

Service Dimensions

Airlines

Automotive: Car Service

Automotive: New Car Sales

Clothes & Accessories: Clothes

Communication: Mobile Operators

Communication: ISPs

Education: Schools

Education: Universities

Finance: Banks

Finance: Insurance

Finance: Real Estate

Finance: Retail

Finance: Savings

Finance: TFSAs

Restaurants: Fast Food

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*

2021

Credibility.  
Integrity.  
Relevance.



Powered by



ACK



جامعة أبوظبي  
ABU DHABI UNIVERSITY



Member of

ESOMAR<sup>22</sup>  
Corporate

The Arab World's only 100% consumer  
powered customer satisfaction index

# Our Services



## Understand

### STARTUPS:

- ✓ CSI dashboard subscription
- ✓ Mystery shopping
- ✓ In-depth interviews
- ✓ Culture of Excellence Index
- ✓ Executive in-depth interviews
- ✓ Focus groups
- ✓ Team focus groups
- ✓ Social media tracking
- ✓ Team Engagement Index



## Strategize

### ESTABLISHED:

'STARTUPS' SERVICES

#### PLUS:

- ✓ Customer journey map
- ✓ Service level target
- ✓ Trinity of excellence workshop
- ✓ Team engagement program
- ✓ Eliminate, Reduce, Raise, Create grid
- ✓ Strategy map
- ✓ Service slogan
- ✓ Value Chain assessment



## Build

### CORPORATE:

'ESTABLISHED' SERVICES

#### PLUS:

- ✓ Vision, mission & values
- ✓ Training
- ✓ Ideation platform
- ✓ Service standards
- ✓ Internal communication
- ✓ Innovation programs
- ✓ Training
- ✓ Staff rewards



## Recalibrate

### ENTERPRISE:

'CORPORATE' SERVICES

#### PLUS:

- ✓ Mystery shopping
- ✓ Customer promise by segment
- ✓ Focus groups
- ✓ Annual CEI
- ✓ Standards audits

# Index

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## Word from the president



Last year we seem to have adapted as individuals and organizations. Habits changed not only for people, but for companies and their standards of service. This reflects our agility as companies, people and organizations as we all had to deal with the second year of the pandemic that hit us in early 2020 and stopped the world as we know it.

Companies have evolved. While brands initially faced an existential crisis in 2020 forcing them to figure out how to survive, they seem to have understood how to alter their operations to ensure better service.

This is evidenced by the rebounding of the Kuwait national Customer Satisfaction Index CSI score by 6 whole points, a very significant growth, from the rock bottom it reached in 2020. The Kuwait CSI now stands at 76 out of 100. In the UAE, satisfaction marginally grew and is now 77.8 but service there never dropped during the pandemic as the country didn't experience closures and tough restrictions. Brands in the UAE adapted quicker reflected in the minimal increase in satisfaction since 2019 with no decline noted during the first year of Covid-19. Our results are based on 23,661 validated assessments in Kuwait and 8,922 in the UAE. This is after we removed roughly 20% of the collected sample for what we consider weak or unauthentic behavior.

How people interact with brands changed slightly from last year. As restrictions lessened, Instore interactions grew from 57% to 59% in Kuwait and from 63% to 66% in the UAE. Mobile App transactions are 25% in Kuwait and 16% in the UAE, dropping two percentage points in both countries as customers prefer to go in person.

Across the 10 dimensions, Quality and Reliability maintained their correlation to overall satisfaction at 29% and 24% respectively. While App, Website, and Call Center showed little correlation to overall satisfaction: they have become an expected and necessary part of the delivery of service. While digital platforms proliferate, for consumers, overall satisfaction depends on the quality of products offered in a reliable manner.

Our experience across the years reaffirms that the more companies address service wholeheartedly, the more they can become heroes to their customers. Good service means scores in the high 80's and possibly the 90's which we consider heroic. Only 4% of the brands have consistently scored in the high 80's over the past 12 years. Our data also shows that the lack of consistency in satisfaction scores, the lower a brand's overall satisfaction is. Brands that are consistent tend to score highest.



## Word from the president (continued)

Looking forward to 2022, we are excited to offer our subscription dashboard that allows companies to view their scores anytime to address service weaknesses. We have also consulted many brands on the Trinity of Excellence, our comprehensive framework for quality service. Customer satisfaction matters more in times of crisis than in times of plenty as brands face a shrinking pie with declining consumer consumption. People stay loyal to brands with good service. The challenge for brands is to persistently stay service centric. We can help ensure that with our service range.

A handwritten signature in blue ink, appearing to read "Faten", written in a cursive style.

**Faten Abu Ghazaleh**

President

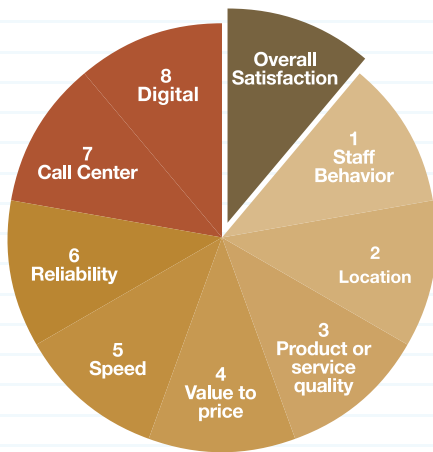


1  
Executive  
summary



# 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 vote directly on [www.servicehero.com](http://www.servicehero.com) from January 1<sup>st</sup> - December 31<sup>st</sup> 2021. 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 on 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.

## 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 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 29,834 assessments were cleaned to arrive at the final 23,661 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 73.9 on Expected (before dealing with a brand) and 76.0 for Actual Satisfaction (after dealing with it). Since the score for Actual Satisfaction is higher by 2.1, this means consumers have received higher satisfaction than they expected. The highest service dimensions are Location (79.5), Product (79.0), and Reliability (78.8). The lowest dimensions are Delivery (67.4), Value (69.2), and Speed (75.4).

## Demographics

Non Arabs, Females, consumers aged 18-29, 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 76.6 on the likelihood to 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 scores 32%, with Non Arabs, Females, lower education, and those aged 18-29 being most loyal.



### **Categories**

Of the 19 categories assessed, 10 of them matched, or exceeded, the Kuwait Index score. These were mostly with Restaurants. The lowest scoring categories are ISPs, Mobile Operators, and Fine Dining.

### **Interaction and visit frequency**

Based on where consumers interacted with the brand (Over the phone, Online, App, and In-store), consumers who interacted through Mobile Apps had the highest satisfaction (78.0), while interaction In Store scored lowest (75.0).

Regarding the Frequency of Interaction with the brand, we find that Weekly interactions scored highest (79.2), and Annually scored lowest (67.0). This suggests that consumers visit the brands they are satisfied with more than those that do not, which they visit less frequently.

### **Changes since last year**

Kuwait increased significantly in satisfaction by 5.4 points, or 8%, since last year as companies adapt to the pandemic.

All dimensions increased in satisfaction since last year.

In the industry category, ISPs and Supermarkets increased in satisfaction the most, while Fast food and Fine Dining declined.

### **Comparison to UAE, US, & Singapore CSI**

The US Index scored 74.4 for their national index, putting them above Kuwait index. UAE scored 77.7, higher than the Kuwait Index by a significant 7.1 points.

The Singapore CSI stands at 74.3, higher than the Kuwait Index.



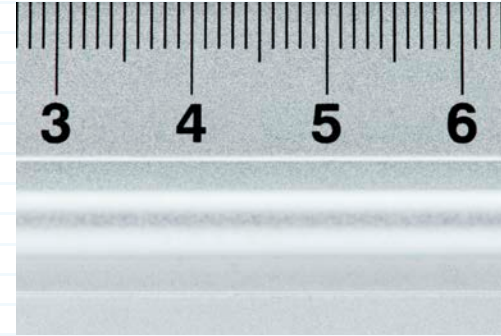
# Service Hero's benefits

Service Hero taps into an unexploited market niche



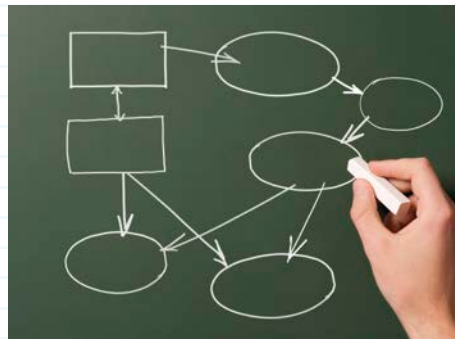
## People powered

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 11 dimensions for assessment to compare to the service benchmark.



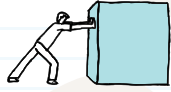
## Actionable

Provides companies with an understanding of their strengths and weaknesses relative to their competitors so that action plans can be made.



## Helps Kuwait

The objective service benchmark for across categories and time helps drive brand performance which fuels the economy.



# 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 lower expectations for services as the index for Kuwait is 73.9 across all industries. The highest expectations of service amongst demographics are lower educated, those aged 18-29, Females, and Non Arabs. The highest expectations by industry are Local Brands, Cafes, and Health Clubs. The lowest expectations (and therefore image or reputation) are ISPs, Car Service, and Mobile Operators.

- **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

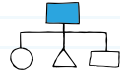
Because satisfaction in Kuwait is 76.0, the gap between customer expectations and satisfaction is 5.4, which is significant. The largest gaps between expectations and actual satisfaction for categories are for New Car Sales, Car Service, and Private Hospitals.

- **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, Product has a 29% impact on satisfaction and Reliability has a 24% 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 32% (which means 32% of customers are promoters), most customer profiles have higher loyalty. These are namely Females, those aged 18-29, Non Arabs, and lower educated customers. Categories that have strong loyalty are Local Brands, Cafes, and Casual Dining - all restaurant categories. The ones with the lowest, least amount of promoters, are ISPs, Fine Dining, and Mobile Operators.

- **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.

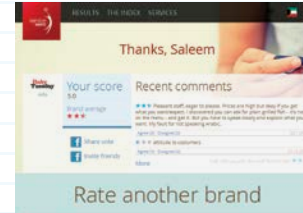


# Process overview of the key survey steps

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



1. Web banner / Social media promoting Service Hero



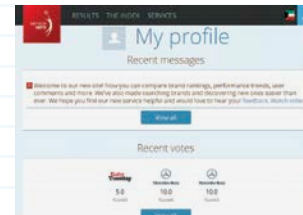
5. Respondent votes for other companies



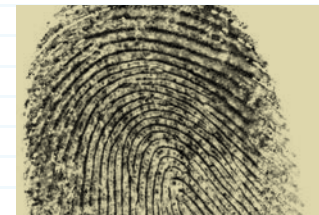
9. Results in permanent database once confirmed



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



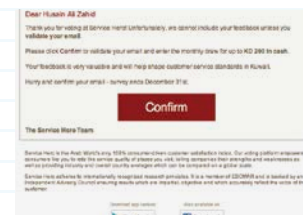
7. Responses stored in temporary database



11. High-level results shared with Advisory Council



4. Respondent votes for first company



8. Email sent to respondent to confirm identity

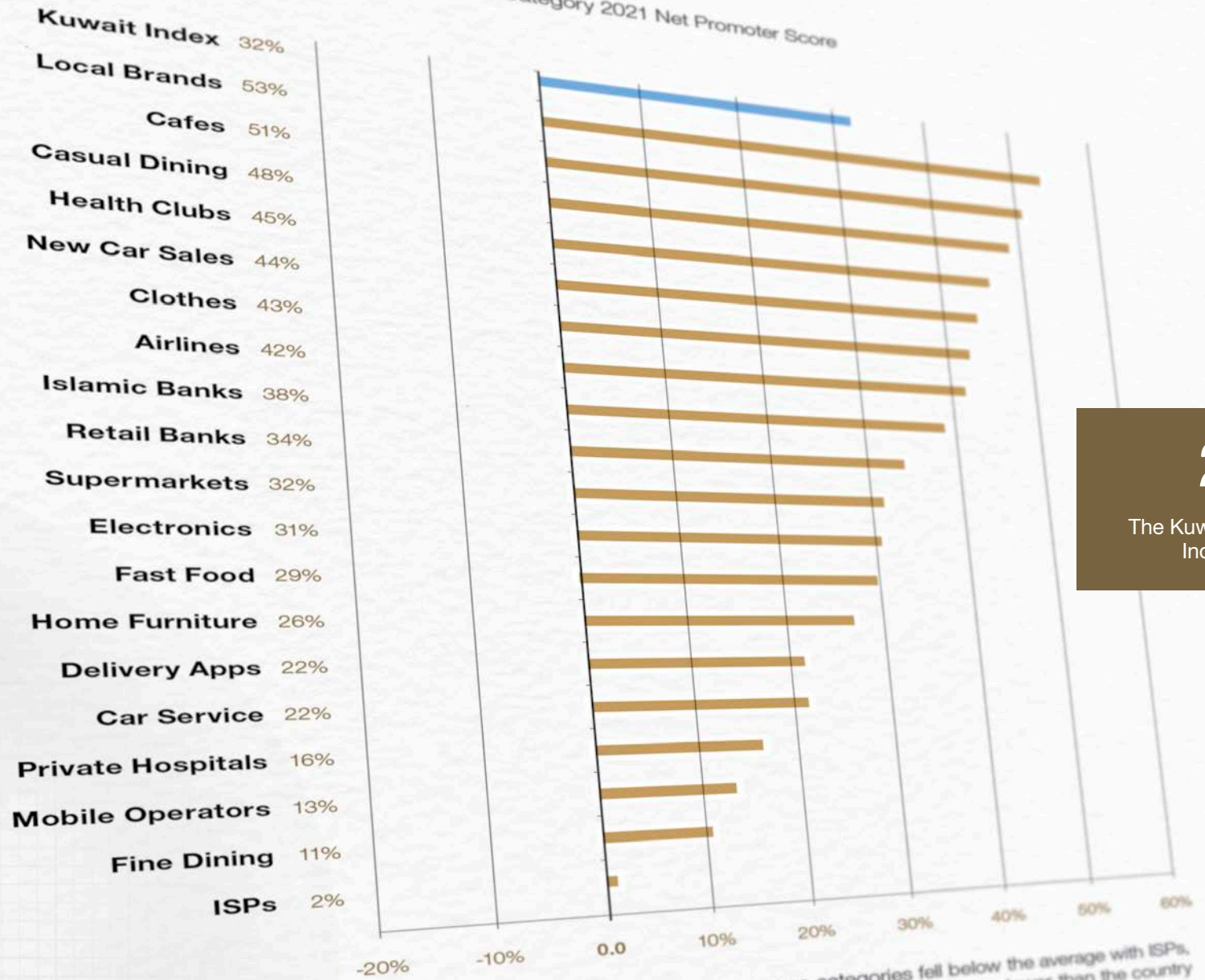


12. Service Hero winners announced publicly



## Category NPS

Service Hero CSI Category 2021 Net Promoter Score



2

The Kuwait Index

With the country average at 32%, some categories fell below the average with ISPs, Fine Dining, Mobile Operators, and Private Hospitals scoring lower than the country average. While the majority are still Ambassadors, these categories have high numbers of Detractors. The highest NPS scores are for restaurant categories.



## Sample composition

**The national sample is accurate with a  $\pm 2$  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.**

	<b>Votes 2021</b>	<b>Votes 2021 Distribution</b>	<b>Kuwait eligible population distribution</b>
<b>Gender</b>			
Female	8,279	34%	33%
Male	14,996	63%	67%
<b>Nationality</b>			
Arabs	8,397	35%	See note <sup>1</sup>
Kuwaiti	8,450	35%	32%
Non Arabs	6,245	26%	See note <sup>1</sup>
<b>Age Groups</b>			
16 to 17 Years	152	0%	10%
18 to 29 Years	4,249	17%	29%
30 to 39 Years	9,258	39%	29%
40 to 49 Years	5,862	24%	20%
50 to 59 Years	2,492	10%	10%
More Than 60 Years	557	2%	2%
<b>Education</b>			
Elementary or below	102	0%	See note <sup>2</sup>
High school	2,765	12%	See note <sup>2</sup>
Diploma	4,082	17%	See note <sup>2</sup>
University graduate	12,866	54%	See note <sup>2</sup>
Master or PHD	2,620	11%	See note <sup>2</sup>
<b>Total</b>	<b>23,661</b>	<b>100%</b>	<b>100%</b>

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.

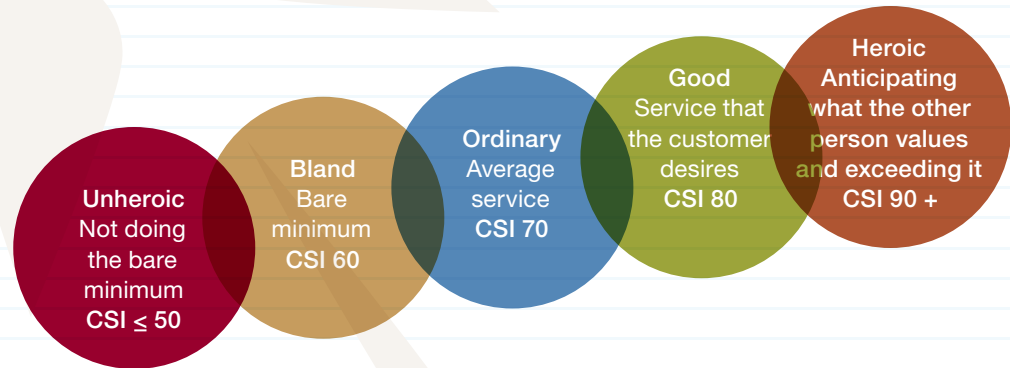
**Note 1:** Kuwait population data is only split by Kuwaiti or non-Kuwaiti.

**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.



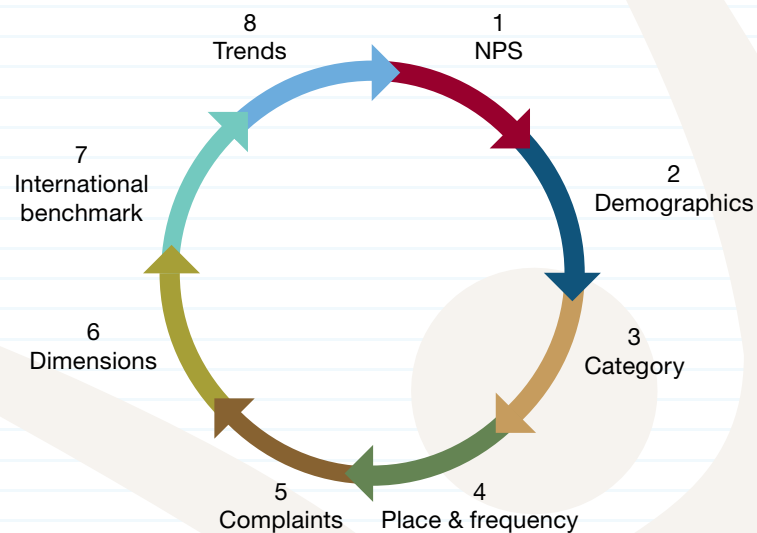
## Interpreting the score



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.



## How results will be displayed

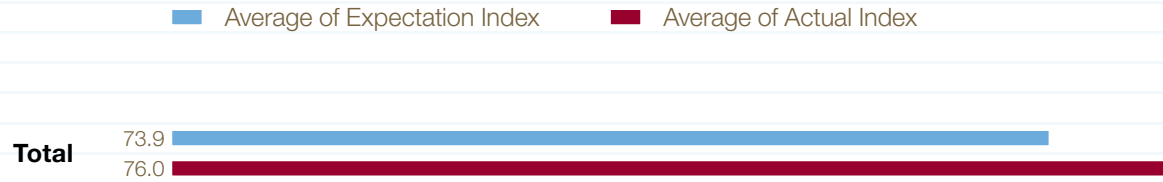


Results will be reported on levels as seen in the chart.



# Kuwait Index: Before and after

Service Hero Index - Kuwait 2021



### A gap of 2.1 between expected and actual

Usually, consumer expectations will be higher than actual service assessments. In 2021, consumers had lower expectations and higher satisfaction, meaning they are above expectations by 2.1 points.

This could be due to the effects of the pandemic on consumers service mindset.

Kuwait scored 73.9 on average for **Expected** standards and it scored 76.0 on **Actual** service standards – placing it in the **Ordinary** service level.





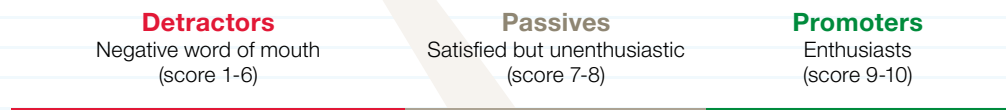
## Net Promoter Score

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.

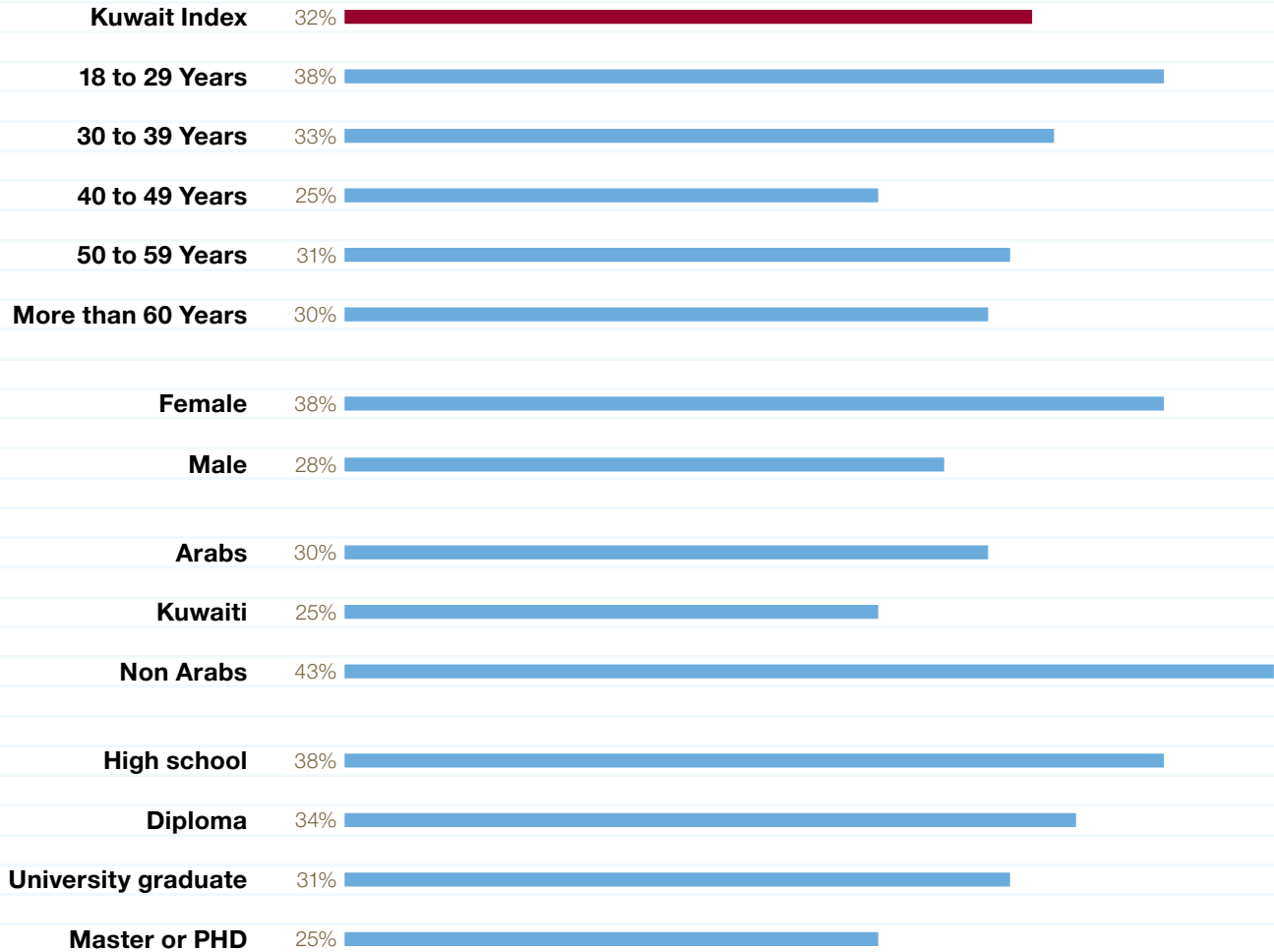
**Passives** (score 7-8) are satisfied but unenthusiastic customers who are vulnerable to competitive offerings.

**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 32%

Net promoter score - Service Hero Index 2021



Demographic groups are all Ambassadors with Kuwait scoring 32% NPS score. The largest concentration of Ambassadors are Females, Non Arabs, those with a lower education, and the 30-39 age group. There are no demographic groups with a high concentration of Detractors.

**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).



## Index by demographic factors

	<b>Expected</b>	<b>Actual</b>	<b>Gap</b>
Female	75.5	78.2	2.7
Male	73.2	74.9	1.7
Arabs	73.6	75.1	1.5
Kuwaiti	71.2	73.9	2.7
Non Arabs	77.8	79.4	1.6
18 to 29 years	76.2	79.0	2.8
30 to 39 years	73.8	76.3	2.5
40 to 49 years	72.2	74.0	1.8
50 to 59 years	75.0	75.4	0.4
More than 60 years	71.7	75.6	3.9
High school	76.8	78.7	1.9
Diploma	74.5	77.1	2.6
University graduate	73.8	75.8	2.0
Master or PHD	71.2	73.0	1.8

Females are more satisfied than Males in 2021 and both genders do not have significant gaps between expected and actual satisfaction.

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

The 40-49 age group has the lowest satisfaction and those aged 18-29 year olds have the highest.

Those with a higher education tend to be less satisfied than those with lower education.

In 2021, we have seen expectations being exceeded by companies evolving to meet and exceed the needs of consumers.



# Image and loyalty

Kuwait Index demographics recommend scores 2021



The age groups that are more likely to recommend a brand are the 18-29 and 30-39 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 40-49 who may have become less tolerant to poor service over the years.

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



## Demographic comparisons 2016 vs. 2021

Actual Satisfaction

	'16	'17	'18	'19	'20	2021
Female	77.8	78.3	77.7	76.9	72.7	78.2
Male	74.2	75.4	74.0	74.2	69.4	74.9
Arabs	74.9	76.7	76.2	74.2	68.9	75.1
Kuwaiti	74.6	74.7	73.7	74.3	68.4	73.9
Non Arabs	76.3	77.5	76.4	77.7	74.0	79.4
18 to 29 years	73.9	77.5	77.4	77.6	73.1	79.0
30 to 39 years	75.3	75.5	74.4	74.6	71.1	76.3
40 to 49 years	75.0	76.4	74.2	74.8	68.0	74.0
50 to 59 years	75.2	74.2	74.7	73.7	69.5	75.4
More than 60 years	78.3	78.5	79.7	78.2	69.4	75.6
High school	76.3	77.4	80.4	77.8	71.5	77.1
Diploma	76.1	78.1	76.9	76.6	72.3	75.8
University graduate	75.2	76.7	75.4	75.1	70.8	73.0
Master or PHD	72.6	72.5	71.1	73.0	67.4	76.0

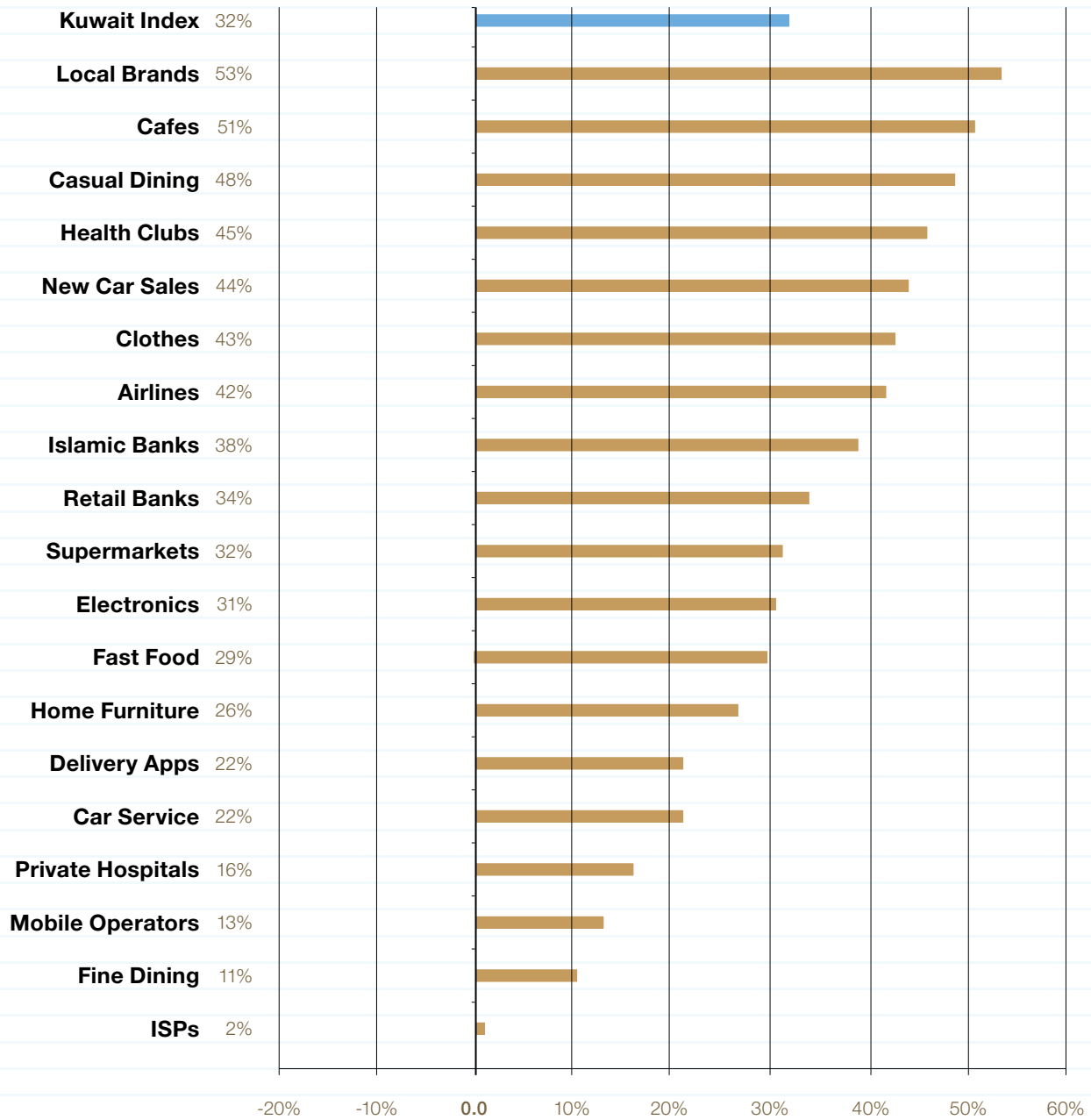
All demographic groups experienced an increase in satisfaction since last year. This increase can be attributed to companies adapting their services to meet consumers needs during the pandemic.

The groups with the largest increase in satisfaction are both Males and Females, Arabs, 60+, and those with a higher education.



# Category NPS

Service Hero CSI Category 2021 Net Promoter Score

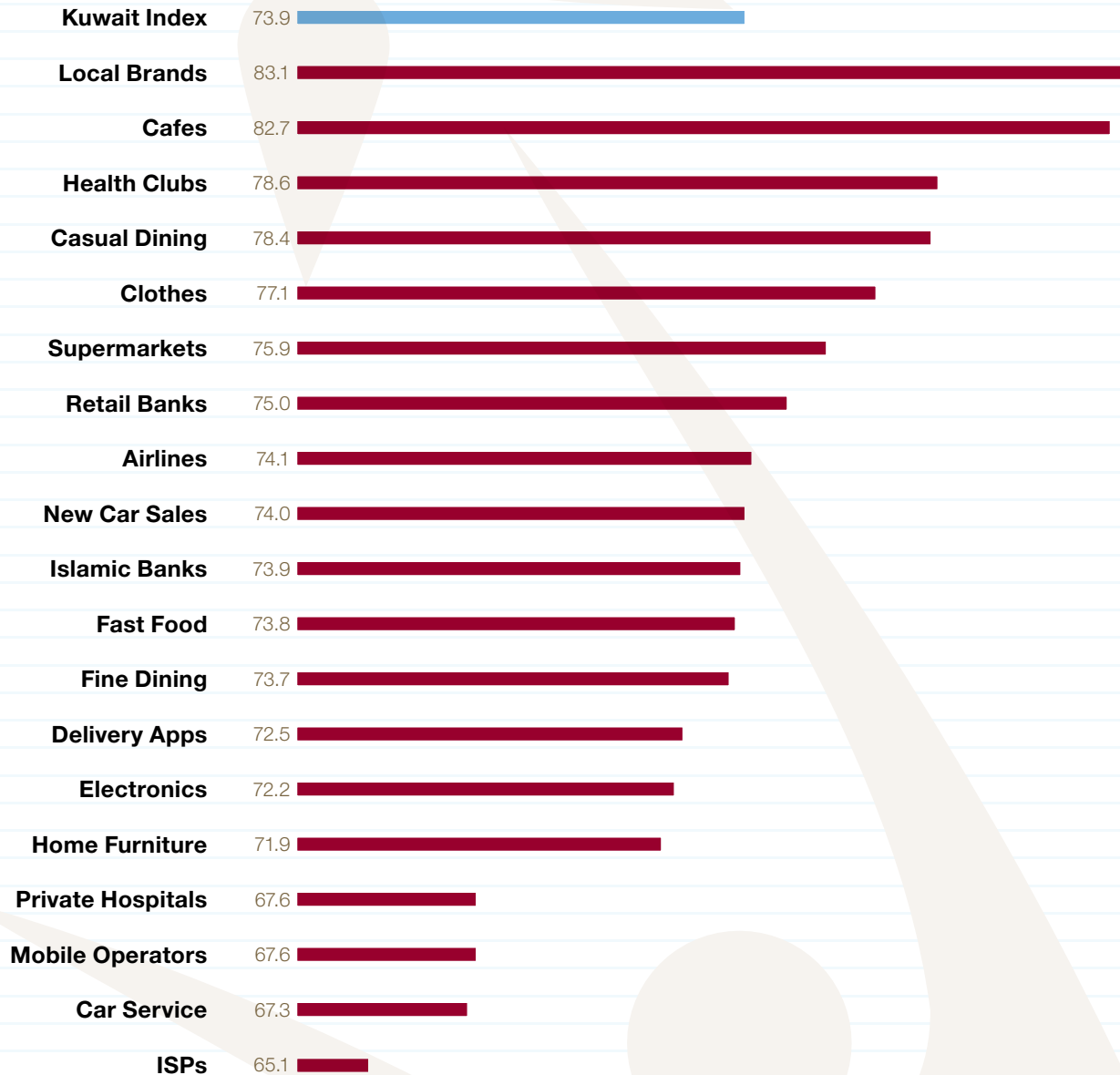


With the country average at 32%, some categories fell below the average with ISPs, Fine Dining, Mobile Operators, and Private Hospitals scoring lower than the country average. While the majority are still Ambassadors, these categories have high numbers of Detractors. The highest NPS scores are for restaurant categories.



# The Kuwait expected index across all 19 categories

Expected Index



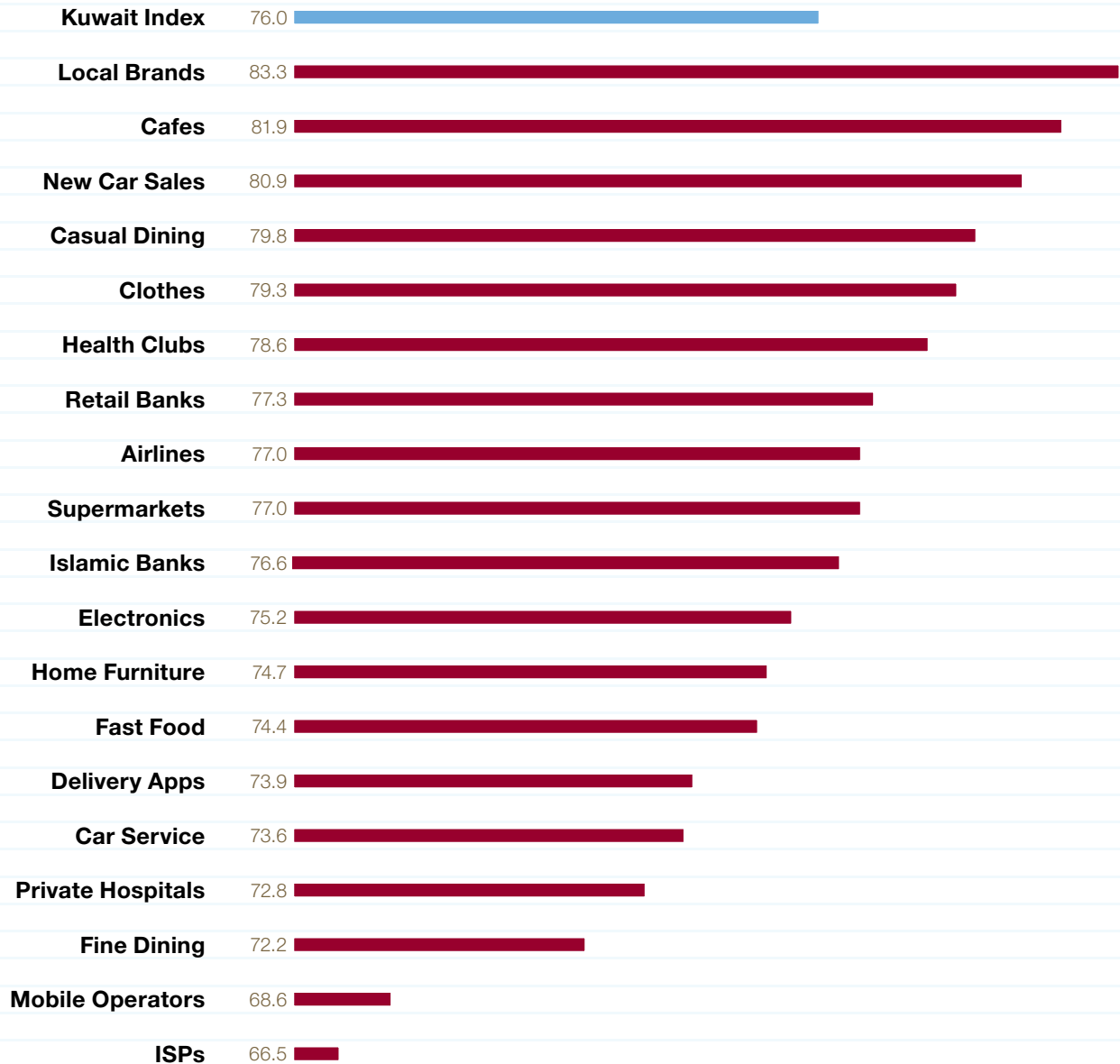
The top expectations are for Local Brands, Cafes, and Health Clubs. The lowest is ISPs, Car Service, and Mobile Operators.

Restaurant industries as top categories have excelled and adapted during the pandemic.



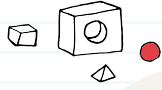
# The Kuwait actual index across all 19 categories

Actual Index



The top three scoring industries are Local Brands, Cafes, and New Car Sales. The lowest industries on Actual Satisfaction are ISPs, Mobile Operators, and Fine Dining.





## Interaction category

Point of Interaction

	In store / branch	Website	Phone	Mobile App
<b>Kuwait Index</b>	<b>75.0</b>	<b>77.6</b>	<b>76.2</b>	<b>78.0</b>
Local Brands	82.4	88.9	96.3	80.6
Delivery Apps	82.3	68.3	78.9	72.8
Cafes	81.6	53.7	97.5	93.4
Fine Dining	71.0	97.2	86.1	70.4
Fast Food	74.6	76.6	71.4	75.1
Casual Dining	79.1	78.4	86.4	79.8
Health Clubs	79.8	88.9	33.3	88.9
Supermarkets	77.1	73.4	85.2	71.4
Electronics	75.6	73.6	68.8	78.9
Home Furniture	75.1	67.3	68.5	73.6
Clothes	79.1	78.3	83.3	79.3
Private Hospitals	72.2	82.9	85.1	88.1
ISPs	62.0	72.0	54.1	66.2
Mobile Operators	57.7	70.6	58.1	74.0
Retail Banks	74.2	77.8	76.0	79.7
Islamic Banks	71.6	82.9	68.3	81.2
Airlines	74.7	78.2	78.8	76.5
New Car Sales	80.7	87.6	86.0	76.9
Car Service	73.7	77.8	85.2	75.0
Highest				
Lowest				

On a country level, Mobile Apps scored highest with 78.0 points and In store scored lowest with 75.0. Companies shifting their services to digital channels to meet the needs of consumers during the pandemic could be the reason for a high satisfaction score.

Local brands scored highest for In store interaction, with Mobile Operators scoring lowest. Cafes scored highest Over the Phone and Mobile Apps, while scoring lowest for Website. ISPs scored lowest for Mobile Apps and Health Clubs have the lowest score for Over the Phone.



## Frequency category

Frequency of Visits

	Week	Monthly	3 months	6 months	Yearly
<b>Kuwait Index</b>	<b>79.2</b>	<b>75.2</b>	<b>74.1</b>	<b>72.5</b>	<b>67.0</b>
Local Brands	83.3	83.2	85.2	85.2	81.5
Delivery Apps	77.6	71.1	67.1	54.7	55.8
Cafes	87.0	79.5	80.8	49.1	70.5
Fine Dining	71.5	79.5	76.2	70.1	54.1
Fast Food	75.2	76.1	64.4	69.8	52.6
Casual Dining	89.5	80.8	79.4	79.5	72.7
Health Clubs	80.6	63.0	N/A	88.9	52.8
Supermarkets	77.5	77.2	70.8	62.2	44.7
Electronics	70.8	75.8	73.2	73.8	72.6
Home Furniture	89.7	78.5	68.4	73.3	73.0
Clothes	82.6	80.5	76.9	79.3	71.5
Private Hospitals	80.0	73.9	71.7	71.1	70.1
ISPs	63.3	62.0	63.5	68.3	62.5
Mobile Operators	59.0	62.4	62.7	69.8	68.0
Retail Banks	84.1	75.0	76.3	74.7	77.1
Islamic Banks	82.1	78.4	73.8	77.2	66.9
Airlines	87.0	75.2	75.0	77.4	76.7
New Car Sales	88.7	75.3	70.9	79.0	81.8
Car Service	75.2	81.9	72.4	73.9	68.1
Highest					
Lowest					

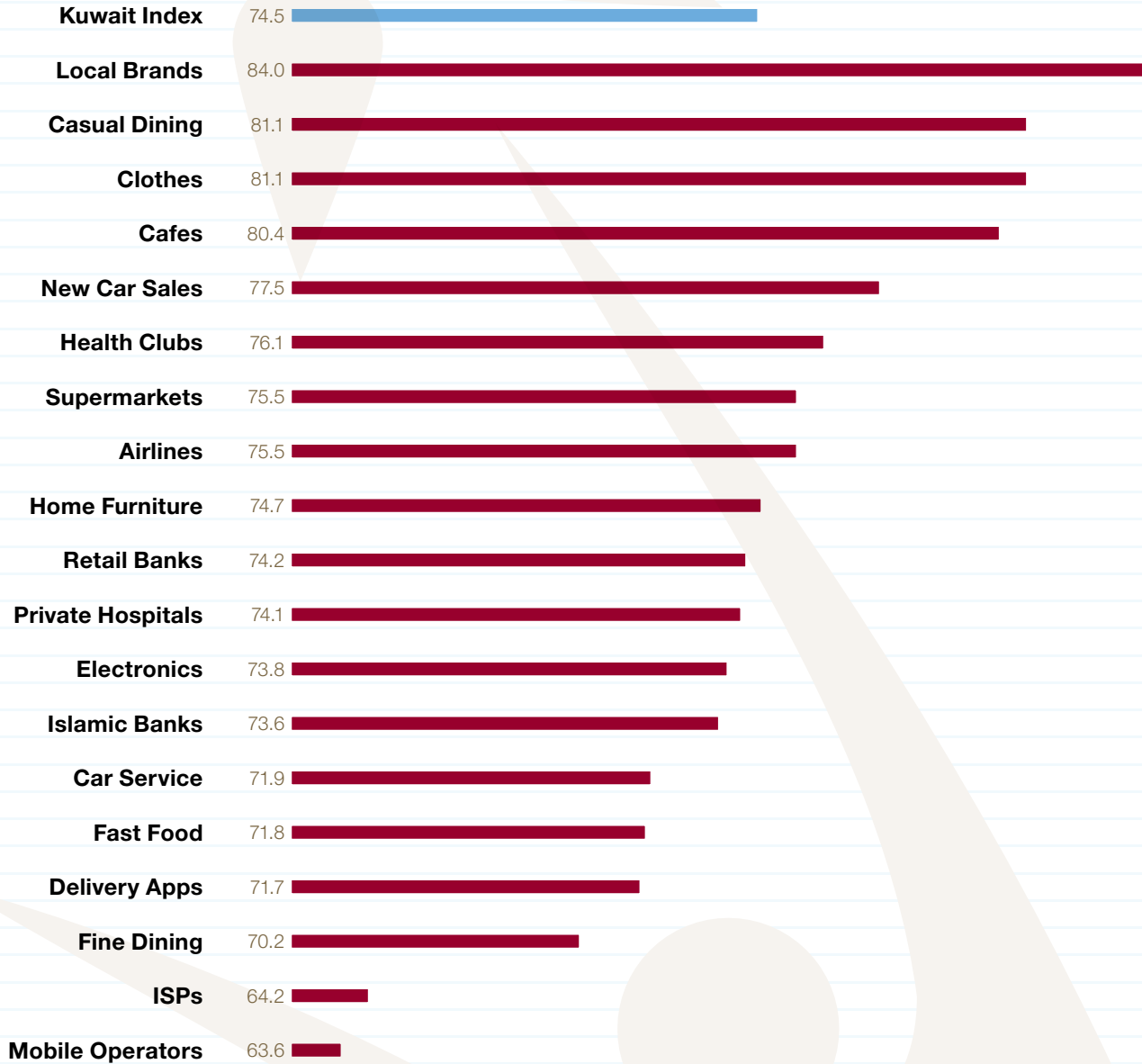
Weekly interactions with a brand scored highest with a score of 79.2. Annual interactions scored lowest with a score of 67.0.

On a category level, the trends seem to continue with a majority of categories frequented weekly scoring highest. Annual scores are, on average, the lowest scoring.



# Complaint resolution category

Kuwait Index complaint average score 2021

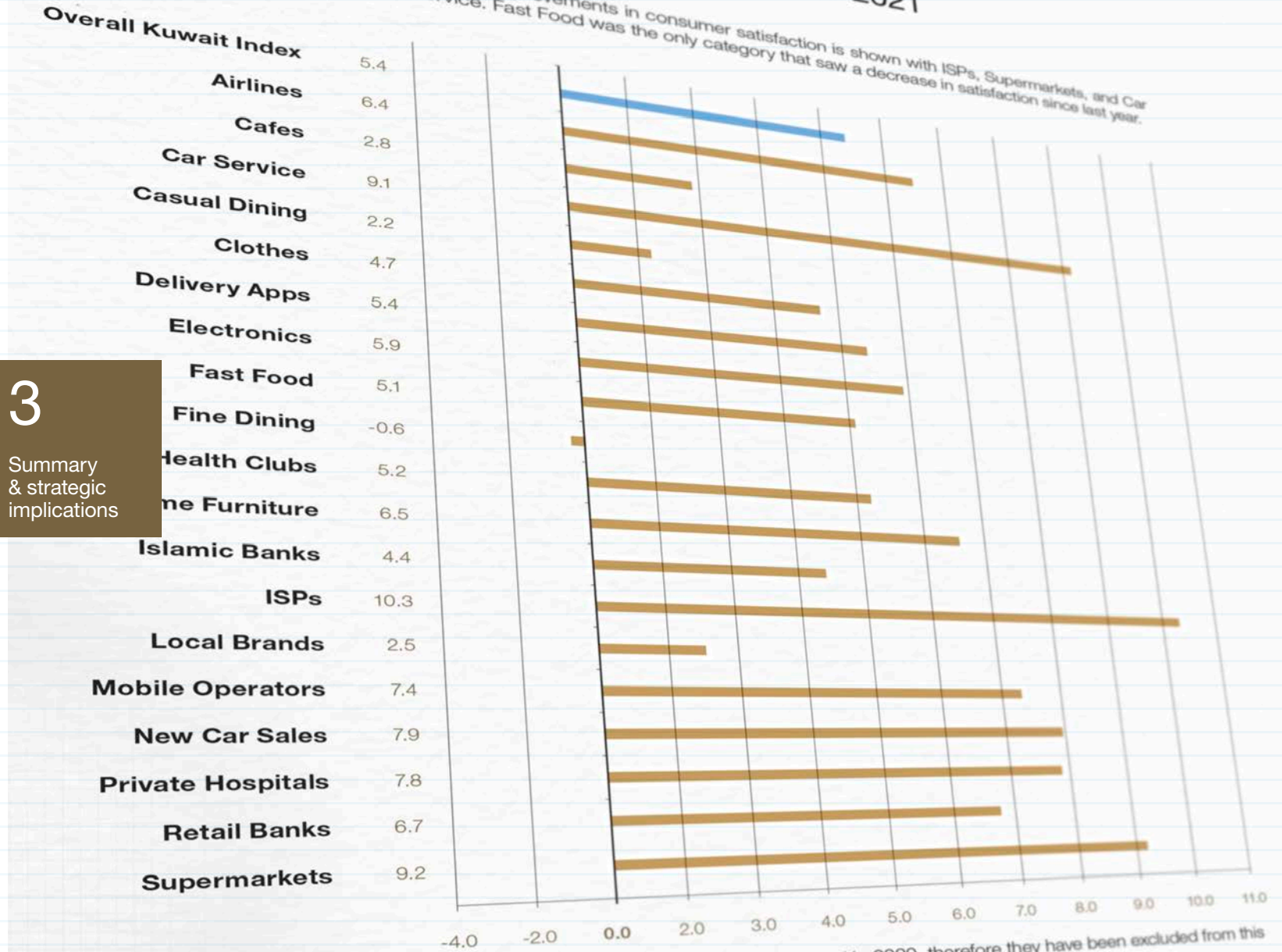


Consumers in Kuwait scored an Ordinary score of 74.5 on how brands deal with complaints. Local Brands and Cafes both had Good scores, while ISPs and Mobile Operators had the lowest, Unheroic, scores.



## Category Growth 2020 vs. 2021

Notable improvements in consumer satisfaction is shown with ISPs, Supermarkets, and Car Service. Fast Food was the only category that saw a decrease in satisfaction since last year.



### 3

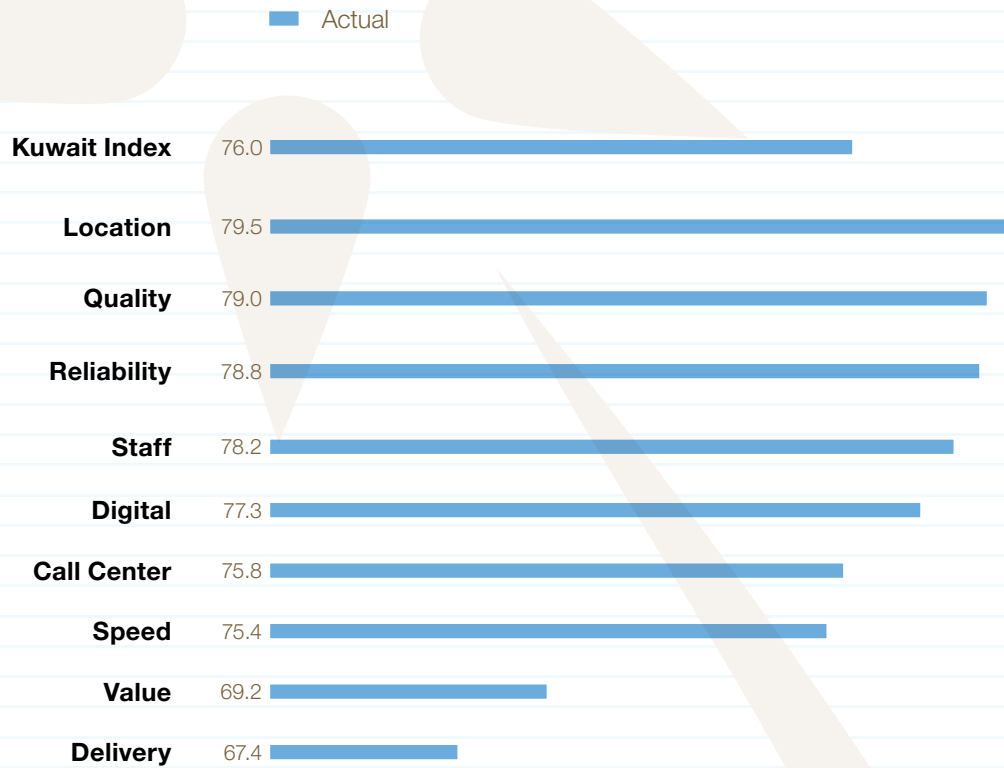
Summary & strategic implications

The Delivery Apps category was added in 2020, therefore they have been excluded from this comparison chart.



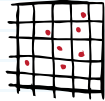
## Kuwait Index by service dimension

Kuwait Index 2021 service dimension



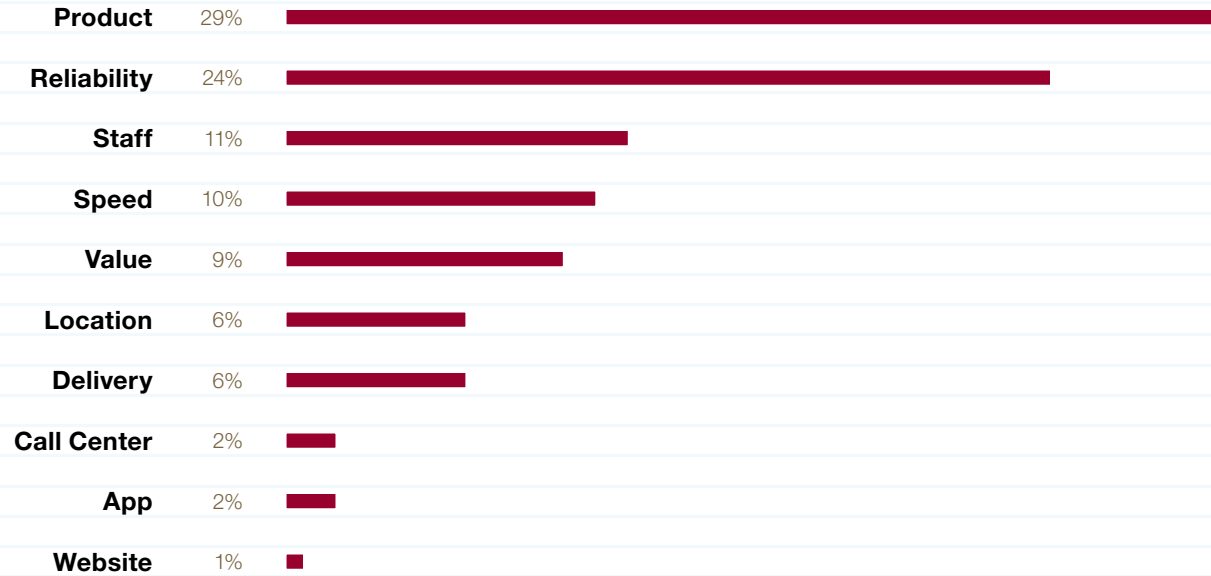
When we look at dimension scores, Location, Product, and Reliability scored highest. Delivery, Value for Money, and Speed scored lowest.

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



## Correlation of dimensions to overall satisfaction

Service dimensions most influential to overall satisfaction (R Square 85%, 23,661 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, there are 2 dimensions that are critical in influencing overall satisfaction: Product Quality (29% impact) and Reliability and Accuracy (24% impact). If companies prioritize their effort on these dimensions it would help them improve satisfaction.

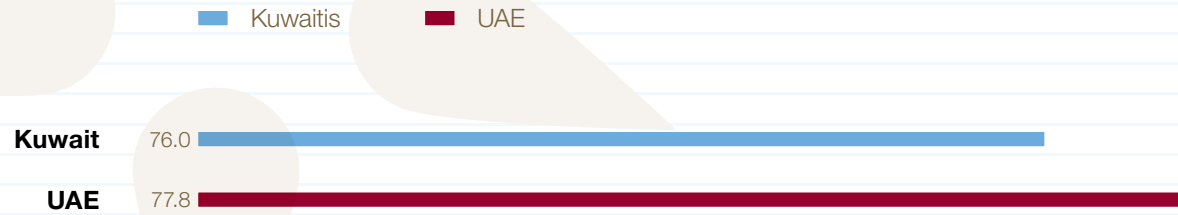
Also, during the pandemic, Reliability as a strong driver of satisfaction makes sense as consumers look to companies that are maintaining and excelling in their safety standards.

On the flip side, Website and App have no impact on overall satisfaction, while Staff, Speed and Value have a small degree of influence.



# Comparing Kuwait & UAE

Kuwait & UAE scores 2021



Kuwait has a lower score than the UAE in actual satisfaction and a (-1.8) difference, which is not significant. Comparing categories, there are a few categories that perform well in both countries such as Casual Dining, Cafes, 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 Delivery, whereas in Kuwait Location scored highest and Delivery satisfaction scoring lowest. In UAE, Value 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 is Females and those with a lower education. The demographic differences in satisfaction between the countries comes with age, where we see those aged 50+ as being more satisfied compared to Kuwait, as well as Emiratis being the most satisfied nationality.

Looking at NPS scores, Kuwait posted a 32% score while UAE has a higher one at 37%. On average, consumers in Kuwait are less likely to promote a brand than in the UAE.



## Category CSI comparison to 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 second highest, with the ACSI and Singapore showing lower scores.

Category	Kuwait Service Hero CSI	UAE Service Hero CSI	US ACSI Index	Singapore CSI Index
Airlines	77.0	81.0	76.0	77.0*
Cafes	81.9	83.9	N/A	69.6
Car Service	73.6	76.4	78.0	N/A
Casual Dining	79.8	82.5	80.0	73.1
Clothes	79.3	78.9	78.0	73.3
Electronics	75.2	79.6	77.0	72.7
Fast Food	74.4	81.4	78.0	74.0
Fine Dining	72.2	N/A	N/A	73.1
Health Clubs	78.6	N/A	N/A	N/A
Home Furniture	74.7	79.1	77.0	72.7
Islamic Banks	76.6	74.9	78.0	74.0*
ISPs	66.5	N/A	65.0	66.9
Local Brands	83.3	N/A	N/A	N/A
Mobile Operators	68.6	58.5	74.0	69.2
New Car Sales	80.9	84.0	78.0	N/A
Private Hospitals	72.8	73.0	69.0	72.7**
Retail Banks	77.3	73.8	78.0	74.0*
Supermarkets	77.0	79.1	76.0	72.0
Delivery Apps	73.9	81.6	78.0	76.4
<b>Overall Score</b>	<b>76.0</b>	<b>77.8</b>	<b>73.7</b>	<b>74.0*</b>

\* 2020

\*\* 2019

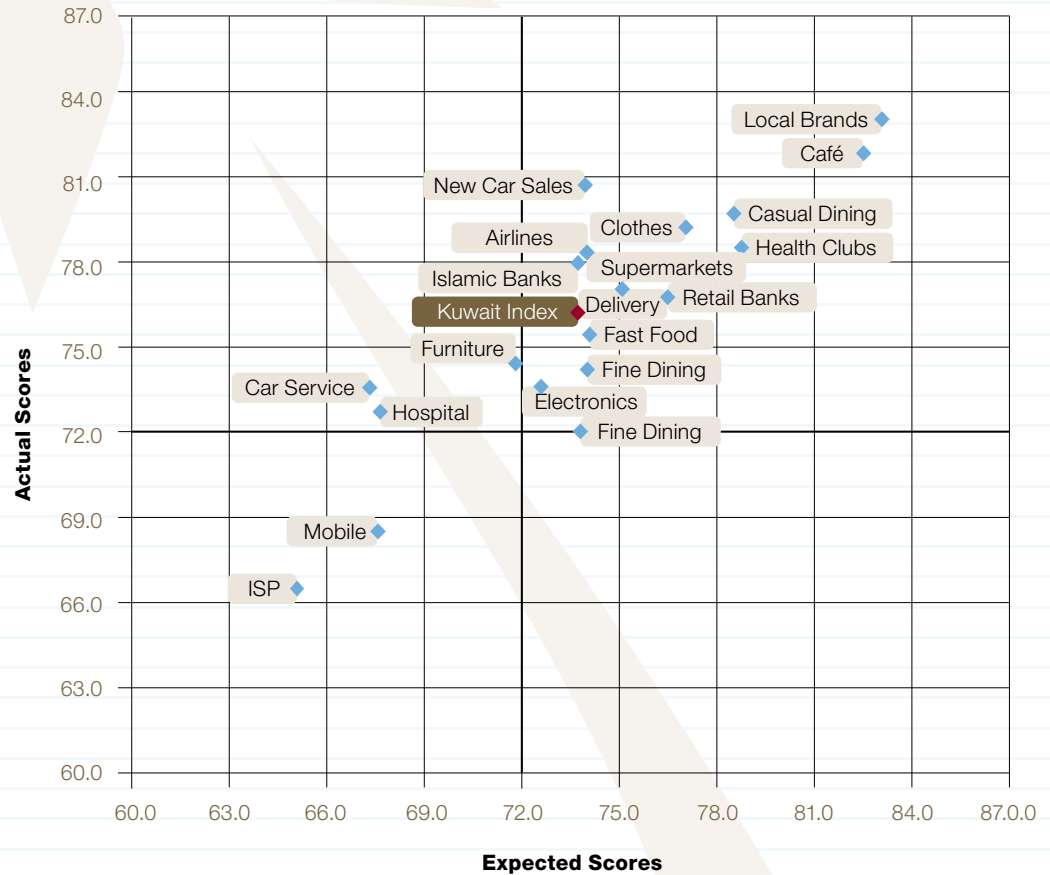
**Note:** Some categories measured by the Kuwait Service Hero CSI cannot be directly compared to categories in the US and Singapore as they are defined and measured differently on those indexes.





# Market position of all 19 categories

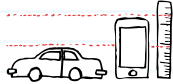
Mapping categories on expectation and actual scores to understand their market position



Industry categories in the top right quadrant such as Local Brands, Cafes, and Casual Dining 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 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.



## Category comparison 2016 vs 2021

Actual Satisfaction

As companies have adapted during the pandemic, satisfaction for Kuwait increased significantly from 2020, and scores higher than 2016. The top scoring categories throughout the years have traditionally been Cafes, Casual Dining, and Home Furniture. Notable improvements in consumer satisfaction are shown with ISPs, Supermarkets, and Car Service. Home Furniture, Fast Food, and Fine Dining saw the largest decrease in satisfaction since 2016.

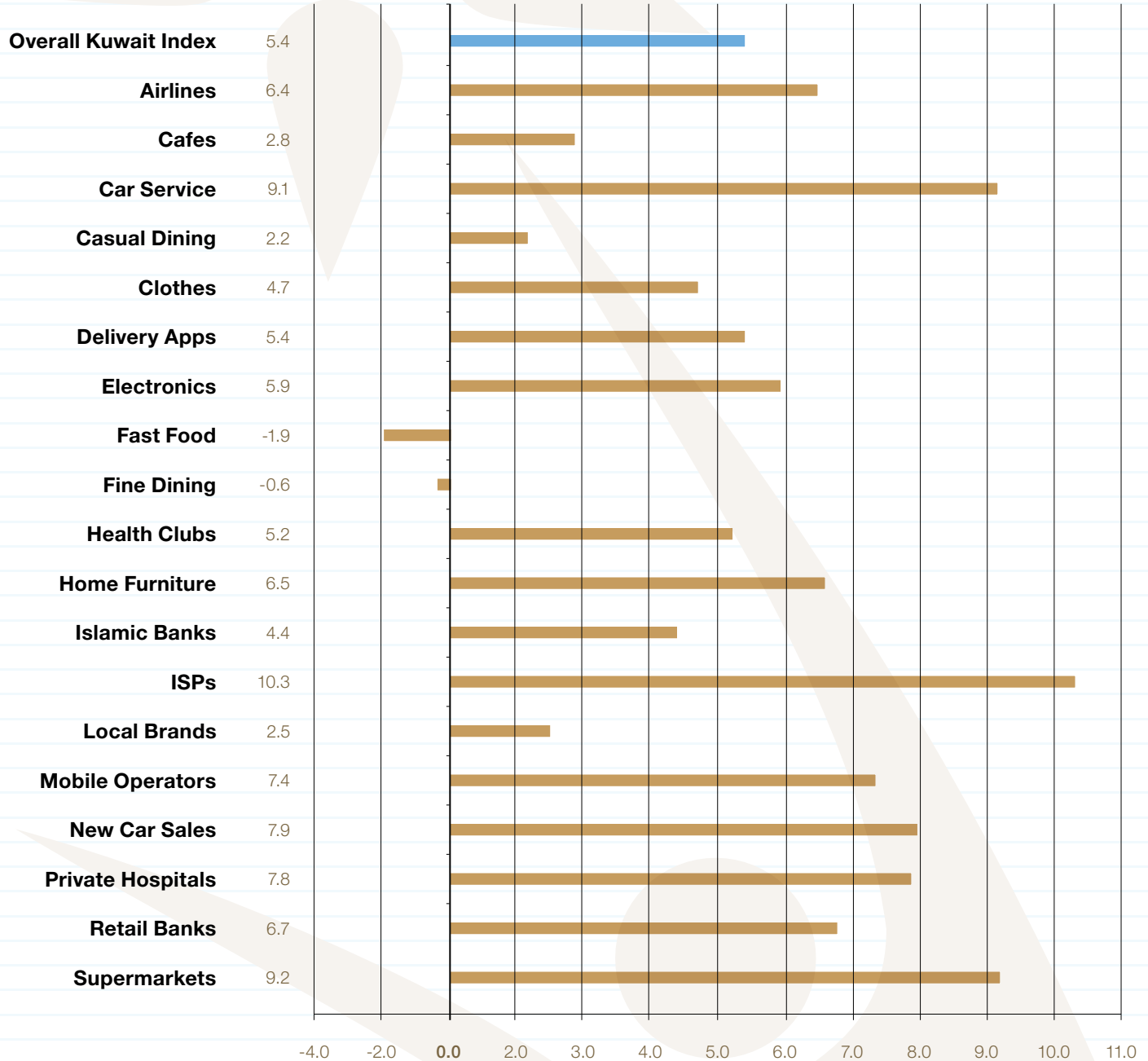
	'16	'17	'18	'19	'20	2021
<b>Kuwait Index</b>	<b>75.3</b>	<b>76.5</b>	<b>75.4</b>	<b>75.1</b>	<b>70.6</b>	<b>76.0</b>
Airlines	74.4	78.9	73.3	69.0	70.7	77.0
Cafes	83.3	83.0	80.5	83.1	79.1	81.9
Car Service	73.0	75.8	73.7	74.3	64.5	73.6
Casual Dining	81.3	78.8	81.0	81.1	77.6	79.8
Clothes	81.0	79.5	78.4	81.0	74.5	79.3
Delivery Apps	N/A	N/A	N/A	N/A	68.5	73.9
Electronics	72.7	76.8	77.5	74.2	69.3	75.2
Fast Food	77.0	75.2	75.4	78.1	76.3	74.4
Fine Dining	76.3	78.5	78.7	76.6	72.8	72.2
Health Clubs	72.8	74.5	74.3	81.5	73.4	78.6
Home Furniture	81.3	78.8	79.4	68.5	68.2	74.7
Islamic Banks	76.6	82.4	73.3	74.4	72.2	76.6
ISPs	63.1	62.2	63.3	61.9	56.2	66.5
Local Brands	N/A	N/A	N/A	79.4	80.8	83.3
Mobile Operators	69.3	67.6	69.0	67.9	61.2	68.6
New Car Sales	77.5	79.4	78.1	81.2	73.0	80.9
Private Hospitals	70.7	73.4	73.9	72.4	64.9	72.8
Retail Banks	73.5	75.9	73.4	74.9	70.6	77.3
Supermarkets	76.0	79.4	78.6	73.1	67.8	77.0
Highest						
Lowest						

**Note:** Local brands was added in 2019. Delivery Apps was included in 2020.



## Category Growth 2020 vs. 2021

Notable improvements in consumer satisfaction is shown with ISPs, Supermarkets, and Car Service. Fast Food was the only category that saw a decrease in satisfaction since last year.



The Delivery Apps category was added in 2020, therefore they have been excluded from this comparison chart. 33



**best** بست  
AL-YOUSIFI اليوسفي

بنك بوبيان  
Boubyan Bank



4  
Kuwait  
Awards 2020



# Top three country winners

From their website



## FIRST PLACE

Qatar Airways is the national airline of the State of Qatar and one of the aviation industry's big success stories. Beginning in 1994, the airline was re-launched in 1997 under the mandate of His Highness the Emir, Sheikh Hamad bin Khalifa Al Thani, who outlined a vision to turn Qatar Airways into a leading international airline with the highest standards of service and excellence.

Qatar Airways has since become one of the fastest, and largest, growing carriers in the history of aviation with unprecedented expansion averaging double digit growth year on year.

Under the dynamic leadership of Group Chief Executive, His Excellency Mr. Akbar Al Baker, Qatar Airways turned into an award-winning carrier and one of the best in the world.

Travel today involves a mix of short, medium and long-haul segments, with more people travelling than ever before. With the breadth of network coverage today, virtually no destination is unreachable. This is why the commitment to service is paramount; as their guests are travelling farther and more frequently than ever before, the experience on board is an important part of the journey itself.



## SECOND 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

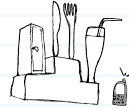
that is expected to reach 30 branches by 2014, Boubyan Bank is working hard to enhance its circle of activities and achievements to reach an even higher status in the Islamic banking field in Kuwait. This new strategy also saw an enhancement of the packages of services and Islamic banking products provided 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.



## THIRD PLACE

Nike, Inc., is an American sportswear company headquartered in Beaverton, Oregon. It was founded in 1964 as Blue Ribbon Sports by Bill Bowerman, a track-and-field coach at the University of Oregon, and his former student Phil Knight. They opened their first retail outlet in 1966 and launched the Nike brand shoe in 1972.

The company was renamed Nike, Inc., in 1978 and went public two years later. By the early 21<sup>st</sup> century, Nike had retail outlets and distributors in more than 170 countries, and its logo—a curved check mark called the "swoosh"—was recognized throughout the world.



## Comparing the winners of 2016 to 2021

The Service hero CSI awarded 15 category winners in 2010 expanding to 19 since 2011, of which 3 companies were 11 time consecutive winners in the 2021 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 2016 to 2021**

<b>Service Hero Category</b>	<b>2021 Winner</b>	<b>'20</b>	<b>'19</b>	<b>'18</b>	<b>'17</b>	<b>'16</b>
Car Sales	<b>Chevrolet</b>	Yes	No	No	No	Yes
Car Service	<b>Lexus</b>	No	No	Yes	No	No
Airlines	<b>Qatar Airways</b>	Yes	Yes	Yes	yes	No
Clothes	<b>Nike</b>	No	No	No	No	No
ISPs	<b>Zain</b>	No	Yes	Yes	Yes	Yes
Mobile Operators	<b>Zain</b>	Yes	Yes	Yes	Yes	Yes
Islamic Banks	<b>Boubyan</b>	Yes	Yes	Yes	Yes	Yes
Retail Banks	<b>NBK</b>	Yes	Yes	Yes	Yes	Yes
Private Hospitals	<b>Royale Hayat</b>	Yes	Yes	Yes	Yes	Yes
Cafes	<b>Caribou Coffee</b>	Yes	Yes	Yes	Yes	Yes
Fast Food	<b>McDonalds</b>	No	Yes	No	Yes	No
Casual Dining	<b>Cheesecake Factory</b>	Yes	No	No	No	Yes
Electronics	<b>Best AI Yousifi</b>	Yes	No	No	No	No
Home Furniture	<b>IKEA</b>	No	No	Yes	No	No
Supermarkets	<b>City Center</b>	No	No	No	No	No
Delivery Apps*	<b>Deliveroo</b>	Yes	N/A	N/A	N/A	N/A

\* Category added in SH CSI 2021

4  
of 4

# Rate brand

How would you rate

How well did the brand meet your **expectations**

Your overall **satisfaction** with this company

Likelihood of **recommending** this brand

How well the brand **fixed** any issues

**Staff** attitude, knowledge & competence

**Reliability** and consistency

**Quality** of product or service

Service **speed**

**Value** for money



1 2 3 4 5 **6** 7 8 9 10

1 2 3 4 5 6 **7** 8 9 10

1 **2** 3 4 5 6 7 8 9 10

1 2 3 4 5 **6** 7 8 9 10

1 2 3 **4** 5 6 7 8 9 10

1 2 3 4 5 6 7 **8** 9 10

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

What suggestions do you have?

Submit rating

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](http://www.servicehero.com) regarding the quality of service they receive in private sector companies in Kuwait. The survey was live January 1<sup>st</sup> - December 31<sup>st</sup> 2021.

### Sample

The index aimed to collect a total sample of 10,000 valid votes for Kuwait distributed over 19 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. 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

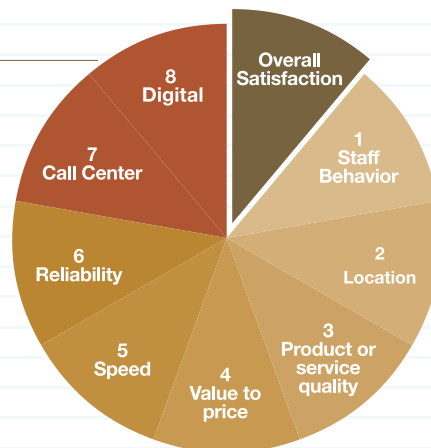
A number of security measures were deployed of either technical nature to verify the authenticity of the voter, or later, at the data cleansing stage, to remove any suspicious data.

### 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.







## Security measures and rules for valid votes

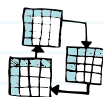
**To ensure that each visitor is a legitimate customer, a number of security measures have been put in place.**

### 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

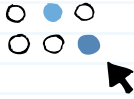
- All voters are asked to submit a correct email upon registration
- No votes were tabulated unless this email address is authenticated by the user via an automated trigger
- No single user can vote for the same company more than once
- IP address monitoring which statistically measures incoming connections 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 4,030 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 **23,661** votes.

<b>Our rules that have been implemented (Automated &amp; Manual)</b>	<b>Votes removed</b>
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
<b>Total votes removed</b>	<b>799</b>
<b>Data Cleansing (Automated &amp; Manual)</b>	<b>Votes removed</b>
1 Remove votes that are NA across all dimensions in the <b>after</b> evaluation	yes
2 Remove votes that are only made for <b>before</b> assessment and NA votes for <b>after</b> 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
<b>Total votes removed</b>	<b>(6,173)</b>
<b>Total votes obtained</b>	<b>29,834</b>
<b>Total votes assessed</b>	<b>23,661</b>



# 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 <b>7</b> 8 9 10 NA	Staff attitude, knowledge and competence	1 2 3 4 5 6 7 <b>8</b> 9 10 NA
1 2 3 4 5 <b>6</b> 7 8 9 10 NA	Location attractiveness and convenience	1 2 3 4 5 6 7 8 <b>9</b> 10 NA
1 2 3 4 5 6 7 <b>8</b> 9 10 NA	Value for money (price compared to quality) of the product or service	1 2 3 4 5 <b>6</b> 7 8 9 10 NA
1 2 3 4 5 6 <b>7</b> 8 9 10 NA	Product or service quality	1 2 3 4 5 6 7 8 <b>9</b> 10 NA
1 2 3 4 <b>5</b> 6 7 8 9 10 NA	Service speed	1 2 3 4 5 6 7 <b>8</b> 9 10 NA
1 2 3 4 5 6 <b>7</b> 8 9 10 NA	Reliability and accuracy of the product or service	1 2 3 4 5 6 <b>7</b> 8 9 10 NA
1 2 3 4 5 6 7 8 <b>9</b> 10 NA	Their call center	1 2 3 4 5 <b>6</b> 7 8 9 10 NA
1 2 3 4 5 6 7 8 <b>9</b> 10 NA	Their Digital	1 2 3 4 <b>5</b> 6 7 8 9 10 NA
1 2 3 4 5 6 <b>7</b> 8 9 10 NA	Your overall satisfaction with the company or brand	1 2 3 <b>4</b> 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:

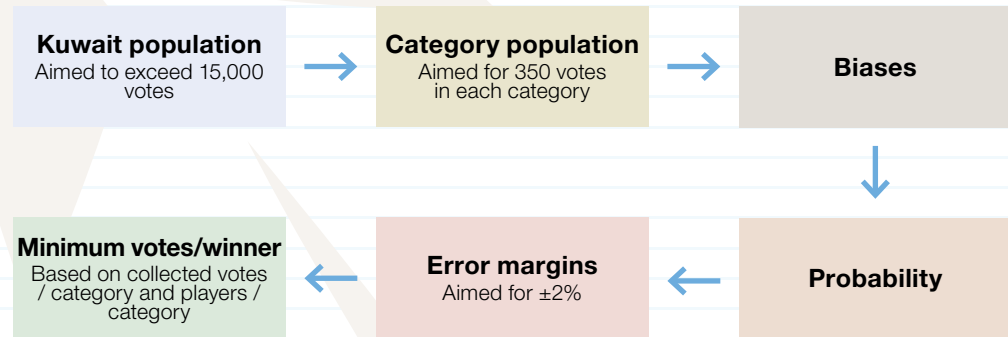
1. What they expected **before** receiving the service
2. What they actually experienced **after** being served

**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.

## **Kuwait population.**

The population of individuals which is eligible to vote in Kuwait is 3 million.

It **excludes** (around 1.25 million individuals):

- Anyone under 16 years
- Laborers

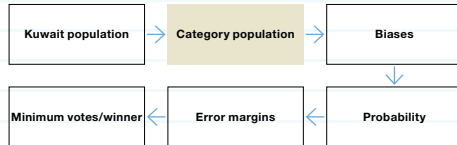
**Note:** All population figures are from the Public Authority for Civil Information and the Ministry of Planning.





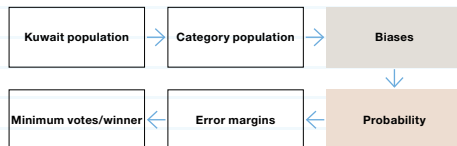
# Sampling approach (continued)

## 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.

### 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



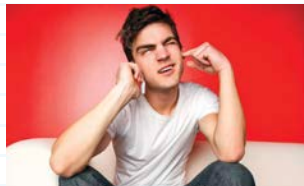
**Airlines**



**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**



**Delivery app**

## Sampling approach (continued)

**Minimum sample sizes and error margins for all categories.**

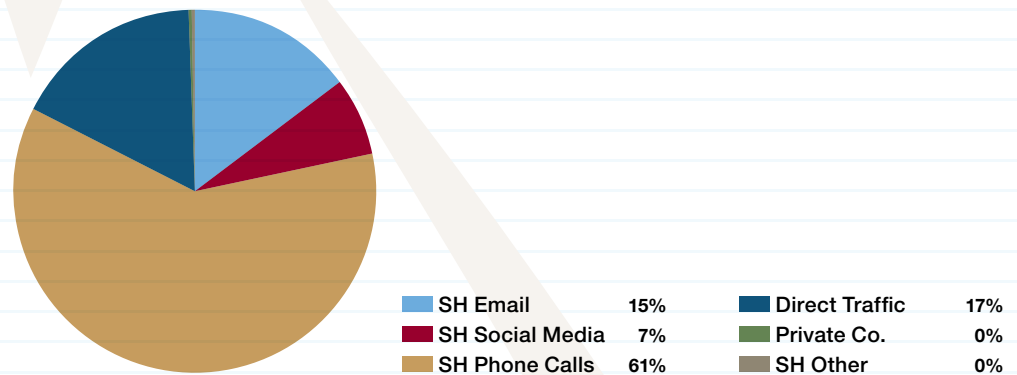
<b>Confidence level: 95%</b>			
<b>Sector</b>	<b>Biased Population</b>	<b>Sample @ 5%</b>	<b>Total Votes</b>
Airlines	88,186	293	1,359
New Car Sales	88,186	293	1,246
Car Service	88,186	293	1,429
Clothing	88,186	293	1,831
Mobile Operator	88,186	293	1,910
ISPs	88,186	293	1,632
Café	88,186	293	396
Fast Food	88,186	293	1,365
Casual Dining	88,186	293	597
Fine Dining	48,992	242	169
Electronics	88,186	293	2,204
Retail banks	68,505	273	2,084
Islamic banks	30,833	196	1,504
Furniture	58,791	259	499
Private Hospital	37,421	216	2,002
Supermarkets	88,186	293	1,982
Health Clubs	37,421	216	51
Local Brands	37,421	216	80
Delivery Apps	88,186	293	1,324

This table shows the 19 categories included in the 2021 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.



## 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)



**Abdulmajeed Al-Shatti**  
Ex-Chairman of the Board and Managing Director, Commercial Bank of Kuwait



**Nauman S Sehgal**  
Former Chief Operating Officer, Noor Investment Financial Company



**Dr. Alessandro Magnoli Bocchi**  
CEO of Foresight Advisors

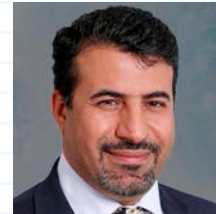
### Academic Advisors



**Dr. Fahad Al Sumait**  
Vice President for Academic Affairs at the Gulf University for Science and Technology in Kuwait



**Amal Al-Binali**  
Vice President for Admissions & Public Affairs at the American University of Kuwait



**Dr. Majed Alsarheed**  
Head of the Innovation and Entrepreneurship Center at the Australian College of Kuwait





خيال للاستشارات  
Khayal Consultants

6

About Khayal  
Consultants

# About Khayal Consultants

**Business consulting, creative design + digital experiences since 1996//**

■ Kuwaiti managed ■ +20 years experience ■ Multidisciplinary ■ Passionate



**Khayal Consultants**

*working ideas*

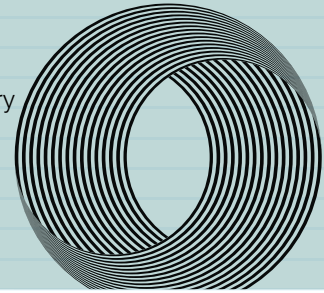
## CREATE

Full range of services for creating a brand.

**Branding:** Logo Development | Usage Manuals | Stationary Design

**Print:** Annual Reports | Corporate Brochures | Marketing Collateral Newsletters | Calendars & Occasions | Articles & Guides

**Motion:** Motion Graphics



## CONNECT

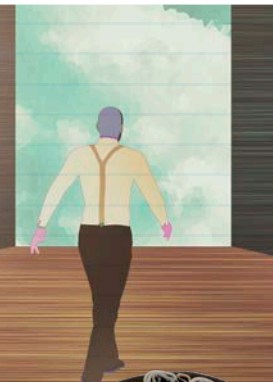
Full service digital capabilities from end to end.

**Consulting:** Strategy & Planning | Benchmarking

**Websites & Mobile:** UI & UX Design | Development | Responsive Websites | Mobile Apps | SEO & SEM | Traffic & Performance Analysis

**xReality:** Virtual Reality | Augmented Reality | Mixed Reality

**Solutions & Support:** Content Management | Digital Signage & Way Finding | Hosting & Monitoring | Maintenance & Support | Mobile Engagement



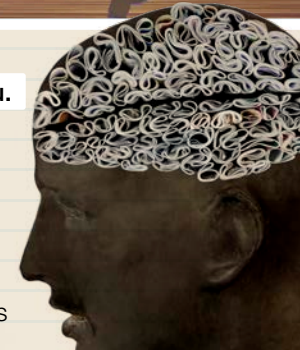
## TRANSFORM

Be relevant. Be smart. Be where customers will find you.

**Consulting:** Strategy review | Brand audit | Culture of excellence Customer experience

**Market Research:** Focus groups | In-depth Interviews Employee engagement | Phone surveys | Mystery shopping

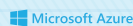
**Manpower Development:** Service excellence training Coaching & mentoring | Shadow coaching | Presentation skills



## CLIENTS



## PARTNERS



**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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