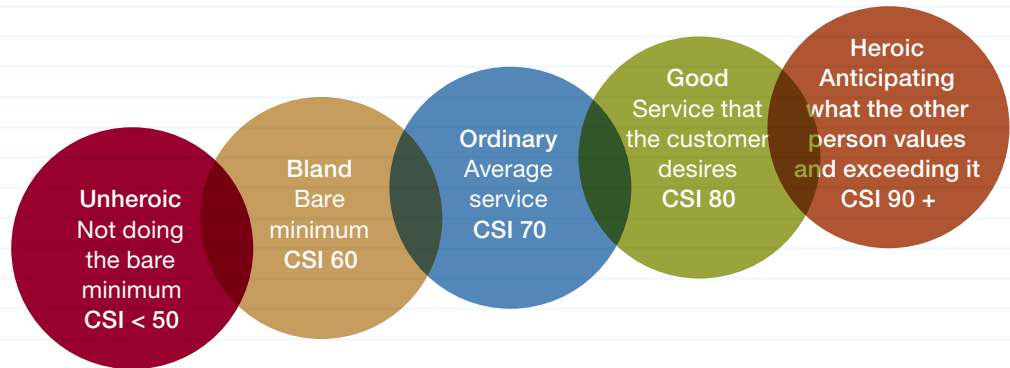
Note 1: Kuwait population data is only split by Kuwaiti or non-Kuwaiti.

Note 2: Data on education distribution is not available.

Note 3: 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 9% of votes.



Interpreting the score



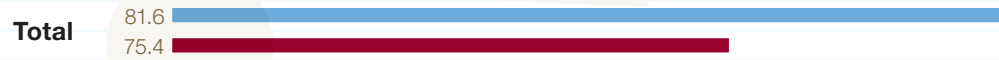
Companies fall into one of the **five groups** regarding the strength of service based on the score that they obtain. On the country level, the same legend is applied. For example, if the score for Kuwait is a 70, it is then placed at the bottom of the **“Ordinary”** category.



Kuwait Index: Before and after

Service Hero Index - Kuwait 2018

■ Average of Expectation Index ■ Average of Actual Index



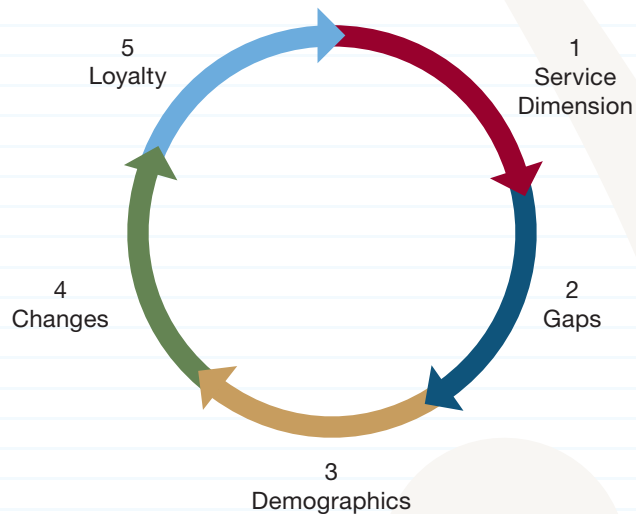
A gap of -6.2 between expected and actual

Usually consumer expectations will be higher than actual service assessments. In 2018 consumers had higher expectations and lower satisfaction, meaning we are below expectations by a gap of -6.2 which is not a healthy gap.

Kuwait scored 81.6 on average for **Expected** standards and it scored 75.4 on **Actual** service standards – placing it in the **Moderate** service level.



How results will be displayed



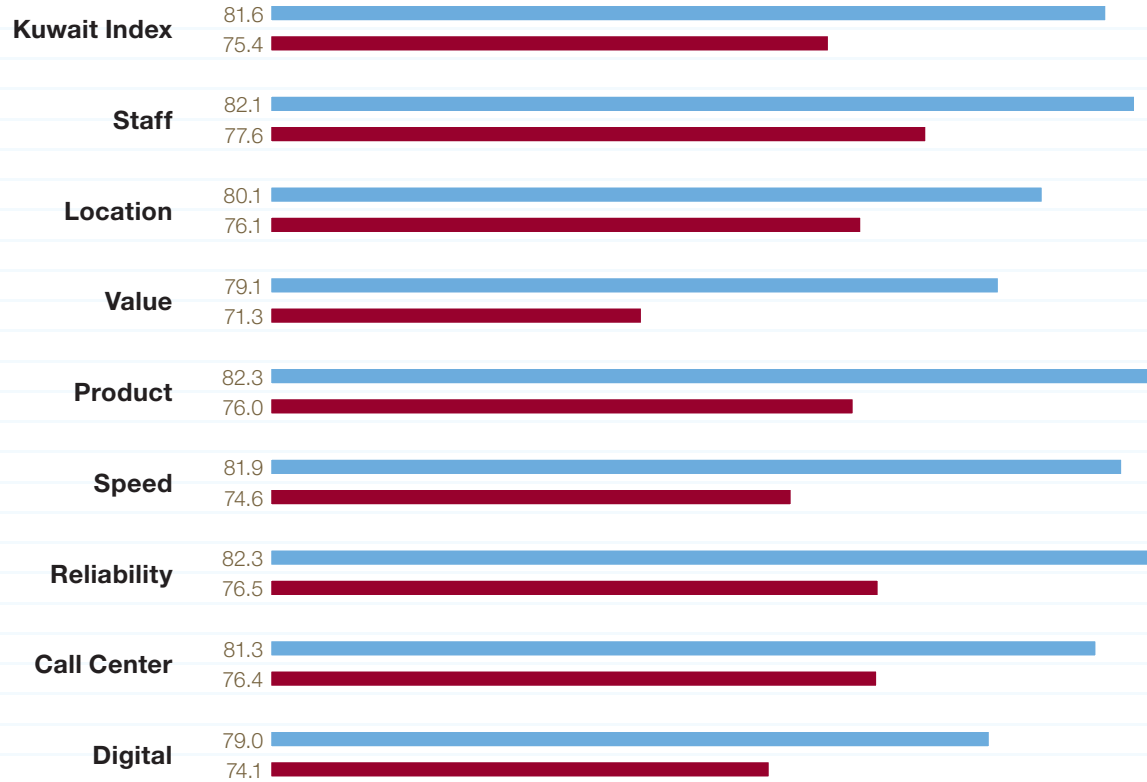
Results will be reported on five levels as seen in the chart.



Kuwait Index by service dimension

Kuwait Index 2018 service dimension

Expected Actual



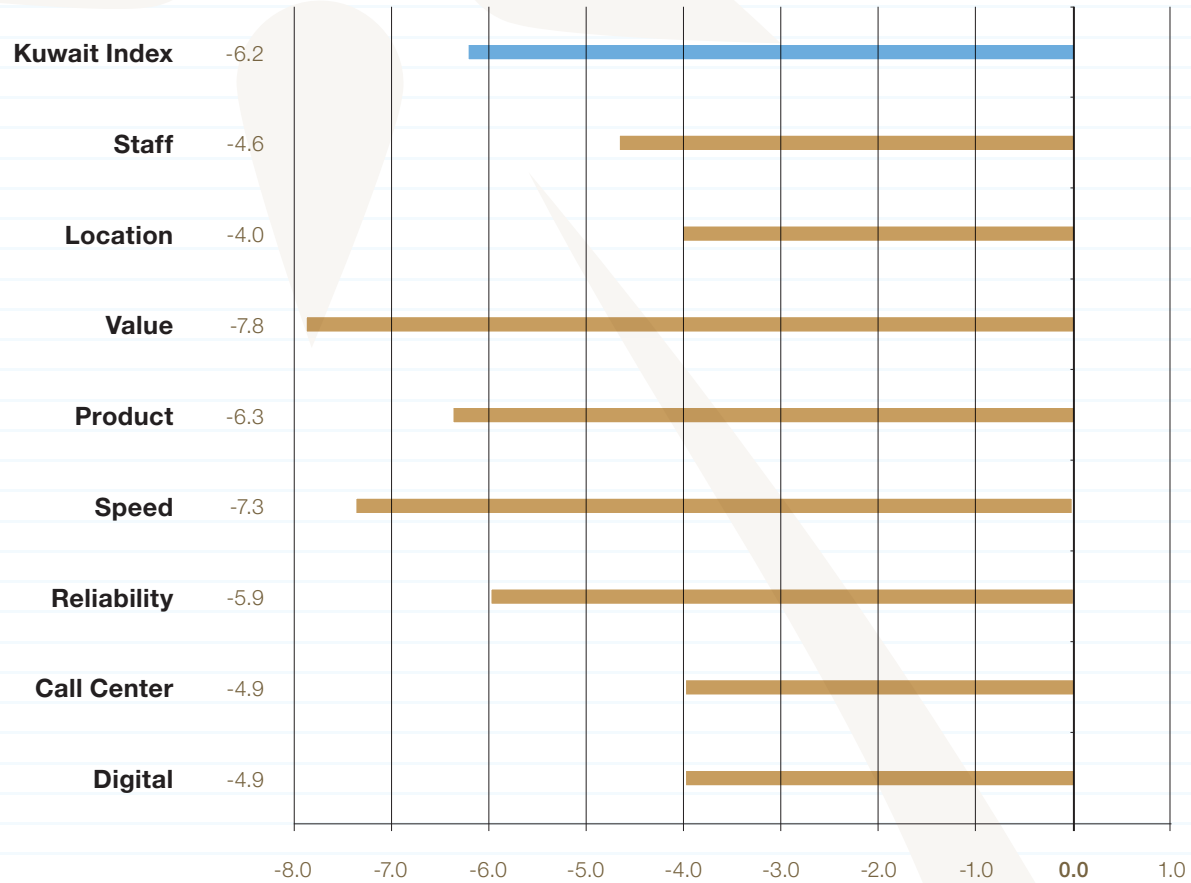
The highest score per dimension on an **Expected** level (before dealing with a brand) is for Product and Reliability while the lowest is for Value for Money and Digital.

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

Note: Conventional categories are evaluated on satisfaction with their Call Center and Digital Service with the exclusion of Supermarkets, Fine Dining, Cafe, and Clothes.



Gap analysis for Kuwait



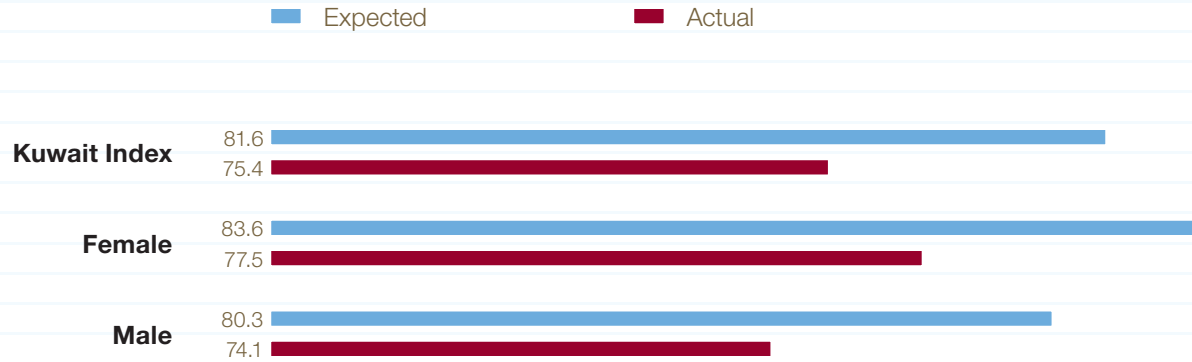
Analysis of positive and negative gaps between Expected and Actual scores

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 within +/- 3 point range; therefore, companies in 2018 are not meeting customer expectations for all dimensions.



Index by demographic factors

Kuwait Index results by gender

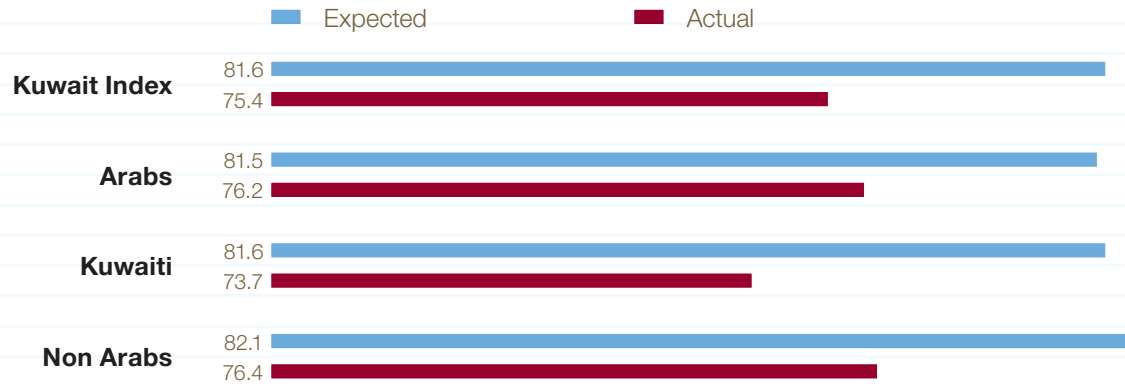


Gender

Women have both a higher expectation and higher assessment of standards on a before and after basis than men do.



Kuwait Index results by nationality



Nationality

Non Arabs scored highest on expectation and actual satisfaction. Kuwaitis scored the lowest on actual satisfaction when dealing with a brand.



Kuwait Index results by age



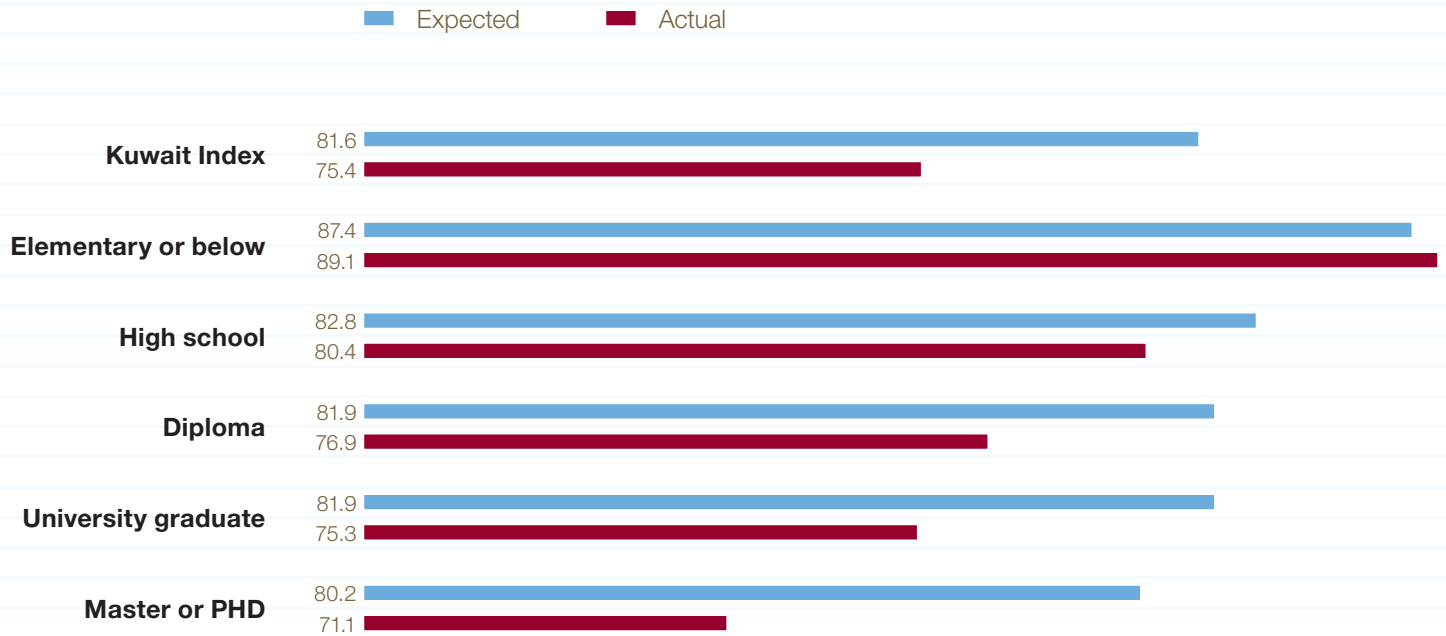
Age

Actual satisfaction is highest amongst teenagers and those aged 60 or more. Satisfaction is lowest for adults in the 40-49 as well as 30-39 age groups. This is possibly due to their high expectations not being met by companies and are less tolerant of poor service.



Service dimension scores by education

Expected and Actual scores



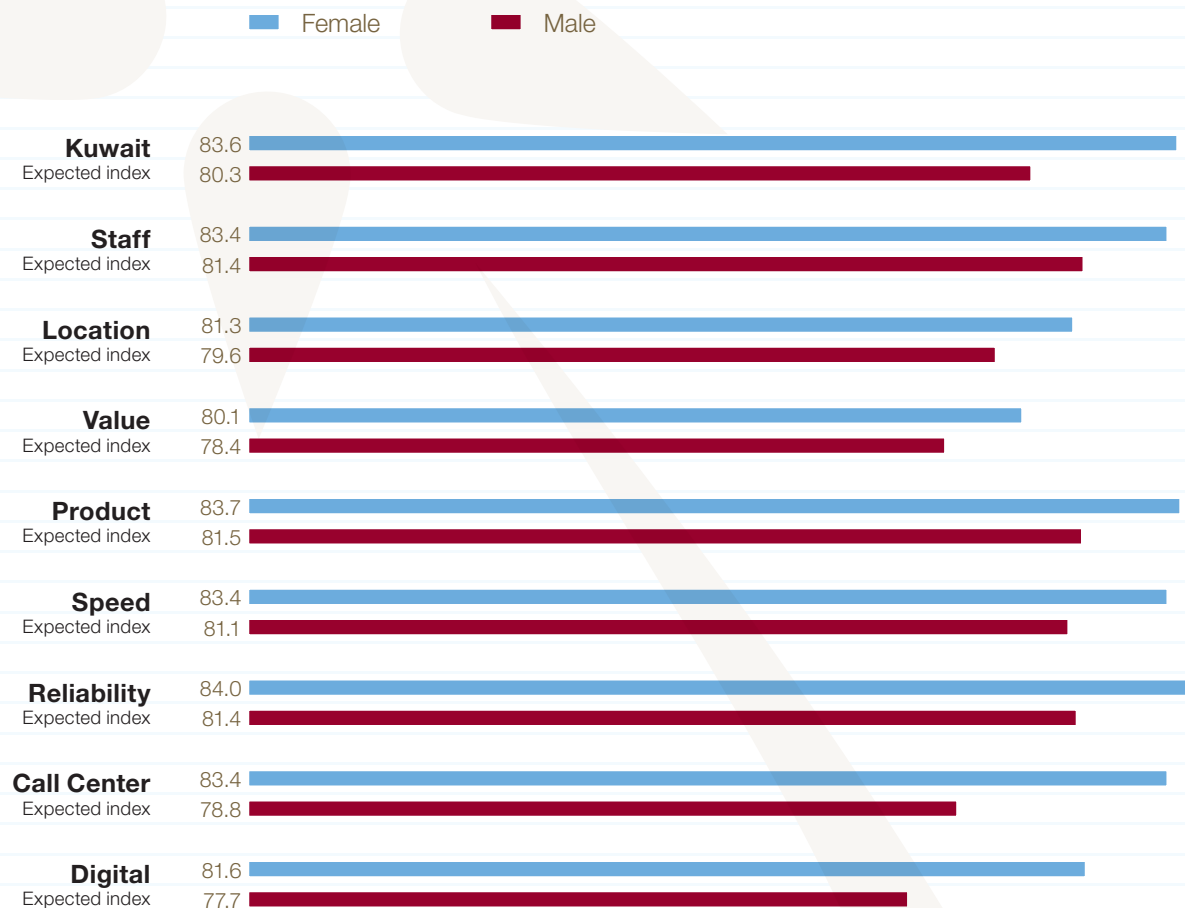
Education

Actual satisfaction is highest amongst those with lower education. 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

Kuwait Expected Index



Female

Expectation: Overall women's expectations exceed those of males on every dimension. Highest is Reliability and Product Quality, lowest is Value for Money.

Male

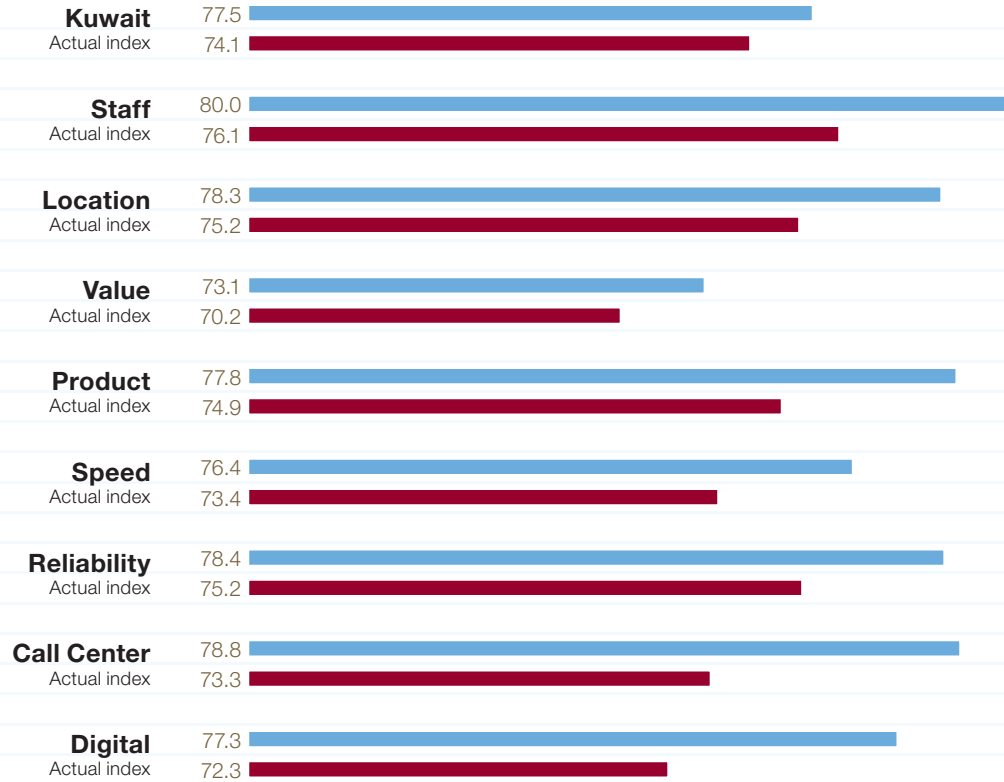
Expectation: Service expectations for males fall below women on every dimension. Highest is Reliability and Product Quality.



Service dimension scores by gender

Kuwait Actual Index

Female Male



Female

Actual: Females are more satisfied than males on every service dimension. Their highest satisfaction score is Staff Attitude followed by Call Center. Their lowest is Value and Speed.

Male

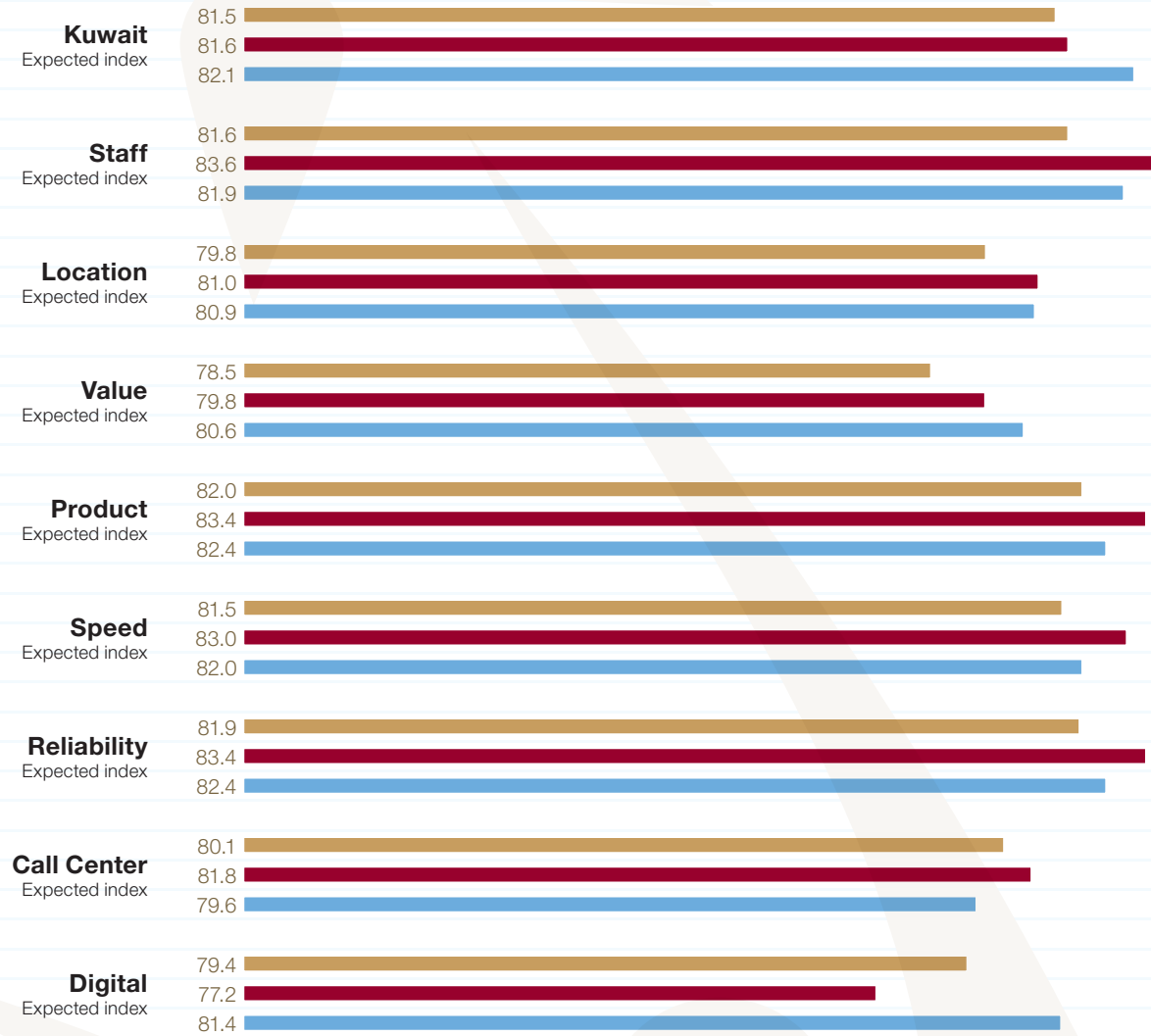
Actual: Similar to Females, Men are most satisfied by Staff Attitude and the least satisfied with Value and Digital.



Dimension scores by nationality

Expectations before dealing with a brand

Arabs Kuwaitis Non Arabs



Lowest

Arabs have the lowest expectation on 6 of the 8 dimensions.

Highest

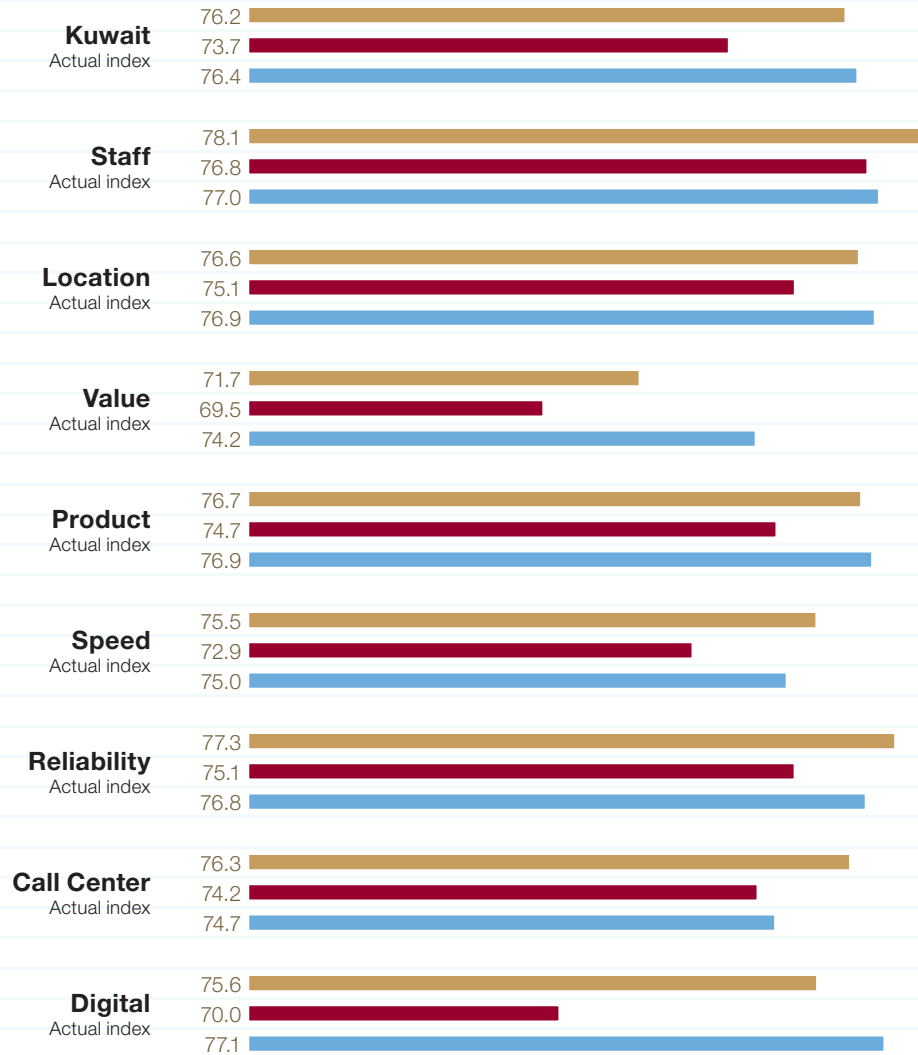
Kuwaitis have the highest expectations for most dimensions.



Dimension scores by nationality

Actual satisfaction after dealing with a brand

Arabs Kuwaitis Non Arabs



Lowest

All nationalities have Value as the lowest scoring dimension.

Highest

Kuwaitis and Arabs have the highest satisfaction for Staff while Non Arabs scored Digital the highest.



Dimension scores by age group

Actual scores and gaps between actual and expected scores

Actual	16-17	18-29	30-39	40-49	50-59	60+	Kuwait Index
Staff	86.6	79.8	76.3	76.3	76.4	81.9	77.6
Location	80.5	77.5	75.4	74.8	75.5	80.7	76.1
Value	80.4	73.0	70.6	70.4	70.4	77.9	71.3
Product	84.8	78.2	74.8	75.0	75.3	80.6	76.0
Speed	78.9	75.9	73.6	73.9	74.4	80.0	74.6
Reliability	87.5	78.3	75.5	75.3	74.7	79.6	76.5
Call Center	84.1	77.1	75.1	74.0	72.6	80.5	76.4
Digital	83.2	75.7	72.7	73.3	70.2	80.2	74.1
Overall	87.8	77.4	74.3	74.2	74.6	79.7	75.4
Gap							
Staff	6.5	-3.9	-5.0	-5.8	-4.1	-1.7	-4.6
Location	3.5	-3.7	-4.2	-5.0	-3.6	-3.8	-4.0
Value	5.6	-7.5	-8.0	-8.5	-6.7	-6.2	-7.8
Product	2.0	-5.3	-7.0	-7.0	-4.7	-4.1	-6.3
Speed	-1.0	-6.8	-7.7	-8.5	-5.6	-5.3	-7.3
Reliability	6.1	-5.0	-6.3	-7.1	-5.2	-4.6	-5.9
Call Center	4.1	-4.3	-5.5	-5.7	-5.1	-3.5	-4.9
Digital	4.3	-5.0	-5.4	-5.2	-6.2	-4.0	-4.9
Overall Gap	5.0	-5.5	-6.2	-7.5	-5.4	-4.8	-6.2
Best							
Worst							

Satisfaction

Value for Money is the **lowest** score for most age groups. The **highest** satisfaction for most age groups are Staff Attitude, Location, and Reliability.

Gaps

In terms of **positive** gap scores by age group, all groups had, primarily, negative gaps with the exception of most dimensions for 16-17 year olds.



Dimension scores by education

Actual scores and gaps between actual and expected scores

	Elementary or below	High school	Diploma	University Grad	Master or PHD	Kuwait Index
Actual						
Staff	88.0	81.7	79.1	77.3	74.0	77.6
Location	85.9	81.4	77.1	75.9	73.2	76.1
Value	82.9	75.8	71.5	71.3	68.1	71.3
Product	88.2	81.1	77.5	75.9	72.4	76.0
Speed	88.6	78.6	75.9	74.3	71.2	74.6
Reliability	89.5	81.2	78.0	76.4	72.7	76.5
Call Center	87.2	79.3	75.8	74.8	70.8	76.4
Digital	88.3	80.6	74.8	73.6	69.6	74.1
Overall	89.1	80.4	76.9	75.3	71.1	75.4
Gap						
Staff	2.4	-1.6	-5.8	-4.7	-6.6	-4.6
Location	3.4	0.2	-4.8	-4.3	-5.8	-4.0
Value	0.6	-3.9	-9.3	-7.7	-9.8	-7.8
Product	1.1	-2.0	-6.6	-6.5	-8.6	-6.3
Speed	2.9	-4.3	-8.2	-7.7	-8.9	-7.3
Reliability	3.2	-1.8	-6.4	-6.0	-8.3	-5.9
Call Center	1.8	-2.7	-6.2	-5.2	-7.6	-4.9
Digital	1.4	-0.9	-4.3	-5.4	-7.8	-4.9
Overall Gap	1.7	-2.3	-5.0	-6.6	-9.1	-6.2
Best						
Worst						

Satisfaction

Most education levels are similar with Staff and Reliability being the highest. Value for Money is the lowest satisfaction for all education levels.

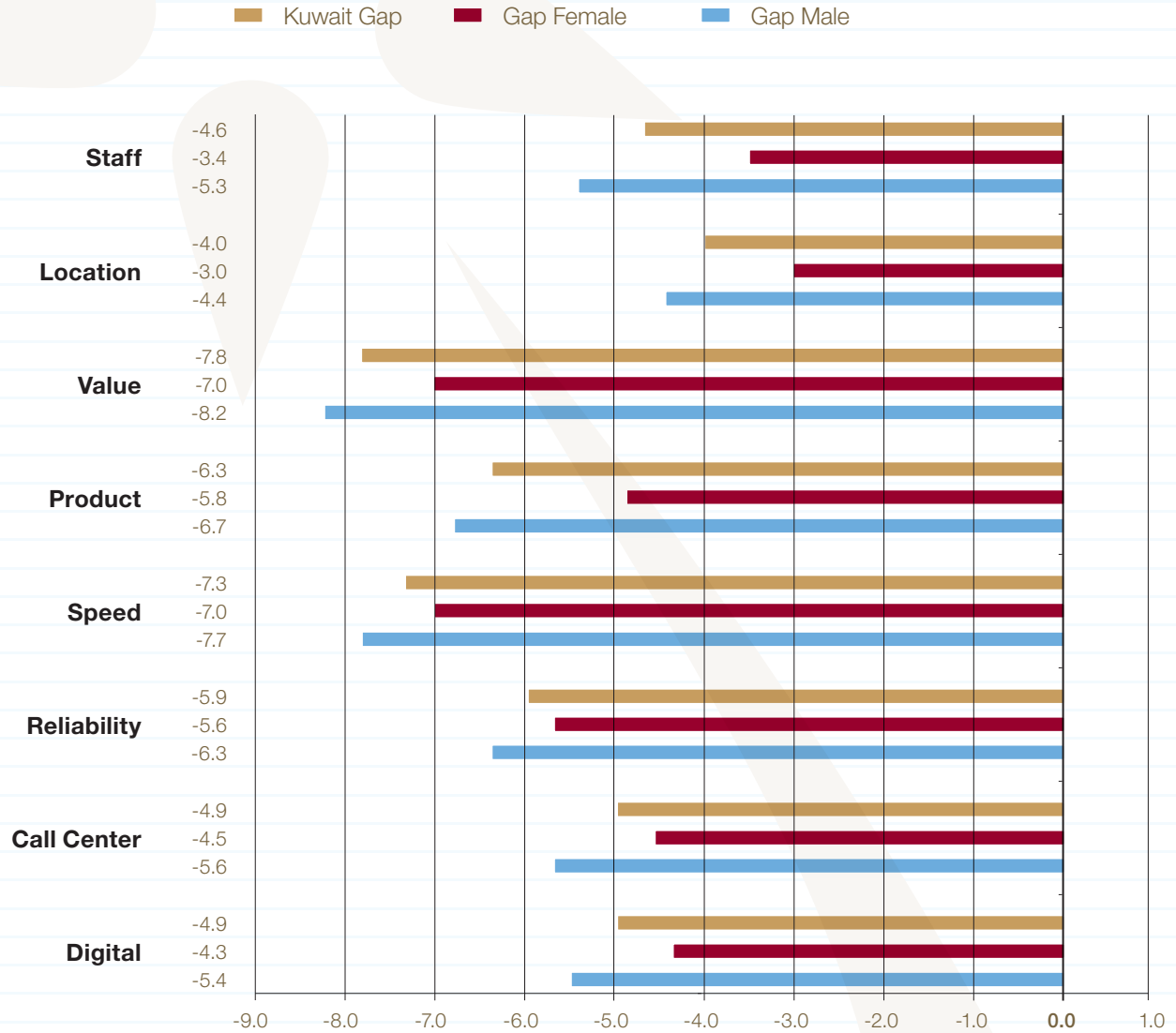
Gaps

There were few **positive** gaps across all education levels with Elementary or below being the only exception. The group where expectations were not met the most is Master or PHD. The highest negative gap for most education levels are with Value for Money.



Gaps by gender

Kuwait Index 2018 - Gap Analysis



Females

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

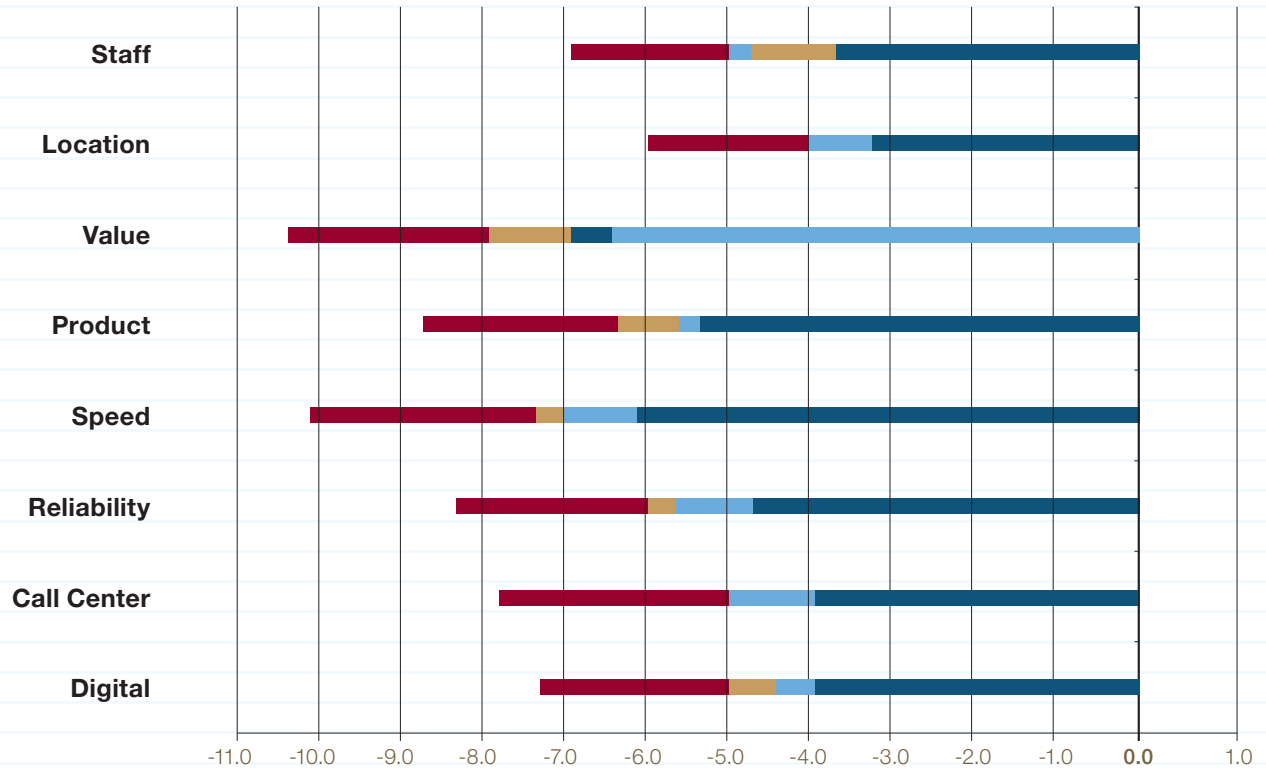
Males

Males also showed negative gaps across all dimensions. The largest negative gaps Males showed are for Value for Money and Speed of Service.



Gaps by nationality

Arabs Gap Kuwaiti Gaps Non Arabs Gap Kuwait Index



	Staff	Location	Value	Product	Speed	Reliability	Call Center	Digital
Arab Gap	-3.6	-3.2	-6.8	-5.3	-6.1	-4.6	-3.8	-3.8
Kuwaiti Gap	-6.8	-5.9	-10.4	-8.7	-10.1	-8.3	-7.7	-7.3
Non Arabs Gap	-4.9	-4.0	-6.4	-5.5	-7.0	-5.6	-4.9	-4.4
Kuwait Index	-4.6	-4.0	-7.8	-6.3	-7.3	-5.9	-4.9	-4.9

No service dimension exceeded expectations for any nationality group as they all fell below expectations. Kuwaitis had the largest negative gaps in Value.



Image and loyalty

Kuwait Index recommend scores 2018



One question is examined here - the likelihood to recommend a brand.

Kuwait scored a 75.7 on the **loyalty**, or the recommendation score.

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



Recommend scores by nationality

Kuwait Index recommend scores 2018

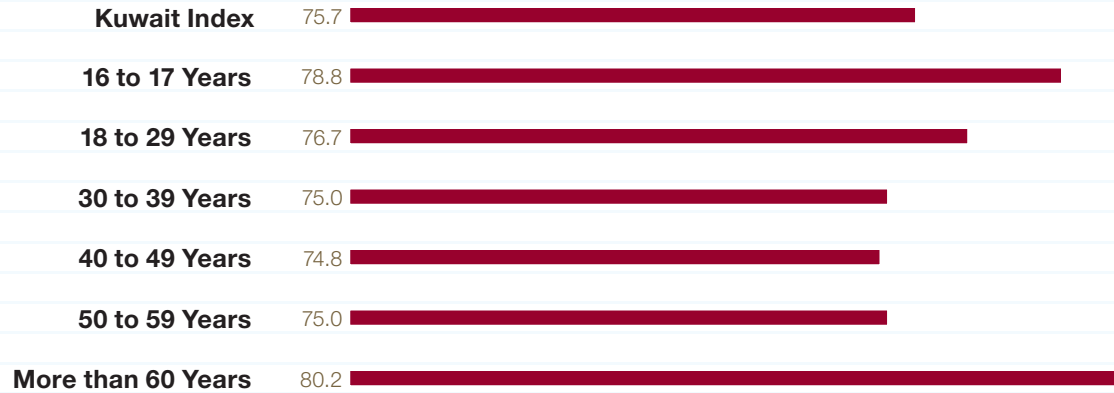


The least likely nationality to recommend a brand are Kuwaitis, while the most likely to recommend a brand are Non Arabs. None of the nationalities had a 'strong' score.



Recommend scores by age group

Kuwait Index recommend scores 2018

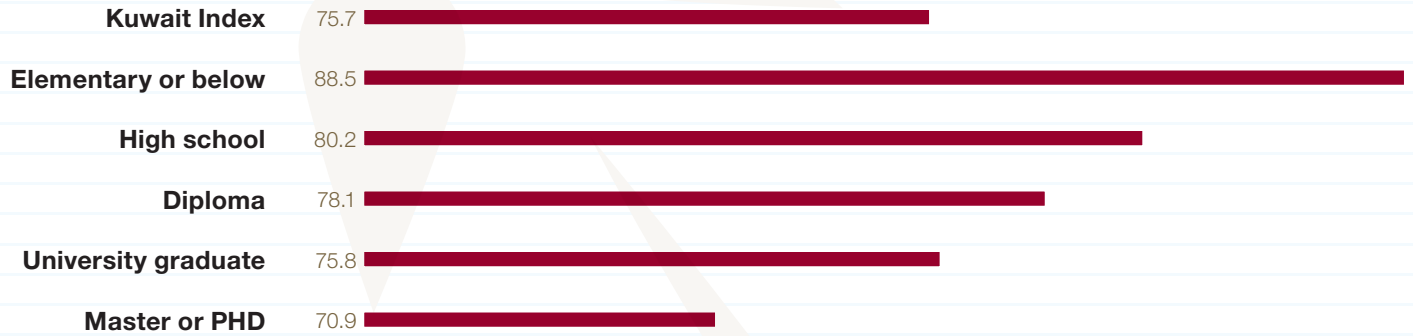


The two age groups that are more likely to recommend a brand are the 60+ and 16-17 age groups. Typically, very young consumers tend to recommend a brand to their peers while the same applies to older groups. The least likely to recommend a brand are the 'middle of the pack' age groups between 30-59 years.



Recommend scores by education level

Kuwait Index recommend scores 2018

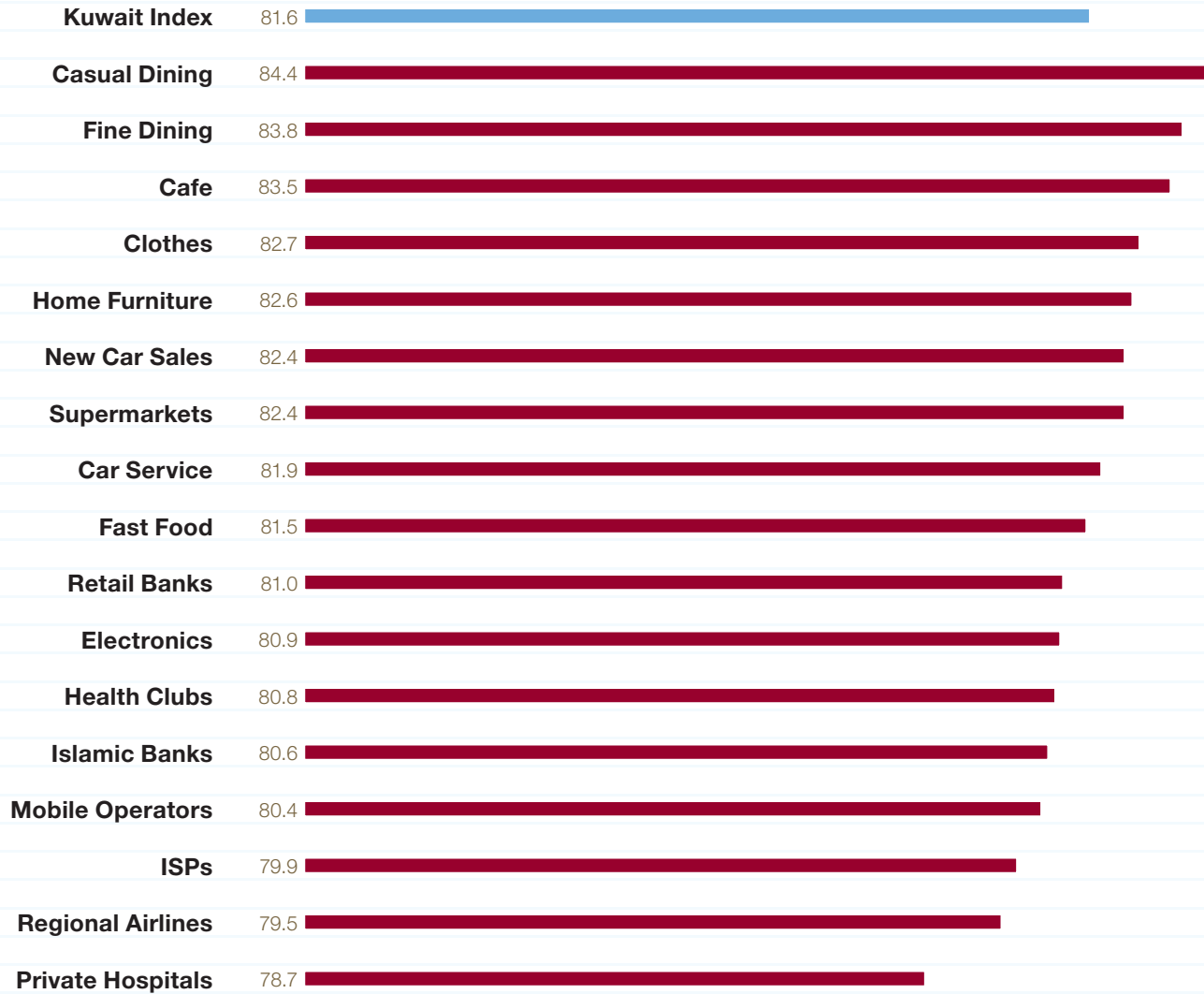


Those with a higher education level beyond a four year degree are the least likely to recommend a brand, while the most likely to recommend a brand are those with a lower education.



The Kuwait expected index across all 17 categories

Expected Index



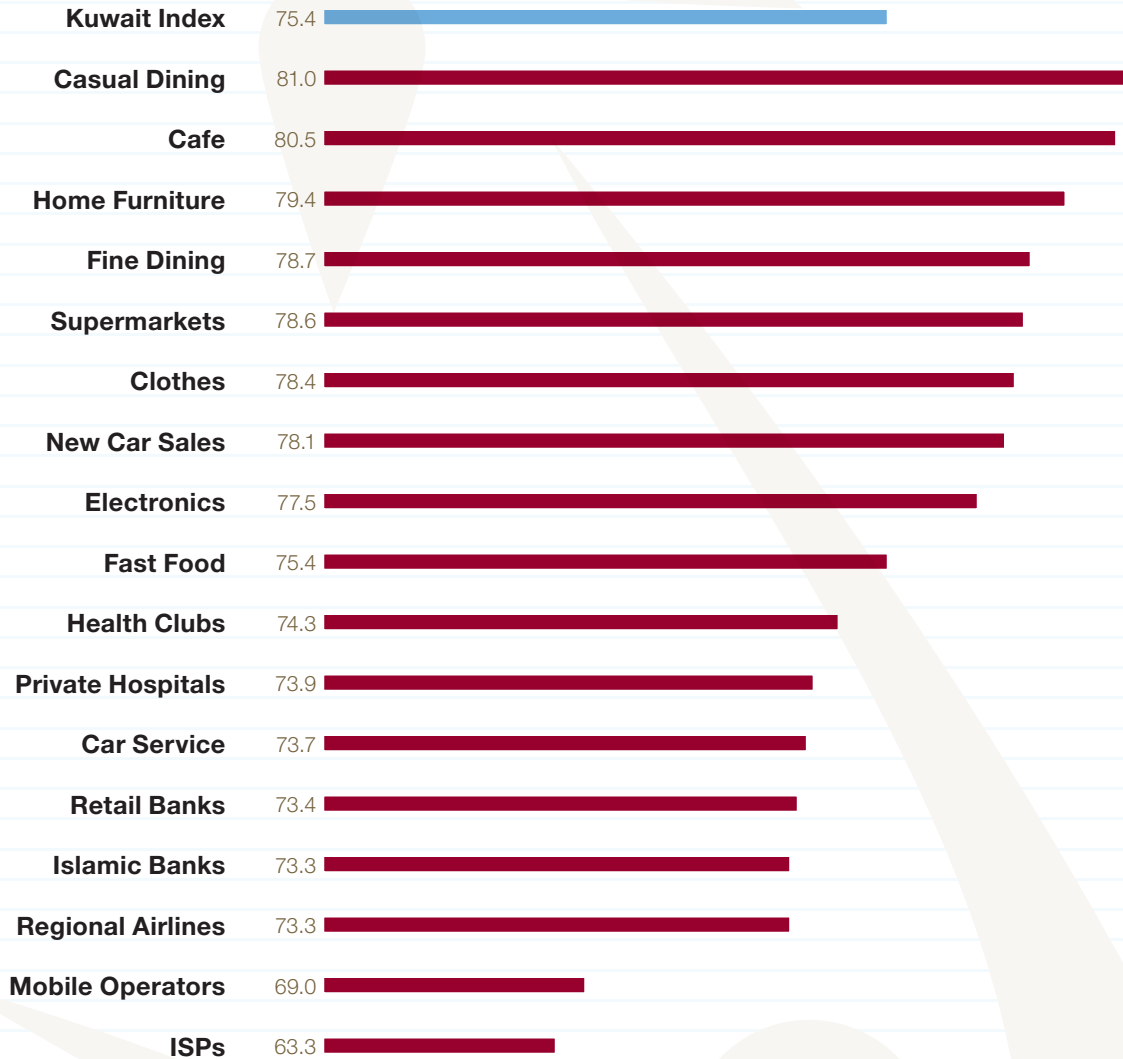
Eight industry categories exceeded the Kuwait Expected index score.

The top expectations are for Casual Dining, Fine Dining, and Cafes. The lowest expectations is Private Hospitals, Airlines, and ISPs.



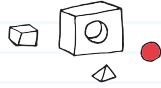
The Kuwait actual index across all 17 categories

Actual Index



Nine industries exceeded or met the Kuwait Index for Actual Satisfaction.

The top three scoring industries are Casual Dining, Cafes, and Home Furniture. The lowest industries on Actual Satisfaction are ISPs, Mobile Operators, and Airlines, relatively similar to those in the expectations. This means that consumers do not have a high expectation of these industries.



Interaction

Point of Interaction

	In store / branch	On the phone	Online
Kuwait Index	77.2	73.1	75.0
Cafe	81.7	80.5	76.9
Car Service	72.0	70.2	74.9
Casual dining	81.6	84.1	84.8
Clothes	77.8	85.7	70.5
Electronics	76.7	66.4	74.9
Fast Food	78.1	74.0	76.4
Fine Dining	78.4	85.4	63.8
Health Club	76.5	83.0	70.1
Home Furniture	78.4	62.6	82.2
Islamic Banks	72.6	86.1	81.4
ISPs	68.8	64.9	68.8
Mobile Operators	69.3	67.6	72.3
New Car Sales	77.8	73.4	81.0
Private Hospitals	74.9	82.0	83.1
Regional Arab Airlines	73.4	74.0	76.9
Retail Banks	74.6	75.7	80.3
Supermarkets	78.8	89.9	80.3
Best			
Worst			

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

On a country level, In store interactions scored highest with 77.2 points and over the phone scored the lowest with 73.1 points.

Cafes scored highest for face to face interactions while ISPs scored lowest. Over the phone, Supermarkets scored highest and Home Furniture was lowest. Finally, Online users were most satisfied with Casual Dining while the lowest scoring one was for Fine Dining.



Frequency

Frequency of Visits

	Week	Monthly	3 months	6 months	Year
Kuwait Index	81.6	77.6	75.9	73.2	71.6
Cafe	85.9	81.1	76.3	70.0	60.8
Car Service	87.1	68.4	72.3	73.7	70.7
Casual dining	91.7	84.4	79.4	77.1	62.7
Clothes	80.8	80.2	76.1	76.7	62.1
Electronics	80.6	77.6	76.6	72.8	70.2
Fast Food	83.3	77.1	72.9	63.7	49.9
Fine Dining	89.1	78.0	79.9	72.5	71.0
Health Club	80.1	72.6	77.8	79.9	72.1
Home Furniture	86.1	84.4	79.3	76.3	75.1
Islamic Banks	77.5	78.1	81.3	77.3	72.3
ISPs	58.6	70.5	68.1	70.7	69.4
Mobile Operators	67.7	69.1	72.2	69.7	69.1
New Car Sales	76.3	75.7	75.5	81.5	78.5
Private Hospitals	86.8	77.5	76.1	67.7	74.7
Regional Arab Airlines	73.8	77.5	75.8	74.3	74.7
Retail Banks	82.0	78.1	78.6	70.7	74.5
Supermarkets	81.4	79.6	78.1	73.2	72.8
Best					
Worst					

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

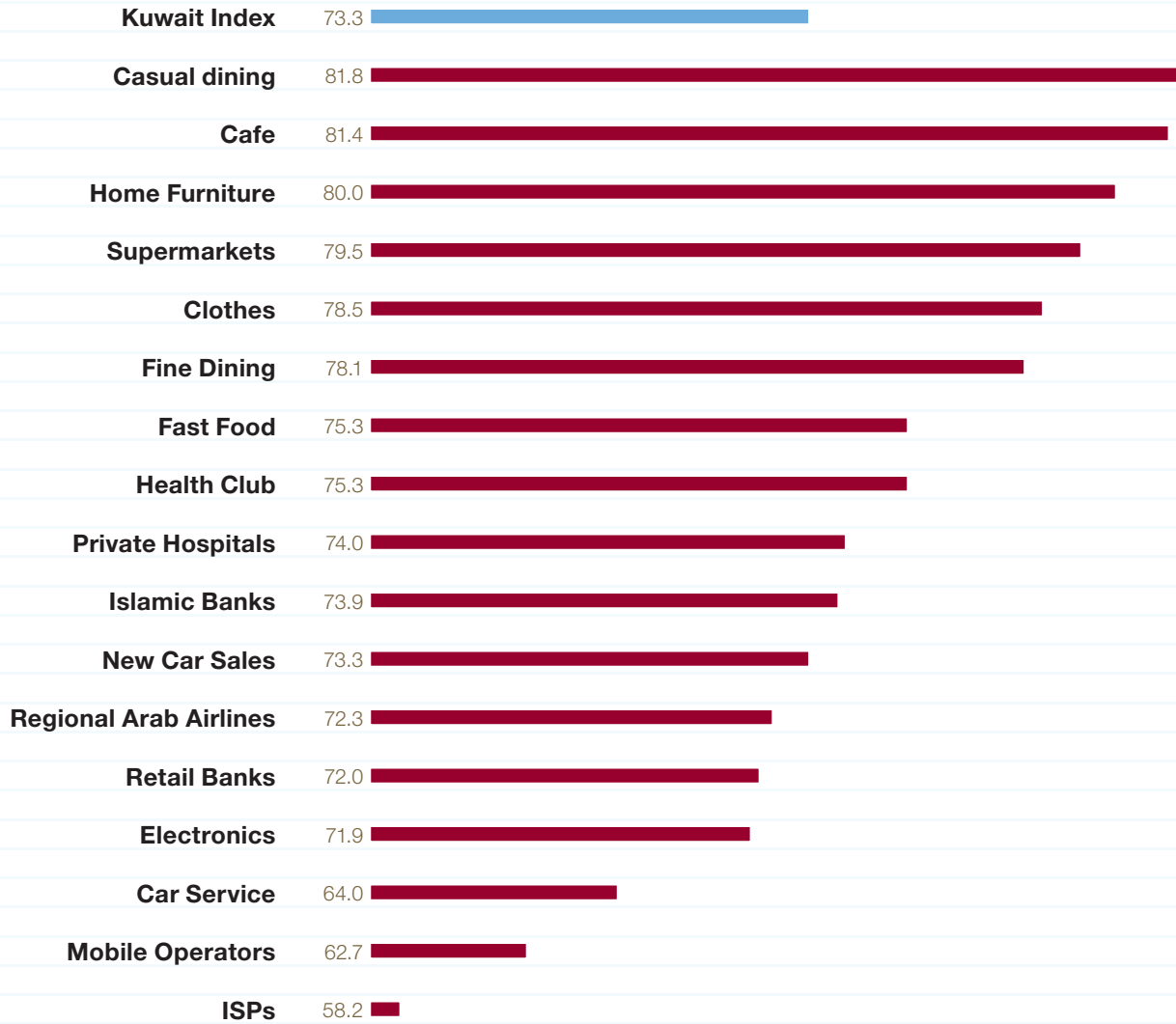
Weekly interactions with a brand scored highest with a Good score of 81.6. Annual interactions scored lowest with 71.6.

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

Kuwait Index complaint average score 2018



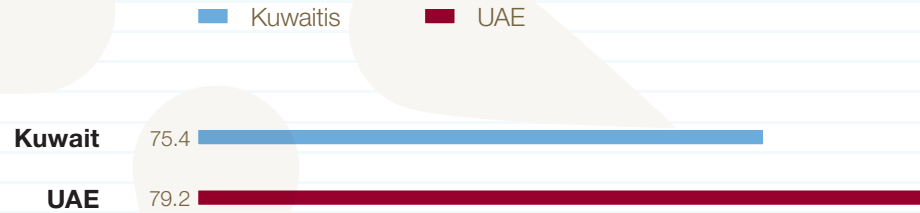
Note: This is a new question that was added in 2018 for the first time.

Consumers in Kuwait scored an average score of 73.3 on how brands deal with complaints. This score is on the lower side of Ordinary using our 5-level scale. 11 of the 17 categories met or exceeded the Kuwait score, with ISPs, Mobile Operators, and Car Service bringing the score down.



Comparing Kuwait & UAE

Kuwait & UAE scores 2018



Kuwait has a lower 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.

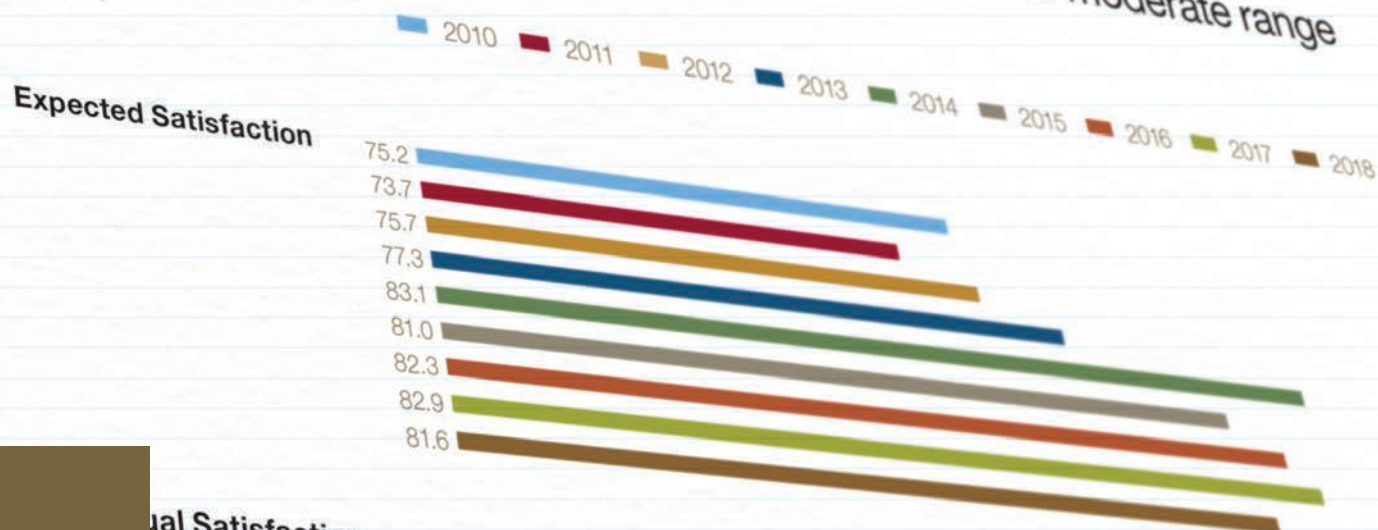
Investigating dimensions between UAE & Kuwait shows similarities as well as differences. The highest scoring dimension for UAE is Reliability, whereas in Kuwait Staff scored highest. The lowest scoring dimensions for UAE & Kuwait is Value which means that consumers feel this dimension is the weakest 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.

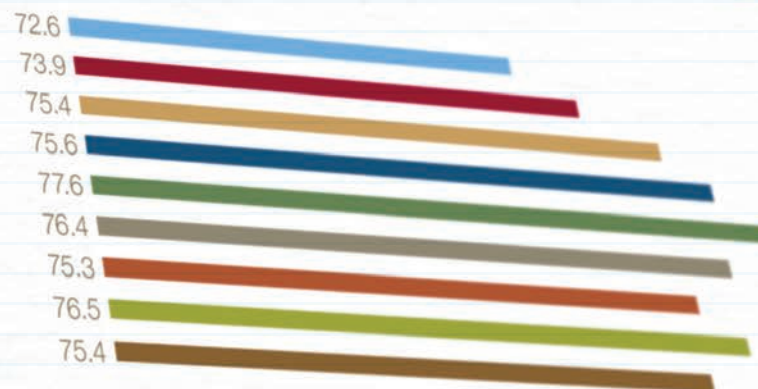
Looking at NPS scores, Kuwait posted a 30% score while UAE has a higher one at 35%. On average, consumers in Kuwait are less susceptible to promoting brands than in UAE.



Kuwait's overall score remains in the moderate range



Actual Satisfaction



Since 2010 Average Actual Satisfaction improved 2.6 points or 4% but the increase has not been steady. The CSI peaked in 2014 and has decreased in satisfaction since last year.

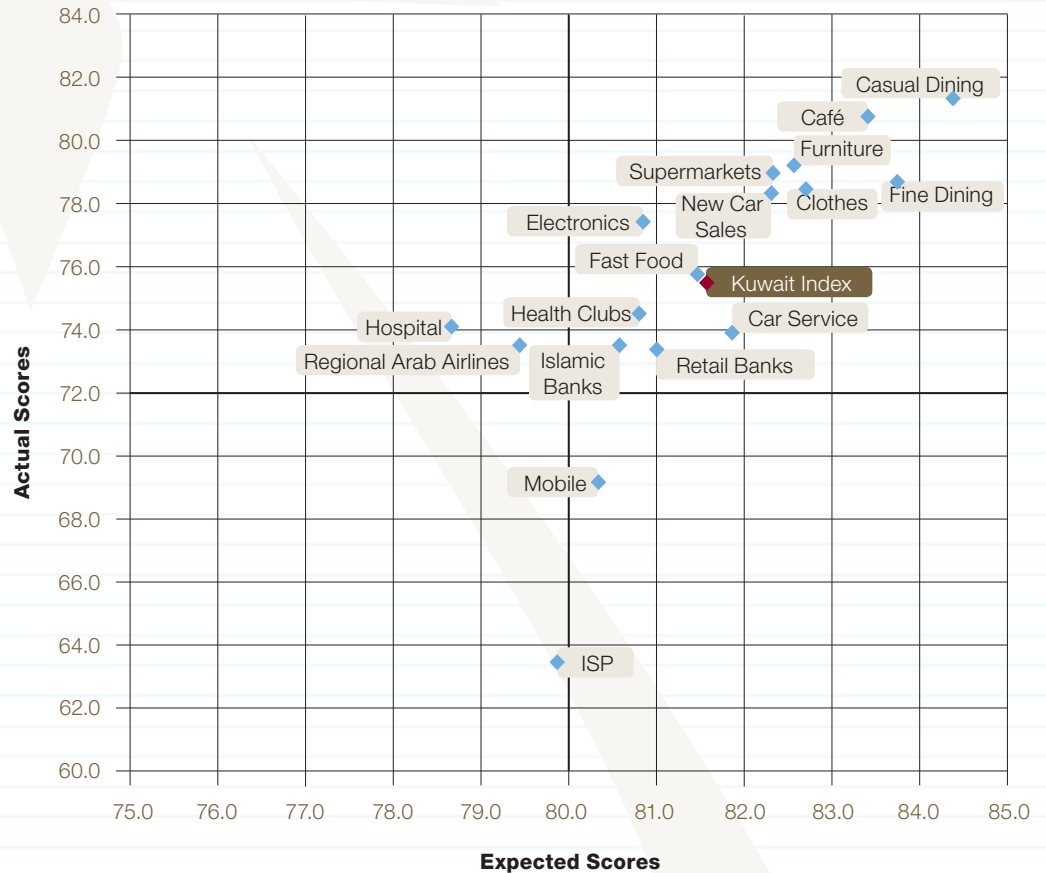
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Summary
& strategic
implications



Market position of all 17 categories

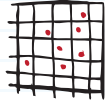
Mapping categories on expectation and actual scores to understand their market position



Industry categories in the top right quadrant such as Cafe, Casual Dining, and Home Furniture are in the best position as their actual scores exceed expected scores. They need to sustain this position over time.

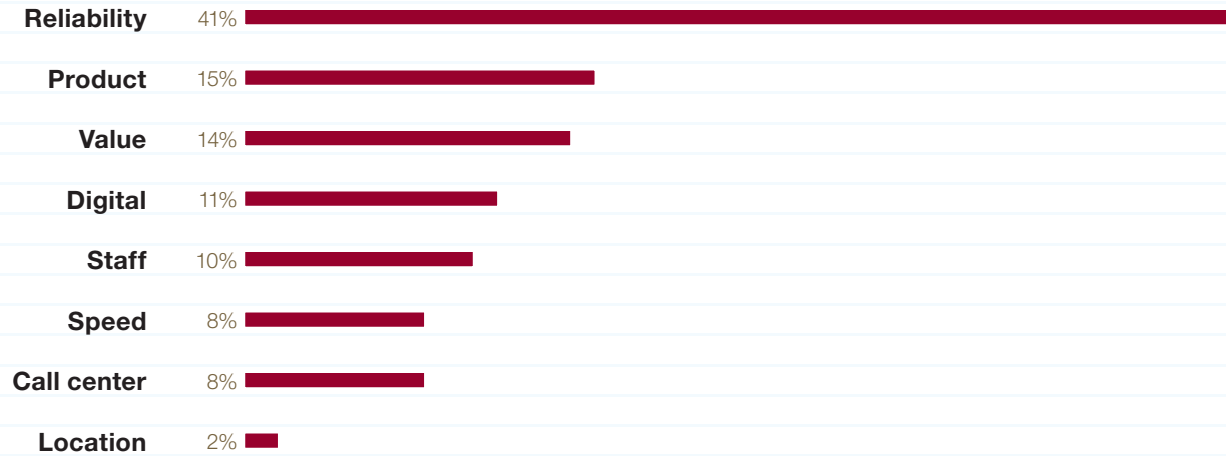
Industry categories in the top left quadrant need to improve their image and overall performance as a small gap exists between expectation and actual scores.

Industries in the bottom left quadrant such as ISPs and Mobile Operators are in a weak position as they are scoring low on expected and actual scores. Their challenge is improving actual 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%, 22,117 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 one dimension has a critical role in influencing overall satisfaction: Reliability and Accuracy (41% impact). If companies prioritize their effort on only this dimension it would help them improve satisfaction.

On the flip side, Location has no impact on overall satisfaction while Product and Value have a small degree of influence.



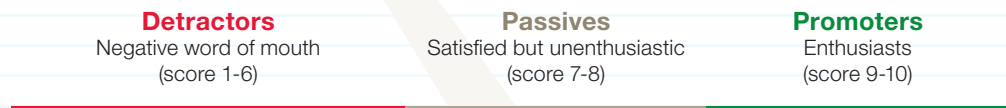
Net Promoter Score

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 method 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



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

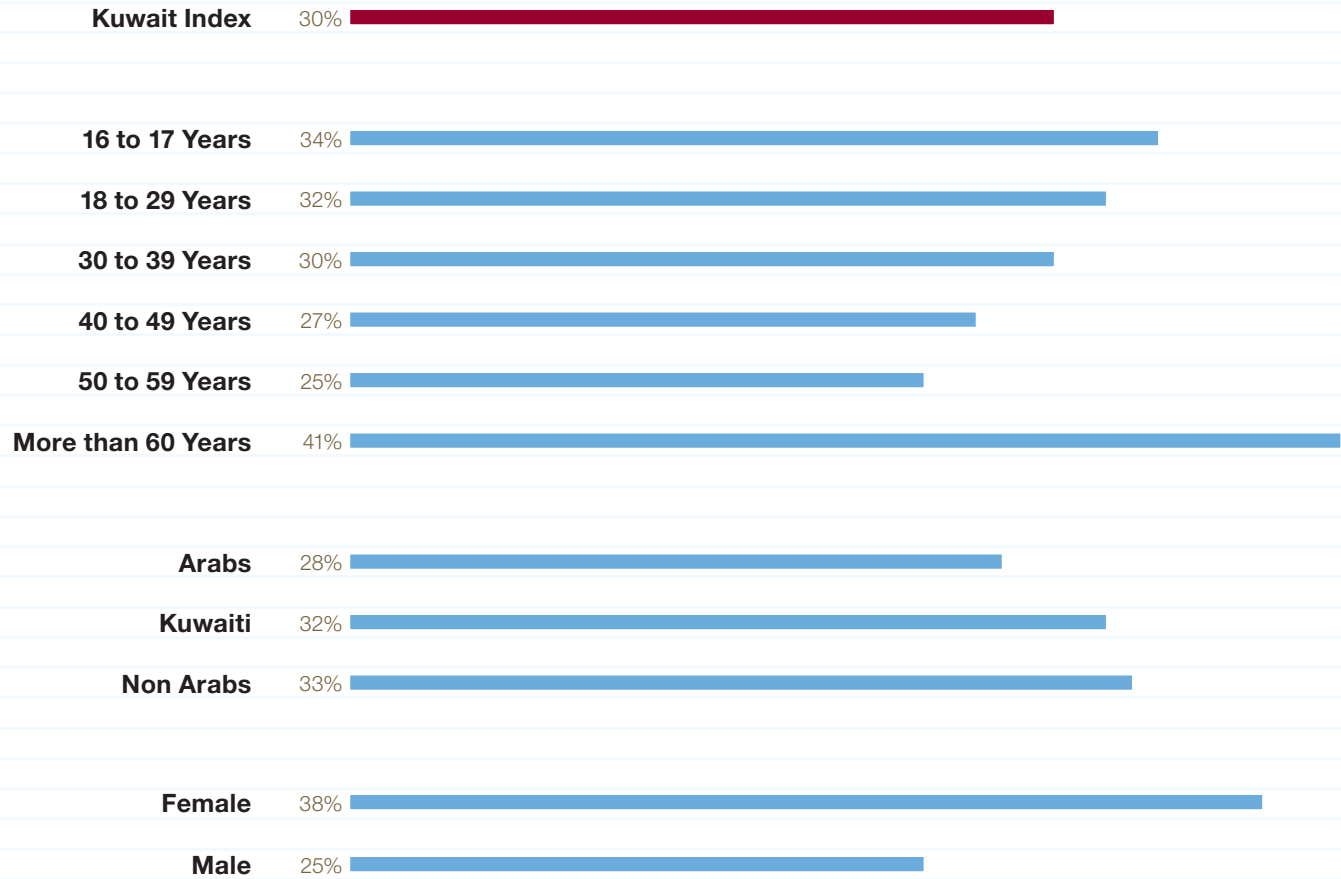
Passives (score 7-8) are satisfied but unenthusiastic customers who are vulnerable to competitive offerings.

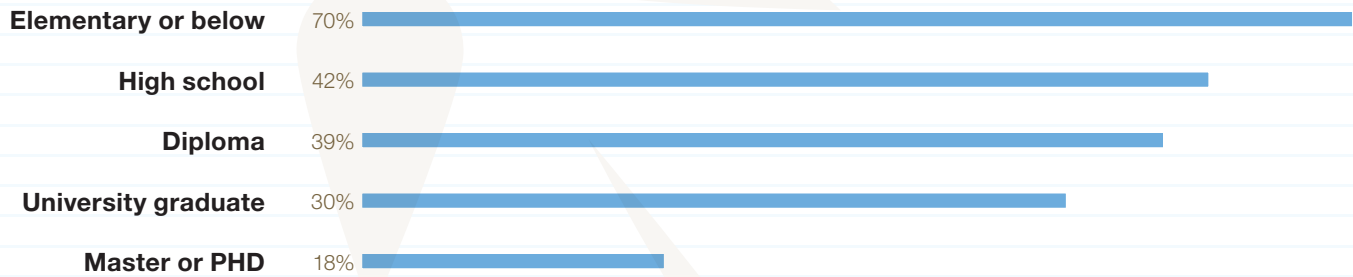
Detractors (score 1-6) are unhappy customers who can damage your brand and impede growth through negative word-of-mouth.



The net promoter score for Kuwait is 30%

Net promoter score - Service Hero Index 2018





While the country average is 30%, demographic groups vary on being either Ambassadors or Detractors. The largest concentration of Ambassadors are Females, Non Arabs, those with a lower education, and those aged over 60. The largest concentration of Detractors are Males, consumers with a higher education (University, Masters or PHD) and those aged 50-59 years.

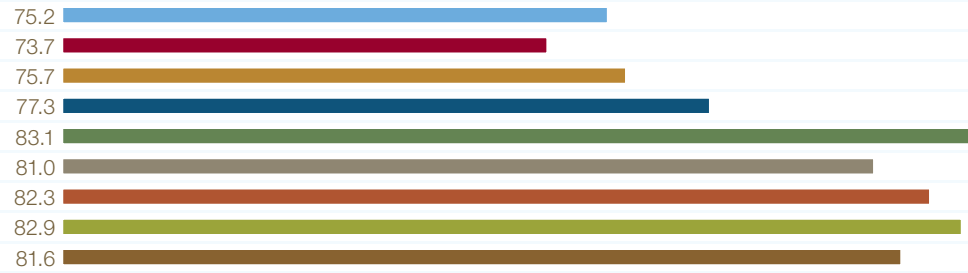
Note: 1. NPS definition: How much more of customers promote a brand versus being detractors.
 2. Promoters (score 9-10), Passives (score 7-8), and Detractors (score 1-6).



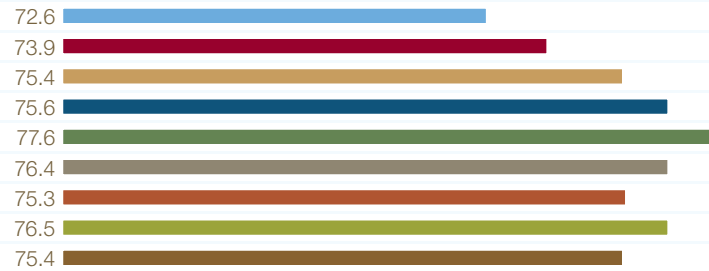
Kuwait's overall score remains in the moderate range

2010 2011 2012 2013 2014 2015 2016 2017 2018

Expected Satisfaction



Actual Satisfaction



Since 2010 Average Actual Satisfaction improved 2.6 points or 4% but the increase has not been steady. The CSI peaked in 2014 and has decreased in satisfaction since last year.



Category Comparison 2010 vs 2018

Actual Satisfaction

Satisfaction for Kuwait in 2018 increased from 2010. The top scoring categories throughout the years have traditionally been Cafes, Casual Dining, and Home Furniture, with New Car Sales scoring high in 2017. Notable improvements with consumer satisfaction in the past nine years are shown in Car Service, Home Furniture, and Electronics. ISPs and Islamic Banks saw a decrease in satisfaction since 2010.

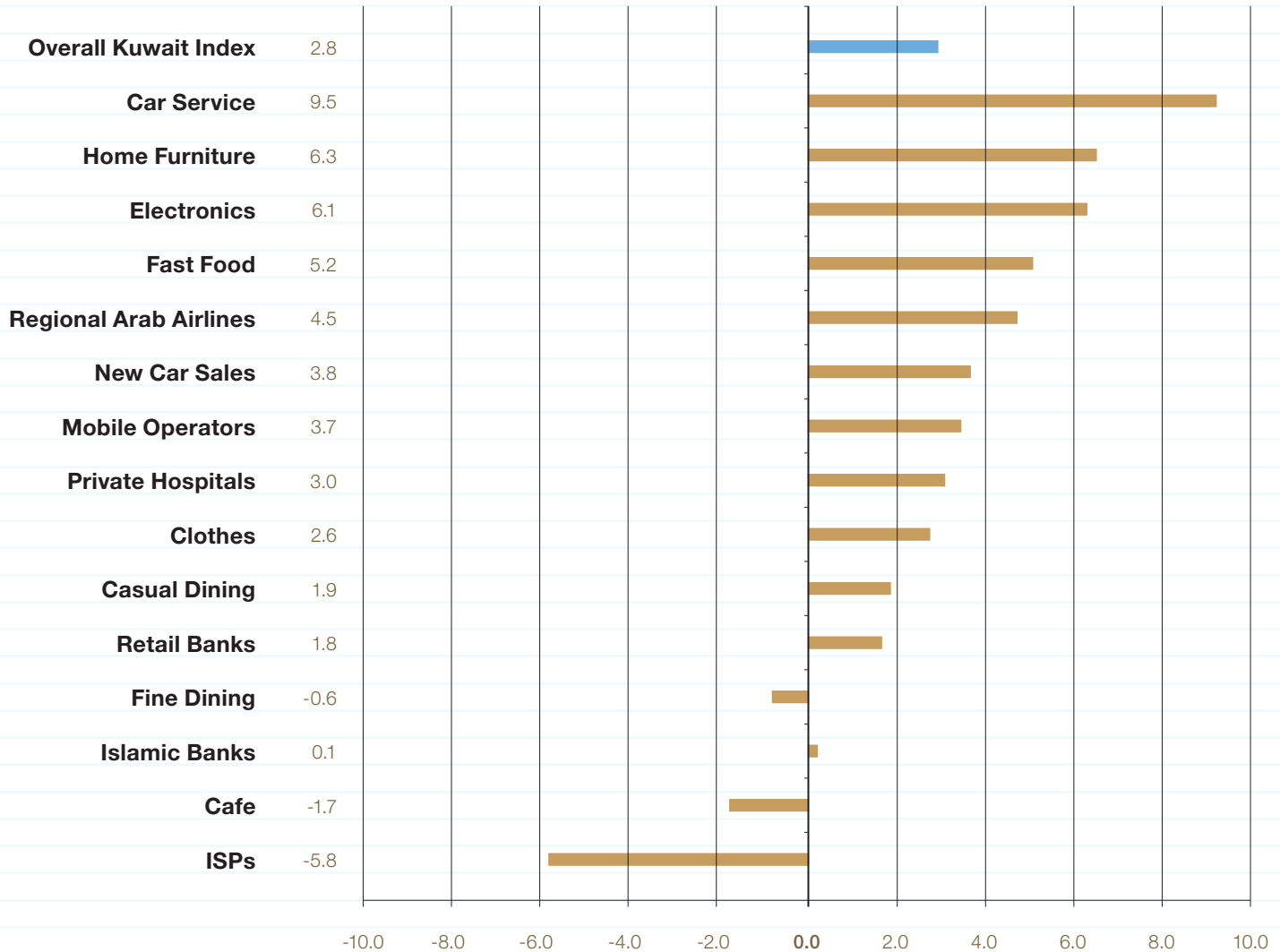
	2010	2011	2012	2013	2014	2015	2016	2017	2018
Kuwait Index	72.6	73.9	75.4	75.6	77.6	76.4	75.3	76.5	75.4
Cafe	82.2	81.1	82.7	79.7	82.0	80.3	82.6	83.0	80.5
Car Service	64.2	66.4	69.4	75.0	77.9	79.0	73.2	75.8	73.7
Casual Dining	79.5	79.3	80.6	80.7	80.8	80.0	80.9	78.8	81.0
Clothes	75.8	79.8	79.6	80.5	79.8	79.1	80.3	79.5	78.4
Electronics	71.4	73.7	74.7	73.4	74.0	72.1	73.0	76.8	77.5
Fast Food	70.3	73.3	77.0	73.8	73.7	75.6	76.8	75.2	75.4
Fine Dining	79.3	78.4	79.9	79.7	75.9	76.5	76.3	78.5	78.7
Health Clubs	N/A	N/A	73.6	72.8	76.6	75.4	72.7	74.5	74.3
Home Furniture	73.1	78.5	77.7	79.5	78.4	79.7	79.6	78.8	79.4
Islamic Banks	74.9	78.9	77.2	74.3	81.1	78.1	76.8	82.4	73.3
ISPs	69.1	65.0	66.2	72.2	71.0	67.9	66.4	62.2	63.3
Mobile Operators	65.3	65.3	67.7	72.2	74.2	71.8	70.4	67.6	69.0
New Car Sales	74.3	76.5	75.0	79.7	79.6	80.9	77.8	79.4	78.1
Private Hospitals	69.7	73.4	73.5	70.9	70.7	72.0	70.7	73.4	73.9
Regional Arab Airlines	68.7	74.4	75.6	76.9	77.3	75.9	74.9	78.9	73.3
Retail Banks	73.6	73.9	77.1	79.8	79.0	76.8	74.4	75.9	73.4
Supermarkets	N/A	74.8	75.8	75.3	77.6	76.6	75.8	79.4	78.6

Note: Local Airlines has been changed to Regional Arab Airlines in 2011 which therefore increased the number of brands in the category. The Health Club category was only added in 2012.



Category Growth 2010 vs. 2018

Notable improvements with consumer satisfaction are seen in Car Service, Home Furniture, and Electronics. Categories that saw a decrease in consumer satisfaction are ISPs, Cafes, Islamic Banks, and Fine Dining.



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

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



Dimension Comparisons 2010 vs. 2018

Actual Satisfaction

	2010	2011	2012	2013	2014	2015	2016	2017	2018
Staff	74.8	75.8	76.7	77.8	78.1	78.1	77.3	78.3	77.6
Location	76.1	77.0	77.3	78.0	77.3	77.7	76.6	77.5	76.1
Value	67.5	70.5	72.2	72.8	74.7	73.4	72.6	72.5	71.3
Product	72.4	75.2	76.0	76.5	77.6	77.2	76.2	77.1	76.0
Speed	71.4	73.3	74.3	75.0	76.1	75.6	74.9	75.5	74.6
Reliability	73.5	75.6	76.1	76.7	78.4	77.2	76.3	77.9	76.5
Call Center	69.2	70.1	71.5	74.3	75.8	75.3	73.8	74.9	76.4
Digital	73.9	74.9	75.7	77.3	78.6	74.6	74.2	74.3	74.1

Overall there are improvements in most dimensions, with Call Center and Value having the largest increase since 2010. Digital and Location are the dimensions that score lower in satisfaction.



Demographic Comparisons 2010 vs. 2018

Actual Satisfaction

	2010	2011	2012	2013	2014	2015	2016	2017	2018
Female	75.1	77.6	78.4	79.0	80.4	78.4	77.8	78.3	77.5
Male	71.6	72.3	74.1	74.1	76.7	75.6	74.2	75.4	74.1
Arabs	74.8	75.8	74.9	77.0	78.2	77.0	74.9	76.7	76.2
Kuwaiti	71.6	69.2	72.5	71.1	75.1	75.3	74.6	74.7	73.7
Non Arabs	70.4	73.3	78.4	79.0	77.8	76.3	76.3	77.5	76.4
16 to 17 years	69.0	67.5	82.7	87.8	84.0	79.3	83.9	80.9	87.8
18 to 29 years	74.1	75.1	76.5	77.2	77.9	75.8	73.9	77.5	77.4
30 to 39 years	73.0	72.8	74.3	74.3	77.2	76.1	75.3	75.5	74.3
40 to 49 years	69.4	73.0	75.8	75.9	77.4	76.2	75.0	76.4	74.2
50 to 59 years	77.6	74.7	77.4	73.7	77.8	77.9	75.2	74.2	74.6
More than 60 years	81.2	68.8	82.1	79.0	74.5	75.4	78.3	78.5	79.7
Elementary or below	N/A	N/A	76.0	85.3	80.0	75.2	79.4	77.2	89.1
High school	N/A	N/A	76.8	81.5	81.0	79.2	76.3	77.4	80.4
Diploma	N/A	N/A	76.5	75.4	78.0	78.2	76.1	78.1	76.9
University graduate	N/A	N/A	75.7	75.3	77.6	76.2	75.2	76.7	75.3
Master or PHD	N/A	N/A	71.9	72.7	73.8	73.2	72.6	72.5	71.1

While Males and Females saw an increase in satisfaction over the last eight years, Females increased their satisfaction most. Non Arabs saw the largest growth in satisfaction since 2010.

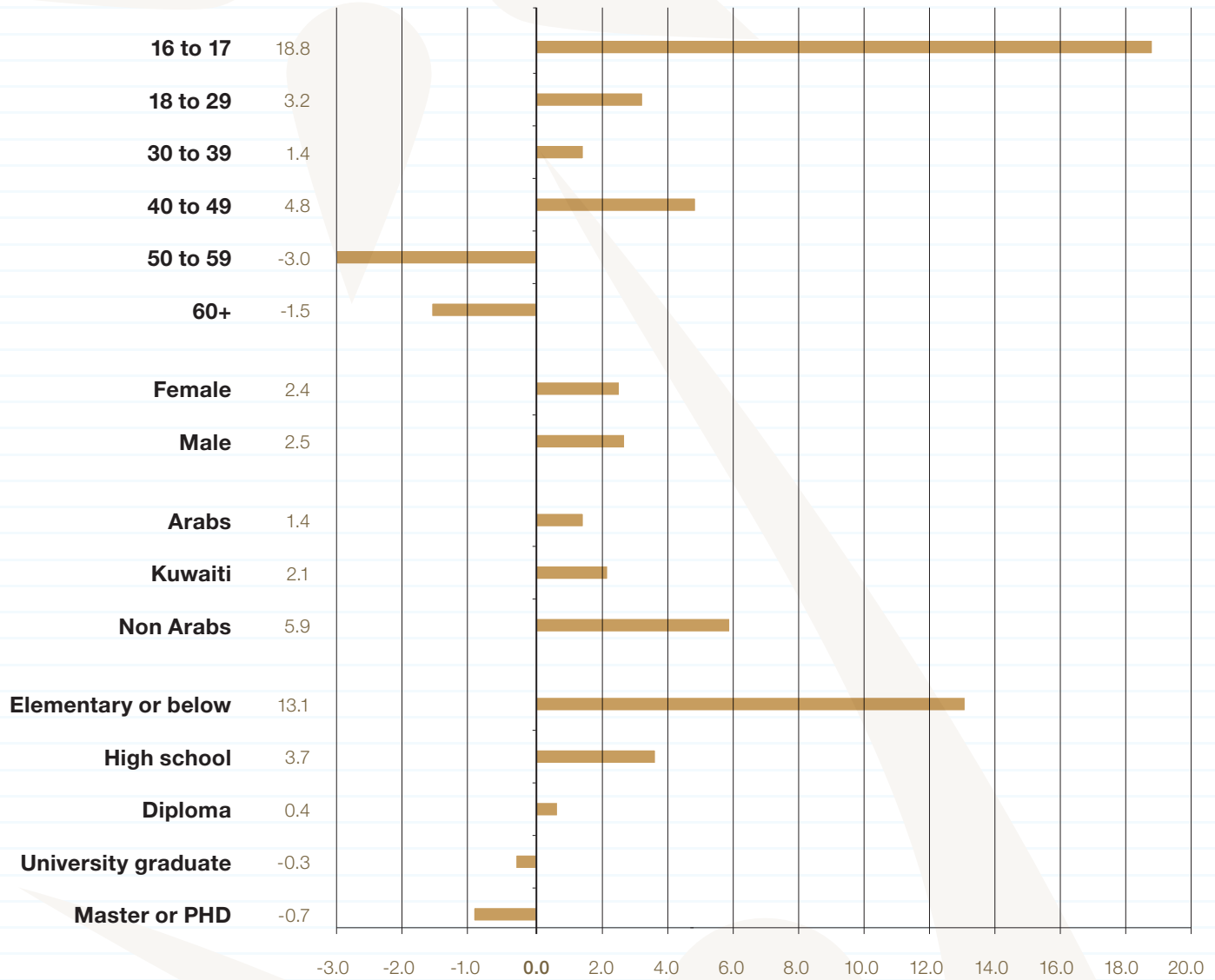
The age groups with the highest increases in satisfaction since 2010 are teens and the 18-29 age group.

By education, Elementary increased since 2012 (the year we started collecting this information). Growth in satisfaction was lowest for those holding a Masters or PhD.



Demographic growth 2010 vs. 2018

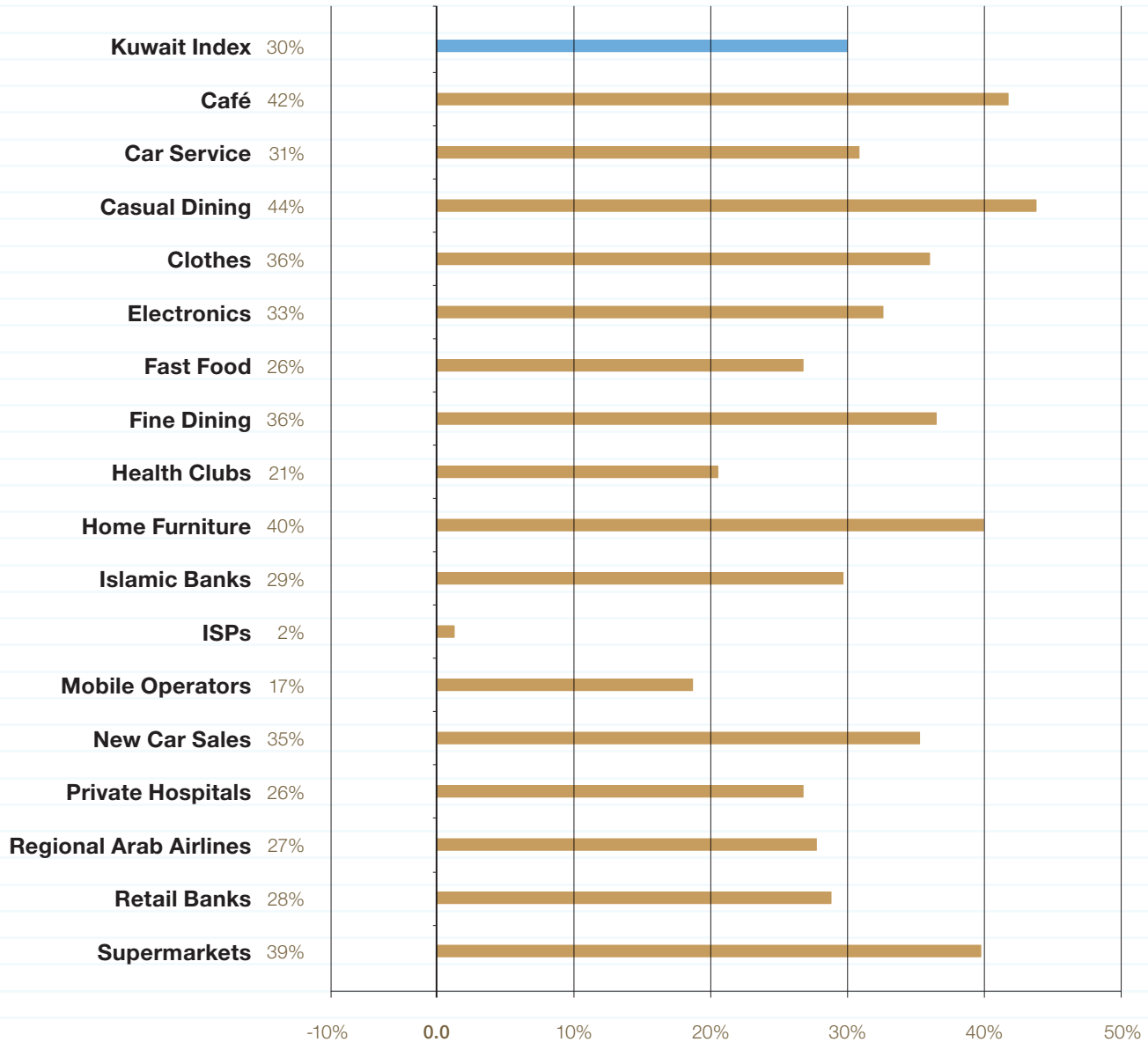
Actual Satisfaction





Category NPS

Service Hero CSI Category 2018 Net Promoter Score



While the country average is 30%, a number of categories are below the average with ISPs being the lowest and almost having more brand Detractors than Ambassadors. This is followed by Mobile Operators and Private Hospitals, all of which have lower NPS scores compared to the national average. Industries enjoying a healthy presence of brand ambassadors are in Casual Dining, Cafes, and Home Furniture.



Net Promoter Score by demographic group and changes over the years

	2010 NPS	2011 NPS	2012 NPS	2013 NPS	2014 NPS	2015 NPS	2016 NPS	2017 NPS	2018 NPS
Kuwait	25%	27%	29%	29%	34%	30%	29%	33%	30%
Female	32%	35%	40%	39%	43%	36%	37%	38%	38%
Male	21%	23%	25%	25%	31%	27%	25%	29%	25%
Arabs	32%	33%	28%	32%	34%	30%	27%	32%	28%
Kuwaiti	21%	15%	23%	18%	27%	29%	28%	28%	32%
Non Arabs	24%	26%	38%	37%	35%	28%	31%	35%	33%
16 to 17 years	32%	26%	56%	54%	49%	50%	51%	36%	34%
18 to 29 years	30%	30%	34%	32%	34%	27%	26%	31%	32%
30 to 39 years	28%	23%	25%	27%	33%	28%	28%	30%	30%
40 to 49 years	10%	24%	30%	32%	35%	30%	31%	36%	27%
50 to 59 years	45%	26%	38%	25%	30%	32%	27%	23%	25%
More than 60 years	56%	9%	50%	33%	26%	24%	49%	42%	41%
Elementary or below	N/A	N/A	29%	63%	51%	26%	44%	31%	70%
High school	N/A	N/A	33%	47%	45%	40%	37%	39%	42%
Diploma	N/A	N/A	32%	31%	33%	36%	32%	36%	39%
University graduate	N/A	N/A	31%	27%	33%	29%	28%	33%	30%
Master or PHD	N/A	N/A	16%	22%	24%	19%	22%	21%	18%

The NPS score has declined since last year by 3%, but improved by 5% since 2010.

The demographic groups showing the strongest increase in NPS since 2010 are those aged 50-59, those with a lower education and Kuwaitis.

Since last year, NPS declined by 3%, with a mix of demographics increase or declining in overall loyalty shown brands.

Note: Education was added as a demographic field in 2012.



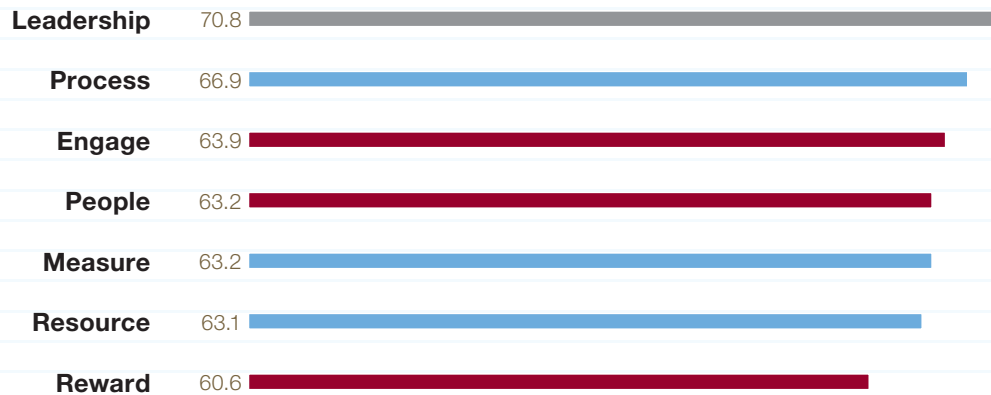
Building a Culture of Excellence

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.



Industry comparison with other markets

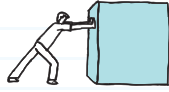
In comparing with other national customer satisfaction indexes, notably the American ACSI (which has been running since 1996), we note that Kuwait is lower than the US and UAE index, with the Singapore CSI scoring lowest.

Category	Kuwait Service Hero CSI	UAE Service Hero CSI	US ACSI Index	Singapore CSI Index
Café	80.5	83.4	80.0	73.9
Car Service	73.7	79.9	82.0	N/A
Casual Dining	81.0	83.0	81.0	74.4
Clothes	78.4	80.2	79.0	72.8
Electronics	77.5	83.6	79.0	71.8
Fast Food	75.4	78.9	80.0	73.6
Fine Dining	78.7	N/A	N/A	N/A
Health Clubs	N/A	N/A	N/A	N/A
Home Furniture	79.4	80.8	N/A	N/A
Islamic Banks	73.3	75.2	81.0	74.1**
ISPs	63.3	N/A	62.0	68.9
Mobile Operators	69.0	66.6	74.0	71.1
New Car Sales	78.1	85.6	82.0	N/A
Private Hospitals	73.9	75.2	76.0	N/A
Regional Arab Airlines	73.3	80.5	73.0	74.5
Retail Banks	73.4	75.0	81.0	74.1**
Supermarkets	78.6	80.5	79.0	72.9
Overall Score	75.4	79.2	77.0*	72.9**

* Q3 2018

** Scores are from 2017

Note: Some categories measured by the 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 Kuwait Index

Which factors affect service excellence in Kuwait across industries?



The Service Hero CSI measures satisfaction by collecting scores on a number of factors: the eight service dimensions in terms of expectations, satisfaction and gaps, customer demographic profiles, loyalty, industry categories, and changes over time. A review of the data allows us to understand which factors improve satisfaction and which impede it.

Strategic implications for Kuwait

Three foundations for service excellence exist: understanding customer expectations, 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 for service as the index for Kuwait is 81.6 across all industries, despite being lower than last year. Expectations are highest for Product, Reliability, and Staff. The highest expectations of service amongst demographics are lower educated and those aged 60+, Females and Non Arabs. The highest expectations by industry are for Casual Dining, Fine Dining, and Cafes - all part of the restaurants sector. The lowest expectations (and therefore image or reputation) are for Private Hospitals, Airlines, and ISPs.

- **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 in Kuwait is 75.4, the gap between customer expectations and satisfaction is -6.2, which is significant. The largest gaps by dimensions are for Value and Speed and for categories it is ISPs, Mobile Operators, and Car Service. No category has a positive gap.

- **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 41% impact on satisfaction and Product or Service Quality has a 15% 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 Kuwait is at 30% (which means only 30% of customers are promoters), some customer profiles have lower loyalty. These are namely Arabs, Males, and those with a high education. Categories that have strong loyalty are Casual Dining, Cafes, and Home Furniture. ISPs has a NPS of 2%, which means that a significant number of their consumers are detractors rather than promoters.

- **Recommendation:** Train your staff on empathy and focusing on the customers' needs.
- **Recommendation:** Measure your staff satisfaction 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



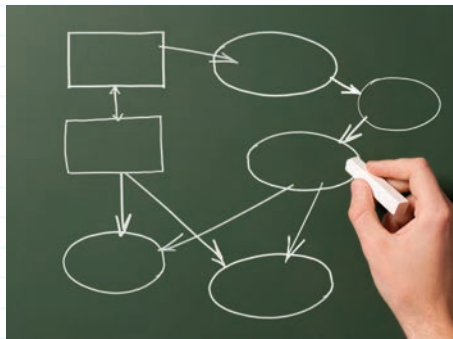
People powered

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 Kuwait

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

4

Kuwait
Awards 2018



Nominees



STARBUCKS



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 33 brands were evaluated



Home furniture



- Defined as: Any store focused on the sale of durable furniture as well as decorative items
- A total of 15 brands were evaluated



Restaurant: Fast food

- Defined as: Typical fast food restaurants that offers burgers and other types of value meals
- A total of 34 brands were evaluated



Health care: Private hospitals

- Defined as: Any private health care provider offering inpatient and outpatient services
- A total of 10 brands were evaluated



PF. CHANG'S



Restaurant: Casual dining

- Defined as: Restaurants that serve moderately-priced food in a relaxed atmosphere where visitors can dress casually
- A total of 68 brands were evaluated



Clothes & accessories

- Defined as: Retail outlets that sell clothes excluding stores solely selling accessories and shoes
- A total of 102 brands were evaluated



Specialty Store: Electronics

- Defined as: Any stores focused on the sale of durable and nondurable electronic items
- A total of 8 brands were evaluated



GMC



Autos: New Car Sales

- Defined as: The purchase of a new car directly from an authorized car dealer
- A total of 37 brands were evaluated

Nominees

Autos: Car service



- Defined as: The service or maintenance of a car from an authorized car dealer
- A total of 36 brands were evaluated



Financial: Islamic banks

- Defined as: Any domestic Islamic non-commercial bank
- A total of 5 brands were evaluated

Regional Arab Airlines



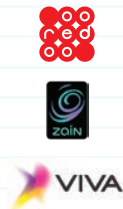
- Defined as: Any airline using Kuwait as its main headquarter
- A total of 16 brands were evaluated



Financial: Commercial banks

- Defined as: Any domestic commercial non-Islamic bank
- A total of 5 brands were evaluated

Communications: Mobile operators



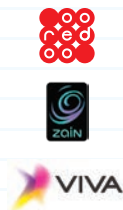
- Defined as: Any domestic company focused on offering mobile phone packages and services
- A total of 3 brands were evaluated



Specialty Store: Supermarkets

- Defined as: Any large self-service store retailing food, perishables and household supplies
- A total of 7 brands were evaluated

Communications: Internet service providers



- Defined as: Any local internet service provider
- A total of 9 brands were evaluated



Restaurant: Fine dining

- Defined as: Full service restaurants with specific dedicated meal courses served in a more formal atmosphere
- A total of 25 brands were evaluated

Overall Kuwait 2018 winner

First Place



FROM THEIR WEBSITE

Established in 2004, Boubyan Bank is an Islamic bank working in accordance with the Islamic Shari'a and applying the correct Islamic teachings in all its transactions with investors' and clients' finances, be they individuals or companies. Boubyan Bank is working hard to spread an integrated Islamic banking culture among its clients and staff by being the Islamic role model that we all seek.

Since the first year of its in 2010, Boubyan Bank has witnessed a radical change. Today it follows a studied and fixed route towards its goals. In addition to expanding its network of branches

that is expected to reach 30 branches by 2014, Boubyan Bank is working hard to enhance its circle of activities and achievements to reach an even higher status in the Islamic banking field in Kuwait. This new strategy also saw an enhancement of the packages of services and Islamic banking products provided by Boubyan Bank to its clients in accordance with the Islamic Shari'a, such as banking services to individuals, institutions, companies or corporations, funds, different investment portfolios, other commercial services, and financing services for individuals and companies.



Overall Kuwait 2018 winner

Second Place

ميسر الخانم
Mais Alghanim
Restaurant مطعم



FROM THEIR WEBSITE

The history of Mais Alghanim Restaurant dates back to the previous century when its founding father Edmond Barakat (Abu Emile), opened a canteen for the employees of Yusuf Ahmed Alghanim & Sons Co., called “Mess Alghanim”. Over time, strong ties and personal relations grew between Abu Emile, Kuwaiti, and Expatriate families extending over three phases and three generations. The first phase commenced in 1953 during which complete meals and take-away services were offered transforming the canteen into a restaurant for one and all.

In 1974, Emile Barakat (Abu Edmond) presided over the business from his late father marking the beginning of the second phase. Under his

leadership, the restaurant moved to the old Kuwait television station in 1987 where it was registered at the Ministry of Commerce and Industry in the name of Yusuf Ahmed Alghanim & Sons Co. It was at this time that the name was changed from “Mess Alghanim” to “Mais Alghanim”.

Abu Edmond’s vision also brought Mais Alghanim forward into the third phase to its present location in 2003, a building of true traditional Kuwaiti design, preserving the heritage and genuine tradition. Hence, after more than 50 years of successful service, the late Abu Edmond’s brothers and eldest son continue to welcome guests with the same spirit through generations of genuine hospitality, and good food.



Overall Kuwait 2018 winner

Third Place



FROM THEIR WEBSITE

Bayerische Motoren Werke, popularly known as BMW, is a German based automobile manufacturing company. It was founded by Franz Josef Popp in 1916. BMW is headquartered in Munich, Bavaria, Germany. With an employee count of 105,876, as of 2012, BMW is one of most admired and trusted automobile manufacturer.

BMW is the parent company for the much revered, royal-class automobile maker Rolls-Royce Motor Cars. BMW currently manufactures and produces cars and motorcycles, with latter being shipped under BMW Motorrad.

Ali Alghanim & Sons Automotive Company joined the premium car market in 1986 as BMW Group importer for Kuwait. In 1998 other premium brand Land Rover joined the dealership, followed by the ultra-luxury Rolls-Royce and the extroverted MINI in 2003. Supported by After Sales facilities, all these products enjoy such levels of technical support, which many argue is the main reason for the company's success.



Category Winners 2018



Restaurants: Cafés
Caribou Coffee



Restaurants: Casual dining
Mais Alghanim



Restaurants: Fast Food
Subway



Clothes & accessories
GAP



Home furniture
IKEA



Autos: New Car Sales
BMW



Specialty Store: Electronics
Carrefour



Healthcare: Private hospitals
Royal Hayat Hospital

Category Winners 2018



Communications: Mobile operators
Zain



Specialty: Supermarkets
Saveco



Autos: Car service
Lexus



Financial: Retail banks
National Bank of Kuwait



Communications: ISPs
Zain



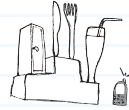
Regional Arab Airlines
Qatar Airways



Financial: Islamic banks
Boubyan Bank



Restaurants: Fine dining
Sakura



Comparing the winners of 2010 to 2018

The Service Hero CSI awarded 15 category winners in 2010 expanding to 17 since 2011, of which 3 were consecutive winners in the 2018 assessment. This suggests that leading companies do have in place programs to ensure customer satisfaction is achieved. In the categories that witnessed a change, much of that was due to heightened competition as different companies jostled for better positions and focused more attention on meeting customer satisfaction needs.

Table 1 Comparison of SH CSI winners 2010 to 2018

Service Hero Category	2018 Winner	2017	2016	2015	2014	2013	2012	2011	2010
Car Sales	BMW	No	No	No	No	No	No	No	No
Car Servicing	Lexus	No	No	No	No	No	No	No	Yes
Regional Arab Airlines	Qatar	Yes	No	No	No	No	No	Yes	No
Clothes	Gap	No	No	No	No	No	No	No	No
ISPs	Zain	Yes	Yes	Yes	No	No	No	No	No
Mobile Operators	Zain	Yes	Yes	Yes	Yes	No	Yes	Yes	No
Islamic Banks	Boubyan	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Retail Banks	NBK	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes
Private Hospitals	Royale Hayat	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Cafes	Caribou Coffee	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Fast Food	Subway	No	No	No	No	No	No	No	No
Casual Dining	Mais Alghanim	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes
Electronics	Carrefour	No	No	No	No	No	No	No	No
Home Furniture	IKEA	No	No	No	Yes	Yes	Yes	Yes	Yes
Supermarkets*	Saveco	Yes	Yes	Yes	No	No	No	No	No
Fine Dining	Sakura	N/A	N/A	Yes	No	No	No	No	No
Health Clubs**	Oxygen	N/A	N/A	No	Yes	No	No	No	No

* Category added in SH CSI 2011

** Category did not meet quota requirements for the SH CSI 2018

4 of 4 Rate brand

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

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

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

How would you rate

After visit

Your experience after your visit

☹️

Staff attitude, knowledge & competence 1 2 **3** 4 5 6 7 8 9

Location convenience, parking, operating hours & 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

Service speed 1 2

Reliability, consistency & accuracy of the product/service **1**

Call center or any phone based interaction 1 2 **3** 4 5 6 7

App, social media and website 1 2 3 4 5 **6**

Your overall satisfaction with the company or brand 1 2 3 4 5 6

Likelihood of recommending this brand to family or friends 1 2 3 4 **5**

How well did the brand fix any issues you faced? 1 2 **3** 4 5

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

Submit



Overview

High-level overview of the Service Hero index approach.

Methodology

Service Hero is an online survey where respondents voted directly on www.servicehero.com regarding the quality of service they receive in private sector companies in Kuwait. The survey was live January 1 - December 31st 2018.

Sample

The index aimed to collect a total sample of 10,000 valid votes for Kuwait distributed over 17 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: Fine Dining, Supermarkets, Clothes and Health Clubs assessment for Call center and Digital were excluded. Respondents were also asked if they would recommend a brand to a friend or relative, what the overall satisfaction is, how did the brand resolve complaints and if there are any other comments they would like to provide.

Security

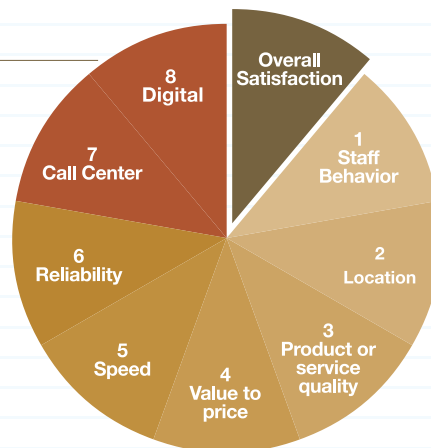
A number of security measures were deployed of either technical nature to verify the authenticity of the voter, or later, at the data cleansing stage, to remove any suspicious data.

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: 14 categories assess all 8 service dimensions, while 3 categories only assess 6 service dimensions.





The questionnaire

What respondents actually voted on.

Note The Call center and Digital dimension questions were exempt from Cafes, Clothes, and Fine Dining service categories.

Before Your expectations before your visit	How would you rate	After Your expectations after your visit
☹️		☺️
1 2 3 4 5 6 7 8 9 10 NA	Staff attitude, knowledge and competence	1 2 3 4 5 6 7 8 9 10 NA
1 2 3 4 5 6 7 8 9 10 NA	Location attractiveness and convenience	1 2 3 4 5 6 7 8 9 10 NA
1 2 3 4 5 6 7 8 9 10 NA	Value for money (price compared to quality) of the product or service	1 2 3 4 5 6 7 8 9 10 NA
1 2 3 4 5 6 7 8 9 10 NA	Product or service quality	1 2 3 4 5 6 7 8 9 10 NA
1 2 3 4 5 6 7 8 9 10 NA	Service speed	1 2 3 4 5 6 7 8 9 10 NA
1 2 3 4 5 6 7 8 9 10 NA	Reliability and accuracy of the product or service	1 2 3 4 5 6 7 8 9 10 NA
1 2 3 4 5 6 7 8 9 10 NA	Their call center	1 2 3 4 5 6 7 8 9 10 NA
1 2 3 4 5 6 7 8 9 10 NA	Their 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 recommending this company to family or friends		
1 2 3 4 5 6 7 8 9 10 NA		
How well did the service compare with your ideal offering		
1 2 3 4 5 6 7 8 9 10 NA		
Do you have any comments or suggestions?		

Respondents voted on 2 levels:

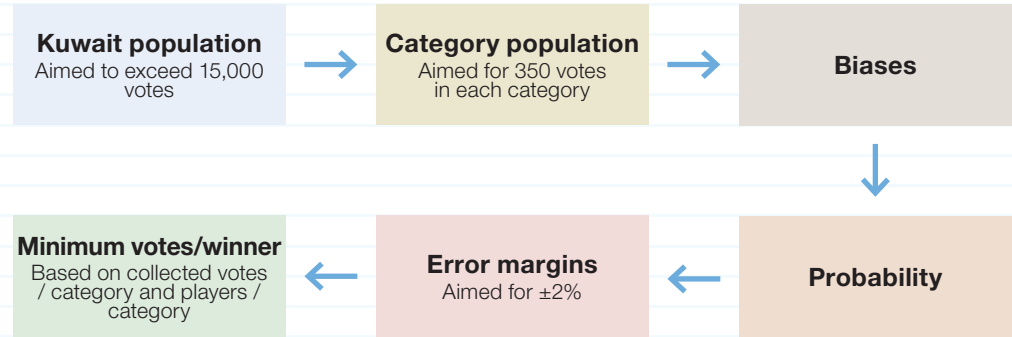
1. What they expected **before** receiving the service
2. What they actually experienced **after** being served

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



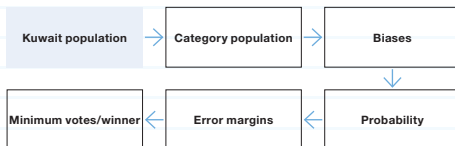
Sampling approach

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 Kuwait is **2,995,000**.

This figures **includes**:

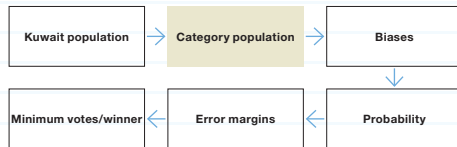
- Males and females
- Kuwaiti and non-Kuwaiti nationalities

It **excludes** (around 750,000 individuals):

- Anyone under 16 years
- Laborers

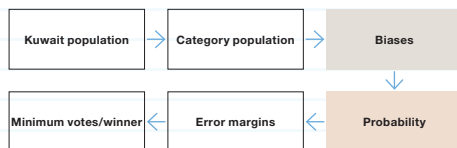
Note: All population figures are from the Public Authority for Civil Information and the Ministry of Planning.

Category population.



1. To ensure statistical relevance, we looked at the **category population** – this is the proportion of Kuwait’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 Kuwait population is a mobile phone user
3. For some categories the **% user population** was smaller e.g. for Fine Dining restaurants, 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 Kuwait, only X% will actually be inclined to vote
 - We have assumed 5% for Kuwait overall is the population bias - in other words, this is the percent of Kuwait’s population who will be inclined to vote online

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.

Sampling approach (continued)

The categories included in the Service Hero assessment.

- The survey covered only commercial or private non-government institutions
- 8 categories were assessed
- Each category can be further broken down into sub categories



Regional Arab Airlines



Automotive: Sales + Service



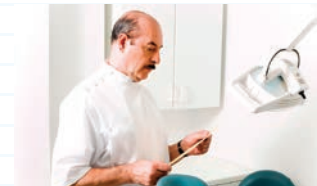
Banks: Conventional + Islamic



Communications: Mobile + ISPs



Leisure: Health club



Health care: Private Hospitals



**Restaurants: Café + Fast food
Formal dining + Casual dining**



**Specialty Stores: Electronics
Supermarkets + Furniture + Clothes**

Minimum sample sizes and error margins for all categories.

Confidence level: 95%

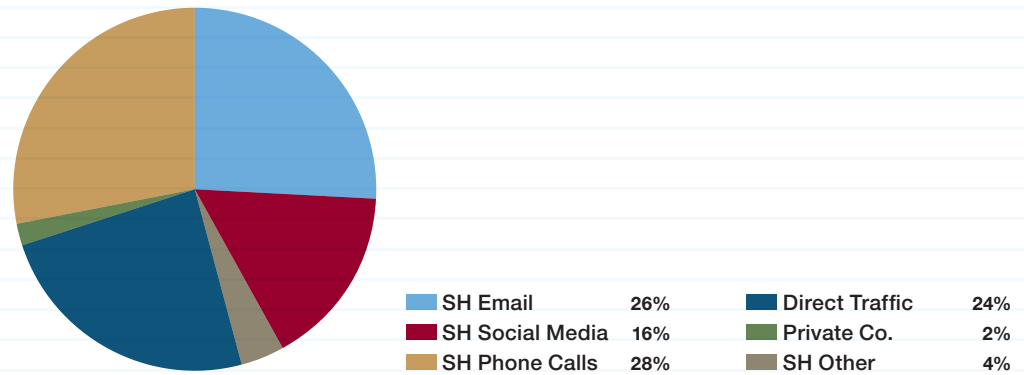
Sector	Biased Population	Sample @ 5%	Total Votes
Airlines	88,186	293	1,494
New Car Sales	88,186	293	866
Car Service	88,186	293	961
Clothing	88,186	293	1,850
Mobile Operator	88,186	293	2,057
ISPs	88,186	293	1,357
Café	88,186	293	1,483
Fast Food	88,186	293	2,733
Casual Dining	88,186	293	1,408
Fine Dining	48,992	242	373
Electronics	88,186	293	1,674
Commercial banks	68,505	273	1,104
Islamic banks	30,833	196	905
Furniture	58,791	259	981
Private Hospital	37,421	216	872
Supermarkets	88,186	293	1,721
Health Clubs	37,421	216	332

This table shows the 17 categories included in the 2018 index. It shows:

- Population bias at 5% i.e. the percent of Kuwait's population who will be inclined to vote online
- Minimum sample needed for an error margin at a 95% confidence level
- Total validated votes obtained

Source of votes and platforms used to vote from

Since the Service Hero CSI is mostly online (70% of assessments), we deploy a promotion plan that utilizes digital marketing. The source is taken from our validated assessments 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.



The phone based assessments were collected using our proprietary database of consumers to ensure all demographic groups and categories were well represented.



Security measures and rules for valid votes

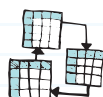
To ensure that each visitor is a legitimate customer, a number of security measures have been put in place.

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 Kuwait 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 7,595 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 **22,171** 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	6,569
Data Cleansing (Automated & Manual)	Votes removed
1 Remove votes that are NA across all dimensions in the after evaluation	yes
2 Remove votes that are only made for before assessment and NA votes for after evaluation	yes
3 Respondent voted for brands that should not be in the assessment	yes
4 Votes exhibited suspicious behavior patterns which raised alarms regarding the authenticity of the assessment.	yes
Total votes removed	(1,026)
Total votes obtained	29,766
Total votes assessed	22,171



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.

Abdulmajeed Al-Shatti

Ex-Chairman of the Board and Managing Director, Commercial Bank of Kuwait



Beginning his career in KISR in 1977, Al Shatti has been an important advisor to important Financial and Oil Producing Institutes such as:

- Member of the Board of Directors for the Commercial Bank of Kuwait (CBK)
- Member of an economic team formed by the Council of Ministers to “Counter the impact of the International Financial Crisis on the Kuwaiti Economy”
- The Steering Committee to develop the Kuwait Institute for Scientific Research (KISR) Seventh Strategic Plan
- Elected to Chair the “Kuwait Banking Association” Board of Directors, passing two important laws (‘The Consumer Debt Relief Fund’ and ‘Economic and Financial Stabilization Law’) during his tenure
- Director on the boards of Bank of Bahrain and Kuwait (2004 to 2008), National Technology Investment Company (2006 to 2008), Kuwait Clearing Company (1997-2001), Housing Finance Company (2002-2004), and Kuwait Shipbuilding and Repair Company (1997-1999)
- Helped the Kuwait Petroleum Corporation (KPC) to establish the International Relations Department

Mr. Al Shatti Graduated from Syracuse University in 1977 in Industrial Engineering and Operations Research, and has a MS in Engineering Economics Systems in 1984 from Stanford University.

Nauman S Sehgal

Chief Operating Officer, Noor Investment Financial Company



Nauman Sehgal is a licensed CPA and a business Graduate. After spending 11 years combined in big four professional advisory and accounting firms (PWC and EY), Nauman joined the Kuwaiti conglomerate Al Wazan Group in 1993 in chief executive and operations position.

Currently he is Chief Operating Officer (COO) of Noor Investments. Nauman has a proven track record in driving companies from a wide spectrum of industries in the State of Kuwait to higher levels of profitability and performance. Throughout his career he has demonstrated the ability to effectively:

- Lead start-ups
- Turn around under performing companies
- Expand businesses through his strategic thinking, team building, effective troubleshooting
- Broad based operational, financial and business development expertise

Nauman’s acute vision and strategy of prioritizing customer service excellence, brand management and maintaining quality standards and best practices has secured recognition for the businesses he led. The successful outcomes are an indication of Nauman’s outstanding leadership and strive towards corporate Excellence.



Advisory Council members (continued)

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. Alessandro Magnoli Bocchi

CEO of Foresight Advisors



Alessandro Magnoli Bocchi is the founder and CEO of Foresight Advisors. Over the past 25 years, he has been working in the field of economic analysis, business management and international investments in Europe, the US, Asia, the Middle East, Latin America, and Africa. Prior to creating Foresight Advisors, Dr. Magnoli Bocchi was Chief Economist and member of the management team and Investment Committee at the Kuwait China Investment Company (KCIC). Before joining KCIC in 2008, he was senior economist with the World Bank, where he was recruited through the Young Professionals Program in 2000. Previously, he held the positions of Research Associate at Harvard University and Economist at the Inter-American Development Bank. He is Qualified Chartered Accountant, Fiscal and Business consultant under Italian jurisdiction (Dottore Commercialista) and has published numerous articles and books. He holds a Ph.D. in Management Sciences from ESADE; an MBA/MIM from CEMS (Bocconi/ESADE); and a BA in Business Administration from Bocconi University. He is also completing a degree in International Law from the University of Parma.

Academic Advisors



Dr. Fahad Al Sumait

Department Chair of the Mass Communication and Media Department and Assistant Professor of Communication at the Gulf University for Science and Technology in Kuwait

Fahed Al-Sumait is an Assistant Professor of Communication and Department Chair of the Mass Communication and Media Department at the Gulf University for Science and Technology in Kuwait, where he has also served as interim Dean of Student Affairs, Advisor to the Vice President of Academic Services and Acting Assistant Dean of the College of Arts and Sciences. He was previously a Fulbright-Hays Dissertation Fellow for his research into contested discourses on Arab democratization, as well as a post-doctoral research Fellow at the Middle East Institute in the National University of Singapore. He is co-editor of the books, “The Arab Uprisings: Catalysts, Dynamics and Trajectories” (2014, Rowman & Littlefield), and “Covering bin Laden: Global Media and the World’s Most Wanted Man” (2015, University of Illinois Press). He holds a BA in Journalism from the University of Washington, an MA in intercultural communication from the University of New Mexico and a PhD in international political communication from the University of Washington

Dr. Samar Baqer

Assistant professor of marketing at the College of Business Administration in Kuwait University



Dr. Samar Baqer is a Fulbright who is currently working as an assistant professor of marketing at the College of Business Administration in Kuwait University.

Since she joined the college she had held several administrative positions. She was the supervisor of the Executive Seminar Unit in 2008. Then, she became the director of the Office of Students Training and Alumni between the years of 2011 and 2013. Recently she became the supervisor of the Entrepreneurship and Innovation Unit, which is the latest addition to the Center of Excellence in Management at the College of Business Administration.

Beside her academic work, Dr. Baqer is a public speaker and a consultant. She worked for the Ministry of Planning in a couple of projects. Moreover, she worked as an advisor for the executive chairman of Kuwait National Fund for SME Development from 2014 to 2016. Recently, she worked as a consultant for KFAS Academy, a non-for-profit company under the umbrella of Kuwait Foundation for the Advancement of Sciences.

She followed her passion for human development and women empowerment by founding a volunteering group called “Jawaher”. This group works on developing several skills for young girls (8 to 16 years old) to prepare them to face life and overcome different types of challenges.

Dr. Baqer is a member of the American Marketing Association, Kuwait Economic Society, and Business and Professional Women Network.



Advisory Council members (continued)

Amal Al-Binali

Vice President for Admissions & Public Affairs at the American University of Kuwait



Amal Al-Binali is the Vice President for Admissions & Public Affairs at the American University of Kuwait (AUK). She manages the departments of Admission, PR & Marketing, and Scholarship & Financial Aid, and serves as AUK's government relationship officer to issues regarding higher education, mostly with the Private Universities Council, with whom she is an active member of the Scholarship Committee.

Additionally, Al-Binali is a member of the Board of Directors for Al-Rayan Holding Company, Kuwait's largest K-12 education company that operates six schools across Kuwait, including the country's leading Indian and Pakistani schools.

During her career, she has worked as the operations manager of a marketing research company based in Lebanon and Jordan, and as a research coordinator at a political think tank at Kuwait University. Al-Binali received a degree in Journalism from the University of Leipzig, Germany, and is now pursuing a Master's degree in Business Administration from the University of Hull, UK.

Dr. Majed Alsarheed

Head of the Innovation and Entrepreneurship Center at the Australian College of Kuwait



Dr. Majed Alsarheed is the Head of the Innovation and Entrepreneurship Center at the Australian College of Kuwait. He has over 20 years of industrial and academic experience including the start-up and operation of his manufacturing facility in Kuwait. He is currently teaching Entrepreneurship at the Australian College of Kuwait. Prior to joining the Australian College of Kuwait, Dr. Alsarheed worked for several major Aerospace companies in the United States, leveraging his substantial experience in project management as well as design and development of aircraft equipment. Through his significant background in design and analysis, Dr. Alsarheed has managed multi-million dollar projects from conception to delivery.

Dr. Alsarheed obtained his Doctor of Philosophy and Mechanical engineering from Lehigh University, in PA, USA, and has conducted multiple entrepreneurship training programs throughout Kuwait.

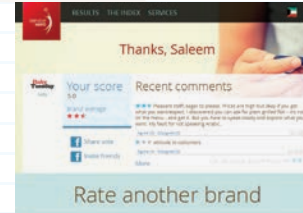


Process overview of the key survey steps

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



1. Web banner / Social media promoting Service Hero



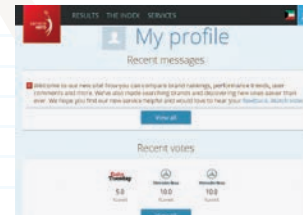
5. Respondent votes for other companies



9. Results in permanent database once confirmed



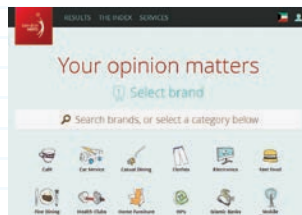
2. Directs to servicehero.com, Mobile App or facebook.com



6. Respondent submits vote with personal data



10. Data cleansing & verification procedures after close of votes



3. Respondent chooses category & brand



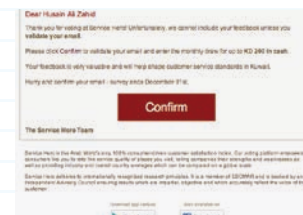
7. Responses stored in temporary database



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



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About Khayal
Consultants



خيال للاستشارات
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
<p>Print</p> <ul style="list-style-type: none"> Annual Reports Corporate Brochures Marketing Collateral Newsletters Calendars Greetings & Occasions Articles & Guides <p>Branding</p> <ul style="list-style-type: none"> Logo Development Usage Manuals Stationary Design <p>Motion</p> <ul style="list-style-type: none"> Motion Graphics Interactive 	<p>Consulting</p> <ul style="list-style-type: none"> Strategy & Planning Benchmarking Traffic & Performance Analysis <p>Sites & Portals</p> <ul style="list-style-type: none"> UX & UI Design Development <p>Mobile Engagement</p> <ul style="list-style-type: none"> Mobile Optimized Websites Mobile Apps Mobile Messaging <p>xReality</p> <ul style="list-style-type: none"> Virtual Reality Augmented Reality Mixed Reality <p>Social Media</p> <ul style="list-style-type: none"> Development Monitoring & Analytics <p>e-Marketing Services</p> <ul style="list-style-type: none"> SEO & SEM Online Advertising <p>Solutions & Support</p> <ul style="list-style-type: none"> Content Management Digital Signage & Way Finding Hosting & Monitoring Maintenance & Support 	<p>Consulting</p> <ul style="list-style-type: none"> Strategy Review Business Model Review Value Chain Image / Brand Audit <p>Research</p> <ul style="list-style-type: none"> Focus Groups In-Depth Interviews Online Surveys Phone Surveys Mystery Shopping <p>Manpower Development</p> <ul style="list-style-type: none"> Service Quality ABC Training Employee Morale

A selection of some of Khayal's clients



Prime Minister Diwan



بنك الكويت المركزي
Central Bank of Kuwait



ALRIFAI



KUFPEC
Kuwait Foreign Petroleum Exploration Co. K.S.C.
A Subsidiary of Kuwait Petroleum Corporation



NATIONAL
INVESTMENTS
COMPANY



مؤسسة الخليج للاستثمار
Gulf Investment Corporation



NBK
CAPITAL



مصانع الحكم
alam STEEL



GUST
SINCE 1987



hayat
communications



مستشفى المواصلات الجديد
NEW MOWASAT HOSPITAL



مركز سلطان
THE SULTAN CENTER



بنك الخليج
GULF BANK



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



IPE
A'Takamul



بنك بروجان
BURGAN BANK



ميسان
meysan
partners



الإمتياز
الاستثمار للاستثمار
ALIMTIYAZ INVESTMENT



ASiYA
INVESTMENTS



ALARGAN
مركز خدمة الإسكان الدولي
ALARGAN INTERNATIONAL REAL ESTATE CO.



AREF



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



Disclaimer

Please note that the views and opinions expressed herein are solely those of the author(s)/Public Survey and do not necessarily reflect those of the company.

While Service Hero adheres to internationally recognized standard market research protocols, and has selected sample sizes to ensure accuracy, results may include a slight margin of error as is common in any sampling techniques. Therefore no warranties or assurances are made in relation to the utmost accuracy or comprehensiveness and content of this report and attachments.

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