



KUWAIT RESULTS

The voice of the consumer

2019



Service Dimensions
Airlines
Automotive: Car Service
Automotive: New Car Sales
Clothes
Communications: ISPs
Banks
Banks
Furniture
Hospitals
Brands
Safe
Restaurants: Fast Food
Restaurants: Fine Dining
Specialty Electronics
Categories
Consumer Index
Consumer Index
3 Product or service quality index
4 Value to price index
5 Speed index
6 Reliability index
7 Call center index
8 Digital index
9 Loyalty index
10 Complaints Resolution

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

Sporty Stores: Electronics
Restaurants: Fine Dining
Restaurants: Fast Food
Restaurants: Casual Dining
Restaurants: Café
Local Brands
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
Service Dimensions

Credibility.
Integrity.
Relevance.



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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 training curriculums for service excellence in:

- The ABC'S of Service
- Dealing with Conflict
- Coaching & Mentoring
- Presentation Skills

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Word from the president



In our tenth year, the Service Hero Customer Satisfaction Index continues to be unique: it is the only independent national CSI in the region which rates different industry categories using a uniform benchmark. It deploys rigorous research methods to provide companies with relevant, impartial data collected from every day consumers using best-practices research standards.

Based on 22,514 validated consumer assessments in 2019, customer satisfaction in Kuwait is an Ordinary score of 75.1 points (considered average service) out of a maximum of 100 points. This is roughly the same score as the previous year, yet, unlike 2018, customers expect good service (84.3 points) with a gap of -9.2 points between what they anticipated and what they received. In fact, the index finds that customer expectations have been on the rise but companies' ability to meet their expectations has been widening.

To ensure we maintain our impartiality, we have a respected Independent Advisory Council comprised of leading academics and professionals to ensure that we comply with our own standards and those of the European Society for Opinions and Market Research. All collected data 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.

Among the 18 categories listed in the index, strongest are Cafés at 83.1, Casual Dining at 81.1, as well as Gyms and New Car Sales and Clothes all at 81 points. Scoring lowest and barely meeting customer expectations, (Bland in our legend), are Mobile Operators at 67.9 and ISPs 61.9 points. Since 2010 most improved are Car Service 16% and Fast Food, 11%. Three categories dropped - ISPs -10%, Home Furniture -6% and Supermarkets -5%.

The index for complaint resolution is an Ordinary score of 72.5 - leaving a lot of room for improvement. Lowest scoring categories are so weak that they are not even meeting customer needs, we label them as "Unheroic" and here we find ISPs at 51.4 and Mobile Operators 58.2 points. Only five categories had good scores over 80 points: Cafés, Clothes, Casual Dining, Health Clubs and Local Restaurants.

Most customer interactions, 70%, still occur In-store while 25% are Online and 3% on the Phone. Though, this pattern is flipped for ISPs 75%, Mobile Operators 65%, and Banks 50% where online has the highest share of interactions. Satisfaction is highest when the interaction is Online 76.9 points, followed by In-store 74.7, and Phone based 73.9.

The data provided by our reports aid companies make better service improvement decisions. By looking at their position compared to peers, trends over time, demographic group, and open-ended comments, the Service Hero Customer Satisfaction Index helps them better align to customer needs. A decade of data based on 300,000 collected consumer assessments in Kuwait and the UAE proves that consumers want to give brands feedback to improve. If brands do not listen, they will suffer market share erosion to competitors that are stronger than them in building customer satisfaction and loyalty programs.

A handwritten signature in blue ink, appearing to read "Faten".

Faten Abu Ghazaleh
President

About our sponsor

Enabling a Culture of Science, Technology and Innovation in Kuwait



The Kuwait Foundation for the Advancement of Sciences was established in 1976 by an Amiri Decree under the direction of the late Amir of Kuwait, H. H. Sheikh Jaber Al-Ahmad Al-Jaber Al-Sabah with a vision to create and nurture a thriving culture of science, technology, and innovation for a sustainable Kuwait.

KFAS operations are funded by contributions from the private shareholding companies of Kuwait as part of their corporate social responsibility. The contributions currently amount to one percent (1%) of their annual net profit.

KFAS mission to “stimulate and catalyze the advancement of Science, Technology and Innovation (STI) for the benefit of society, researchers, and enterprise in Kuwait,” continues to be at the heart of all the Foundation’s activities and plans.

Since its creation, KFAS has successfully established a number of dedicated research and educational centers of excellence in Kuwait. These are: The Scientific Center, Dasman Diabetes Institute, Sabah Al-Ahmad Center for Giftedness & Creativity, and Jaber Al-Ahmad Center for Nuclear Medicine and Molecular Imaging. These centers are recognized as world-class facilities and pioneering scientific research institutes. In addition, KFAS has established the Advancement of Sciences Publishing Company, the Foundation’s publishing arm and most recently, KFAS Academy, an online university for continued education.

The limited resources for R&D and STI in Kuwait present constraints and challenges in the drive towards a knowledge-based economy. The new 2017-2021 strategy therefore aims to work with the government to help increase in multiple folds the rate of government funding of research to reach the minimum international average of 1% of GDP.

With the conclusion of the previous five-year strategy and the commencement of the next (2017-2021), KFAS is continuing to contribute towards the creation of a rich scientific culture in Kuwait and to enable a sustainable and robust knowledge based economy.

About our sponsor

KFAS Strategy (2017 - 2021)



Under the KFAS 2017-2021 strategy, the foundation has renewed its commitment to play a leading role in supporting efforts to transform the country into a knowledge-driven economy. This will be achieved through investment in Human Resource development and national projects that provide innovative solutions to challenges of national priority.

This strategy is centered around three main strategic thrust areas:

1. Advocating a scientific culture to enhance science, technology and innovation throughout the community, with a particular emphasis on the youth.
2. Fostering research and development, through investment in research projects and the deployment of innovative technologies to address national priority issues.
3. Enhancing the growth and diversification of the private sector through STI.

These strategic thrust areas are further enriched by support programs that provide resources and tools to ensure that the overall strategic objectives of the Foundation are successfully met, and catalyzing the change needed in Kuwait to foster future development and long-term sustainability.

Vision:

“A thriving culture of science, technology and innovation (STI) for a sustainable Kuwait”.

Mission:

“Stimulate and catalyse the advancement of STI for the benefit of society, research and enterprise in Kuwait.

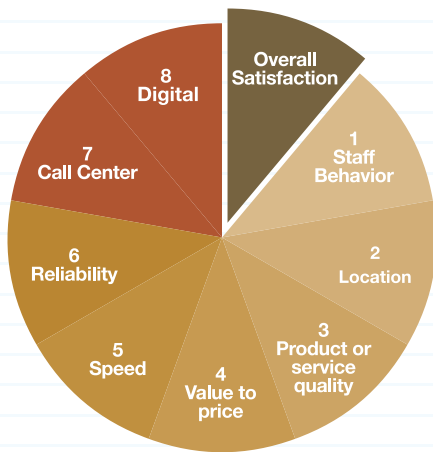


1
Executive
summary



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 1st - December 31st 2019. 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 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 28,412 assessments were cleaned to arrive at the final 22,514 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 84.3 on Expectation (before dealing with a brand) and 75.1 for Actual Satisfaction (after dealing with it). Since the score for Actual Satisfaction is lower by 9.2, this means consumers have higher expectations than actual satisfaction. The highest service dimensions are Staff Attitude (78.5), Reliability (77.2), and Website (76.9), while the lowest are for Value for Money (69.6), and Call Center (74.8).

Demographics

Non Arabs, Females, older customers, and customers with a low education level have the highest satisfaction scores while Arabs, Males, customers with a high education level, and those aged 50-59 have the lowest satisfaction scores.

Loyalty and NPS

Kuwait scored 75.9 on the likelihood of recommending a brand (Loyalty). Females, Non Arabs, customers aged 18-29 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 25%, with Arabs, Males, those aged 50-59, and customers with high education are least loyal.

Categories

Of the 18 categories assessed, 8 of them matched, or exceeded, the Kuwait Index score. These were mostly with Restaurants, New Car Sales, and Clothes. The lowest scoring categories are ISPs, Mobile Operators, and Home Furniture.

Interaction and visit frequency

Based on where consumers interacted with the brand (Over the phone, Online, and In-store), consumers who interacted Online had the highest satisfaction (76.9), while interaction Over the Phone scored lowest (73.9). Regarding the Frequency of their interaction with the brand (Weekly, Monthly, 3 months, 6 months, Annually), we find that Weekly interactions scored highest (80.1) and Annually scored lowest (66.0). This suggests that consumers visit the brands they are satisfied with more than those that do not satisfy them which they visit less frequently.

Changes since last year

Kuwait decreased by 0.3 points since last year and a few demographic groups declined in satisfaction. The consumers with the most improvement since 2018 are Non Arabs and consumers with a higher education.

Most dimensions increased in satisfaction from the previous year with Digital services growing 4% and Speed by 1%. In the industry category, Health Clubs and New Car Sales had positive growth while Home Furniture and Supermarkets showed the largest negative growth. There was a 5% decrease in the NPS to 2018, with Females, Kuwaitis & Arabs decreasing the most.

Changes from 2010

In the ten years since the index started in 2010, Kuwait has increased by 3% (2.5 points) in overall customer satisfaction. The demographic groups that dropped in satisfaction since 2010 are 50-59 year olds, Arabs, and University graduates.

All dimensions increased in satisfaction over the ten year period, with the most satisfaction growth for Call Center, Product Quality, and Speed of Service. By category, Car Service (16%) and Fast Food (11%) had the most significant growth while ISP's (-10%), Home Furniture (-6%) and Supermarkets (-5%) declined the most.

Comparison to UAE, US, & Singapore CSI

The US Index scored 75.7 for their national index, putting them above Kuwait. UAE scored 76.7, higher than the Kuwait Index by 1.6 points, which is a not significantly higher score than consumer satisfaction in Kuwait.

The Singapore CSI stands at 73.5, much lower than all national indexes.



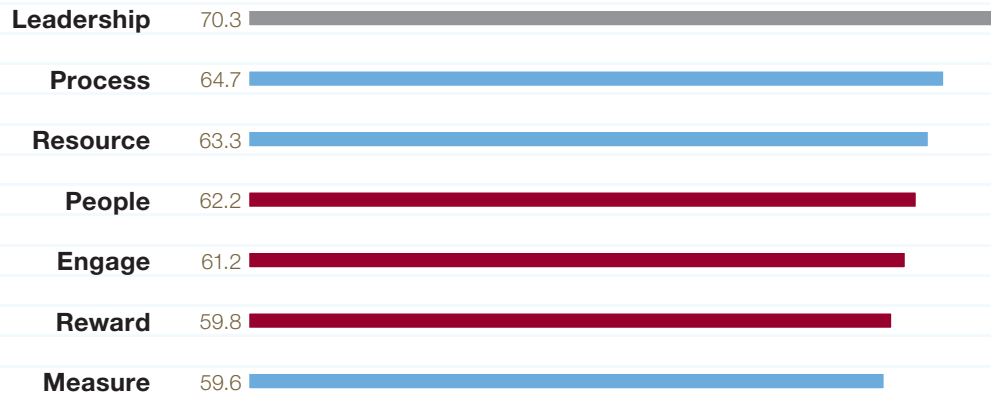
Building a Culture of Excellence

61.6 points Culture of Excellence score 2019

The Culture of Excellence Index is a bilingual online survey comprised of 65 questions that employees of companies complete using a 10-point scale. It focuses on the Service Hero Trinity of Excellence model: **Leadership** (set the direction and inspire), **Win Hearts** (engage, manage the people element, reward), and **Convince the Mind** (measure, introduce the right processes, allocate resources). Each pillar is comprised of building blocks that are rated as per the framework to provide a comprehensive benchmark of the culture's orientation to excellence.

Based on over 1500 assessments collected to date, we find that staff evaluate their companies more critically than consumers as on average the CEI is 61.6 points and is 13.5 points lower than the CSI. Within the framework we have seen that companies exert more effort on factors related to Convince the Mind scoring 62.5 on average (indicated in blue in the chart) than with factors related to Win Hearts 61.1 score (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. It helps organizations to engage their team in a conversation on what service excellence level they should aspire to achieve to align around it.

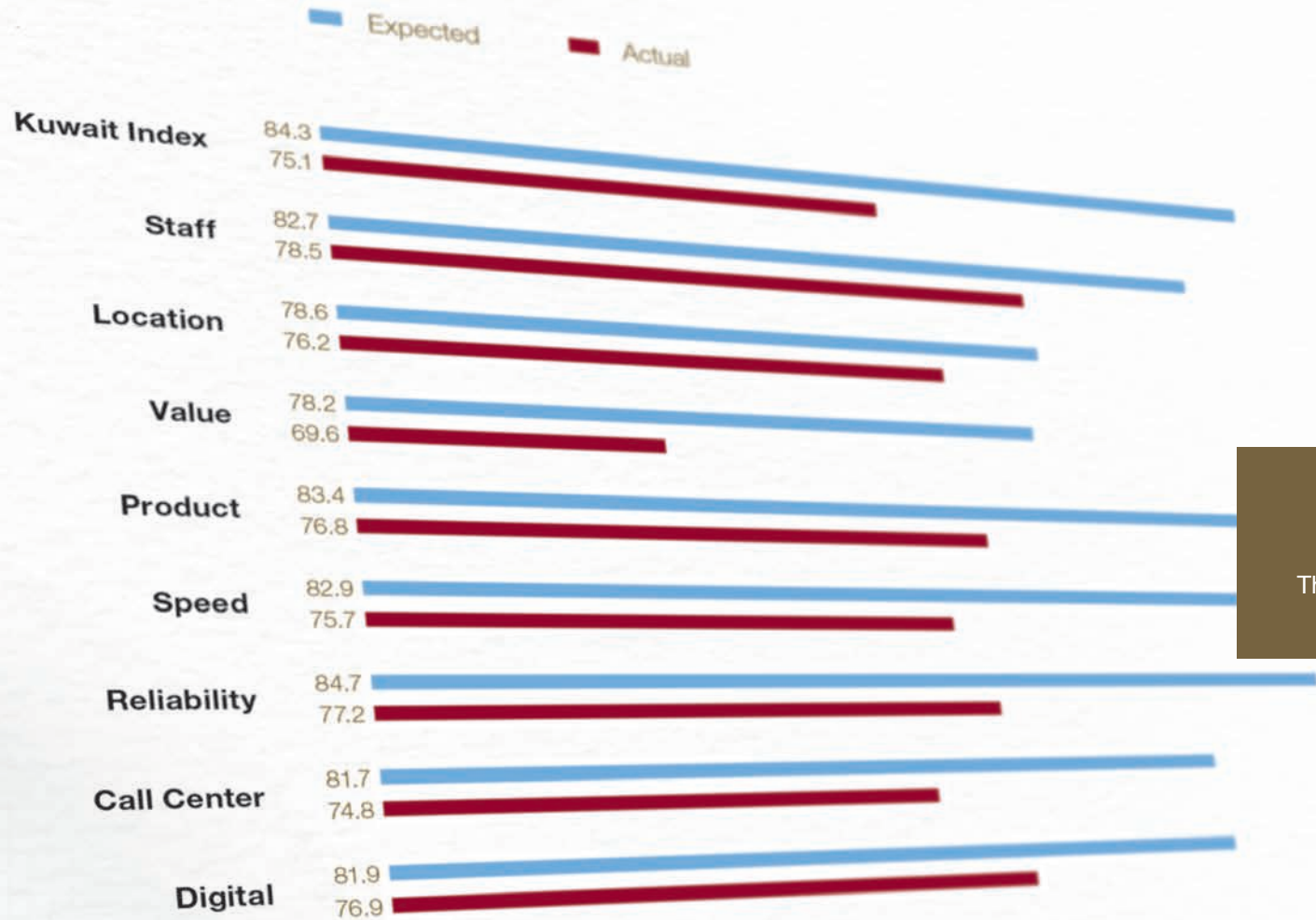


Note: Grey indicates factors under winning hearts, Blue indicates factors to do with the mind. Red indicates Leadership as a pillar.



Kuwait Index by service dimension

Kuwait Index 2019 service dimension



2

The Kuwait Index

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 Location.

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 Call Center.

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



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 2019	Votes 2019 Distribution	Kuwait eligible population distribution
Gender			
Female	7,807	34%	33%
Male	14,402	63%	67%
Nationality			
Arabs	10,443	46%	See note ¹
Kuwaiti	5,322	23%	32%
Non Arabs	6,317	28%	See note ¹
Age Groups			
16 to 17 Years	148	0%	10%
18 to 29 Years	4,559	20%	29%
30 to 39 Years	9,262	41%	29%
40 to 49 Years	5,454	24%	20%
50 to 59 Years	2,053	9%	10%
More Than 60 Years	298	1%	2%
Education			
Elementary or below	149	0%	See note ²
High school	2,050	9%	See note ²
Diploma	3,655	16%	See note ²
University graduate	12,512	55%	See note ²
Master or PHD	3,286	14%	See note ²
Total	22,514	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.

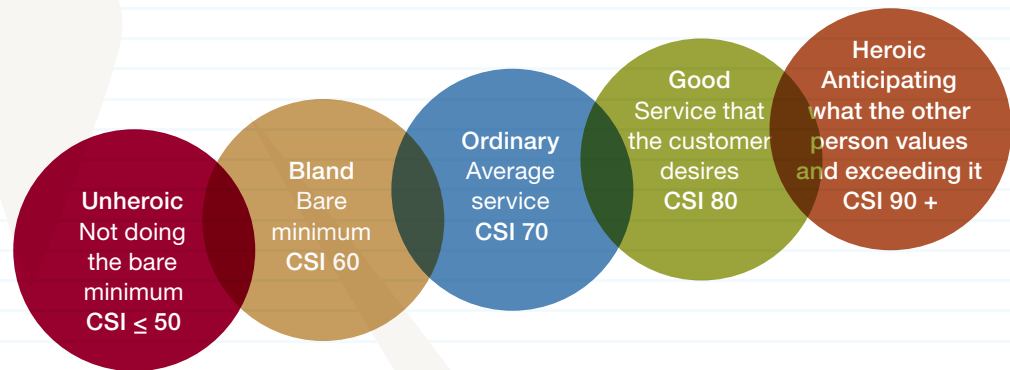
Note 1: Kuwait population data is only split by Kuwaiti or non-Kuwaiti.

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



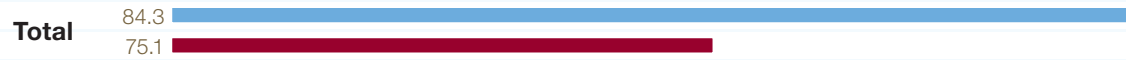
Companies fall into one of the **five groups** regarding the strength of service based on the score that they obtain. On the country level, the same legend is applied. For example, if the score for Kuwait is a 70, it is then placed at the bottom of the **“Ordinary”** category.



Kuwait Index: Before and after

Service Hero Index - Kuwait 2019

■ Average of Expectation Index
 ■ Average of Actual Index



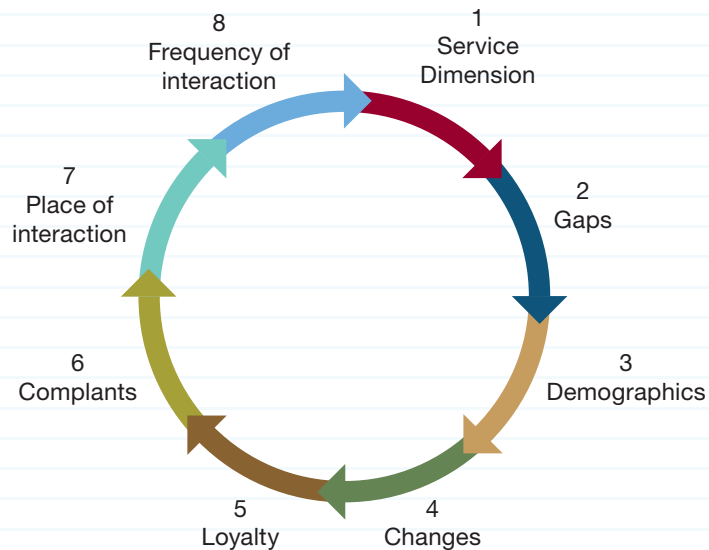
A gap of -9.2 between expected and actual

Usually consumer expectations will be higher than actual service assessments. In 2019 consumers had higher expectations and lower satisfaction, meaning we are below expectations by a gap of -9.2 which is not a healthy gap.

Kuwait scored 84.3 on average for **Expected** standards and it scored 75.1 on **Actual** service standards – placing it in the **Moderate** service level.



How results will be displayed

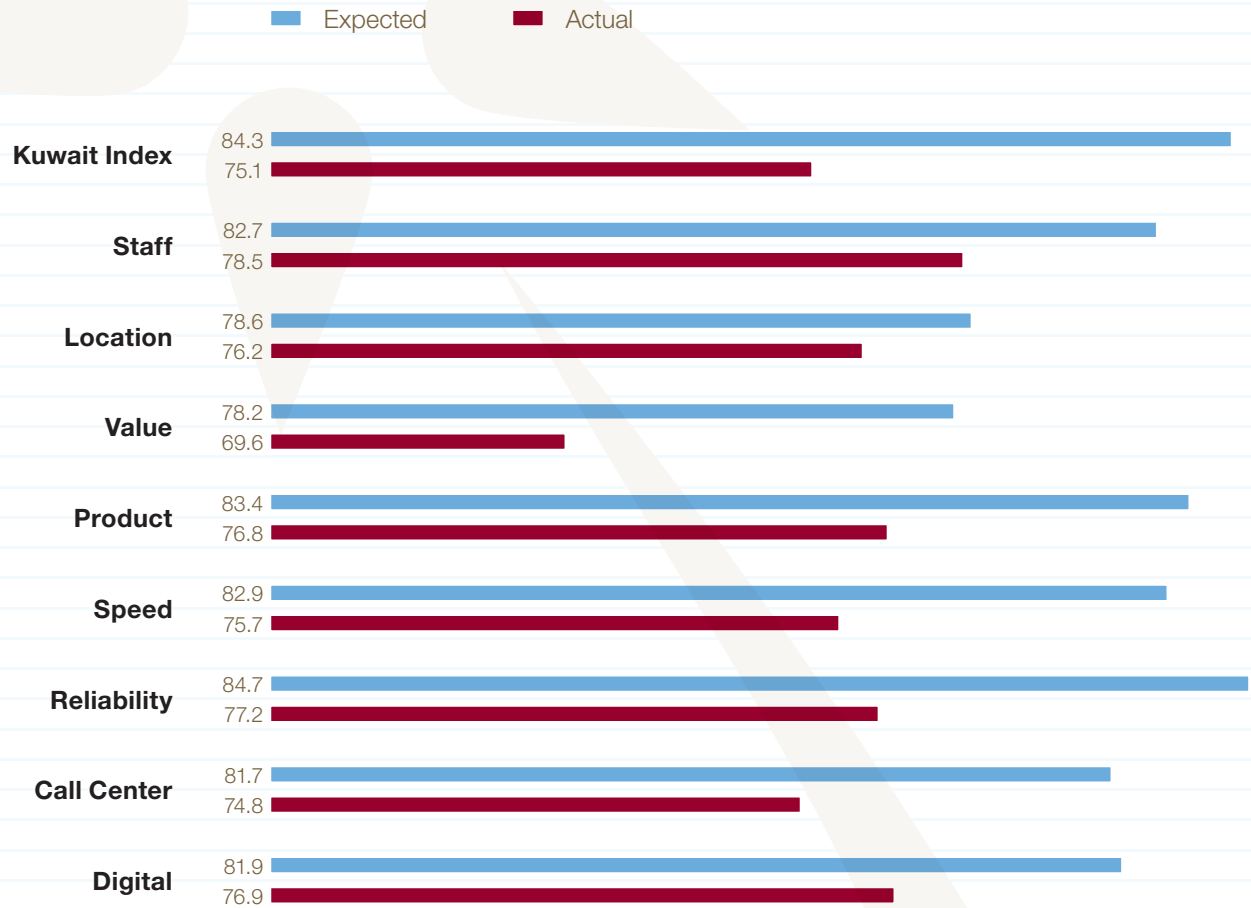


Results will be reported on levels as seen in the chart.



Kuwait Index by service dimension

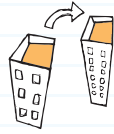
Kuwait Index 2019 service dimension



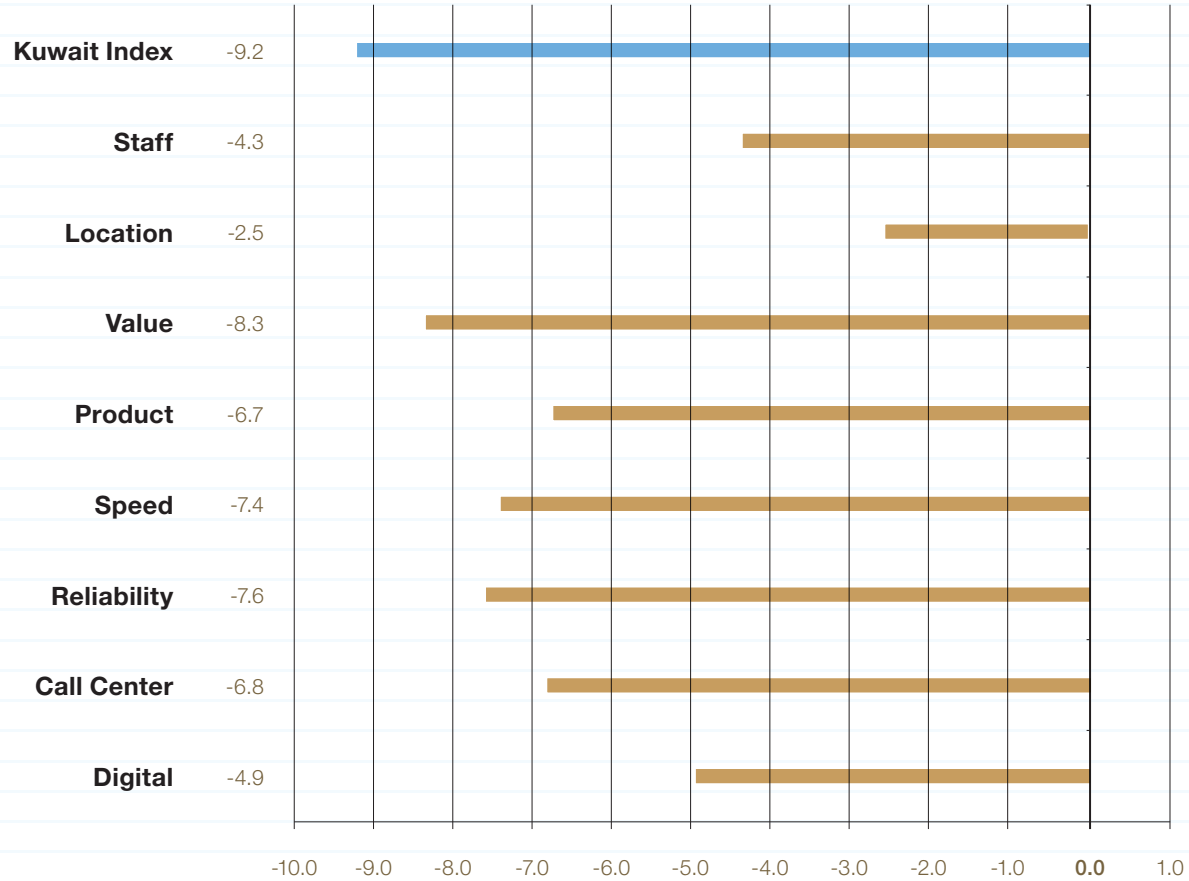
The highest score per dimension on an **Expected** level (before dealing with a brand) is for Reliability and Product while the lowest is for Value for Money and Location.

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 Call Center.

Note: Conventional categories are evaluated on satisfaction with their Call Center and Digital Service with the exclusion of 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. We consider a negative gap is acceptable as long as it is within +/- 3 point range; therefore, companies in 2019 are not meeting customer expectations for most dimensions.



Index by demographic factors

	Expected	Actual	Gap
Female	85.9	76.9	-9.0
Male	83.6	74.2	-9.4
Arabs	84.1	74.2	-9.9
Kuwaiti	83.2	74.3	-8.9
Non Arabs	85.5	77.7	-7.8
16 to 17 years	86.9	75.7	-11.1
18 to 29 years	85.4	77.6	-7.8
30 to 39 years	84.0	74.6	-9.4
40 to 49 years	84.1	74.8	-9.3
50 to 59 years	83.1	73.7	-9.4
More than 60 years	86.7	78.2	-8.5
Elementary or below	86.5	78.5	-8.0
High school	85.6	77.8	-7.8
Diploma	84.7	76.6	-8.1
University graduate	84.8	75.1	-9.7
Master or PHD	82.6	73.0	-9.6

Females are more satisfied than Males in 2019, however both genders have significant gaps between expected and actual satisfaction.

Arabs are the least satisfied nationality, while Non Arabs have the highest satisfaction.

The 50-59 age group has the lowest satisfaction and those aged 60+ have the highest, with 18-29 year olds scoring the second highest satisfaction. All age groups show significant gaps between expected and actual satisfaction.

By education, those with a lower education had the highest satisfaction while those with a Master or PhD had the lowest.



Dimension scores by demographic

Actual scores and gaps between actual and expected scores

Actual	Female	Male	Arabs	Kuwaitis	Non Arabs	Kuwait Index
Staff	79.6	77.6	77.9	78.2	79.2	78.3
Location	77.7	74.9	74.8	75.8	77.7	75.9
Value	70.0	68.3	67.5	68.5	71.9	69.1
Product	77.6	76.1	75.6	76.2	79	76.6
Speed	77.1	74.5	74.9	74.9	77.4	75.4
Reliability	79.0	76.4	76.3	76.5	79.2	77.2
Call Center	78.7	73.1	74.4	72.2	77.3	74.8
Digital	80.0	75.4	76.3	71.7	80.2	76.9
Overall	76.9	74.2	74.2	74.3	77.7	75.1
Gap						
Staff	-3.2	-4.6	-4.1	-5.3	-3.7	-4.3
Location	-1.6	-2.8	-2.8	-2.8	-1.8	-2.5
Value	-7.6	-8.4	-8.9	-8.2	-7.3	-8.3
Product	-6.6	-6.8	-7.4	-6.7	-5.1	-6.7
Speed	-7.1	-7.6	-7.6	-7.4	-6.3	-7.4
Reliability	-7.1	-7.6	-8.1	-7.8	-6.2	-7.6
Call Center	-4.6	-7.5	-5.7	-9.5	-6.6	-6.8
Digital	-3.6	-5.4	-4.4	-8.3	-4.8	-4.9
Overall Gap	-9.0	-9.4	-9.9	-8.9	-7.8	-9.2
Best						
Worst						

Gender

Females scored **highest** on Digital, and **lowest** on Value. Males scored **highest** on Staff and, like Females, scored **lowest** on Value.

Nationality

Kuwaitis and Arabs are the **most** satisfied with Staff and the **least** satisfied with Value. Non Arabs also are **least** satisfied with Value and are **most** satisfied with Digital service.

Gaps

In terms of gaps meeting expectations, Females & Males **largest** gap is Value.

For Kuwaitis the **largest** gaps are in Call Center, Value and Digital, for Arabs they are **largest** for Value and Reliability and for Non Arabs they are **highest** for Value and Call Center.



Dimension scores by age group

Actual scores and gaps between actual and expected scores

							Kuwait
Actual	16-17	18-29	30-39	40-49	50-59	60+	Index
Staff	81.1	80.7	78.0	77.9	76.7	80.2	78.3
Location	84.4	78.1	75.7	75.0	73.8	77.7	75.9
Value	71.4	71.7	68.7	67.8	67.7	74.0	69.1
Product	80.3	78.6	76.3	75.9	75.4	79.6	76.6
Speed	80.5	77.3	74.9	74.8	74.1	79.0	75.4
Reliability	79.8	79.5	76.8	76.4	75.3	80.8	77.2
Call Center	81.0	79.4	73.5	73.2	74.6	80.7	74.8
Digital	82.8	81.3	75.8	75.1	71.7	83.7	76.9
Overall	75.7	77.6	74.6	74.8	73.7	78.2	75.1
Gap							
Staff	-1.8	-2.4	-4.6	-4.2	-5.1	-3.9	-4.3
Location	0.3	-1.2	-2.4	-2.4	-3.9	-2.0	-2.5
Value	-6.0	-6.4	-8.5	-8.8	-9.9	-6.1	-8.3
Product	-5.6	-5.4	-6.9	-6.8	-7.2	-6.1	-6.7
Speed	-4.2	-6.1	-7.8	-7.4	-8.0	-6.5	-7.4
Reliability	-8.0	-5.6	-7.7	-7.8	-8.6	-6.6	-7.6
Call Center	-4.7	-2.5	-7.5	-5.7	-7.8	-3.9	-6.8
Digital	-5.5	-1.7	-6.2	-4.9	-10.3	-2.7	-4.9
Overall Gap	-11.1	-7.8	-9.4	-9.3	-9.4	-8.5	-9.2
Best							
Worst							

Satisfaction

Value is **lowest** for all age groups. The **highest** satisfaction for most age groups is Staff, Digital, and Location.

Gaps

In terms of **positive** gaps, only Location for 16-17 year olds was meeting expectations, while every other dimension scored negative gaps.



Dimension scores by education

Actual scores and gaps between actual and expected scores

	Elementary or below	High school	Diploma	University graduate	Master or PHD	Kuwait Index
Actual						
Staff	79.0	80.6	80.2	78.4	75.9	78.3
Location	83.4	77.6	77.0	75.8	74.3	75.9
Value	67.5	69.9	70.9	69.0	67.1	69.1
Product	75.6	79.5	78.6	76.6	74.3	76.6
Speed	78.1	78.8	76.4	75.3	73.4	75.4
Reliability	78.8	79.8	78.5	77.3	75.2	77.2
Call Center	78.8	82.6	75.5	74.9	72.1	74.8
Digital	80.6	83.6	76.1	77.3	72.6	76.9
Overall	78.5	77.8	76.6	75.1	73.0	75.1
Gap						
Staff	-6.3	-2.3	-4.3	-4.6	-4.3	-4.3
Location	0.0	-1.4	-3.0	-2.6	-2.2	-2.5
Value	-9.9	-7.3	-7.8	-8.7	-8.3	-8.3
Product	-9.8	-4.4	-5.8	-7.0	-7.1	-6.7
Speed	-7.8	-5.4	-7.2	-7.7	-7.7	-7.4
Reliability	-8.0	-5.7	-7.1	-7.8	-7.6	-7.6
Call Center	-2.7	-2.2	-7.8	-7.1	-4.3	-6.8
Digital	-3.9	-2.3	-7.1	-4.6	-4.8	-4.9
Overall Gap	-8.0	-7.8	-8.1	-9.7	-9.6	-9.2
Best						
Worst						

Satisfaction

Most education groups scored Staff **highest**, followed by Location and Digital. All levels had Value as the **lowest** scoring dimension.

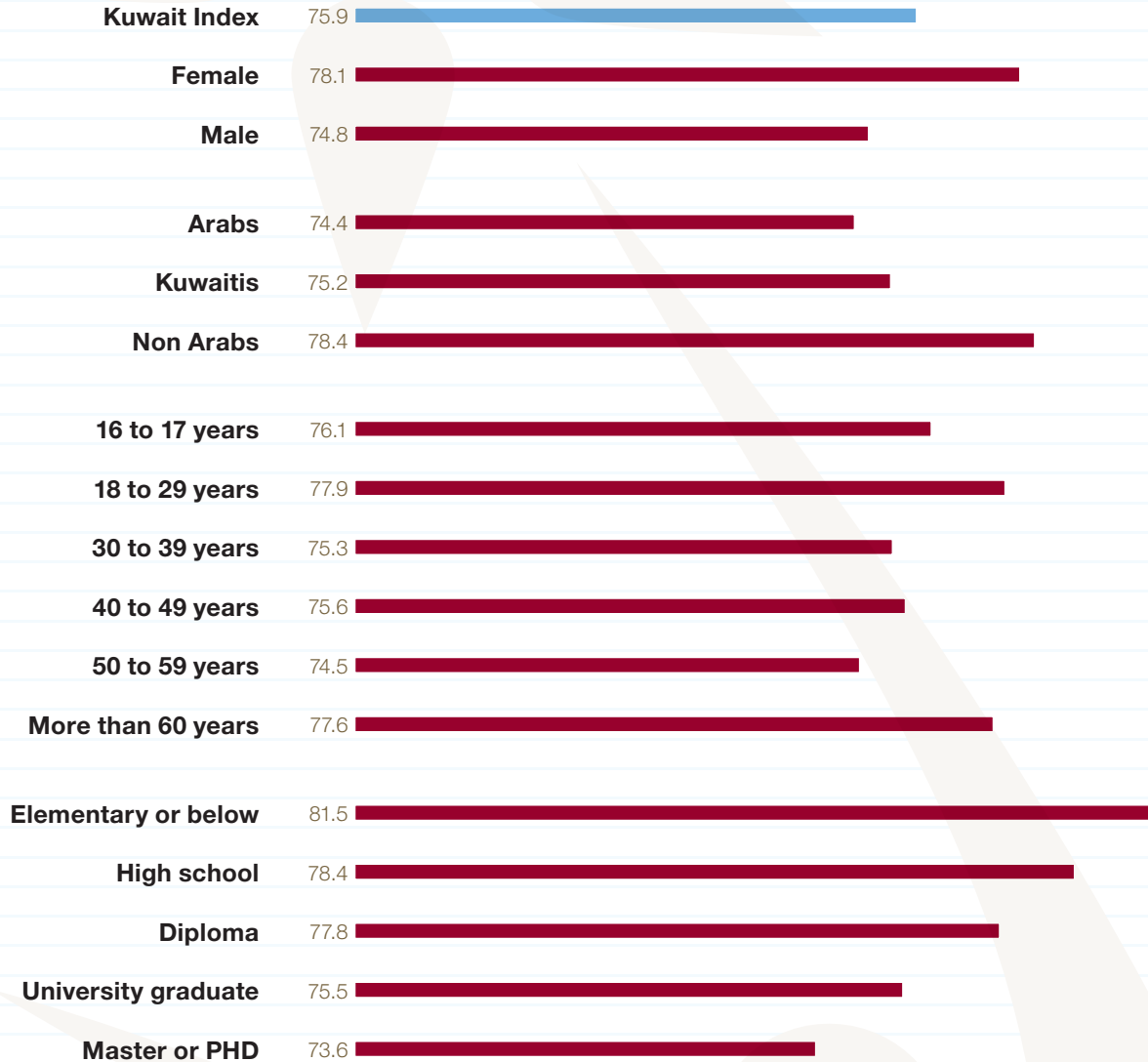
Gaps

There was one **positive** gap across all education levels with Elementary or below scoring **positive** with Location. The **highest** negative gaps for all education levels is with Value.



Image and loyalty

Kuwait Index demographics recommend scores 2019



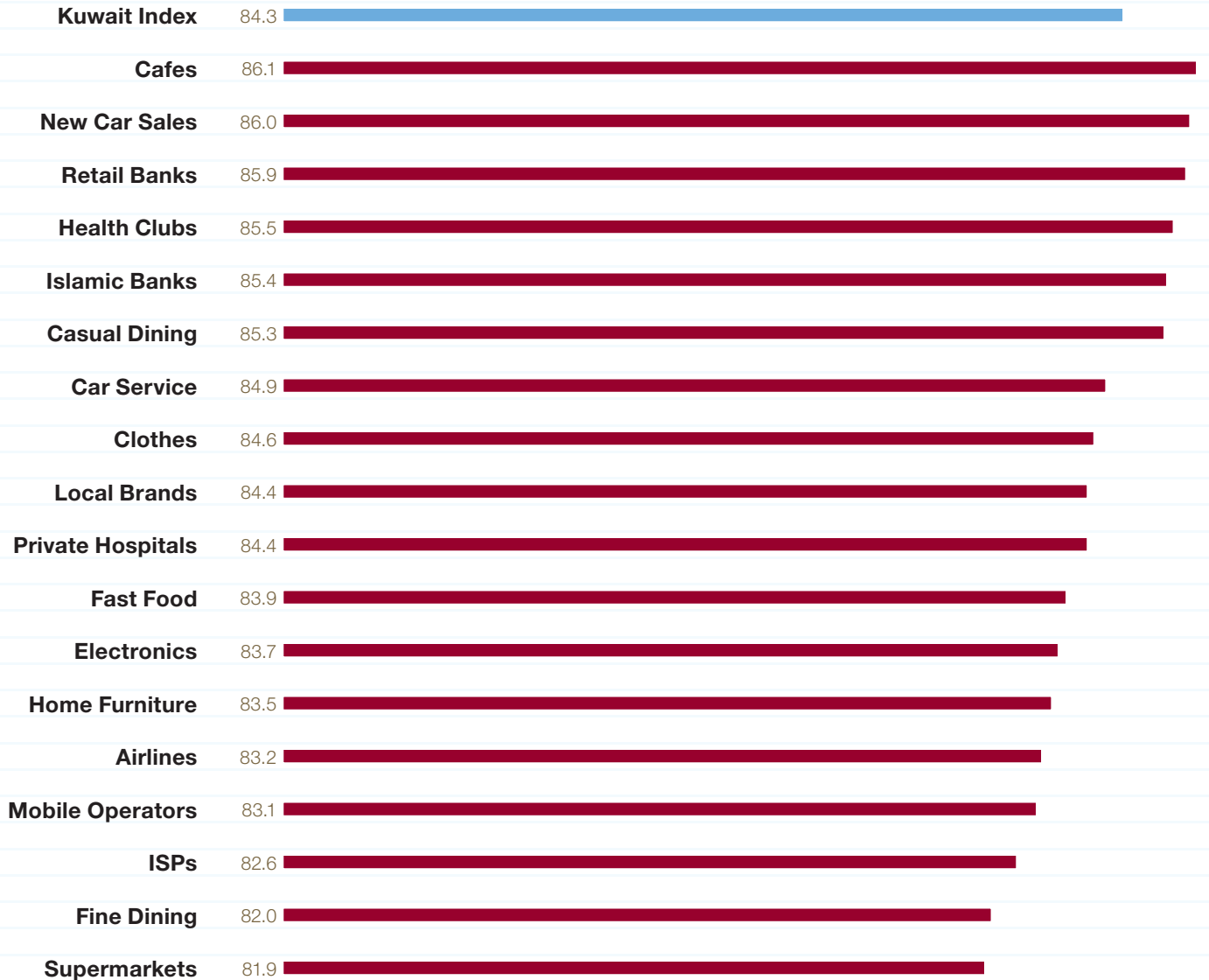
The two age groups that are more likely to recommend a brand are the 18-29 and 60+ age groups. Typically, younger consumers tend to recommend a brand to their peers while the same applies to older groups. The least likely age group to recommend a brand is those aged 50-59 who may have become less tolerant to poor service over the years.

Females are more likely to recommend a brand than Males. Arabs are the least likely nationality to recommend a brand. Those with a higher education tend to have a lower recommendation score as well.



The Kuwait expected index across all 18 categories

Expected Index



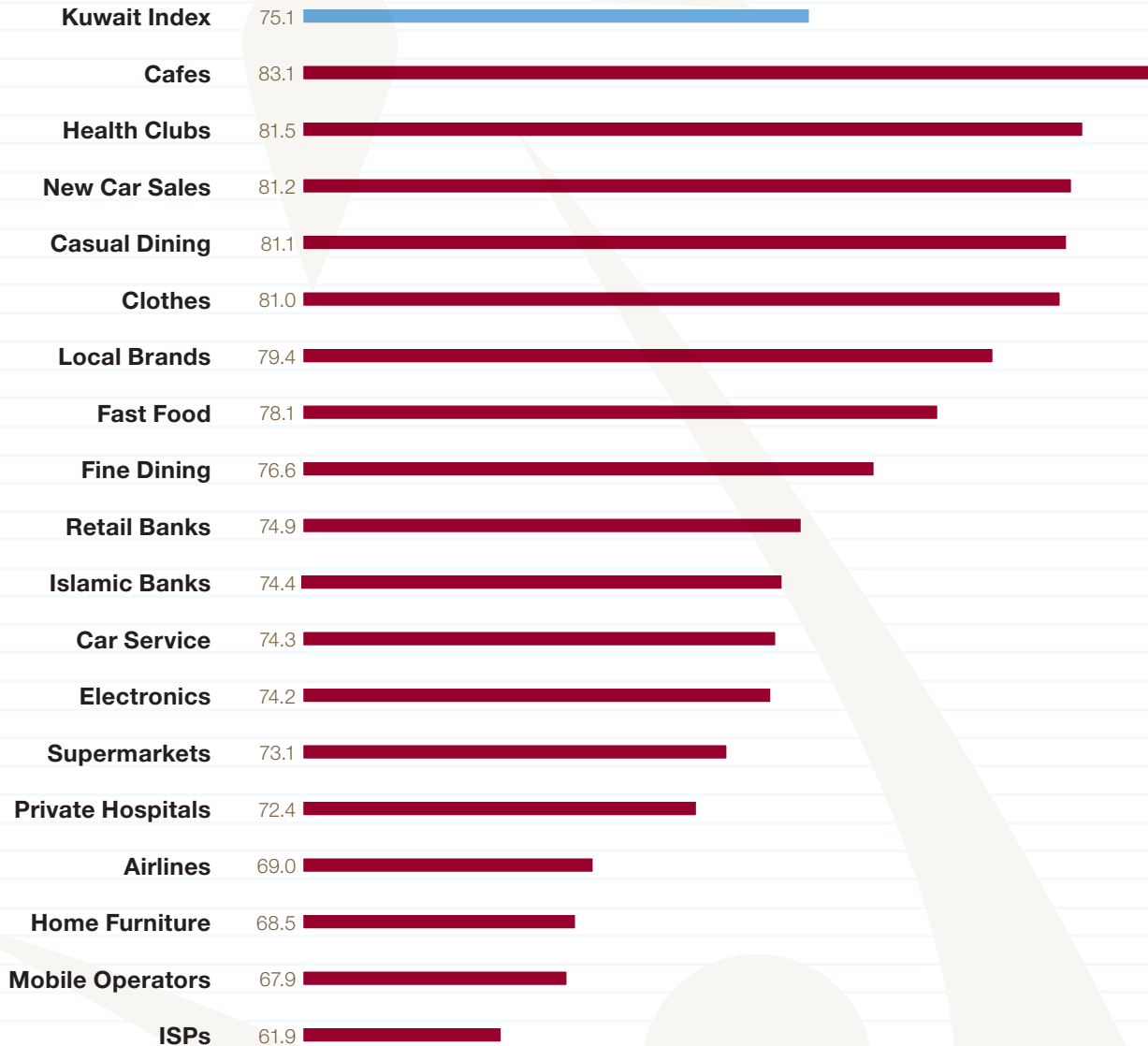
Ten industry categories exceeded the Kuwait Expected index score.

The top expectations are for Cafes, New Car Sales, and Retail Banks. The lowest expectations is Supermarkets, Fine Dining, and ISPs.



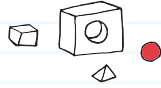
The Kuwait actual index across all 18 categories

Actual Index



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

The top three scoring industries are Cafes, Health Clubs, and New Car Sales. The lowest industries on Actual Satisfaction are ISPs, Mobile Operators, and Home Furniture.



Interaction

Point of Interaction

	In store / branch	Online	Phone
Kuwait Index	74.7	76.9	73.9
Airlines	69.4	68.5	77.2
Cafes	83.7	84.4	75.1
Car Service	74.3	74.1	68.5
Casual Dining	81.2	74.2	84.0
Clothes	80.9	92.2	80.6
Electronics	74.2	71.1	80.6
Fast Food	78.3	81.5	73.2
Fine Dining	76.0	87.7	88.3
Health Clubs	81.7	81.0	88.8
Home Furniture	68.5	85.7	36.1
Islamic Banks	72.0	76.1	83.2
ISPs	61.7	63.7	49.5
Local Brands	80.6	64.7	87.0
Mobile Operators	67.2	69.6	58.6
New Car Sales	81.3	97.2	68.5
Private Hospitals	72.2	72.2	81.5
Retail Banks	71.5	78.9	69.1
Supermarkets	73.1	61.4	78.8
Best			
Worst			

On a country level, Online interactions scored highest with 76.9 points and over the phone scored the lowest with 73.9 points.

Cafes scored highest for face to face interactions while ISPs scored lowest. Over the phone, Health Clubs scored highest and Home Furniture was lowest. Finally, Online users were most satisfied with New Car Sales while the lowest scoring one was for Supermarkets.



Frequency

Frequency of Visits

	Week	Monthly	3 months	6 months	Yearly
Kuwait Index	80.1	79.6	72.8	71.8	66.0
Airlines	70.6	77.2	73.7	67.4	65.8
Cafes	88.5	81.4	76.5	70.9	69.3
Car Service	77.1	79.0	78.4	74.3	67.6
Casual Dining	84.9	85.5	75.9	81.4	70.0
Clothes	81.4	82.7	79.4	75.2	70.5
Electronics	80.7	79.2	72.5	65.2	62.1
Fast Food	83.9	81.1	72.9	67.2	55.0
Fine Dining	80.8	81.5	76.1	71.7	70.9
Health Clubs	82.1	86.8	73.8	85.4	75.3
Home Furniture	88.8	74.8	69.7	69.2	62.2
Islamic Banks	86.2	78.3	73.0	74.8	67.3
ISPs	57.8	70.4	62.9	60.5	57.1
Local Brands	89.9	83.1	81.5	83.0	54.7
Mobile Operators	65.7	73.3	58.6	65.4	64.9
New Car Sales	81.5	83.9	72.7	80.6	81.8
Private Hospitals	76.2	78.0	71.4	67.6	67.3
Retail Banks	83.5	80.5	73.7	73.2	67.6
Supermarkets	77.7	75.4	67.6	57.9	57.4
Best					
Worst					

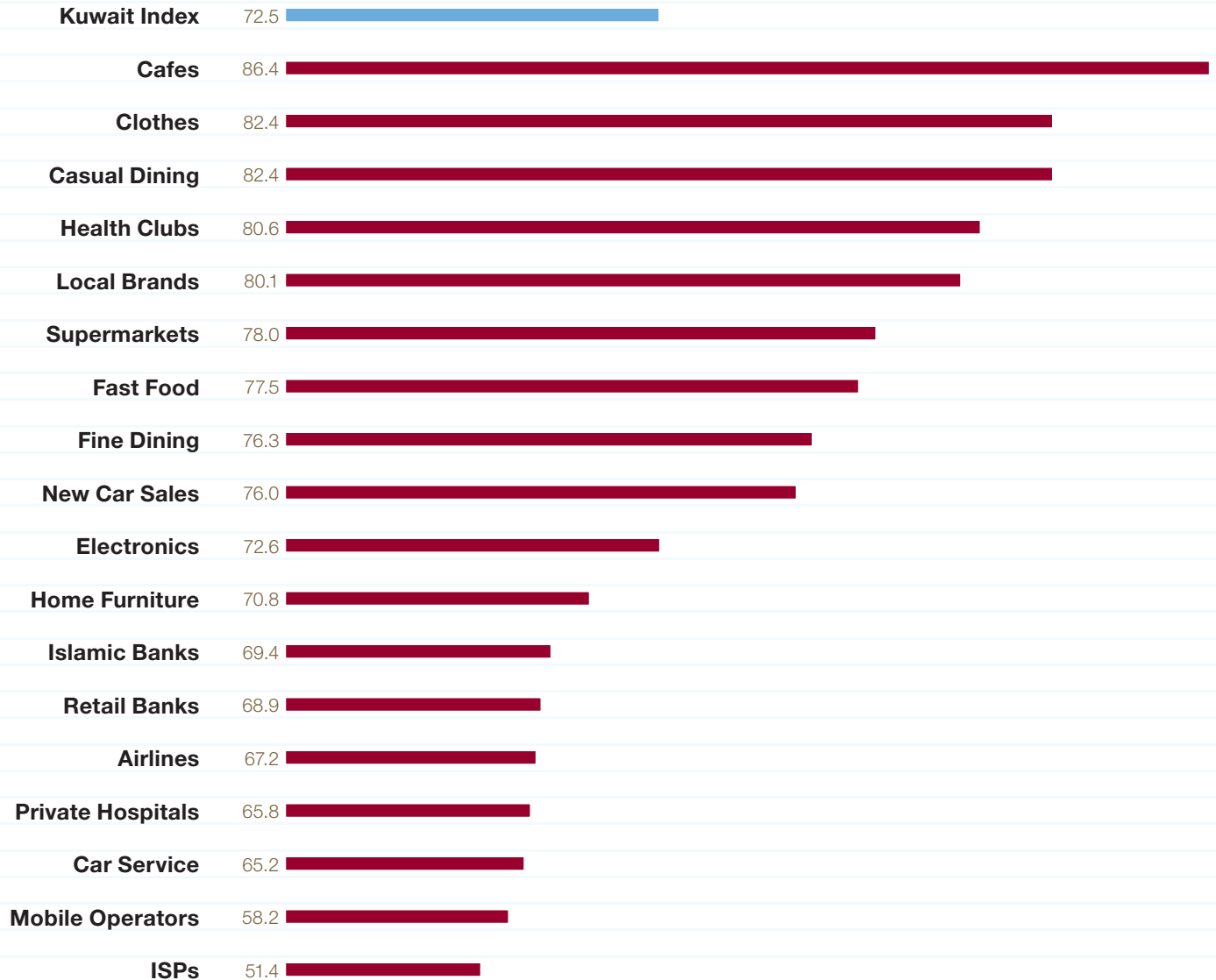
Weekly interactions with a brand scored highest with a Good score of 80.1. Annual interactions scored lowest with a Bland score of 66.0.

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 2019

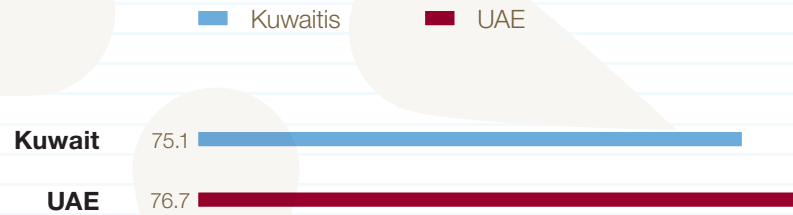


Consumers in Kuwait scored an average score of 72.5 on how brands deal with complaints. This score is on the lower side of Ordinary using our 5-level scale. 10 of the 18 categories met or exceeded the Kuwait score, with ISPs, Mobile Operators, and Car Service bringing the score down.



Comparing Kuwait & UAE

Kuwait & UAE scores 2019



Kuwait has a slightly lower score than the UAE in actual satisfaction and a (1.6 points) difference which is not significant. Comparing categories, there are a few categories that perform well in both countries such as Casual Dining and Clothes. They also share some low scoring categories such as Mobile Operators.

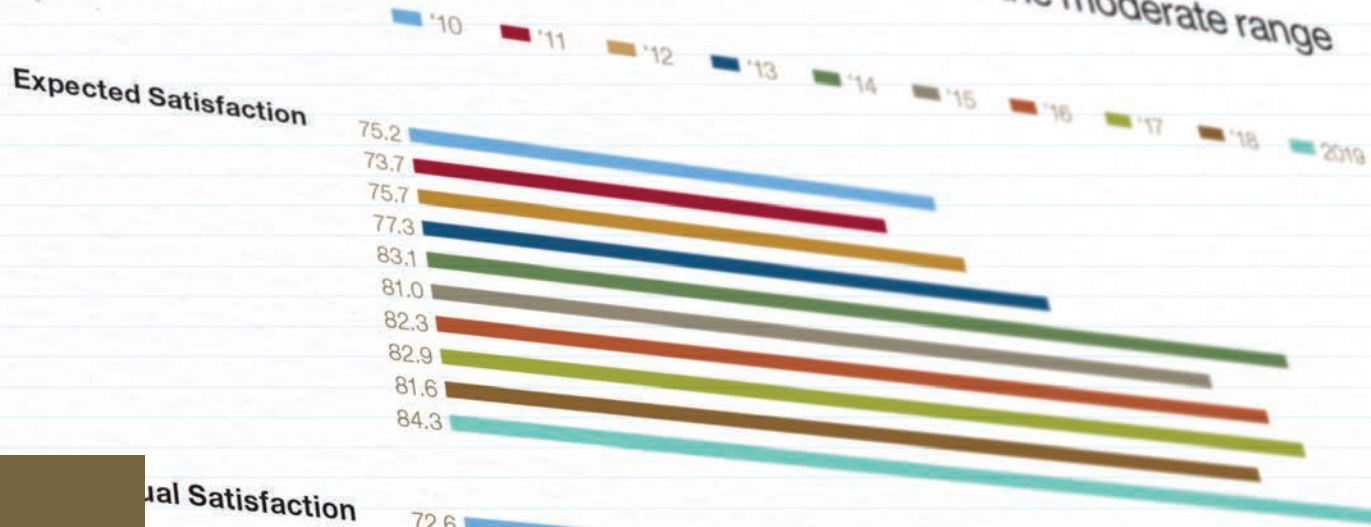
Investigating dimensions between UAE & Kuwait shows similarities as well as differences. The highest scoring dimensions for UAE is Location, whereas in Kuwait Staff Attitude scored highest. The lowest scoring dimensions for UAE & Kuwait is Value, which means that consumers feel this dimension is the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

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 25% score while UAE has a higher one at 34%. On average, consumers in Kuwait are less likely to promote brands than in the UAE.



Kuwait's overall score remains in the moderate range



3

Summary
& strategic
implications

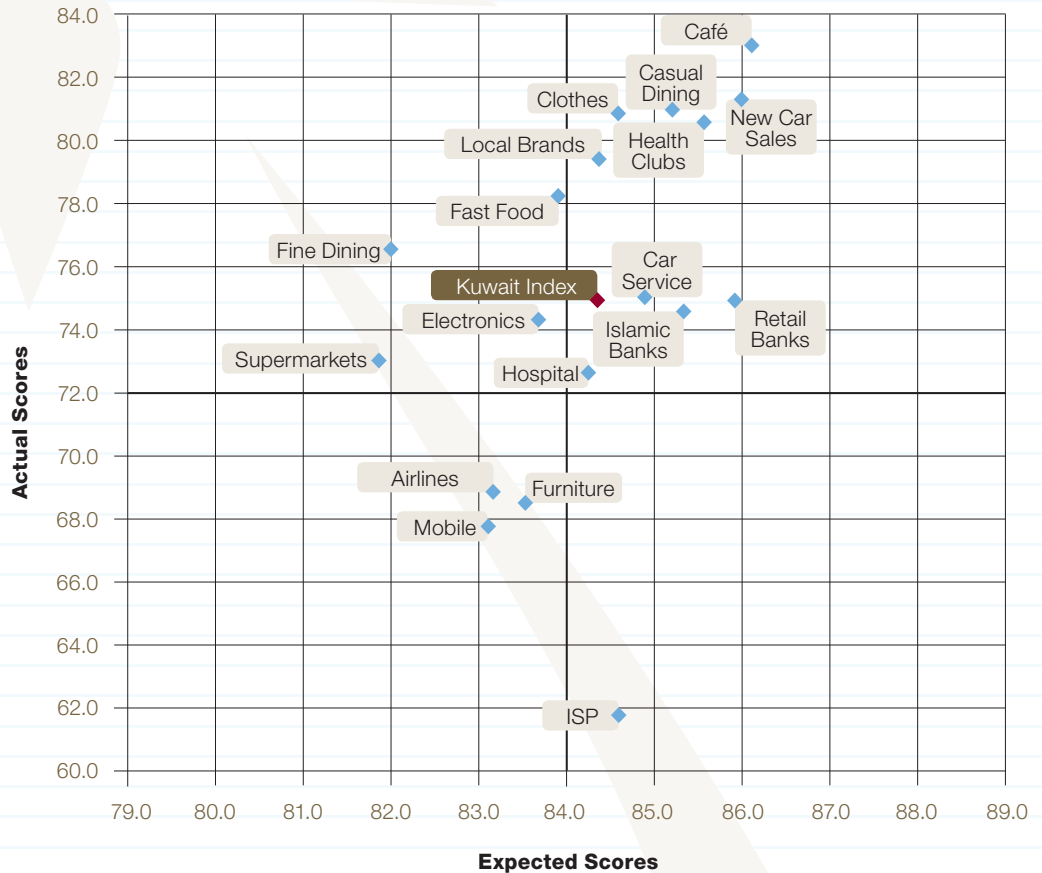


Since 2010 Average Actual Satisfaction improved 2.5 points or 3.5% but the increase has not been steady. The CSI peaked in 2014 and has decreased in satisfaction since last year.



Market position of all 18 categories

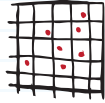
Mapping categories on expectation and actual scores to understand their market position



Industry categories in the top right quadrant such as Cafe, New Car Sales, Casual Dining and Health Clubs are in the best position as their actual scores match their expected scores. They need to sustain this position over time.

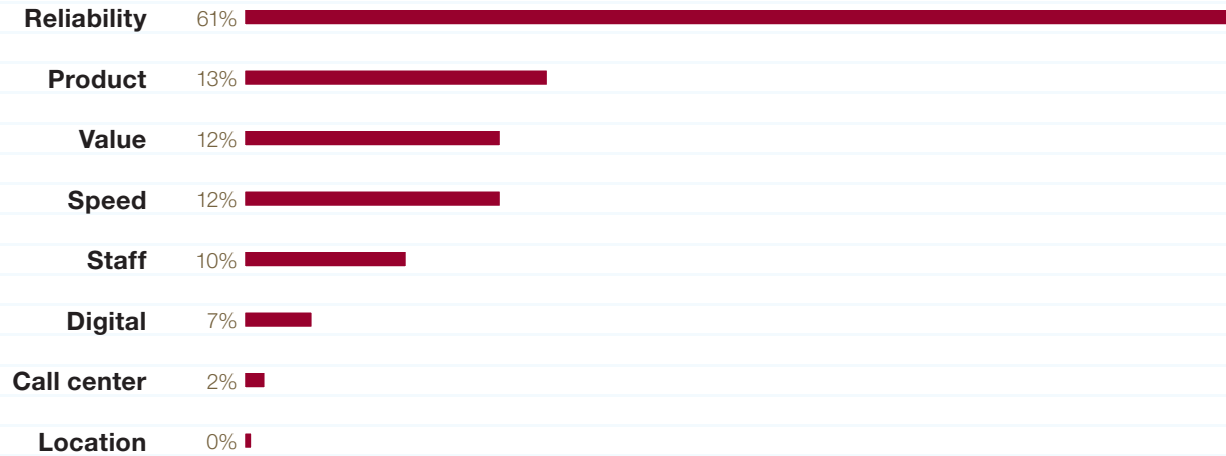
Industry categories in the top left quadrant need to improve their image and overall performance as a small gap exists between expectation and actual scores.

Industries in the bottom left quadrant such as Mobile Operators, Home Furniture, Airlines 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%, 22,514 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, for the first time only one dimension has a critical role in influencing overall satisfaction: Reliability and Accuracy (60% 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.



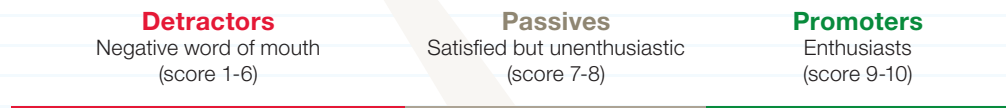
Net Promoter Score

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.

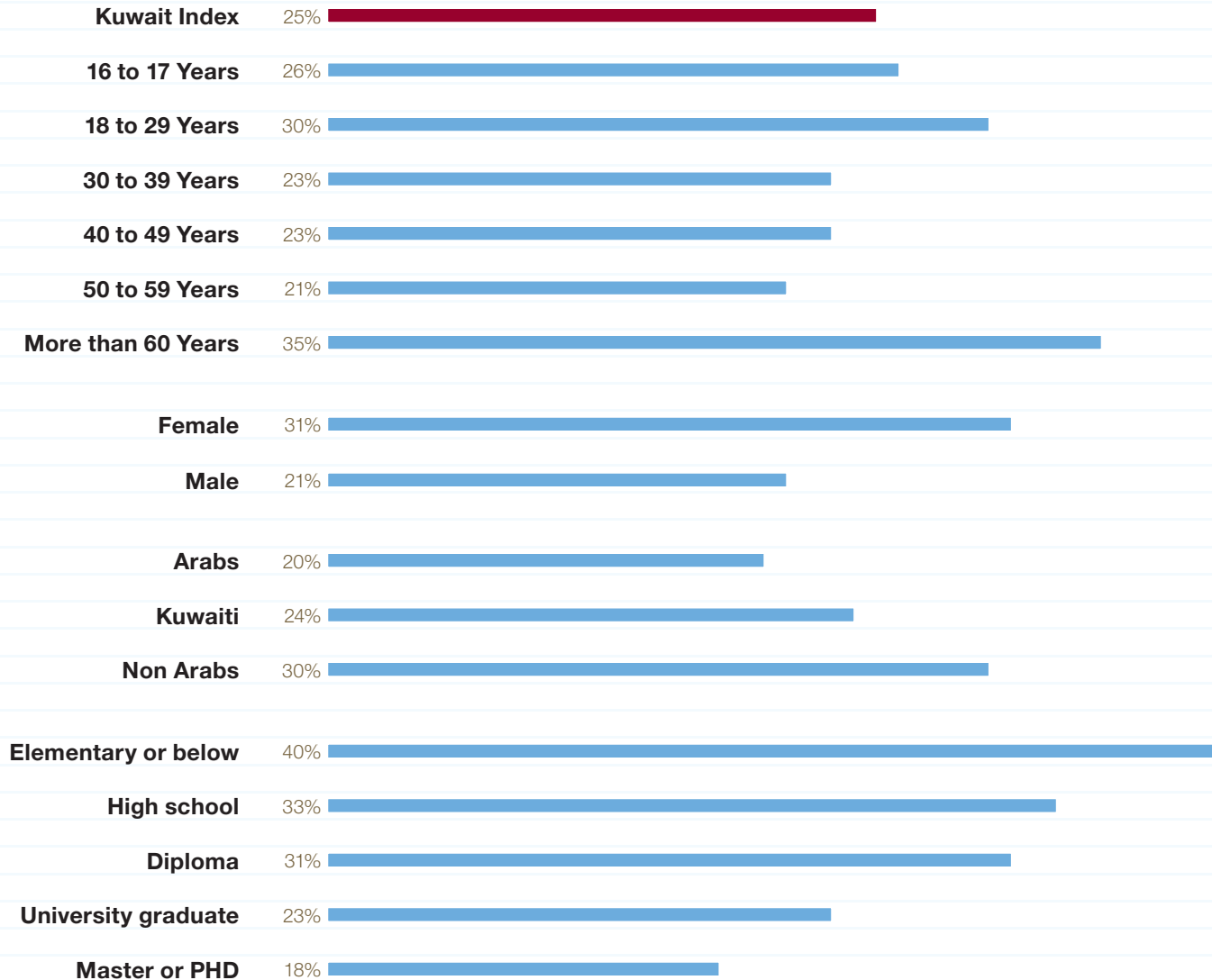
Passives (score 7-8) are satisfied but unenthusiastic customers who are vulnerable to competitive offerings.

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 25%

Net promoter score - Service Hero Index 2019

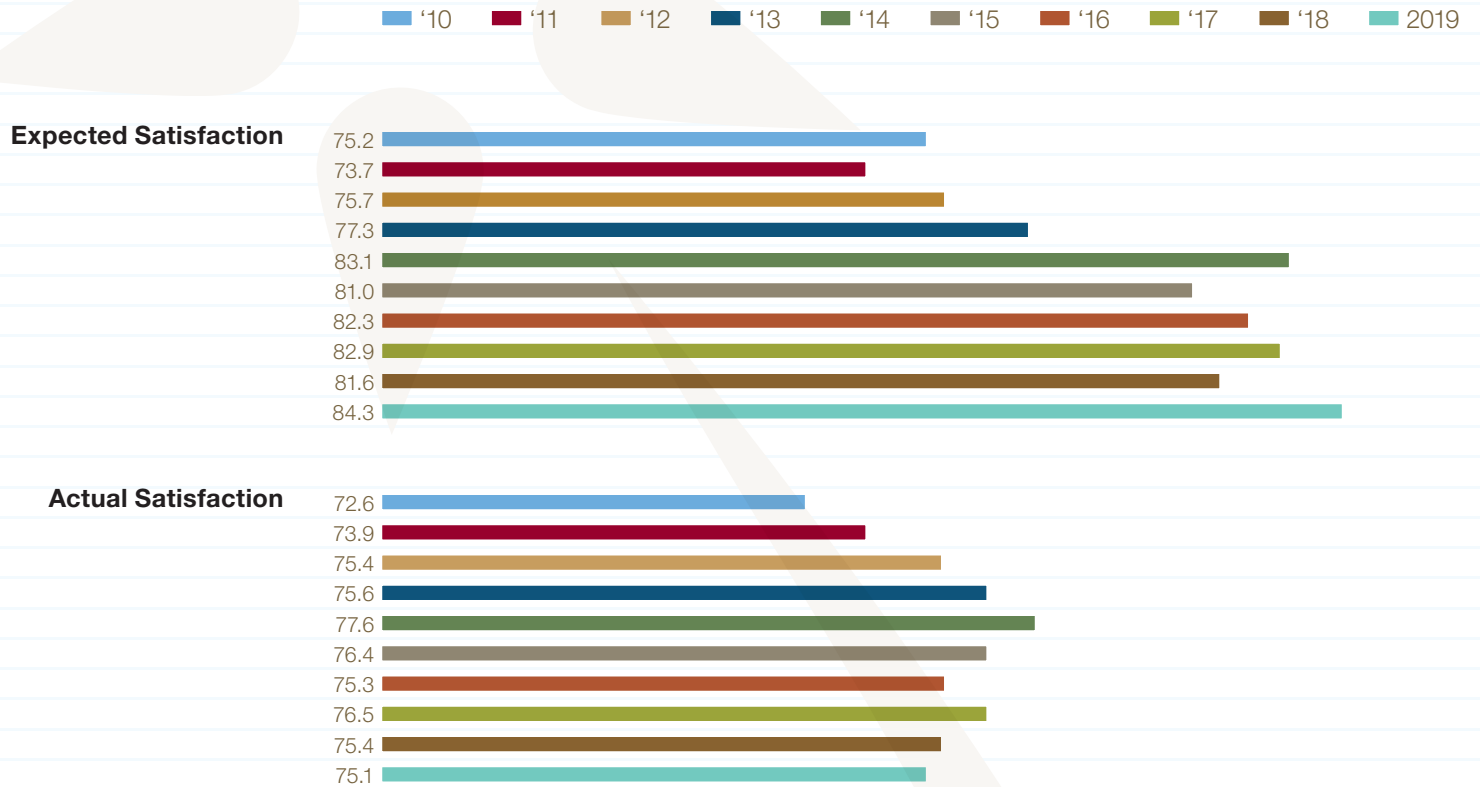


While the country average is 25%, demographic groups vary on being either Ambassadors or Detractors. The largest concentration of Ambassadors are Females, Non Arabs, those with a lower education, and those aged over 60. The largest concentration of Detractors are Males, Arabs, consumers with a higher 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).

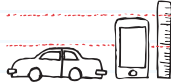


Kuwait's overall score remains in the moderate range



Consumer expectations have been steadily improving as they started at 75.2 in 2010 and now are 84.3 ten years later, a 12% growth rate. Furthermore the gap between what customers expect and what they actually think of service is currently a significant negative 9.2 points. This has increased at an average annual growth rate of 31% and is the widest gap recorded since the index started.

Since 2010, Average Actual Satisfaction improved 2.5 points or 3.5% but the increase has not been steady. The CSI peaked in 2014 and has decreased in satisfaction since last year.



Category Comparison 2010 vs 2019

Actual Satisfaction

Satisfaction for Kuwait in 2019 increased slightly 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 10 years are shown in Car Service and Electronics. Home Furniture and ISPs saw the largest decrease in satisfaction since 2010.

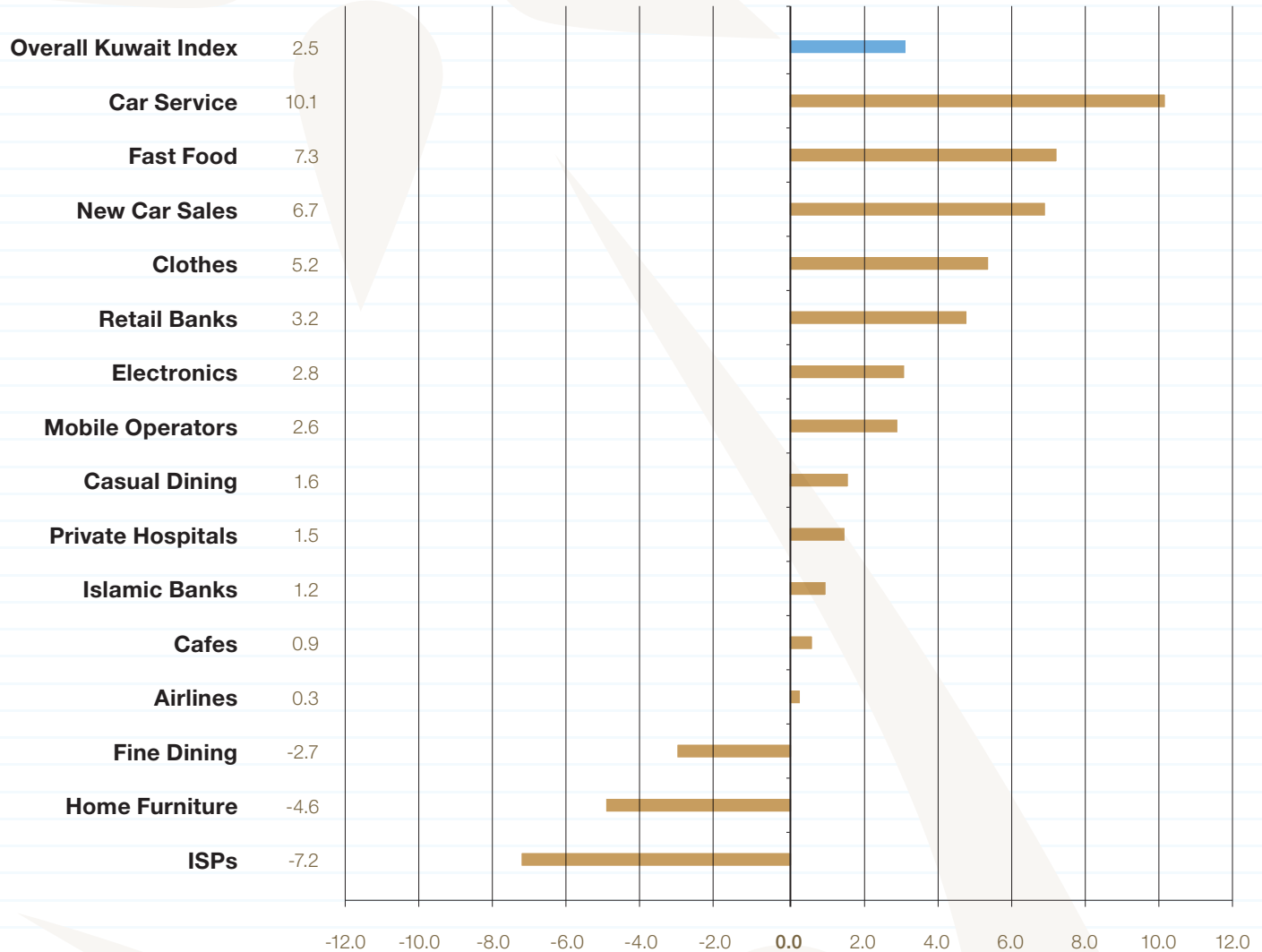
	'10	'11	'12	'13	'14	'15	'16	'17	'18	2019
Kuwait Index	72.6	73.9	75.4	75.6	77.6	76.4	75.3	76.5	75.4	75.1
Airlines	68.7	74.5	75.5	76.6	78.6	76.4	74.4	78.9	73.3	69.0
Cafes	82.2	80.7	82.9	79.3	83.3	80.9	83.3	83.0	80.5	83.1
Car Service	64.2	64.9	69.4	74.1	77.8	80.2	73.0	75.8	73.7	74.3
Casual Dining	79.5	78.4	80.9	80.3	81.6	80.5	81.3	78.8	81.0	81.1
Clothes	75.8	81.5	81.5	81.2	81.4	79.3	81.0	79.5	78.4	81.0
Electronics	71.4	71.9	74.2	73.4	75.7	71.3	72.7	76.8	77.5	74.2
Fast Food	70.3	69.3	76.7	70.4	72.3	75.3	77.0	75.2	75.4	78.1
Fine Dining	79.3	78.3	80.5	79.6	75.9	76.3	76.3	78.5	78.7	76.6
Health Clubs	N/A	N/A	73.1	73.3	77.0	76.8	72.8	74.5	74.3	81.5
Home Furniture	73.1	81.1	78.0	79.0	80.2	81.4	81.3	78.8	79.4	68.5
Islamic Banks	73.2	80.0	77.3	73.0	81.3	78.0	76.6	82.4	73.3	74.4
ISPs	69.1	61.3	64.2	69.4	71.0	66.0	63.1	62.2	63.3	61.9
Local Brands	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	79.4
Mobile Operators	65.3	61.4	66.1	70.8	72.8	70.6	69.3	67.6	69.0	67.9
New Car Sales	74.3	76.3	74.3	79.3	80.5	80.9	77.5	79.4	78.1	81.2
Private Hospitals	70.9	71.9	73.4	69.2	70.5	71.1	70.7	73.4	73.9	72.4
Retail Banks	71.7	70.6	76.7	79.7	79.3	76.5	73.5	75.9	73.4	74.9
Supermarkets	N/A	77.3	76.6	76.4	79.8	78.1	76.0	79.4	78.6	73.1
Best										
Worst										

Note: Local Airlines has been changed to Airlines in 2011 which therefore increased the number of brands in the category. The Health Club category was only added in 2012. Local Brands is a new category that was added in 2019.



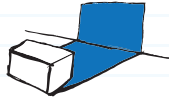
Category Growth 2010 vs. 2019

Notable improvements with consumer satisfaction are seen in Car Service, Fast Food, and New Car Sales. Categories that saw a decrease in consumer satisfaction are ISPs, Home Furniture, and Fine Dining.



Note: Local Airlines was changed to 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, Health Clubs category was included in 2012, and Local Brands is the newest category introduced in 2019. Therefore they have both been excluded from this comparison chart.



Dimension Comparisons 2010 vs. 2019

Actual Satisfaction

	'10	'11	'12	'13	'14	'15	'16	'17	'18	2019
Kuwait Index	72.6	73.9	75.4	75.6	77.6	76.4	75.3	76.5	75.4	75.1
Staff	74.8	75.8	76.7	77.8	78.1	78.1	77.3	78.3	77.6	78.3
Location	76.1	77.0	77.3	78.0	77.3	77.7	76.6	77.5	76.1	75.9
Value	67.5	70.5	72.2	72.8	74.7	73.4	72.6	72.5	71.3	69.1
Product	72.4	75.2	76.0	76.5	77.6	77.2	76.2	77.1	76.0	76.6
Speed	71.4	73.3	74.3	75.0	76.1	75.6	74.9	75.5	74.6	75.4
Reliability	73.5	75.6	76.1	76.7	78.4	77.2	76.3	77.9	76.5	77.2
Call Center	69.2	70.1	71.5	74.3	75.8	75.3	73.8	74.9	76.4	74.8
Digital	73.9	74.9	75.7	77.3	78.6	74.6	74.2	74.3	74.1	76.9

Overall, there are improvements in most dimensions with Call Center and Product having the largest increase since 2010. Location is the only dimension with negative growth since 2010.



Demographic Comparisons 2010 vs. 2019

Actual Satisfaction

	'10	'11	'12	'13	'14	'15	'16	'17	'18	2019
Female	75.1	77.6	78.4	79.0	80.4	78.4	77.8	78.3	77.7	76.9
Male	71.6	72.3	74.1	74.1	76.7	75.6	74.2	75.4	74.0	74.2
Arabs	74.8	75.8	74.9	77.0	78.2	77.0	74.9	76.7	76.2	74.2
Kuwaiti	71.6	69.2	72.5	71.1	75.1	75.3	74.6	74.7	73.7	74.3
Non Arabs	70.4	73.3	78.4	79.0	77.8	76.3	76.3	77.5	76.4	77.7
16 to 17 years	69.0	67.5	82.7	87.8	84.0	79.3	83.9	80.9	87.8	75.7
18 to 29 years	74.1	75.1	76.5	77.2	77.9	75.8	73.9	77.5	77.4	77.6
30 to 39 years	73.0	72.8	74.3	74.3	77.2	76.1	75.3	75.5	74.4	74.6
40 to 49 years	69.4	73	75.8	75.9	77.4	76.2	75.0	76.4	74.2	74.8
50 to 59 years	77.6	74.7	77.4	73.7	77.8	77.9	75.2	74.2	74.7	73.7
More than 60 years	81.2	68.8	82.1	79.0	74.5	75.4	78.3	78.5	79.7	78.2
Elementary or below	N/A	N/A	76.0	85.3	80.0	75.2	79.4	77.2	89.1	78.5
High school	N/A	N/A	76.8	81.5	81.0	79.2	76.3	77.4	80.4	77.8
Diploma	N/A	N/A	76.5	75.4	78.0	78.2	76.1	78.1	76.9	76.6
University graduate	N/A	N/A	75.7	75.3	77.6	76.2	75.2	76.7	75.4	75.1
Master or PHD	N/A	N/A	71.9	72.7	73.8	73.2	72.6	72.5	71.1	73.0

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

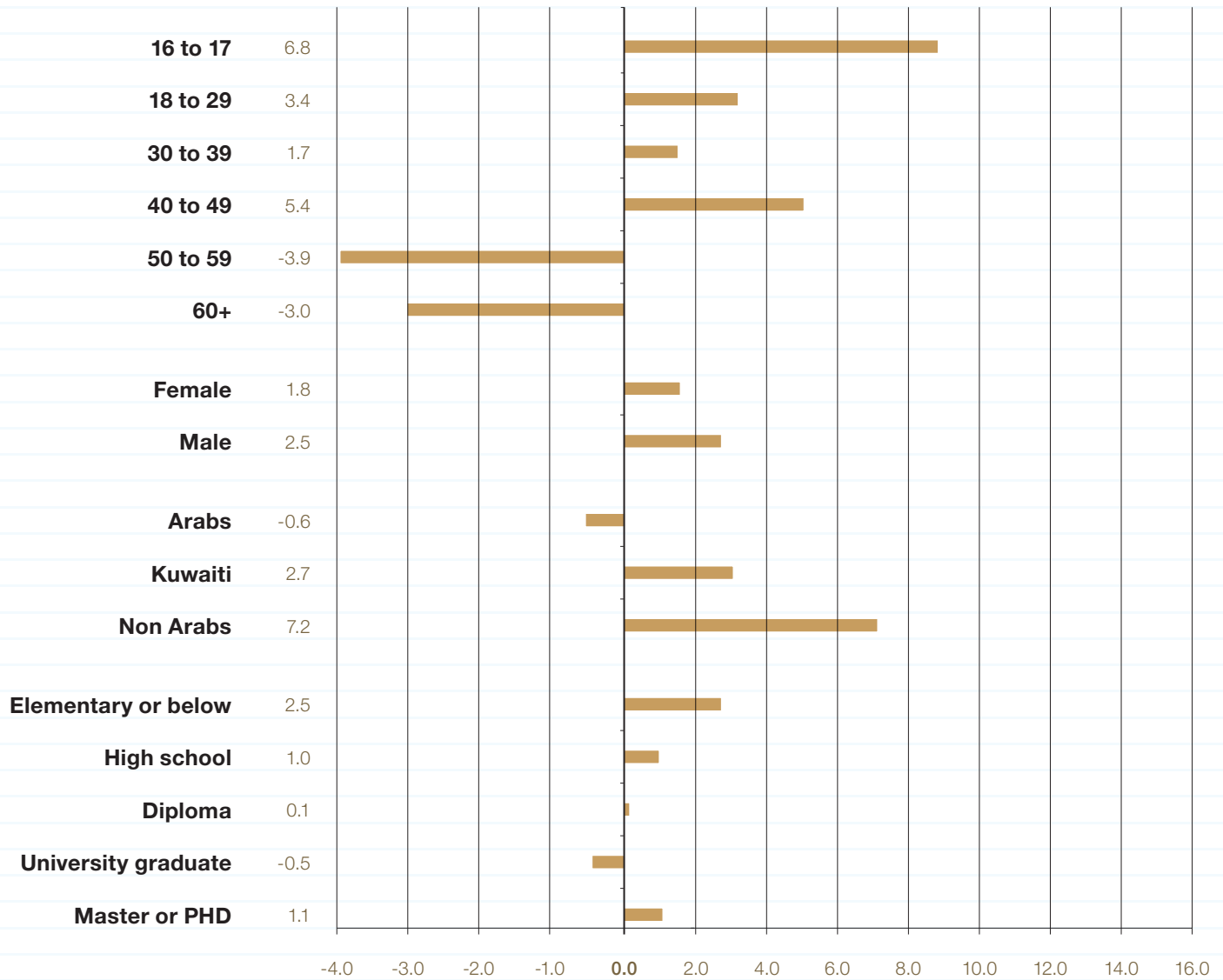
The age groups with the highest increases in satisfaction since 2010 are teens and the 40-49 age group.

By education, Elementary increased since 2012 (the year we started collecting this information). Growth in satisfaction was lowest for University graduates.



Demographic growth 2010 vs. 2019

Actual Satisfaction

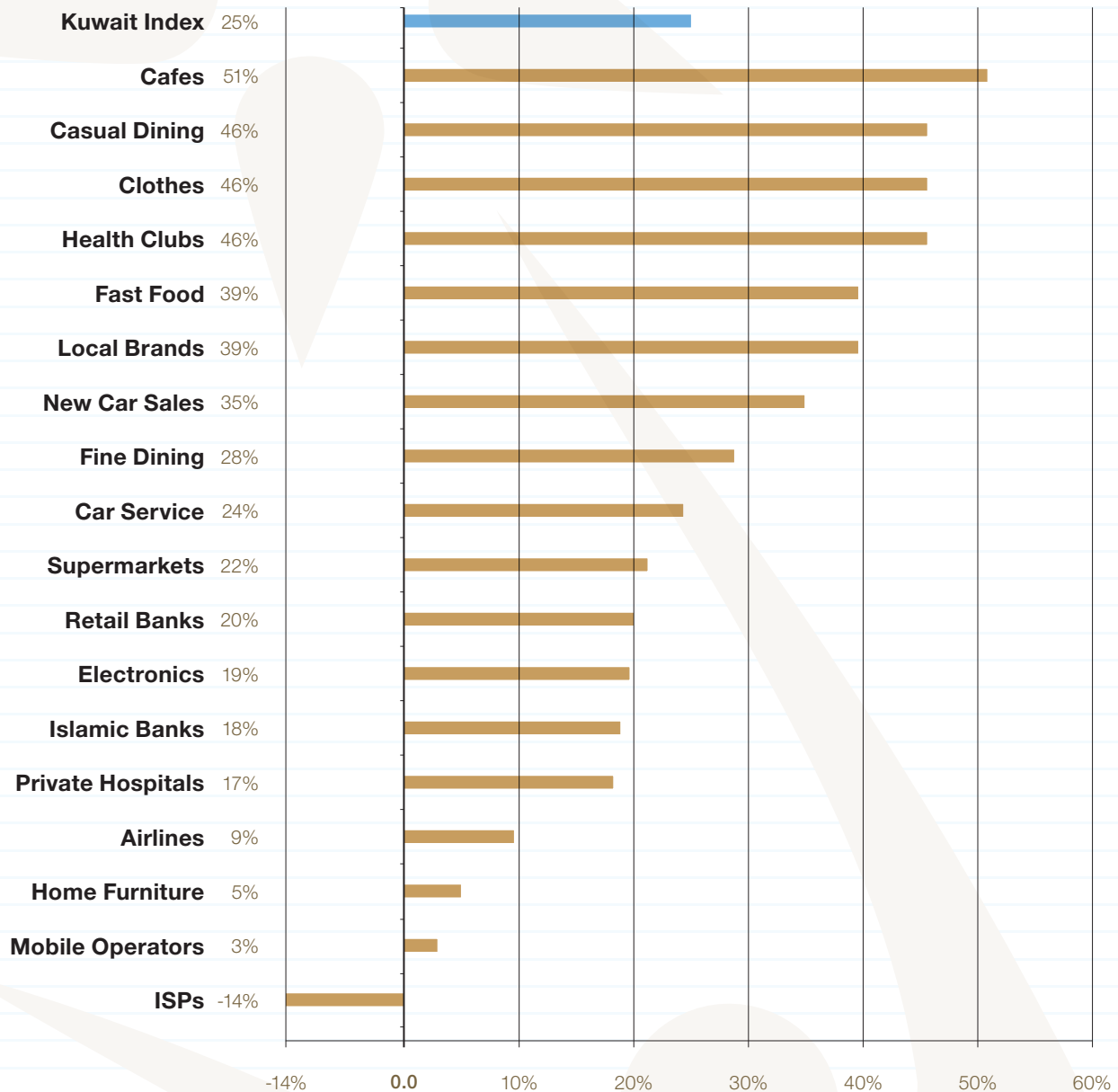


Since 2010, satisfaction has improved in most demographic groups in Kuwait with younger consumers and Non Arabs improving the most. The few groups that fell in satisfaction levels are university graduates, Arabs, and consumers aged over 50 years.



Category NPS

Service Hero CSI Category 2019 Net Promoter Score



While the country average is 25%, a number of categories are below the average with ISPs the only category with a negative NPS, having more Detractors than Ambassadors. This is followed by Mobile Operators and Home Furniture, all of which have lower NPS scores compared to the national average. Industries enjoying a healthy presence of brand Ambassadors are in Cafes, Casual Dining, and Clothes.



Net Promoter Score by demographic group and changes over the years

	'10 NPS	'11 NPS	'12 NPS	'13 NPS	'14 NPS	'15 NPS	'16 NPS	'17 NPS	'18 NPS	2019 NPS
Kuwait	25%	27%	29%	29%	34%	30%	29%	33%	30%	25%
Female	32%	35%	40%	39%	43%	36%	37%	38%	39%	31%
Male	21%	23%	25%	25%	31%	27%	25%	29%	25%	21%
Arabs	32%	33%	28%	32%	34%	30%	27%	32%	28%	20%
Kuwaiti	21%	15%	23%	18%	27%	29%	28%	28%	32%	24%
Non Arabs	24%	26%	38%	37%	35%	28%	31%	35%	33%	30%
16 to 17 years	32%	26%	56%	54%	49%	50%	51%	36%	34%	26%
18 to 29 years	30%	30%	34%	32%	34%	27%	26%	31%	32%	30%
30 to 39 years	28%	23%	25%	27%	33%	28%	27%	30%	30%	23%
40 to 49 years	10%	24%	30%	32%	35%	30%	31%	36%	27%	23%
50 to 59 years	45%	26%	38%	25%	30%	32%	27%	23%	26%	21%
More than 60 years	56%	9%	50%	33%	26%	24%	49%	42%	41%	35%
Elementary or below	N/A	N/A	29%	63%	51%	26%	44%	31%	70%	40%
High school	N/A	N/A	33%	47%	45%	40%	36%	39%	42%	33%
Diploma	N/A	N/A	32%	31%	33%	36%	31%	36%	39%	31%
University graduate	N/A	N/A	31%	27%	33%	29%	28%	33%	30%	23%
Master or PHD	N/A	N/A	16%	22%	24%	19%	21%	21%	18%	18%

The NPS score has declined since last year by 5%, but is similar to the 2010 score.

The demographic groups showing the strongest increase in NPS since 2010 are those aged 40-49, those with a lower education and Non Arabs.

Since last year, NPS declined by 5%, with most demographic groups declining in overall loyalty shown to brands.

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



Industry comparison with other markets

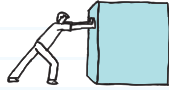
In comparing with other national customer satisfaction indexes, notably the American ACSI (which has been running since 1996), we note that Kuwait is lower than the US and UAE index, with the Singapore CSI scoring lowest.

Category	Kuwait Service Hero CSI	UAE Service Hero CSI	US ACSI Index	Singapore CSI Index
Airlines	69.0	79.5	74.0	75.3
Cafes	83.1	83.1	79.0	74.8
Car Service	74.3	70.3	79.0	N/A
Casual Dining	81.1	83.2	81.0	78.3
Clothes	81.0	82.7	77.0	73.4
Electronics	74.2	83.5	78.0*	73.0
Fast Food	78.1	81.9	79.0	74.6
Fine Dining	76.6	N/A	N/A	N/A
Health Clubs	81.5	N/A	N/A	N/A
Home Furniture	68.5	79.3	N/A	73.0
Islamic Banks	74.4	69.9	80.0	74.6*
ISPs	61.9	N/A	62.0	70.6
Local Brands	79.4	N/A	N/A	N/A
Mobile Operators	67.9	59.6	75.0	72.7
New Car Sales	81.2	77.0	79.0	N/A
Private Hospitals	72.4	72.4	72.0	74.4
Retail Banks	74.9	72.1	80.0	74.6*
Supermarkets	73.1	79.2	78.0	73.6
Overall Score	75.1	76.7	75.7**	73.5*

* 2018

* Q3 2019

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 84.3 across all industries. Expectations are highest for Reliability, Product, and Speed. 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 Cafes, New Car Sales, and Retail Banks. The lowest expectations (and therefore image or reputation) are for Supermarkets, Fine Dining, 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 75.1, the gap between customer expectations and satisfaction is -9.2, which is significant. The largest gaps by dimension are for Value and Reliability and for categories it is ISPs, Mobile Operators, and Home Furniture.

- **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 60% impact on satisfaction and Product or Service Quality has a 13% 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 25% (which means only 25% 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 Cafes, Casual Dining, and Clothes. ISPs is the only category with a negative NPS of -14%, 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



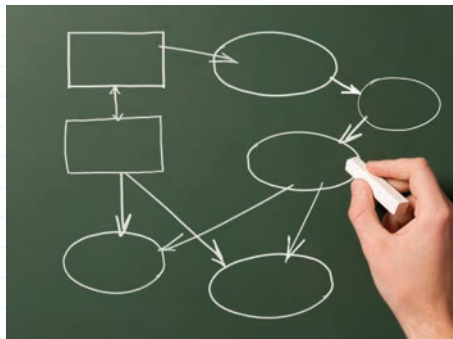
People powered

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 2019



Nominees



Restaurants: Cafés

Winner: Caribou Coffee

- Defined as: Informal restaurants offering a range of desserts and made-to-order sandwiches in addition to hot and cold beverages
- A total of 29 brands were evaluated



Home furniture

Winner: Homecentre

- Defined as: Any store focused on the sale of durable furniture as well as decorative items
- A total of 13 brands were evaluated



Restaurant: Fast food

Winner: McDonald's

- Defined as: Typical fast food restaurants that offers burgers and other types of value meals
- A total of 32 brands were evaluated



Health care: Private hospitals

Winner: Royale Hayat Hospital

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



Restaurant: Casual dining

Winner: Mais Alghanim

- Defined as: Restaurants that serve moderately-priced food in a relaxed atmosphere where visitors can dress casually
- A total of 72 brands were evaluated



PF CHANG'S



Clothes & accessories

Winner: Pull & Bear

- Defined as: Retail outlets that sell clothes excluding stores solely selling accessories and shoes
- A total of 77 brands were evaluated



Specialty Store: Electronics

Winner: Carrefour

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



Autos: New Car Sales

Winner: Toyota

- Defined as: The purchase of a new car directly from an authorized car dealer
- A total of 36 brands were evaluated



Nominees



Autos: Car service

Winner: Chevrolet

- Defined as: The service or maintenance of a car from an authorized car dealer
- A total of 34 brands were evaluated



Financial: Islamic banks

Winner: Boubyan Bank

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



Airlines

Winner: Qatar Airways

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



Financial: Commercial banks

Winner: NBK

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



Communications: Mobile operators

Winner: Zain

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



Specialty Store: Supermarkets

Winner: Saveco

- Defined as: Any large self-service store retailing food, perishables and household supplies
- A total of 8 brands were evaluated



Communications: Internet service providers

Winner: Zain

- Defined as: Any local internet service provider
- A total of 8 brands were evaluated



Overall Kuwait 2019 winners

From their website



FIRST PLACE

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.



SECOND PLACE

The history of Mais Alghanim Restaurant began when its founder 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.

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.

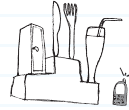


THIRD PLACE

"If I had a brick for every time I've repeated the phrase Quality, Service, Cleanliness and Value, I think I'd probably be able to bridge the Atlantic Ocean with them." —Ray Kroc

Since 1955, McDonald's has been proud to serve the world some of its favorite food. McDonald's operations have steadily grown in the U.S., Europe, the Middle East, Asia-Pacific, Africa, Canada, and Latin America. McDonald's is committed to providing the highest quality food and superior service, at a great value, in a clean and welcoming environment. In the midst of global

economic concerns, McDonald's has maintained a firm grasp on the industry because their core strategy remains unchanged – they continue to invest in people and their Brand. For more than 50 years, they have provided quality food, valued jobs, and meaningful charitable support to the communities they serve, and people everywhere have responded by making McDonald's the number-one foodservice retailer in the world.



Comparing the winners of 2010 to 2019

The Service Hero CSI awarded 15 category winners in 2010 expanding to 18 since 2011, of which 3 were 10 time consecutive winners in the 2019 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 2019

Service Hero Category	2019 Winner	'18	'17	'16	'15	'14	'13	'12	'11	'10
Car Sales	Toyota	No	No	No	No	No	No	No	No	No
Car Service	Chevrolet	No	No	No	No	No	No	No	No	No
Airlines	Qatar Airways	Yes	Yes	No	No	No	No	No	Yes	No
Clothes	Pull & Bear	No	No	No	No	No	No	No	No	No
ISPs	Zain	Yes	Yes	Yes	Yes	No	No	No	No	No
Mobile Operators	Zain	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	No
Islamic Banks	Boubyan	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Retail Banks	NBK	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes
Health Clubs**	Oxygen	Yes	N/A	N/A	No	Yes	No	No	No	No
Private Hospitals	Royale Hayat	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Cafes	Caribou Coffee	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Fast Food	McDonald's	No	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes
Casual Dining	Mais Alghanim	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes
Fine Dining**	Babel	No	N/A	N/A	Yes	No	No	No	No	No
Electronics	Carrefour	Yes	No	No	No	No	No	No	No	No
Home Furniture	Home Center	No	Yes	Yes	Yes	No	No	No	No	No
Supermarkets*	Saveco	Yes	Yes	Yes	Yes	No	No	No	No	No
Local Brands**	Dar Hamad	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

* Category added in SH CSI 2011

** Category did not meet quota requirements for the SH CSI 2019

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

5 Methodology



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 1st - December 31st 2019.

Sample

The index aimed to collect a total sample of 10,000 valid votes for Kuwait distributed over 18 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 3 industries: Fine Dining, 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

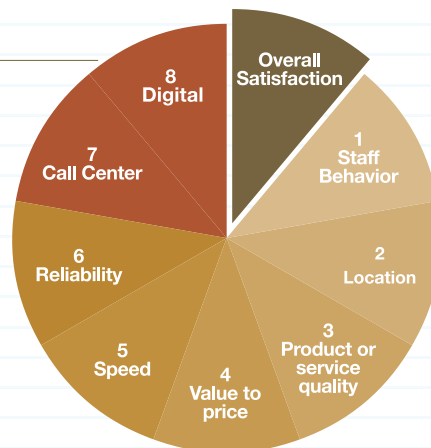
A number of security measures were deployed of either technical nature to verify the authenticity of the voter, or later, at the data cleansing stage, to remove any suspicious data.

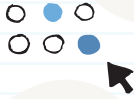
Rigor

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:

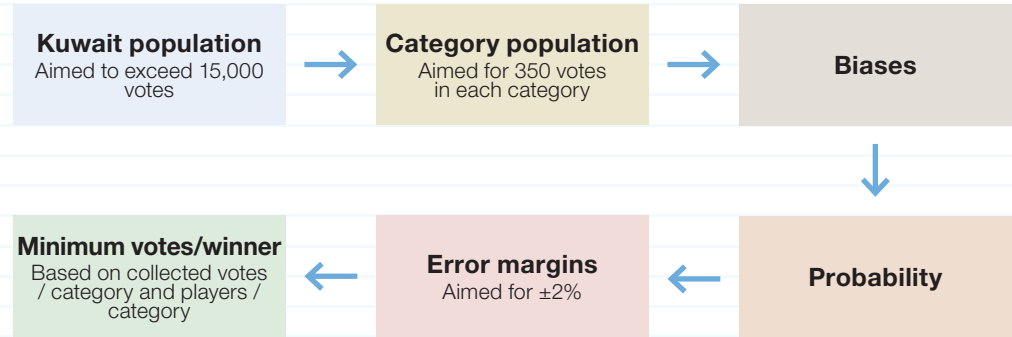
1. What they expected **before** receiving the service
2. What they actually experienced **after** being served

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



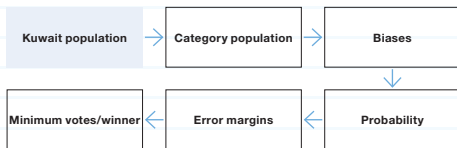
Sampling approach

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**:

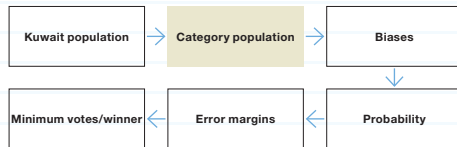
- Males and females
- Kuwaiti and non-Kuwaiti nationalities

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

- Anyone under 16 years
- Laborers

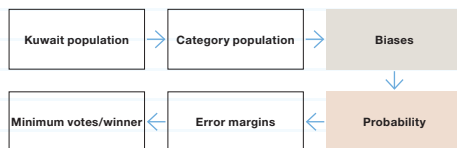
Note: All population figures are from the Public Authority for Civil Information and the Ministry of Planning.

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



Airlines



Automotive: Sales + Service



Banks: Retail + Islamic



Communications: Mobile + ISPs



Leisure: Health club



Health care: Private Hospitals



**Restaurants: Café + Fast food
Fine dining + Casual dining +
Local brands**



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

Minimum sample sizes and error margins for all categories.

Confidence level: 95%

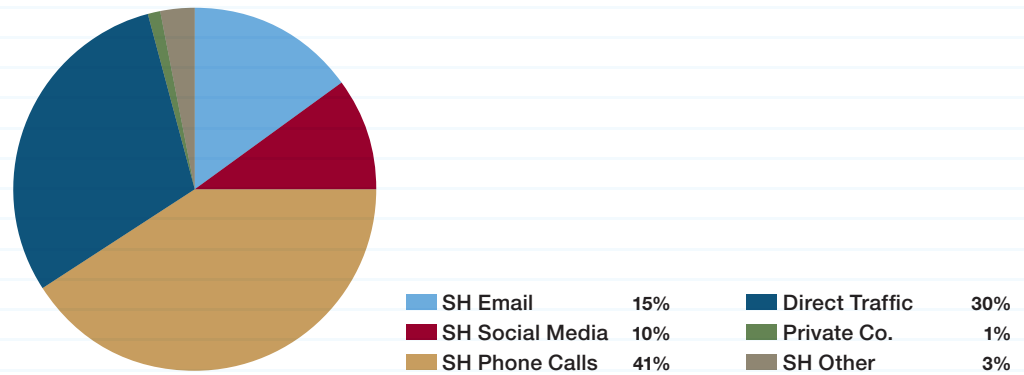
Sector	Biased Population	Sample @ 5%	Total Votes
Airlines	88,186	293	1,815
New Car Sales	88,186	293	975
Car Service	88,186	293	1,087
Clothing	88,186	293	1,204
Mobile Operator	88,186	293	1,548
ISPs	88,186	293	1,677
Café	88,186	293	1,277
Fast Food	88,186	293	2,154
Casual Dining	88,186	293	1,210
Fine Dining	48,992	242	246
Electronics	88,186	293	1,755
Commercial banks	68,505	273	1,779
Islamic banks	30,833	196	1,101
Furniture	58,791	259	1,022
Private Hospital	37,421	216	1,067
Supermarkets	88,186	293	2,188
Health Clubs	37,421	216	171
Local Brands	37,421	216	238

This table shows the 18 categories included in the 2019 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 ratings and platforms used to rate from

Since the Service Hero CSI is mostly online (60% of assessments), we deploy a promotion plan that utilizes digital marketing. After assessments go through a validation process, the source of ratings is indicated below. Digital advertising on leading websites and social media platforms, comprised the bulk of our advertising. A selection of private companies also encouraged their customers to rate for them. Thus, consumers could directly search for the name 'service hero' to reach our rating 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

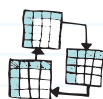
To ensure that each visitor is a legitimate customer, a number of security measures have been put in place.

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	5,898
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	(1,818)
Total votes obtained	28,412
Total votes assessed	22,514



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

Former 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

Former 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

Vice President for Academic Affairs 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

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-Rayyan 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.



Advisory Council members (continued)

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.

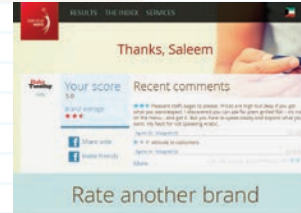


Process overview of the key survey steps

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



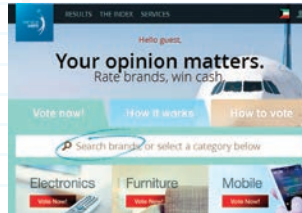
1. Web banner / Social media promoting Service Hero



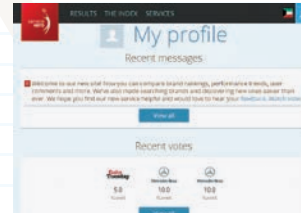
5. Respondent votes for other companies



9. Results in permanent database once confirmed



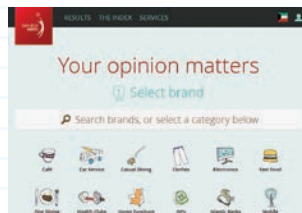
2. Directs to servicehero.com, Mobile App or facebook.com



6. Respondent submits vote with personal data



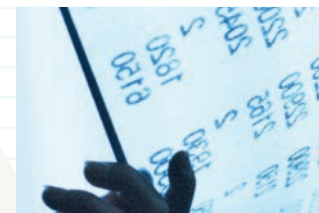
10. Data cleansing & verification procedures after close of votes



3. Respondent chooses category & brand



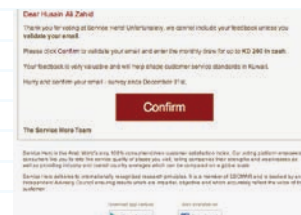
7. Responses stored in temporary database



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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جامعة زايد
ZAYED UNIVERSITY

Member of



6

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

xReality Solutions

Augmented, Virtual and Mixed Reality

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



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



NATIONAL
INVESTMENTS
COMPANY®



مؤسسة الخليج للاستثمار
Gulf Investment Corporation



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 بورتان
BURGAN BANK



ميسان
meysan
partners



الإمتياز
الاستثمار
ALIMTIAZ INVESTMENT



ASIYA
INVESTMENTS



ALARGAN
شركة آل أريجان الدولية عقارات
ALARGAN INTERNATIONAL REAL ESTATE CO.



أريف
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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