service
Hero

KUWAIT RESULTS

The voice of the consumer

2016

Service Dimensions
Airlines: Regional Arab Airlines
Automotive: Car Service
Automotive: New Car Sales
Clothes & Accessories: Clothes
Communication: Mobile Operators
Communication: ISPs
Financial: Retail Banks
Financial: Islamic Banks
Furniture: Home Furniture
Healthcare: Hospitals
Restaurants: Café
Restaurants: Casual Dining
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 Website index
9 Loyalty index
10 Ideal index

Service Dimensions

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

32 Service categories
1 Staff Behavior index
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3 Product or service quality index
4 Value for price index
5 Offers index
6 Reliability index
7 Call center index
8 Website index
9 Loyalty index
10 Ideal index

Credibility.
Integrity.
Relevance.

service **Hero**

In partnership with the American Customer Satisfaction Index

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 in partnership with the respected American Customer Satisfaction Index and in line with ESOMAR standards:
- Annual Customer Satisfaction Index (CSI)
- Quarterly Customer Satisfaction Index (CSI)
- Customer Satisfaction Index (CSI) with customized questions
- Drivers of Satisfaction (based on the CSI)
- NPS Economics (based on the CSI)
- Employee Satisfaction Index (ESI)

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

Consultancy & education
We conduct intensive fact finding engagements to address the building blocks of service and also offer a training curriculum for service excellence.

Index

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Word from the president

Seven years ago, when we started the Arab world's first national customer satisfaction index (CSI), we had a simple aim. We wanted to provide companies with relevant, impartial data collected from everyday consumers. And to do so only using best-practices research standards.

Over the years, consumers increasingly asked if brands cared about their ratings. Although the Kuwait Index from 2010 and 2015 was trending up, implying that their voices were being heard, in time we understood we had an obligation to consumers. After all, it is they who form the backbone of our CSI. So our aim had to widen to give some consumer insights back to consumers.

As a result, in 2016 we introduced two significant changes.

The first was in response to consumers: introducing a brand Scoreboard. Using the Scoreboard on our new website openly displays all user ratings and comments about brands. This allows consumers to search for brands, view their 3-star ratings, browse, agree, disagree and share other user comments, and even see brands' 12-month performance trends before deciding to deal with a brand. And there's more: companies wishing to engage with their customers now have the ability to directly address customer feedback or concerns using our Engagement Dashboard.

The second significant change was launching the index in the United Arab Emirates. The UAE CSI collects data from over 300 companies across 14 categories. That's in addition to the 17 categories and 300 brands in Kuwait. To date we have collected around 150,000 customer assessments for brands in both markets. As always, all data collected is vetted for accuracy and validity. Companies operating in both countries can now compare their results to similar brands in both markets, as can consumers.

Consumers are the pillar of the CSI. Votes collected represent both genders, and all key age, nationality and education levels in both countries. Why do they take time to rate brands? Because they want to have a voice and they want companies to listen and care about their concerns.

Since our journey began 7 years ago, we have witnessed an increase in maturity and investment among companies on the essentials of service excellence. Companies today have a better understanding of what customers expect from them, how to provide satisfactory service, and importantly, how to connect with their customers in order to build loyalty.

We look forward to continuing our mission to shed light on the importance of customer (and employee) satisfaction in the firm belief that it makes the quality of all our lives better.

Faten Abu Ghazaleh
President

1
Executive
summary

Pie chart segments:
- Overall Satisfaction
- 1 Staff Behavior
- 2 Location
- 3 Product or service quality
- 4 Value to price
- 5 Speed
- 6 Reliability
- 7 Call Center
- 8 Website
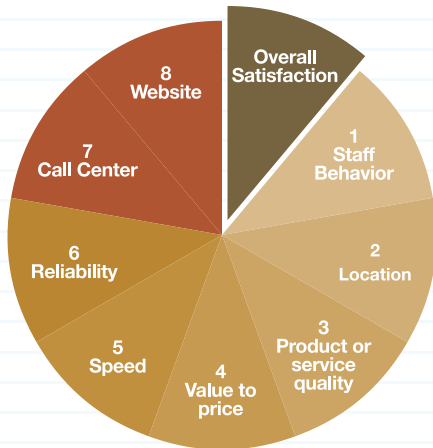
Note: 14 categories assessed all 8 service dimensions, while 3 categories assessed 6 service dimensions.

Methodology
Service Hero is predominantly an online survey where respondents vote directly on www.servicehero.com from January 1- December 31st 2016. Consumers are aware of the survey via online ad banners, phone calls and email shots. We adhere to the research protocols of ESOMAR as well as the American Customer Satisfaction Index. This year is also the first time we will be reporting our scores and findings in a 100 point scale to further emphasize our adherence to these protocols.

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, the likelihood to recommend a brand, and how far a brand is from meeting their ideal offering. 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 22,007 assessments where cleaned to arrive at the final 17,074 sample of valid votes for Kuwait with a minimum of 350 votes per category. This gives a confidence level of 95% with +/- 2% error margin. The sample reflects the demographic structure of Kuwait in terms of the non-labor market of eligible consumers aged over 16 years.

Findings
Kuwait scored 81.3 on Expectation (before dealing with a brand) and 75.4 for Actual Satisfaction (after dealing with it). Since the score for Actual Satisfaction is lower, this means consumers have higher expectations than actual satisfaction. The highest service dimensions are Staff Attitude, Location, and Reliability while the lowest are Value for Money and Call Center.

Demographics
Non Arabs, Females, older customers, and customers with a low education level have the highest satisfaction scores while Kuwaitis, Males, customers with a high education level, and those aged 18-29 have the lowest satisfaction scores.

Loyalty and Ideal
Kuwait scored 75.3 on the likelihood of recommending a brand (Loyalty). Females, Non Arabs, customers aged 16 to 17 and aged 60 or over and those with lower education tend to be most loyal. Looking at the Net Promoter Score (ratio of customers promoting the brand versus being detractors) we see that Kuwait overall scores 29%, with Kuwaitis, Males, those aged 18-29, and customers with high education are least loyal.

Ideal satisfaction scored a 74.2. This represents customers' perception of how they have been serviced, and how close it is to ideal service.

Because this score is marginally lower than the Actual Average satisfaction score by 1.2, it suggests that there is room to improve service levels.

Categories
Of the 17 categories assessed, 9 of them matched, or exceeded, the Kuwait Index score. These were mostly with the Restaurants, Clothes, Islamic Banks, and New Car Sales and Service. The lowest scoring categories are ISPs, Mobile Operators, and Private Hositpials.

The industries with the highest number of customers promoting them (loyalty) are Clothes, Cafes, Casual Dining, and Home Furniture, while the ones with the most detractors are ISPs and Mobile Operators.

Changes since last year
While Kuwait decreased (1.00 points) since last year, a couple of demographic groups actually improved their satisfaction compared to last year. These are consumers aged 30-39, Non Arabs, and those with Elementary level education. Those that dropped the most are 40 to 49 year olds, Males, Arabs, and Diploma holders.

All dimensions decreased in satisfaction from the previous year. In the Industry category, Cafes, Fast Food, and Clothes increased the most while the Automotive, Retail Banks, and ISPs dropped the most in satisfaction. Finally, in terms of Net Promoter Score, an increase in loyalty is shown with those aged 50 and over, Non Arabs, and Females, while other demographics improved their NPS, it was not as significant.

Changes from 2010
In the seven years since the index started in 2010, Kuwait has increased by 4% (2.7 points) in overall customer satisfaction. In demographic groups, Females, consumers aged 16-17 and 50-59 years, and Non Arabs increased the most. The only demographic group that dropped in satisfaction since 2010 are consumers over 60.

Most dimensions increased in satisfaction over the seven year period, except for Website which had the only negative satisfaction between the 8 dimensions. The largest gains in satisfaction are Value for Money and Call Center. By industry, 12 categories improved in the past seven years with Car Service, Fast Food, and Home Furniture increasing the most. The categories decreasing in satisfaction are ISPs, Fine Dining, and Private Hospitals. For Net Promoter Score, all demographic groups increased in loyalty.

Comparison to UAE, US, & Singapore CSI
The US Index scored 75.4 in satisfaction for their national index, putting them on the same level as Kuwait. UAE scored 75.8, putting them marginally higher than the Kuwait Index.

The Singapore CSI stands at 70.2, which is lower than the Kuwait Index.

Dimension scores by nationality
Expectations before dealing with a brand

Arabs

Kuwaitis

Non Arabs

Kuwait
Expected index
81.4
82.5
79.4

Staff
Expected index
81.2
83.7
79.7

Location
Expected index
81.0
81.9
79.0

Value
Expected index
80.0
80.4
78.5

Product
Expected index
82.2
83.6
80.1

Speed
Expected index
81.7
82.8
79.3

Reliability
Expected index
82.4
83.4
80.1

Call Center
Expected index
80.1
81.7
76.9

Website
Expected index
80.5
79.2
77.9

Lowest
Non Arabs have the lowest expectation on all 8 dimensions.

Highest
Kuwaitis have the highest expectations for most dimensions with Arabs having the highest expectation for Website.

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.

Gender	Votes 2016	Votes 2016 Distribution	Kuwait eligible population distribution
Female	5,310	31%	33%
Male	11,236	66%	67%
Nationality			
Arabs	4,434	26%	See note[1]
Kuwaiti	4,949	29%	32%
Non Arabs	4,562	27%	See note[1]
Age Groups			
16 to 17 Years	158	1%	10%
18 to 29 Years	4,058	24%	29%
30 to 39 Years	7,067	41%	29%
40 to 49 Years	3,315	19%	20%
50 to 59 Years	1,211	7%	10%
More Than 60 Years	230	1%	2%
Education			
Elementary or below	120	1%	See note[2]
High school	1,995	12%	See note[2]
Diploma	2,727	16%	See note[2]
University graduate	8,790	51%	See note[2]
Master or PHD	2,469	14%	See note[2]
Total	**17,074**	**100%**	**100%**

From the 2.6 million overall population above 15 years, just under 2 million are eligible to vote. This includes their split by gender, age and as Kuwaiti or non-Kuwaitis. 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

| Dreadful 10-30 | Weak 40-50 | Moderate 60-70 | Awesome 80-100 |
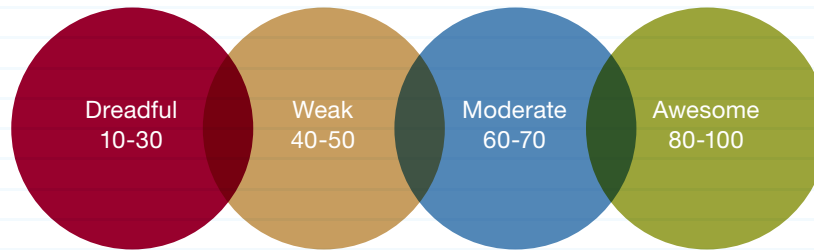
Since we are following the ACSI model of reporting on a 100 point scale, the overall index can be interpreted according to the legend above. Companies fall into one of the **four groups** regarding the strength of service based on the score that they obtain. On the country level, the same legend is applied. For example, if the score for Kuwait is a 60, it is then placed at the bottom of the **"Moderate"** category.

Kuwait Index: Before and after

Service Hero Index - Kuwait 2016

■ Average of Expectation Index ■ Average of Actual Index

Total
81.4
75.4
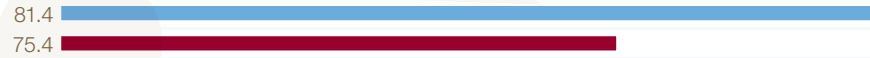
A gap of -5.9 between expected and actual
Usually consumer expectations will be higher than actual service assessments. In 2016 consumers had higher expectations and lower satisfaction, meaning we are below expectations by a gap of -5.9 which is not a healthy gap.

Kuwait scored 81.4 on average for **Expected** standards and it scored 75.4 on **Actual** service standards – placing it in the **Moderate** service level.

How results will be displayed

5
Loyalty

1
Service
Dimension

4
Changes

2
Gaps

3
Demographics
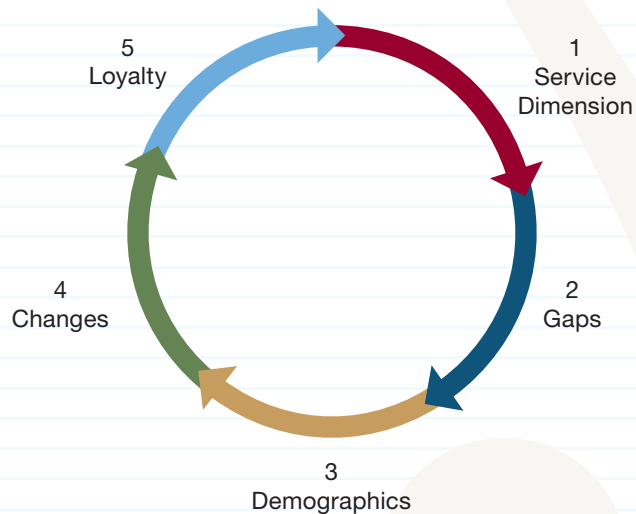
Results will be reported on five levels as seen in the chart.

Kuwait Index by service dimension

Kuwait Index 2016 service dimension

■ Expected   ■ Actual

Kuwait Index
81.4
75.4

Staff
81.6
77.3

Location
80.8
76.6

Value
79.9
72.6

Product
82.2
76.2

Speed
81.5
74.9

Reliability
82.3
76.3

Call Center
80.3
73.8
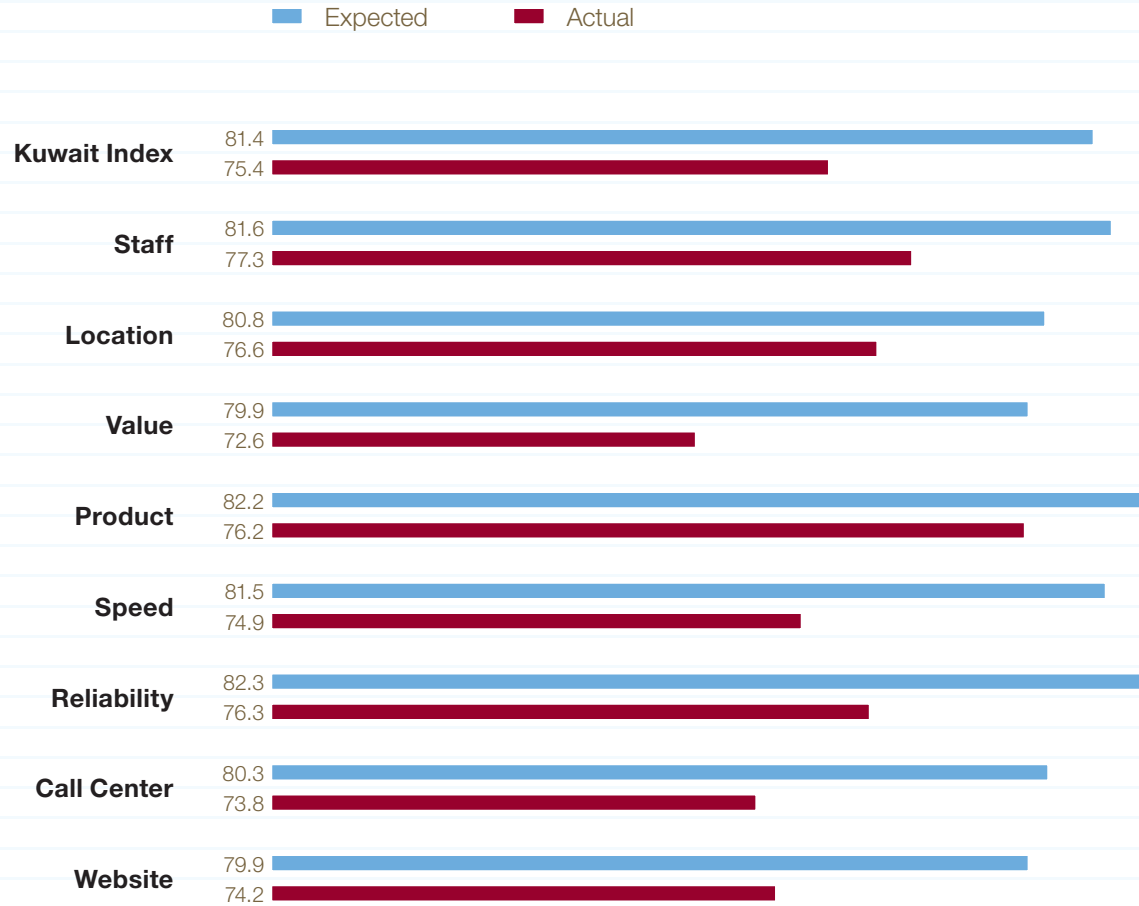
Website
79.9
74.2

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

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

Note: In previous years, Call Center and Website were only assessed for five categories, Regional Arab Airlines, Mobile Operators, ISP's, Conventional and Islamic Banks. Currently all categories were evaluated on satisfaction with their Call Center and Website with the exclusion of Supermarkets, Fine Dining, Cafe, and Clothes.

Gap analysis for Kuwait

Dimension	Score
Kuwait Index	-5.9
Staff	-4.3
Location	-4.2
Value	-7.3
Product	-6.1
Speed	-6.6
Reliability	-6.0
Call Center	-6.5
Website	-5.6

-8.0 -7.0 -6.0 -5.0 -4.0 -3.0 -2.0 -1.0 0.0 1.0
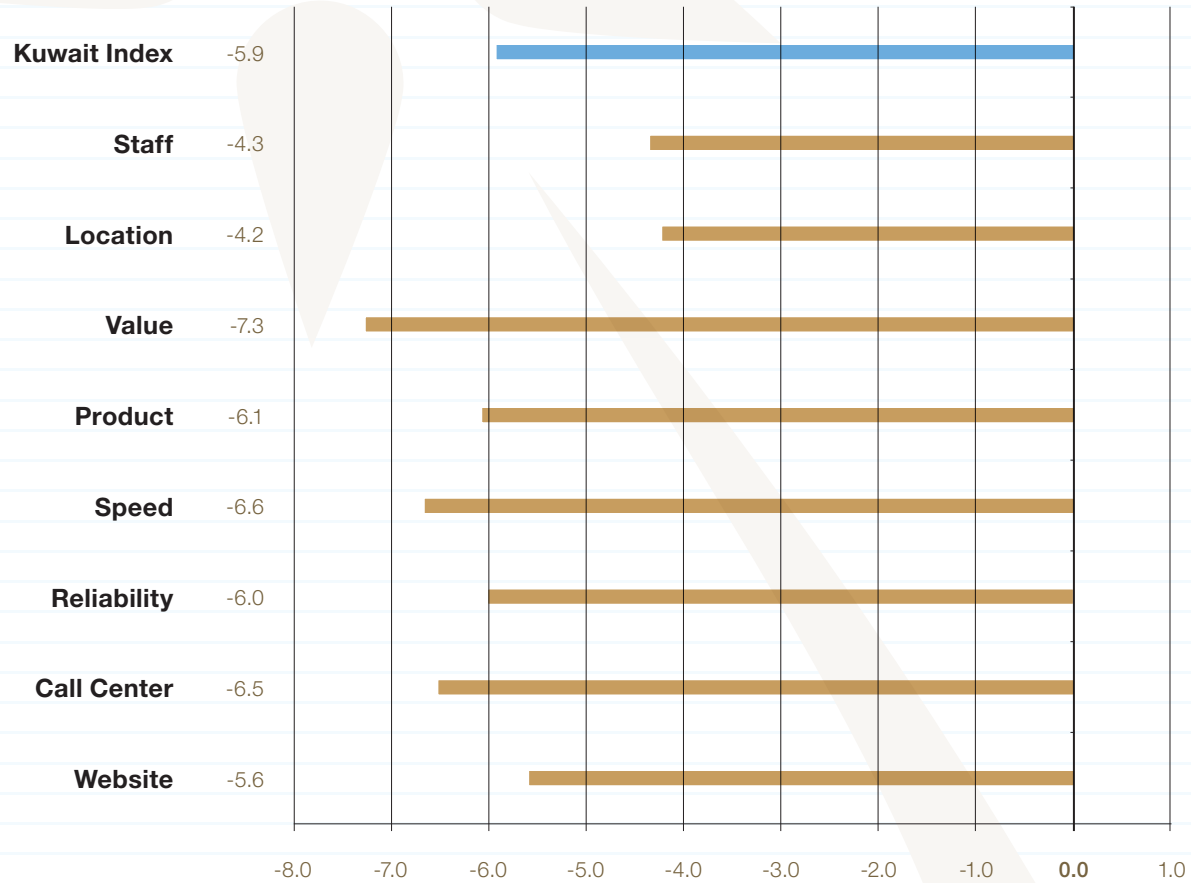
Analysis of positive and negative gaps between Expected and Actual scores
All dimensions obtained a Negative gap - i.e. Actual satisfaction after they experienced a brand was lower than their expectation before they dealt with it. However a negative gap is acceptable as long as it is above -3.00; therefore, companies in 2016 are not meeting customer expectations for all dimensions.

Index by demographic factors
Kuwait Index results by gender

■ Expected   ■ Actual

Kuwait Index
81.4
75.4

Female
83.9
78.1

Male
80.4
74.4
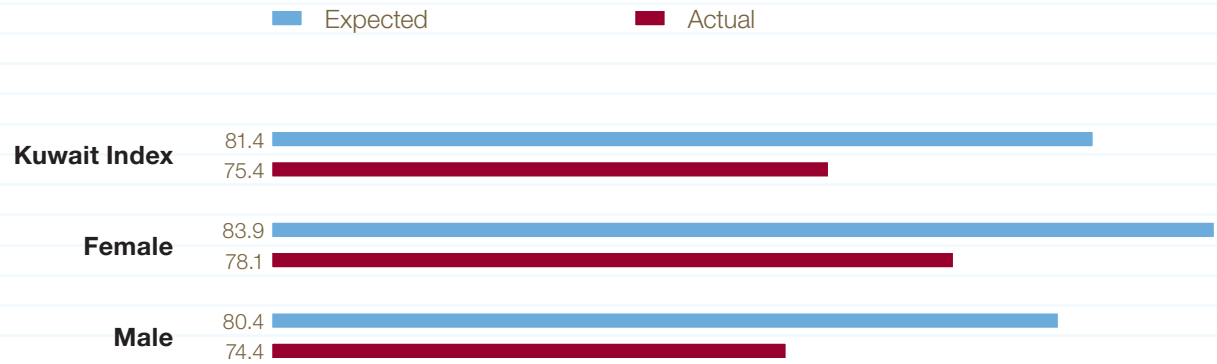
Gender
Women have both a higher expectation and higher assessment of standards on a before and after basis than men do.

Kuwait Index results by nationality

■ Expected   ■ Actual

Kuwait Index
81.4
75.4

Arabs
81.4
75.3

Kuwaiti
82.5
75.1
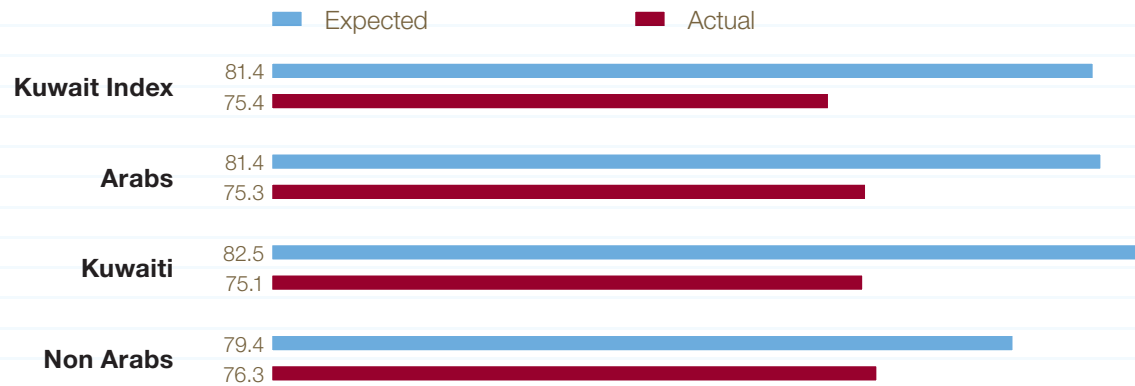
Non Arabs
79.4
76.3

Nationality
Kuwaitis have the highest expectation, but Non Arabs scored highest on actual satisfaction. Kuwaitis scored the lowest on actual satisfaction when dealing with a brand.

Kuwait Index results by age

Legend: **Expected** (blue) — **Actual** (dark red)

Age group	Expected	Actual
Kuwait Index	81.4	75.4
16 to 17 Years	81.3	80.9
18 to 29 Years	81.2	74.5
30 to 39 Years	82.4	75.8
40 to 49 Years	79.8	74.8
50 to 59 Years	82.0	75.6
More than 60 Years	81.0	78.9

Age
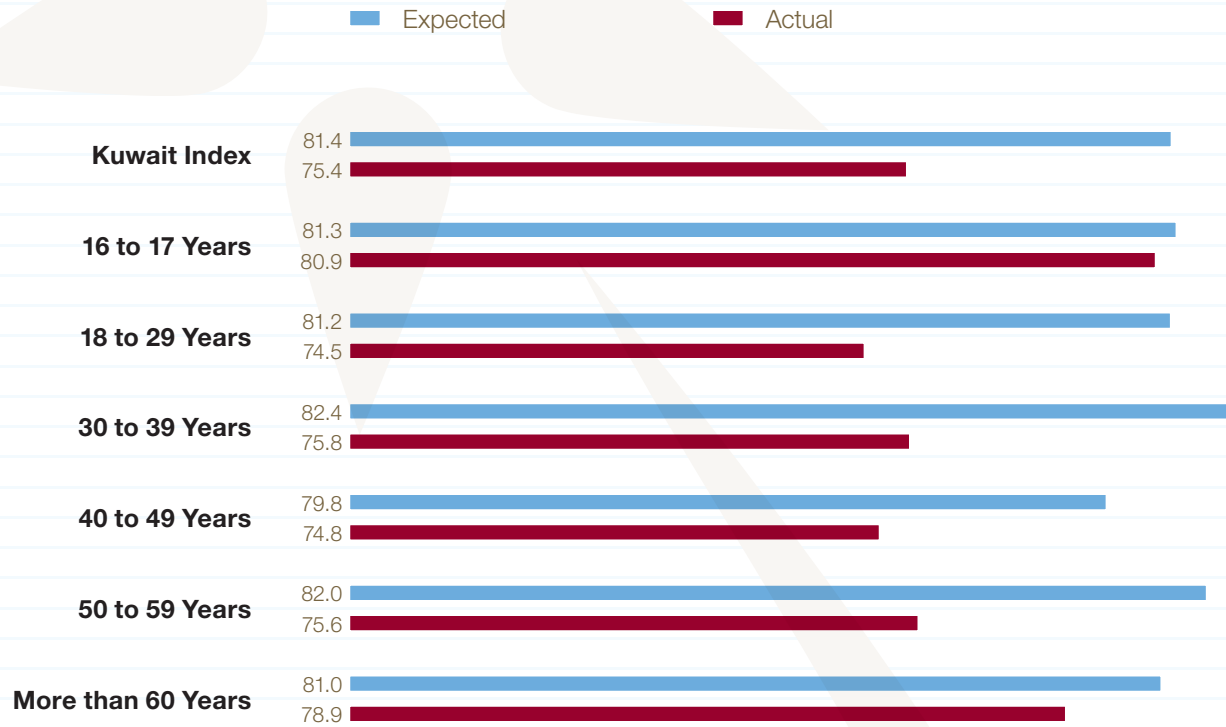
Actual satisfaction is highest amongst teenagers and those aged 60 or more. Satisfaction is lowest for adults in the 18-29 age group. This is possibly due to their high expectations not being met by companies and are less tolerant of poor service.

Service dimension scores by education

Expected and Actual scores

■ Expected   ■ Actual

Education	Expected	Actual
Kuwait Index	81.4	75.4
Elementary or below	82.0	79.5
High school	81.5	76.7
Diploma	80.9	75.8
University graduate	82.5	75.4
Master or PHD	77.8	73.2
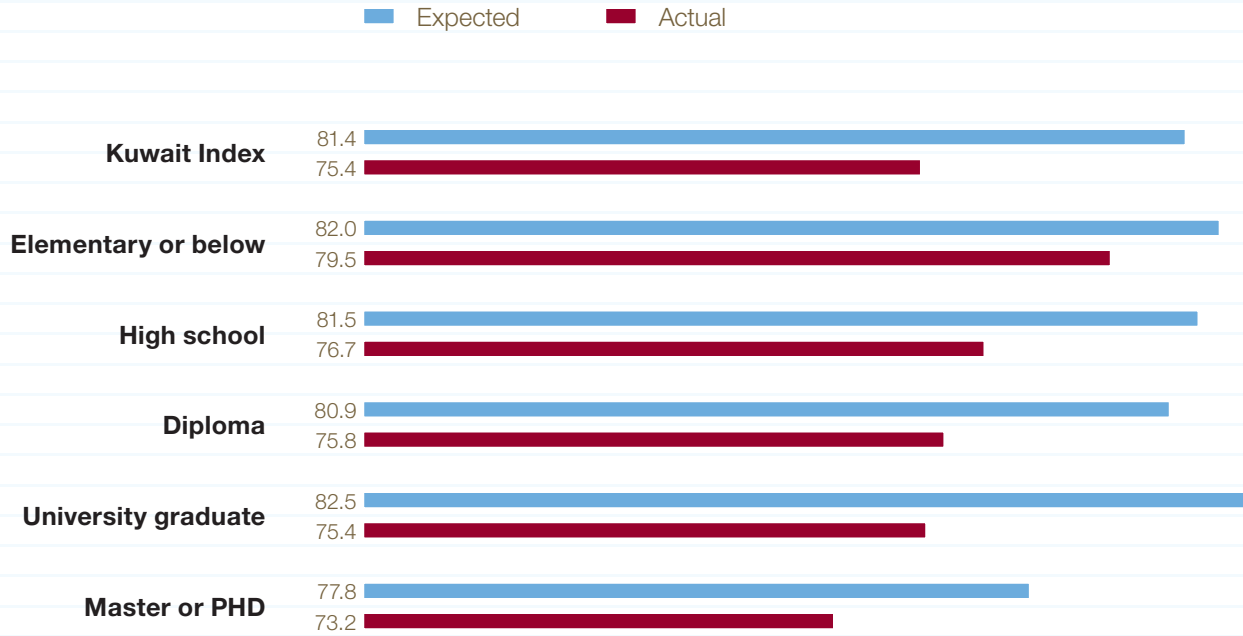
Education

Actual satisfaction is highest amongst those with a Elementary education. The lowest satisfaction level is among those with a Masters or PHD. This could be attributed to the fact that those with a higher education demand a higher level of service.

Service dimension scores by gender

Kuwait Expected Index

■ Female   ■ Male

Kuwait
Expected index
83.9
80.4

Staff
Expected index
83.8
80.7

Location
Expected index
83.6
79.7

Value
Expected index
82.3
78.9

Product
Expected index
84.4
81.4

Speed
Expected index
83.8
80.6

Reliability
Expected index
84.5
81.4

Call Center
Expected index
83.5
79.0

Website
Expected index
77.3
71.9

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

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

Service dimension scores by gender
Kuwait Actual Index

■ Female   ■ Male

Dimension	Female	Male
Kuwait Actual index	78.1	74.4
Staff Actual index	80.2	76.2
Location Actual index	79.4	75.4
Value Actual index	74.8	71.6
Product Actual index	78.5	75.2
Speed Actual index	77.7	73.9
Reliability Actual index	78.5	75.4
Call Center Actual index	77.1	72.5
Website Actual index	72.1	66.5
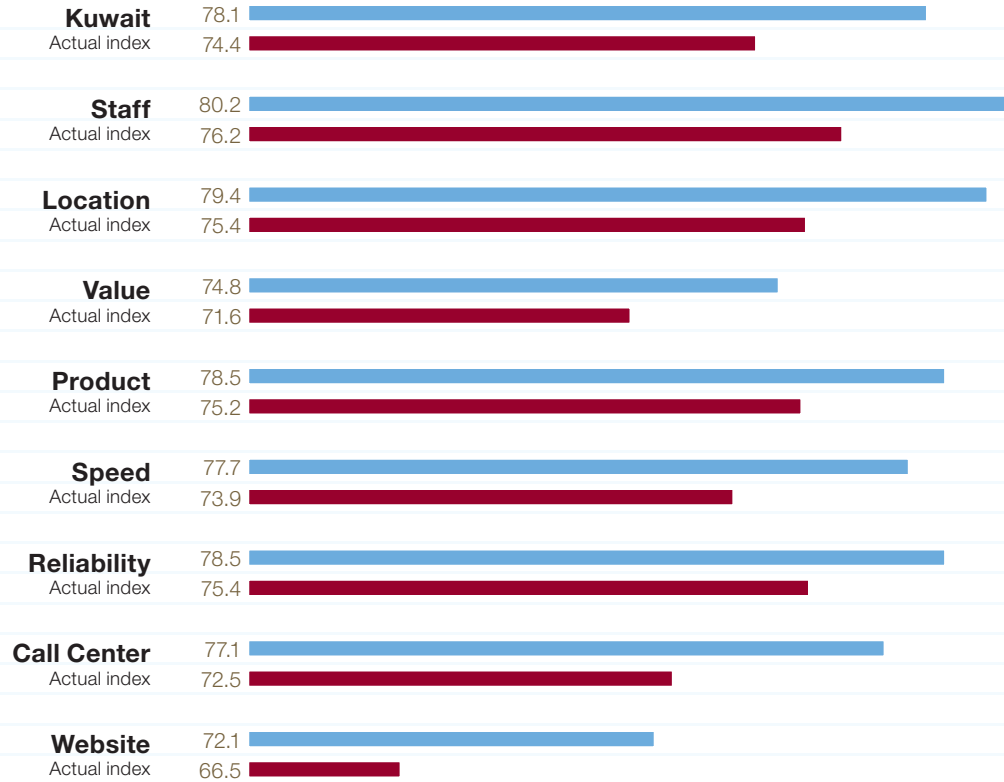
Female
Actual: Females are more satisfied than males on every service dimension. Their highest satisfaction score is Staff Attitude followed by Location. Their lowest is Website and Value for Money.

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

Dimension scores by nationality

Expectations before dealing with a brand

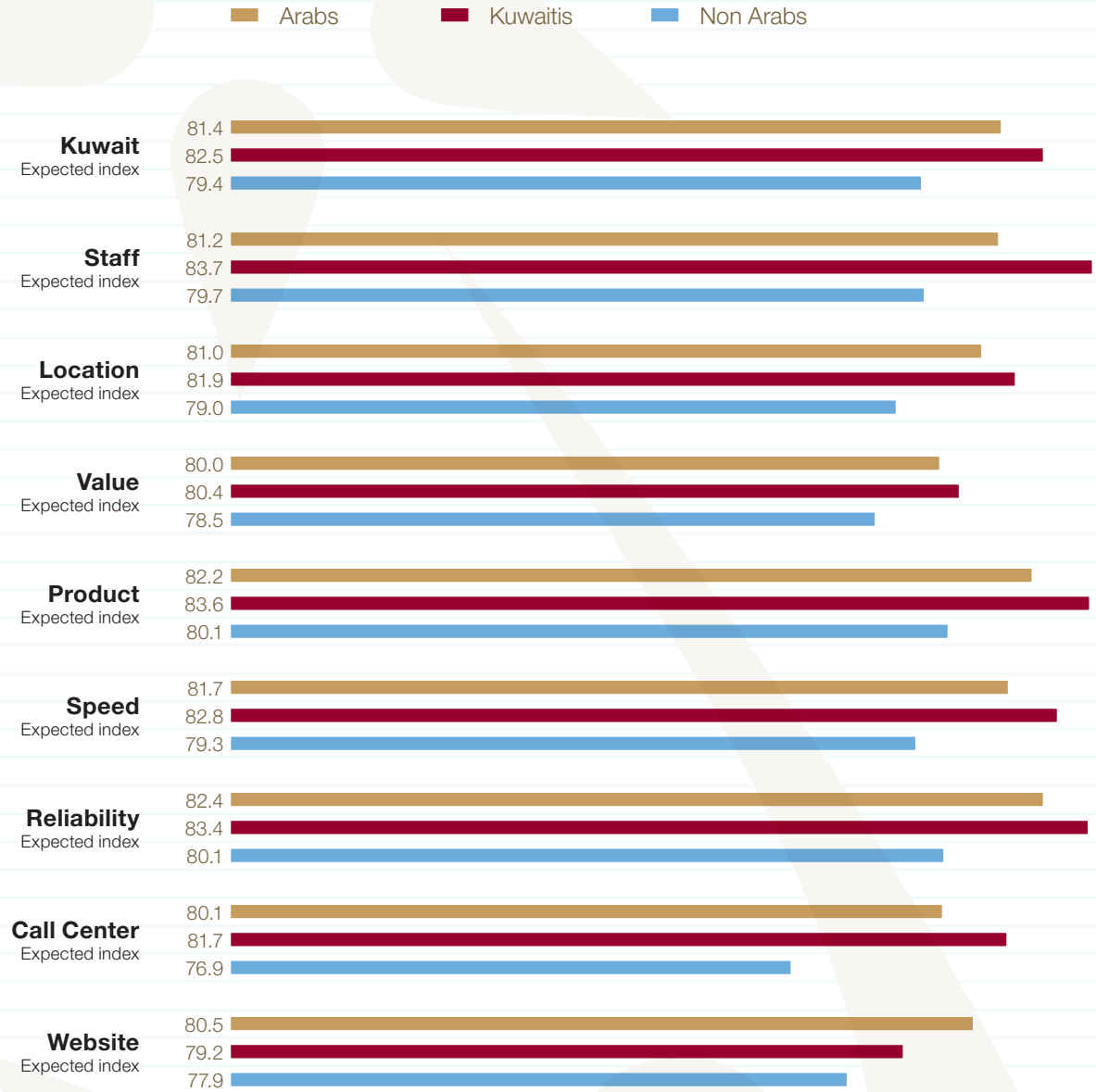Legend: ■ Arabs ■ Kuwaitis ■ Non Arabs

Kuwait
Expected index
- Arabs: 81.4
- Kuwaitis: 82.5
- Non Arabs: 79.4

Staff
Expected index
- Arabs: 81.2
- Kuwaitis: 83.7
- Non Arabs: 79.7

Location
Expected index
- Arabs: 81.0
- Kuwaitis: 81.9
- Non Arabs: 79.0

Value
Expected index
- Arabs: 80.0
- Kuwaitis: 80.4
- Non Arabs: 78.5

Product
Expected index
- Arabs: 82.2
- Kuwaitis: 83.6
- Non Arabs: 80.1

Speed
Expected index
- Arabs: 81.7
- Kuwaitis: 82.8
- Non Arabs: 79.3

Reliability
Expected index
- Arabs: 82.4
- Kuwaitis: 83.4
- Non Arabs: 80.1

Call Center
Expected index
- Arabs: 80.1
- Kuwaitis: 81.7
- Non Arabs: 76.9

Website
Expected index
- Arabs: 80.5
- Kuwaitis: 79.2
- Non Arabs: 77.9

Lowest
Non Arabs have the lowest expectation on all 8 dimensions.
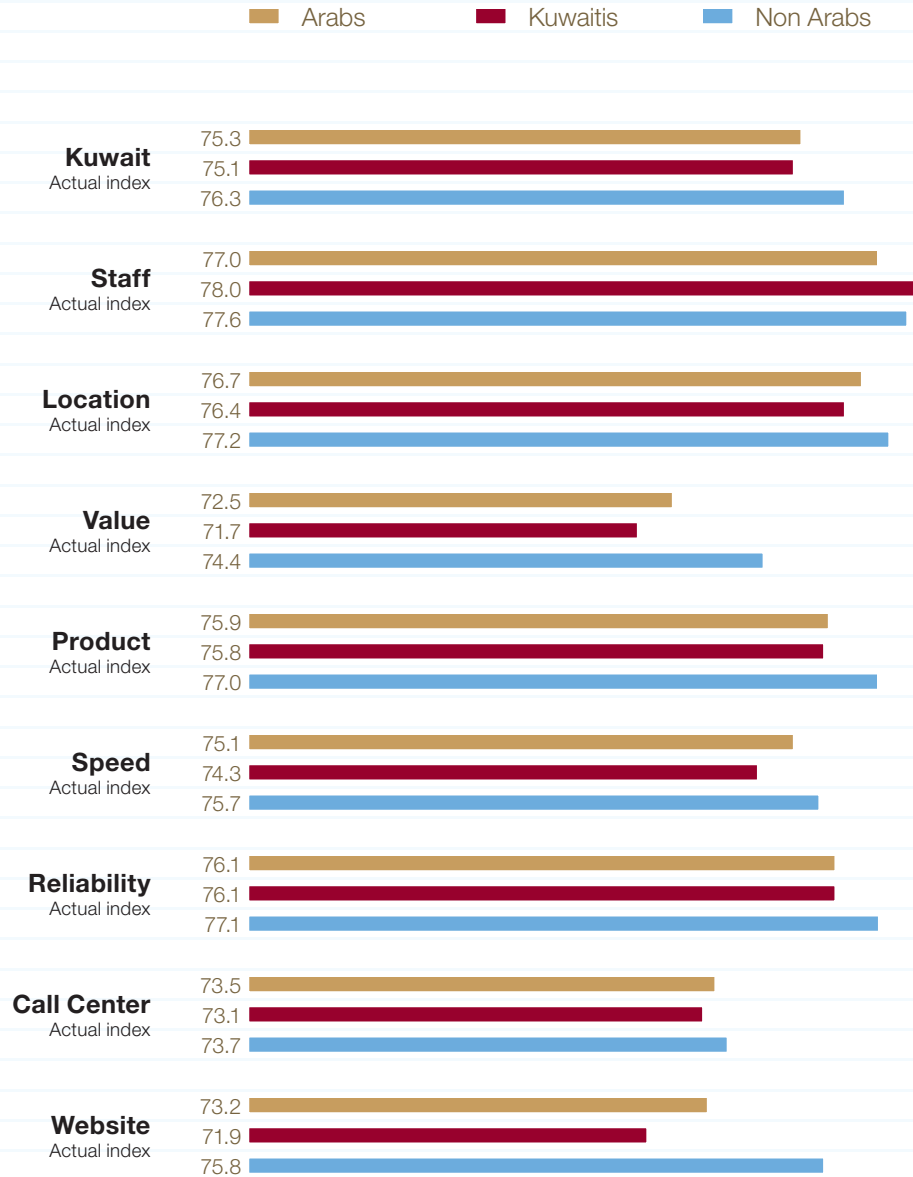
Highest
Kuwaitis have the highest expectations for most dimensions with Arabs having the highest expectation for Reliability.

Dimension scores by nationality

Actual satisfaction after dealing with a brand

Arabs — **Kuwaitis** — **Non Arabs**

Kuwait
Actual index
- 75.3
- 75.1
- 76.3

Staff
Actual index
- 77.0
- 78.0
- 77.6

Location
Actual index
- 76.7
- 76.4
- 77.2

Value
Actual index
- 72.5
- 71.7
- 74.4

Product
Actual index
- 75.9
- 75.8
- 77.0

Speed
Actual index
- 75.1
- 74.3
- 75.7

Reliability
Actual index
- 76.1
- 76.1
- 77.1

Call Center
Actual index
- 73.5
- 73.1
- 73.7

Website
Actual index
- 73.2
- 71.9
- 75.8

Lowest
Kuwaitis and Arabs have the lowest satisfaction score with Value for Money while Non Arabs scored lowest on Call Center.

Highest
All nationalities have the highest satisfaction for Staff Attitude, followed by Location.

Dimension scores by age group

Actual scores and gaps between actual and expected scores

Actual	16-17	18-29	30-39	40-49	50-59	60+	Kuwait Index
Staff	82.4	76.6	77.5	76.0	77.4	79.5	**77.3**
Location	78.5	75.7	77.0	76.2	76.7	77.3	**76.6**
Value	73.0	71.4	73.1	72.3	72.4	77.5	**72.6**
Product	84.3	75.5	76.6	74.7	76.7	80.5	**76.2**
Speed	81.7	73.9	75.0	74.5	76.1	79.6	**74.9**
Reliability	83.9	75.7	76.5	75.7	76.7	79.5	**76.3**
Call Center	75.1	72.1	74.0	74.5	74.3	77.3	**73.8**
Website	68.3	66.1	68.2	68.5	67.5	71.3	**74.2**
Overall	**80.9**	**74.5**	**75.8**	**74.8**	**75.6**	**78.9**	**75.4**

Gap	16-17	18-29	30-39	40-49	50-59	60+	Kuwait Index
Staff	-0.1	-5.1	-5.1	-4.0	-4.2	-0.9	**-4.3**
Location	-1.6	-5.3	-4.6	-3.4	-4.6	-1.8	**-4.2**
Value	-2.9	-8.1	-8.1	-6.0	-8.5	-3.2	**-7.3**
Product	0.5	-6.4	-6.7	-6.0	-5.9	-1.9	**-6.1**
Speed	-1.8	-7.4	-7.4	-5.3	-6.3	-2.1	**-6.6**
Reliability	1.8	-6.6	-6.9	-4.9	-6.3	-2.5	**-6.0**
Call Center	0.7	-7.6	-7.7	-4.3	-7.4	-1.8	**-6.5**
Website	1.2	-7.2	-5.9	-4.0	-6.9	0.2	**-5.6**
Overall Gap	**-0.3**	**-6.7**	**-6.6**	**-5.1**	**-6.4**	**-2.1**	**-5.9**
Best							
Worst							

Satisfaction

Website satisfaction is the **lowest** score for all age groups. The **highest** satisfaction for most age groups is Staff Attitude, Product Quality, and Location.

Gaps

In terms of **positive** gap scores by age group, 16 to 17 year olds have positive gaps for a few dimensions and those aged more than 60 for one dimension only.

Dimension scores by education
Actual scores and gaps between actual and expected scores

Actual	Elementary or below	High school	Diploma	University Grad	Master or PHD	Kuwait Index
Staff	82.3	78.7	77.4	77.4	75.0	**77.3**
Location	80.9	77.4	76.8	76.6	74.5	**76.6**
Value	75.1	73.8	72.7	72.6	70.3	**72.6**
Product	80.8	77.8	77.1	76.0	74.0	**76.2**
Speed	77.7	76.0	75.1	74.9	72.9	**74.9**
Reliability	83.3	77.6	76.7	76.2	74.4	**76.3**
Call Center	74.2	74.6	74.3	73.9	71.0	**73.8**
Website	74.8	75.3	74.8	74.1	70.5	**74.2**
Overall	**79.5**	**76.7**	**75.8**	**75.4**	**73.2**	**75.4**
Gap						
Staff	1.1	-2.8	-4.2	-5.2	-3.3	**-4.3**
Location	-1.5	-4.4	-3.0	-5.3	-2.8	**-4.2**
Value	-4.9	-5.7	-6.4	-8.7	-5.9	**-7.3**
Product	-2.0	-4.3	-4.5	-7.3	-4.6	**-6.1**
Speed	-4.4	-5.6	-6.0	-7.7	-4.5	**-6.6**
Reliability	0.6	-4.2	-5.6	-7.2	-4.2	**-6.0**
Call Center	-2.8	-5.4	-5.7	-8.0	-4.4	**-6.5**
Website	-1.8	-5.5	-3.7	-7.5	-4.2	**-5.6**
Overall Gap	**-2.5**	**-4.7**	**-5.1**	**-7.1**	**-4.6**	**-5.9**
Best						
Worst						

Satisfaction
Most education levels are similar with Staff Attitude being highest and Value for Money being the lowest in satisfaction. Only Elementary level consumers had Reliability as the highest satisfaction and Call Center as the lowest. Masters or PHD however had the lowest scores across all dimensions for education levels.
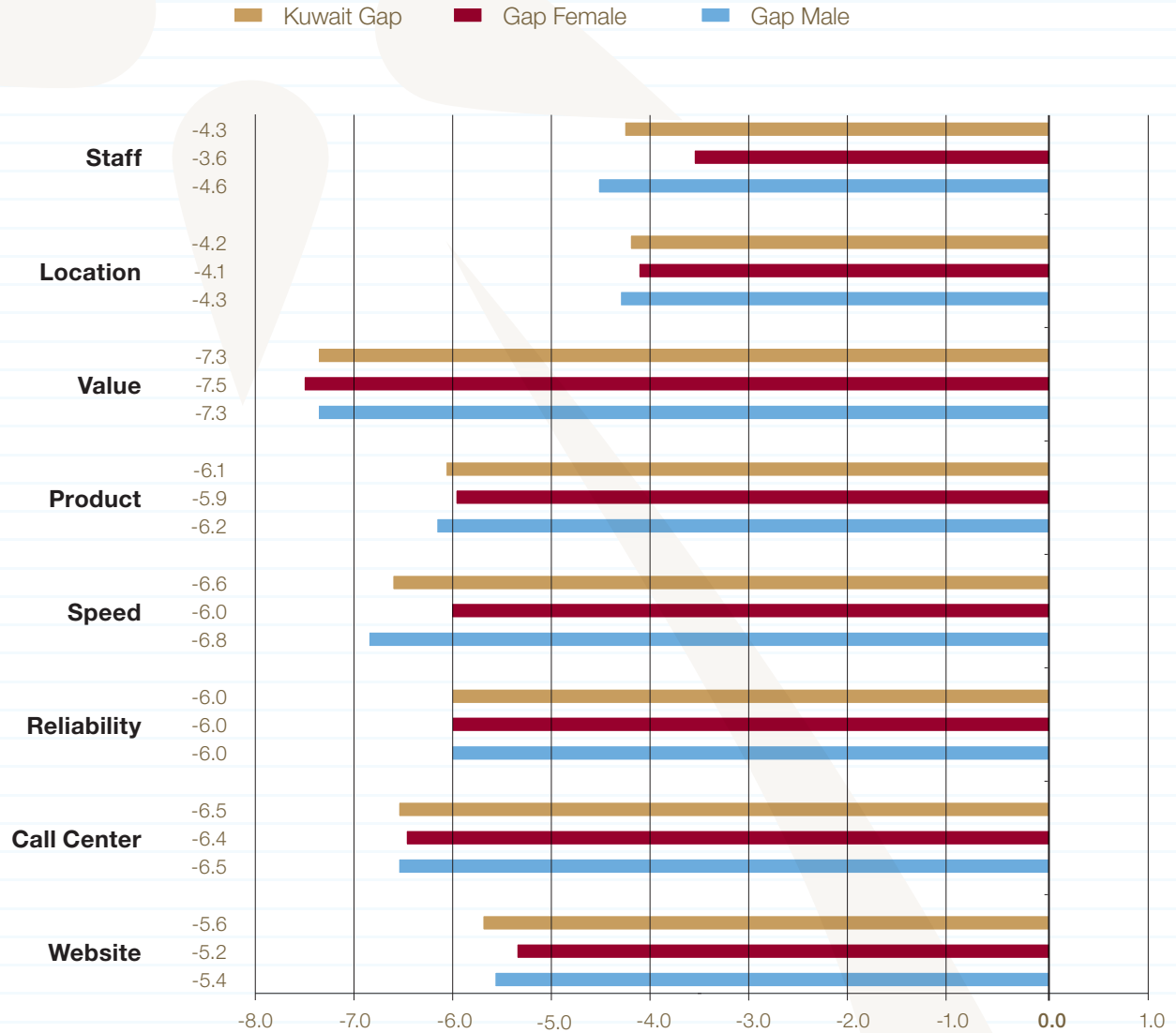
Gaps
There were minimal **positive** gaps across all education levels with expectations being exceeded only for consumers with Elementary level education. The group where expectations were not met the most is University graduates. The highest negative gaps are with Value for Money for all levels.

Gaps by gender
Kuwait Index 2016 - Gap Analysis

Legend: Kuwait Gap | Gap Female | Gap Male

Dimension	Kuwait Gap	Gap Female	Gap Male
Staff	-4.3	-3.6	-4.6
Location	-4.2	-4.1	-4.3
Value	-7.3	-7.5	-7.3
Product	-6.1	-5.9	-6.2
Speed	-6.6	-6.0	-6.8
Reliability	-6.0	-6.0	-6.0
Call Center	-6.5	-6.4	-6.5
Website	-5.6	-5.2	-5.4

Females

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

Males

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

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Gaps by nationality

Legend: Arabs Gap | Kuwaiti Gaps | Non Arabs Gap | Kuwait Index
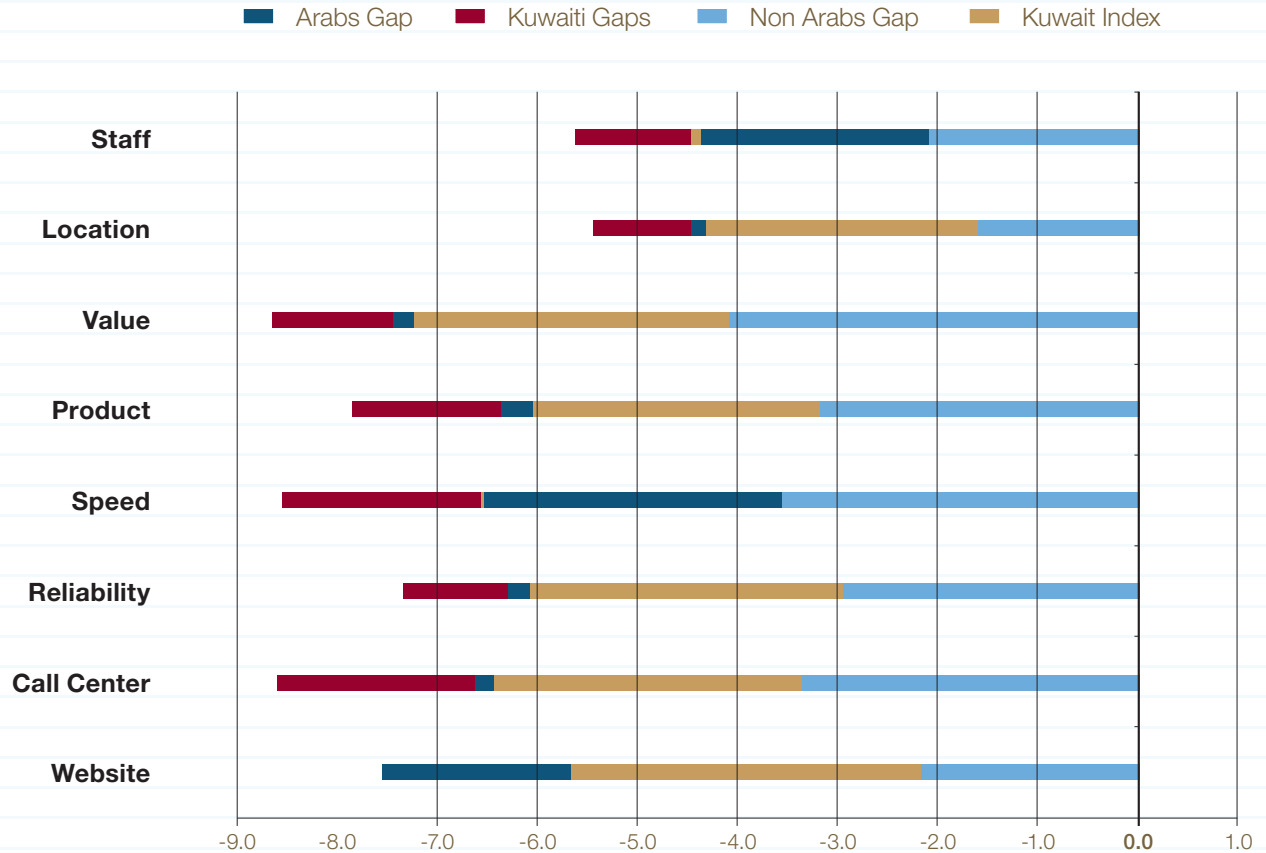
	Staff	Location	Value	Product	Speed	Reliability	Call Center	Website
Arab Gap	-4.2	-4.4	-7.5	-6.4	-6.6	-6.2	-6.7	-7.3
Kuwaiti Gap	-5.7	-5.4	-8.7	-7.8	-8.4	-7.3	-8.6	-7.3
Non Arabs Gap	-2.1	-1.8	-4.1	-3.1	-3.6	-3.0	-3.2	-2.1
Kuwait Index	-4.3	-4.2	-7.3	-6.1	-6.6	-6.0	-6.5	-5.6

No service dimension exceeded expectations for any nationality group as they all fell below expectations. All nationalities had the largest gap in Value. While the smallest gaps is for Location and Staff Attitude.

Image and loyalty
Kuwait Index recommend scores 2016

Kuwait Index	75.3
Female	78.1
Male	74.1

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

Kuwait scored a 75.3 on the **loyalty**, or the recommendation score.

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

Recommend scores by nationality
Kuwait Index recommend scores 2016

Kuwait Index	75.3
Arabs	75.5
Kuwaiti	74.0
Non Arabs	77.6

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

Recommend scores by age group
Kuwait Index recommend scores 2016

	Score
Kuwait Index	75.3
16 to 17 Years	81.4
18 to 29 Years	74.4
30 to 39 Years	75.8
40 to 49 Years	74.6
50 to 59 Years	76.5
More than 60 Years	80.1
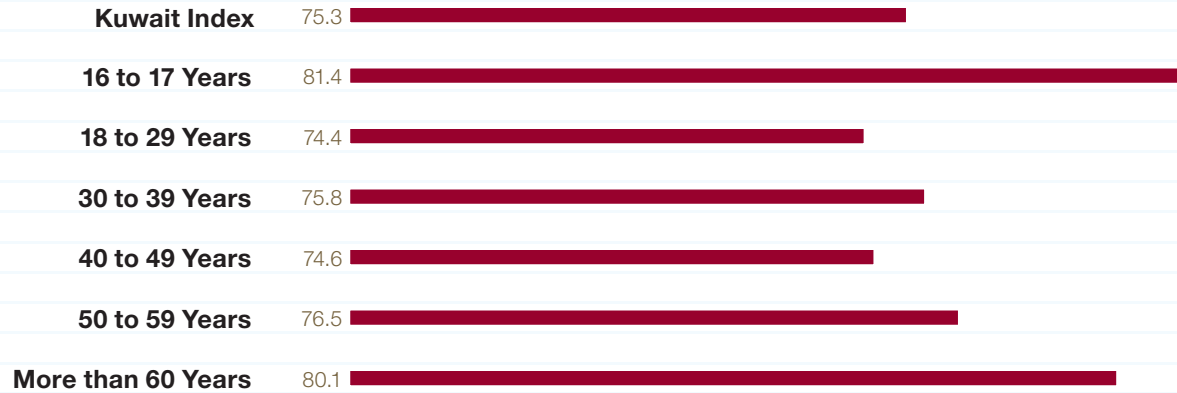
The two age groups that are more likely to recommend a brand are the 16-17 and 50+ age groups. Typically, very young consumers tend to recommend a brand to their peers while the older groups are more likely to recommend brands. The least likely to recommend a brand are the 18 to 29 and 40 to 49 age groups.

Recommend scores by education level

Kuwait Index recommend scores 2016

Kuwait Index	75.3
Elementary or below	80.4
High school	76.5
Diploma	75.4
University graduate	75.4
Master or PHD	73.1
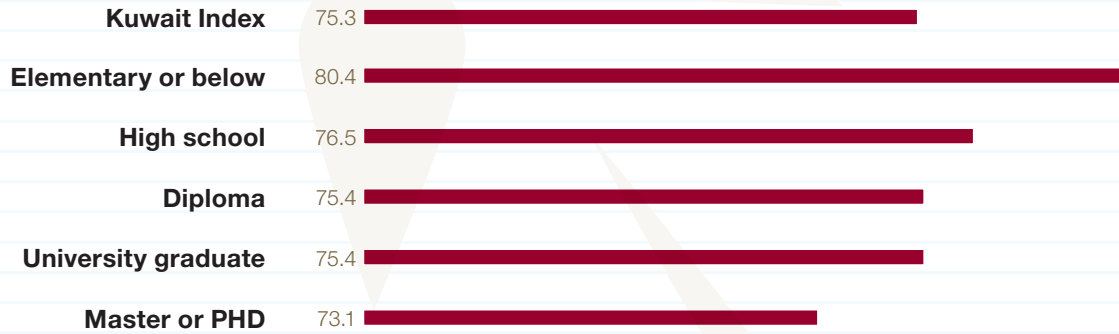
Those with a higher education level are the least likely to recommend a brand, while the most likely to recommend a brand are those with a lower education.

Satisfaction & comparison to an ideal

Overall Satisfaction, Average Satisfaction (8 dimensions), and Comparison to Ideal

Ideal 74.3

Overall satisfaction based on 1 question[*] 75.3

Actual satisfaction (average of 8 dimensions) 75.4
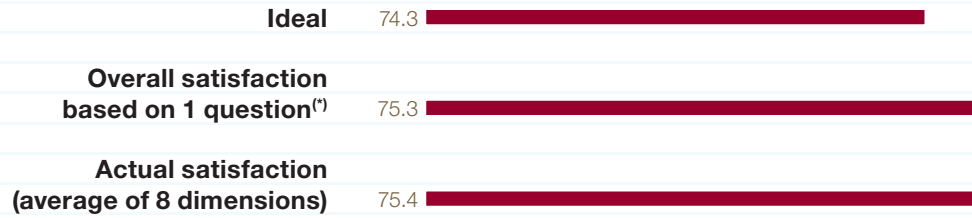
This year, Overall Satisfaction had an almost identical score to Actual Satisfaction (the average of all eight dimensions). How a brand compares to the Ideal Offering is scored lower. This question is, therefore, a more accurate representation of satisfaction that the average of eight dimensions.

The Kuwait expected index across all 17 categories

Expected Index

Category	Score
Kuwait Index	81.4
Cafe	84.4
Casual Dining	84.1
Home Furniture	83.3
Clothes	83.1
New Car Sales	83.0
Car Service	82.8
Islamic Banks	82.0
Retail Banks	81.3
Fine Dining	81.2
Health Clubs	81.2
Supermarkets	80.9
Mobile Operators	80.8
Regional Airlines	80.6
Fast Food	80.4
ISPs	79.6
Private Hospitals	77.7
Electronics	77.1

Seven industry categories exceeded the Kuwait index score for the average of all 8 dimensions on a "before" basis.

The top expectations are for Cafes, Casual Dining, and Home Furniture. The lowest expectations for Categories is for Electronics, Private Hospitals, and ISPs.

Category	Score
Kuwait Index	75.4
Cafe	82.6
Casual Dining	80.9
Clothes	80.3
Home Furniture	79.6
New Car Sales	77.8
Islamic Banks	76.8
Fast Food	76.8
Fine Dining	76.3
Supermarkets	75.8
Regional Airlines	74.9
Retail Banks	74.4
Car Service	73.2
Electronics	73.0
Health Clubs	72.7
Private Hospitals	70.7
Mobile Operators	70.4
ISPs	66.4

Nine industries exceeded the Kuwait Index for the average of all 8 dimensions on an "after" basis.

The top three scoring industries are Cafe, Casual Dining, and Clothes. The lowest vary from industries with low expectations with ISPs, Mobile Operators, and Private Hospitals scoring the lowest.

Category NPS
Service Hero CSI Category 2016 Net Promoter Score
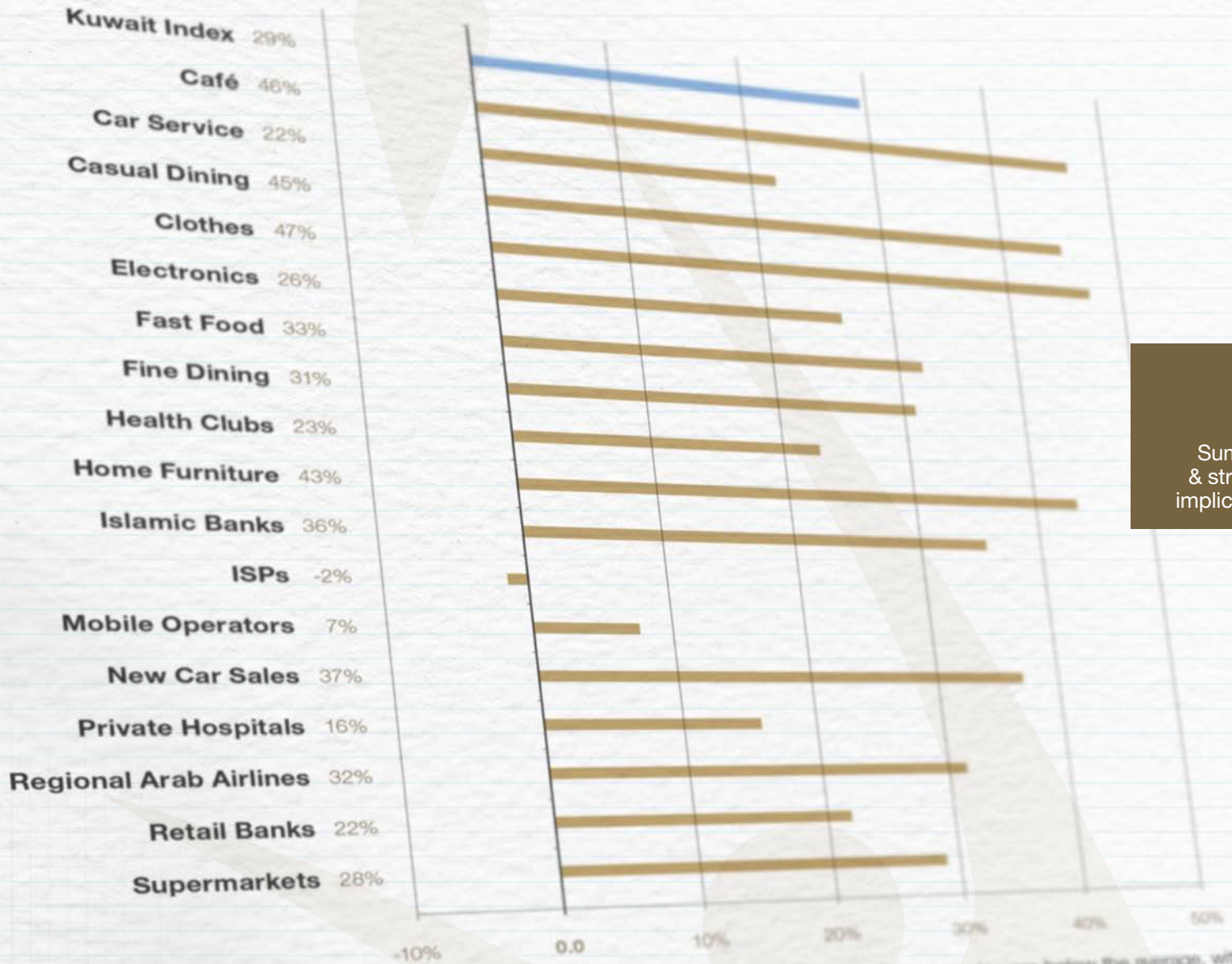
Category	NPS
Kuwait Index	29%
Café	46%
Car Service	22%
Casual Dining	45%
Clothes	47%
Electronics	26%
Fast Food	33%
Fine Dining	31%
Health Clubs	23%
Home Furniture	43%
Islamic Banks	36%
ISPs	-2%
Mobile Operators	7%
New Car Sales	37%
Private Hospitals	16%
Regional Arab Airlines	32%
Retail Banks	22%
Supermarkets	28%

While the country average is 29%, a number of categories are below the average, with ISPs being the lowest and having more brand detractors than ambassadors resulting in the negative score. This is followed by Mobile Operators and Hospitals, all of which have low NPS scores. Industries enjoying a healthy presence of brand ambassadors are in Cafes, New Car Sales and Clothes.

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

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

Industries in the bottom left quadrant such as Private Hospitals and Electronics 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.

Finally, categories in the right bottom quadrant, such as ISPs and Mobile Operators do not meet customer expectations and have low satisfaction.
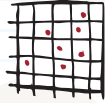
Correlation of dimensions to overall satisfaction

Service dimensions most influential to overall satisfaction (R Square 85%, 17,074 sample)

Dimension	
Reliability	28%
Product	25%
Website	12%
Staff	11%
Value	11%
Call center	10%
Speed	9%
Location	0%
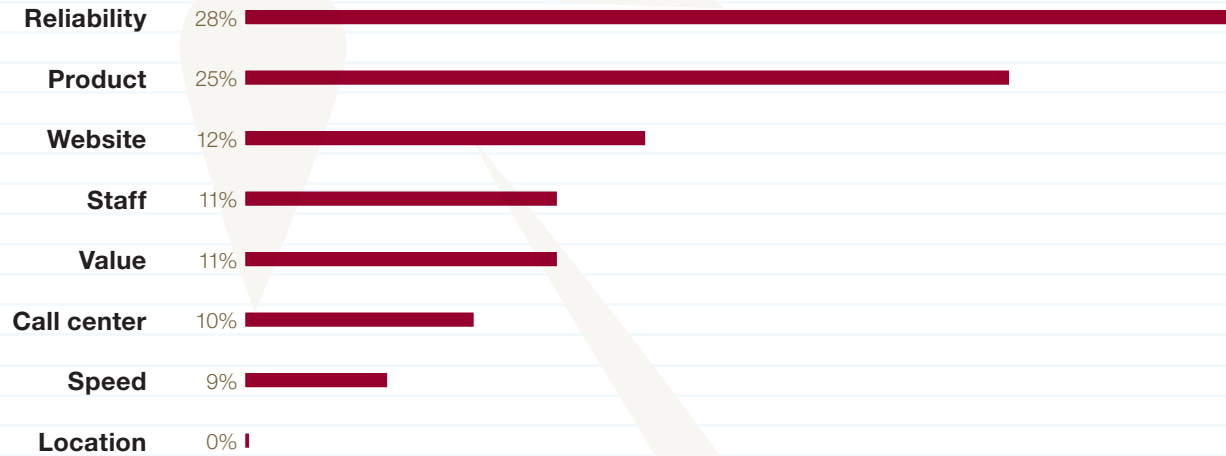
In order to help companies understand which service dimensions are most influential to overall satisfaction, correlation analysis on the entire dataset for all categories is conducted using standard statistical practices.

Based on the model, only two dimensions have a critical role in influencing overall satisfaction: Reliability and Accuracy (28% impact) and Product or Service Quality (25% impact). If companies prioritize their effort on only these two dimensions it would help them improve satisfaction.

On the flip side, Location has no impact on overall satisfaction while Speed of Service, and Call Center 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 measure 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

Detractors	Passives	Promoters
Negative word of mouth	Satisfied but unenthusiastic	Enthusiasts
(score 0-6)	(score 7-8)	(score 9-10)
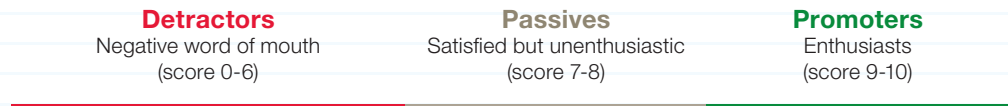
Promoters (score 9-10) are loyal enthusiasts who will keep buying and refer others, fueling growth.

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

Detractors (score 0-6) are unhappy customers who can damage your brand and impede growth through negative word-of-mouth.

The net promoter score for Kuwait is 29%

Net promoter score - Service Hero Index 2016

Kuwait Index	29%
16 to 17 Years	51%
18 to 29 Years	26%
30 to 39 Years	28%
40 to 49 Years	31%
50 to 59 Years	27%
More than 60 Years	49%
Arabs	27%
Kuwaiti	28%
Non Arabs	31%
Female	37%
Male	25%

Elementary or below	44%
High school	37%
Diploma	32%
University graduate	28%
Master or PHD	22%
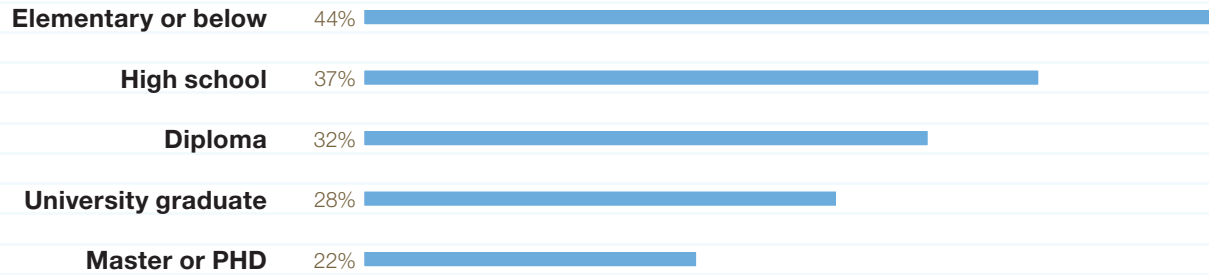
While the country average is 29%, demographic groups vary on being either Ambassadors or Detractors. The largest concentration of Ambassadors are Females, Non Arabs, those with a lower education, and those aged over 60. The largest concentration of detractors are Males, Kuwaitis, consumers with a higher education (University, Masters or PHD) and those aged 18-29 years.

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

Kuwait's overall score remains in the moderate range

2010 **2011** **2012** **2013** **2014** **2015** **2016**

Expected Satisfaction

75.2
73.8
74.3
76.9
82.4
80.0
81.4

Actual Satisfaction

72.6
74.6
75.5
76.2
77.0
76.3
75.4
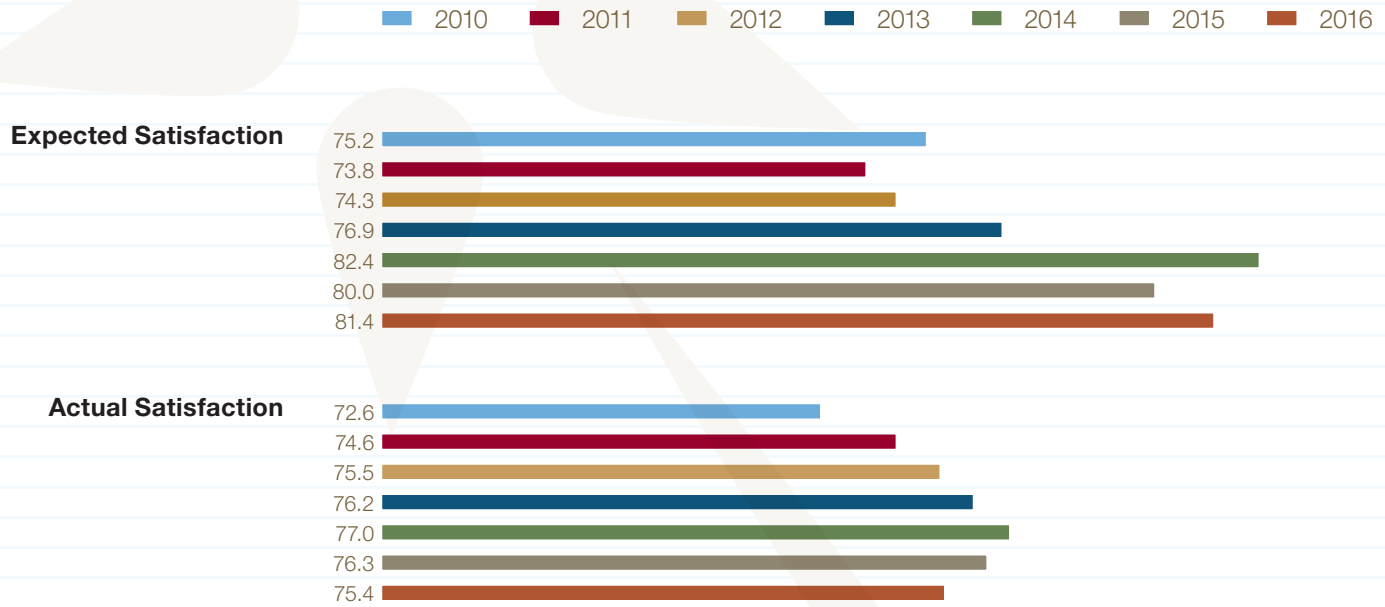
Since 2010 Average Actual Satisfaction improved 2.7 points or 4% but the increase has not been steady. The CSI peaked in 2014 and has been declining for the past two years.
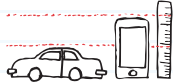
Category Comparison 2010 vs 2016
Actual Satisfaction

Satisfaction for Kuwait in 2016 increased from 2010, but decreased from 2015. The top scoring categories throughout the years have traditionally been Cafes, Casual Dining and more recently New Car Sales and Home Furniture. Notable improvements with consumer satisfaction in the past seven years are shown in Car Service, Home Furniture, and Fast Food. ISPs, Fine Dining, and Private Hospitals saw a decrease in consumer satisfaction since 2010.

	2010	2011	2012	2013	2014	2015	2016
Kuwait Index	72.8	74.6	75.4	76.1	77.0	76.4	75.4
Cafe	82.2	81.1	82.7	79.7	82.0	80.3	82.6
Car Service	64.2	66.4	69.4	75.0	77.9	79.0	73.2
Casual Dining	79.5	79.3	80.6	80.7	80.8	80.0	80.9
Clothes	75.8	79.8	79.6	80.5	79.8	79.1	80.3
Electronics	71.4	73.7	74.7	73.4	74.0	72.1	73.0
Fast Food	70.3	73.3	77.0	73.8	73.7	75.6	76.8
Fine Dining	79.3	78.4	79.9	79.7	75.9	76.5	76.3
Health Clubs	N/A	N/A	73.6	72.8	76.6	75.4	72.7
Home Furniture	73.1	78.5	77.7	79.5	78.4	79.7	79.6
Islamic Banks	74.9	78.9	77.2	74.3	81.1	78.1	76.8
ISPs	69.1	65.0	66.2	72.2	71.0	67.9	66.4
Mobile Operators	65.3	65.3	67.7	72.2	74.2	71.8	70.4
New Car Sales	74.3	76.5	75.0	79.7	79.6	80.9	77.8
Private Hospitals	69.7	73.4	73.5	70.9	70.7	72.0	70.7
Regional Arab Airlines	68.7	74.4	75.6	76.9	77.3	75.9	74.9
Retail Banks	73.6	73.9	77.1	79.8	79.0	76.8	74.4
Supermarkets	N/A	74.8	75.8	75.3	77.6	76.6	75.8

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

Category Growth 2010 vs. 2016

Notable improvements with consumer satisfaction are seen in Car Service, Fast Food, and Home Furniture. Categories that saw a decrease in consumer satisfaction are ISPs, Fine Dining, Private Hospitals, and Cafe.
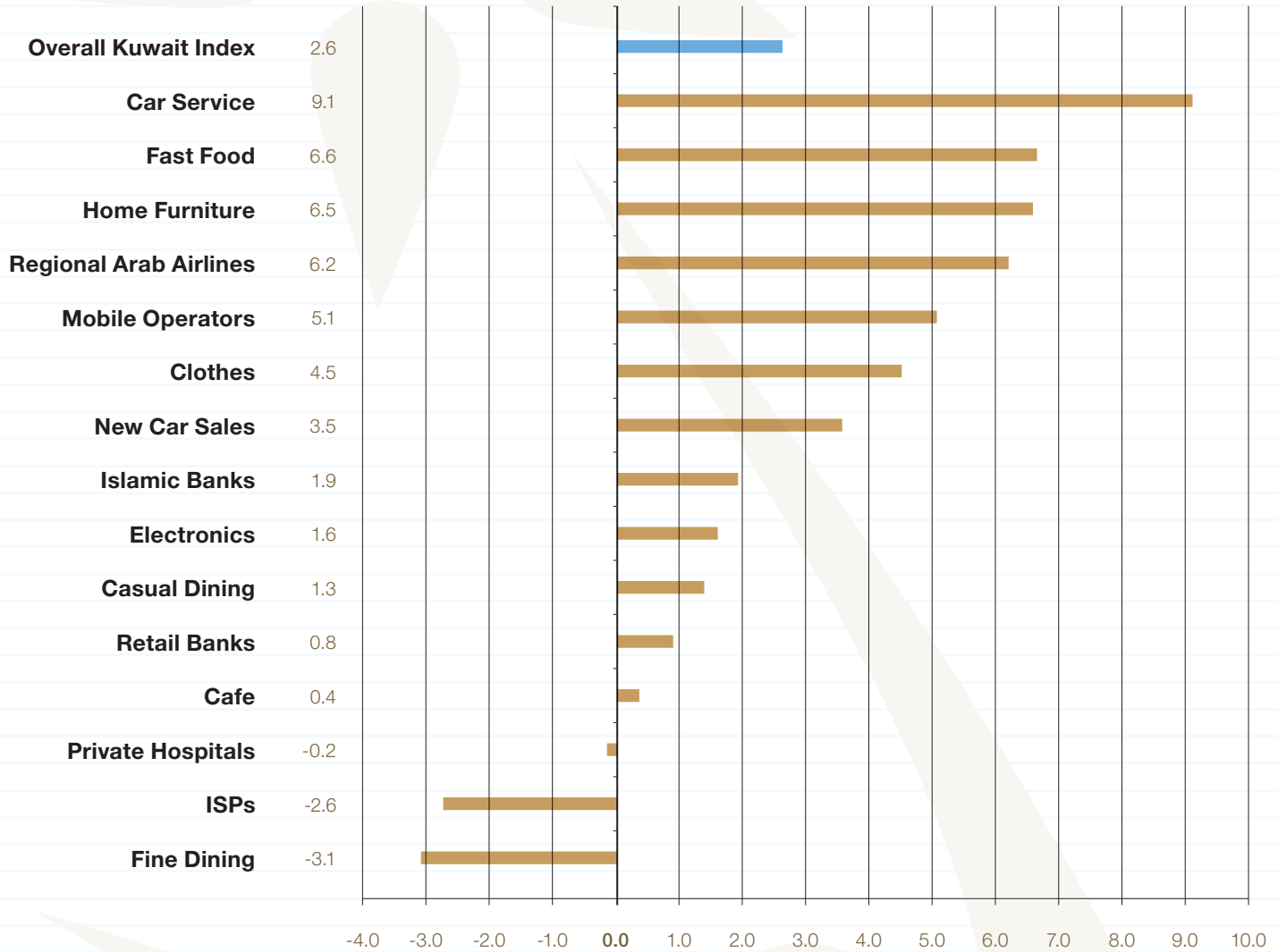
Category	Value
Overall Kuwait Index	2.6
Car Service	9.1
Fast Food	6.6
Home Furniture	6.5
Regional Arab Airlines	6.2
Mobile Operators	5.1
Clothes	4.5
New Car Sales	3.5
Islamic Banks	1.9
Electronics	1.6
Casual Dining	1.3
Retail Banks	0.8
Cafe	0.4
Private Hospitals	-0.2
ISPs	-2.6
Fine Dining	-3.1

-4.0 -3.0 -2.0 -1.0 0.0 1.0 2.0 3.0 4.0 5.0 6.0 7.0 8.0 9.0 10.0

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

The Supermarkets category was added in 2011 and the Health Club category was included in the index in 2012. Therefore they have both been excluded from this 7 year comparison chart.
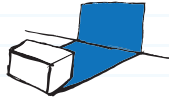
Dimension Comparisons 2010 vs. 2016

Actual Satisfaction

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

Overall there are improvements in most dimensions, with Value for Money and Call Center having the largest increase since 2010. Website is the only dimension to score lower in satisfaction from which is possibly due to the fact that this dimension as of 2016 has been added to 8 more categories than in previous years where only 5 categories were assessed on their Website.

Demographic Comparisons 2010 vs. 2016

Actual Satisfaction

	2010	2011	2012	2013	2014	2015	2016
Female	73.3	77.4	77.9	76.3	79.7	78.4	78.1
Male	72.3	73.6	74.6	76.6	76.3	75.8	74.4
Arabs	73.4	77.6	75.8	77.8	77.9	77.0	75.3
Kuwaiti	72.3	70.2	73.4	72.4	75.1	76.0	75.1
Non Arabs	72.8	73.0	77.6	78.9	76.2	75.4	76.3
16 to 17 years	73.4	75.8	81.6	85.7	82.0	80.9	80.9
18 to 29 years	72.3	76.6	76.4	77.3	77.1	76.4	74.5
30 to 39 years	73.0	74.4	74.8	74.8	77.1	75.8	75.8
40 to 49 years	72.6	74.2	75.8	77.1	78.1	76.8	74.8
50 to 59 years	73.7	76.1	76.7	75.0	77.1	77.1	75.6
More than 60 years	79.1	73.4	78.9	77.0	75.7	76.7	78.9
Elementary or below	NA	NA	69.1	81.8	78.7	75.6	79.5
High school	NA	NA	78.2	80.8	79.6	78.8	76.7
Diploma	NA	NA	76.0	76.7	77.2	78.0	75.8
University graduate	NA	NA	75.6	75.6	77.2	76.3	75.4
Master or PHD	NA	NA	73.6	73.9	74.2	74.0	73.2

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

The age groups with the highest increases in satisfaction since 2010 are teens and the 30-39 age group, while those aged more than 60 years saw a decrease in satisfaction from 2010.

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

Demographic growth 2010 vs. 2016

Actual Satisfaction
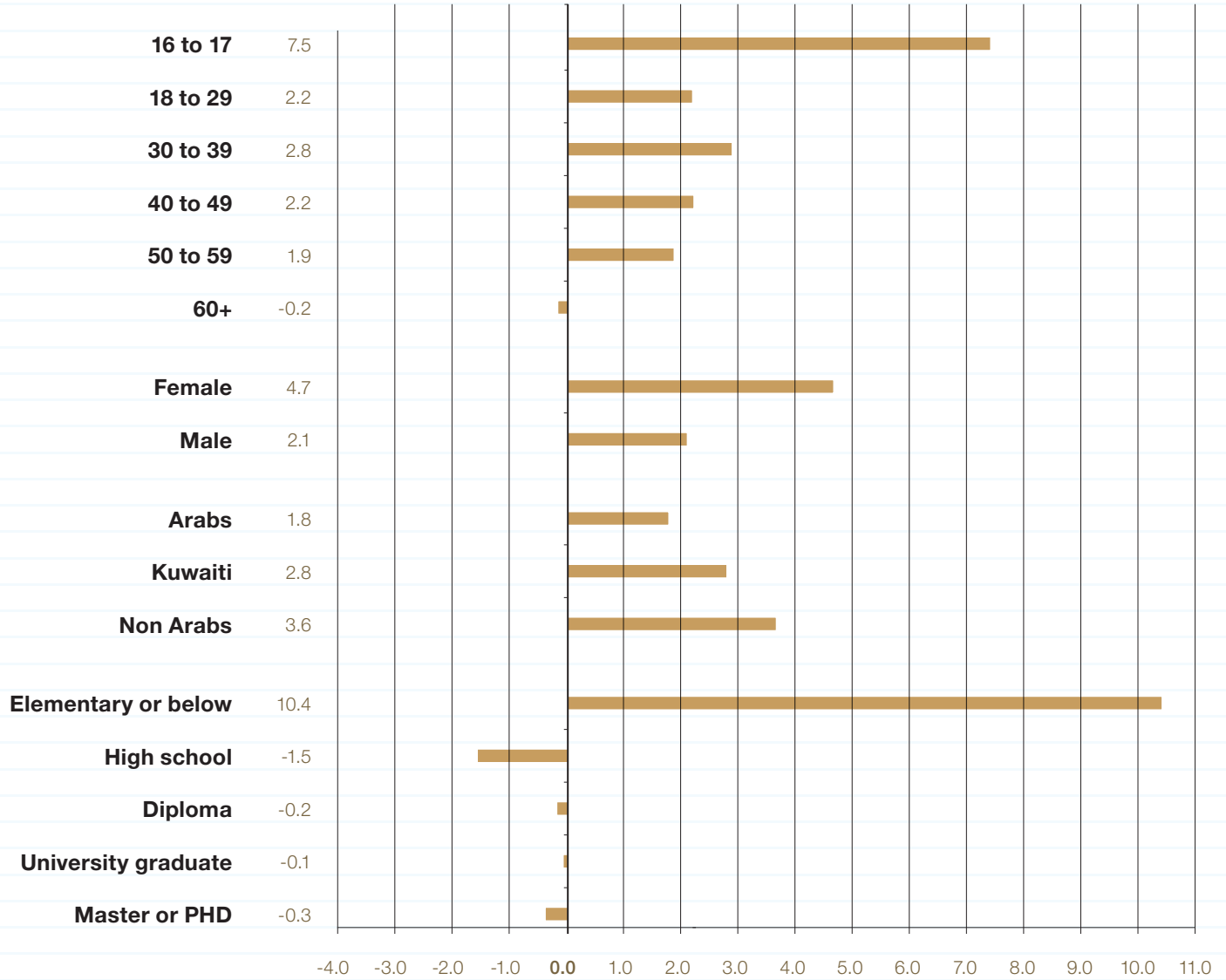
16 to 17	7.5
18 to 29	2.2
30 to 39	2.8
40 to 49	2.2
50 to 59	1.9
60+	-0.2
Female	4.7
Male	2.1
Arabs	1.8
Kuwaiti	2.8
Non Arabs	3.6
Elementary or below	10.4
High school	-1.5
Diploma	-0.2
University graduate	-0.1
Master or PHD	-0.3

Category NPS

Service Hero CSI Category 2016 Net Promoter Score

Category	NPS
Kuwait Index	29%
Café	46%
Car Service	22%
Casual Dining	45%
Clothes	47%
Electronics	26%
Fast Food	33%
Fine Dining	31%
Health Clubs	23%
Home Furniture	43%
Islamic Banks	36%
ISPs	-2%
Mobile Operators	7%
New Car Sales	37%
Private Hospitals	16%
Regional Arab Airlines	32%
Retail Banks	22%
Supermarkets	28%

While the country average is 29%, a number of categories are below the average, with ISPs being the lowest and having more brand detractors than ambassadors resulting in the negative score. This is followed by Mobile Operators and Hospitals, all of which have low NPS scores. Industries enjoying a healthy presence of brand ambassadors are in Cafes, New Car Sales, and Clothes.

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Net Promoter Score by demographic group and changes over the years

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

The NPS score has improved by 4% overall since 2010, but decreased 1% since last year.

The demographic groups showing the strongest increase in NPS since 2010 are teens, Females, and Non Arabs.

Since last year, NPS decreased by 1% and demographic groups saw mixed results overall.

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 equal to the ACSI index and slightly lower than the UAE CSI index. The Singapore index scores lowest.

Category	Kuwait Service Hero CSI	UAE Service Hero CSI	US ACSI Index	Singapore CSI Index
Café	82.6	80.3	79.0	70.7
Car Service	73.2	70.4	82.0	73.1
Casual Dining	80.9	78.9	81.0	69.8
Clothes	80.3	79.5	79.0	71.9
Electronics	73.0	79.7	77.0	71.5
Fast Food	76.8	77.7	79.0	70.7
Fine Dining	76.3	N/A	N/A	N/A
Health Clubs	72.7	N/A	N/A	N/A
Home Furniture	79.6	79.2	N/A	71.5
Islamic Banks	76.8	70.9	80.0	71.1**
ISPs	66.4	N/A	64.0	67
Mobile Operators	70.4	65.5	71.0	69
New Car Sales	77.8	79.9	82.0	73.1
Private Hospitals	70.7	72.7	75.0	72*
Regional Arab Airlines	74.9	79.2	72.0	73.5
Retail Banks	74.4	68.1	80.0	71.1**
Supermarkets	75.8	78.4	73.0	71.5
Overall Score	**75.4**	**75.8**	**75.4***	**70.2****

*Scores are from 2015

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.
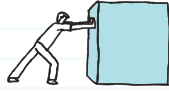
Factors affecting the Kuwait Index

Which factors affect service excellence in Kuwait across industries?

In the 7 years that the Service Hero CSI has been measuring satisfaction, it has collected 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 exceptions, delivering on them in a satisfactory manner, and understanding what it takes to build loyalty. No matter the industry category, all brands need to keep their eye on these three.

Expectations

Customers have high expectations for service as the index for Kuwait is 81.4 across all industries. Expectations are highest for Reliability, Staff Attitude, and Product Quality with the highest expectations of service amongst demographics are lower educated and aged 30-39, Kuwaitis, and Females. The highest expectations by industry are for Cafe, Casual Dining, and Home Furniture. The lowest expectations (and therefore image or reputation) are for Electronics, Private Hospitals, and ISPs.

- **Recommendation:** Understand what customers expect from you by collecting as much information on this regularly using qualitative research as well as quantitative data such as a Customer Satisfaction Index.

Satisfaction

Because satisfaction in Kuwait is 75.4, the gap between customer expectations and satisfaction is -5.9, which is significant. The largest gaps by dimensions are for Value for Money and for categories it is ISPs, Mobile Operators, and Car Service. No category has a positive gap.

- **Recommendation:** Understand which service dimensions are most important from the perspective of the customer. Service Hero runs a correlation model to identify factors driving satisfaction and has identified that, overall, Reliability has a 28% impact on satisfaction and Product or Service Quality has a 25% 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 29% (which means only 29% of customers are promoters), some customers profiles have lower loyalty. These are namely Kuwaitis, Males, and those with a high education. Categories that have strong loyalty are Cafes, Clothes, and Casual Dining. ISPs have a negative NPS as more of their customers are detractors rather than promoters.

- **Recommendation:** Train your staff on empathy and focusing on the customers' needs.
- **Recommendation:** Measure your staff satisfaction with you using an Employee Satisfaction Index as only happy staff will provide good service.

Understand expectations

The customer is the center of excellence

Provide satisfactory service

Aim to build loyalty

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.
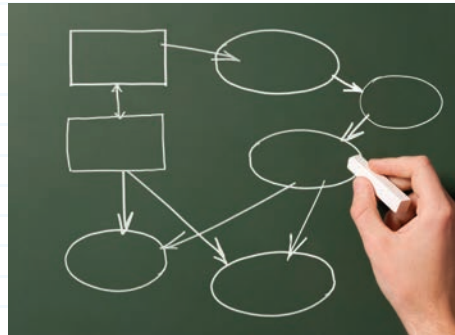
Actionable

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 2016

Nominees

Restaurants: Cafés

- Defined as: Informal restaurants offering a range of desserts and made-to-order sandwiches in addition to hot and cold beverages
- A total of 21 brands were evaluated

Restaurant: Fast food

- Defined as: Typical fast food restaurants that offers burgers and other types of value meals
- A total of 30 brands were evaluated

Restaurant: Casual dining

- Defined as: Restaurants that serve moderately-priced food in a relaxed atmosphere where visitors can dress casually
- A total of 76 brands were evaluated

Specialty Store: Electronics

- Defined as: Any stores focused on the sale of durable and nondurable electronic items
- A total of 9 brands were evaluated

Home furniture

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

Health care: Private hospitals

- Defined as: Any private health care provider offering inpatient and outpatient services
- A total of 9 brands were evaluated

Clothes & accessories

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

Autos: New Car Sales

- Defined as: The purchase of a new car directly from an authorized car dealer
- A total of 31 brands were evaluated

Nominees

Autos: Car service

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

Regional Arab Airlines

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

Communications: Mobile operators

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

Communications: Internet service providers

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

Financial: Islamic banks

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

Financial: Commercial banks

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

Specialty Store: Supermarkets

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

First Place

بـنـك بـوبـيـان
Boubyan Bank

FROM THEIR WEBSITE

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

Since the first year of its in 2010, Boubyan Bank has witnessed a radical change. Today it follows a studied and fixed route towards its goals. In addition to expanding its network of branches that is expected to reach 30 branches by 2014, Boubyan Bank is working hard to enhance its circle of activities and achievements to reach an even higher status in the Islamic banking field in Kuwait. This new strategy also saw an enhancement of the packages of services and Islamic banking products provided by Boubyan Bank to its clients in accordance with the Islamic Shari'a, such as banking services to individuals, institutions, companies or corporations, funds, different investment portfolios, other commercial services, and financing services for individuals and companies.

Second Place

The Cheesecake Factory

FROM THEIR WEBSITE

The Cheesecake Factory story begins in Detroit, Michigan in the 1940's. Evelyn Overton found a recipe in the local newspaper that would inspire her "Original" Cheesecake. Everyone loved her recipe so much that she decided to open a small Cheesecake shop, but she eventually gave up her dream of owning her own business in order to raise her two small children, David and Renee. She moved her baking equipment to a kitchen in her basement and continued to supply cakes to several of the best restaurants in town while raising her family.

In 1972, with their children grown, Evelyn and her husband Oscar decided to pack up all of their belongings and move to Los Angeles to make one last attempt at owning their own business. With the last of their savings, they opened The Cheesecake Factory Bakery and began selling Evelyn's cheesecakes to restaurants throughout Los Angeles. Through hard work and determination their business grew to a modest size and Evelyn was soon baking more than 20 varieties of cheesecakes and other desserts.

With great foresight and intuition, their son David decided to open a restaurant to showcase his mother's selection of cheesecakes. Somehow he just knew that guests would enjoy a restaurant with an extensive dessert menu. It was 1978 and he opened the first The Cheesecake Factory restaurant in Beverly Hills, CA.

Third Place

FROM THEIR WEBSITE

Emirates, wholly owned by the government of Dubai, is an airline based at Dubai International Airport in Dubai, UAE. It is the largest airline in the Middle East, operating over 2,500 flights per week, to 122 cities in 74 countries across six continents. The airline ranks amongst the top 10 carriers worldwide in terms of revenue and passenger kilometres, and has become the largest airline in the Middle East in terms of revenue, fleet size, and passengers. In 2011 the airline was the fourth-largest airline in the world.

Emirates has built up a strong brand name as a leader in the aviation industry, particularly in terms of service excellence, its very rapid growth, coupled with consistent profitability. In 2011, It was awarded the title of "Airline of the Year" for 2011. The award has been given based on recognition of its commitment to safety and operational excellence, along with customer service trendsetters, financial condition including a 22-year consecutive annual profit.

Category Winners 2016

Restaurants: Cafés
Caribou Coffee

Restaurants: Casual dining
The Cheesecake Factory

Restaurants: Fast Food
Domino's Pizza

Clothes & accessories
Next

Home furniture
Home Centre

Autos: New Car Sales
Chevrolet

Specialty Store: Electronics
X-Cite

Healthcare: Private hospitals
Royale Hayat Hospital

Category Winners 2016

Communications: Mobile operators
Zain

Specialty: Supermarkets
Saveco

Autos: Car service
Infiniti

Financial: Retail banks
National Bank of Kuwait

Communications: ISPs
Zain

Regional Arab Airlines
Emirates

Financial: Islamic banks
Boubyan Bank
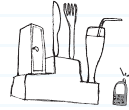
Comparing the winners of 2010 to 2016

The Service Hero CSI awarded 15 category winners in 2010 expanding to 17 since 2011, of which 3 were consecutive winners in the 2016 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 2016

Service Hero Category	2016 Winner	2015	2014	2013	2012	2011	2010
Car Servicing	**Infiniti**	Yes	Yes	No	No	No	No
Car Sales	**Chevrolet**	No	No	Yes	Yes	No	No
Regional Arab Airlines	**Emirates**	Yes	Yes	Yes	Yes	No	No
Clothes	**Next**	No	No	No	No	No	No
ISPs	**Zain**	Yes	No	No	No	No	No
Mobile Operators	**Zain**	Yes	Yes	No	Yes	Yes	No
Islamic Bank	**Boubyan Bank**	Yes	Yes	Yes	Yes	Yes	Yes
Retail Bank	**NBK**	Yes	Yes	Yes	No	Yes	Yes
Hospitals	**Royale Hayat**	Yes	Yes	Yes	Yes	Yes	Yes
Café	**Caribou Coffee**	Yes	Yes	Yes	Yes	Yes	Yes
Fast Food	**Dominos Pizza**	No	No	No	No	No	No
Casual Dining	**Cheesecake Factory**	No	No	No	No	No	No
Electronics	**X-Cite / Alghanim**	Yes	Yes	No	No	No	No
Home Furniture	**Home Centre**	Yes	No	No	No	No	No
Supermarkets*	**Saveco**	Yes	No	No	No	No	No
Fine Dining**	**N/A**	No	No	No	No	No	No
Health Clubs**	**N/A**	No	No	No	No	No	No

* Category added in SH CSI 2011
** Category did not meet quota requirements for the SH CSI 2016

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 |

③ Rate brand

How would you rate

Staff attitude, knowledge & competence

Location convenience, parking, operating hours & attractiveness

Value for money of the product/service

Product/service quality

Service speed

Reliability & accuracy of the product/service

Their call center

Their website

Your overall satisfaction with the company or brand

Likelihood of recommending this brand to family or friends

How did the product/service compare with your ideal offering

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

Aft

Your experience

1 2 **3** 4 5 6

1 2 3 **4** 5 6

1 **2** 3 4 5

1 2 3 4

1 2 3

1 2

1 2

1 2

1

Overview

High-level overview of the Service Hero index approach.

Methodology
Service Hero is an online survey where respondents voted directly on www.servicehero.com regarding the quality of service they receive in private sector companies in Kuwait. The survey was live January 1 - December 31st 2016.

Sample
The index aimed to collect a total sample of 10,000 valid votes for Kuwait distributed over 17 category industries included in the assessment. Each category had a quota of 350 votes. The confidence level is 95% with an ± 2% error margin.

Rating assessment
Respondents rated each company on a scale of 1-10 where ten is the highest score. Eight uniform assessment questions were asked covering the key service dimensions. However for 4 industries: Fine Dining, Supermarkets, Clothes and Health Clubs assessment for Call center and Website where excluded. Respondents were also asked if they would recommend a brand to a friend or relative, how a brand compares to an ideal, what the overall satisfaction is 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 the American Customer Satisfaction Index as well as 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 assess 6 service dimensions.

Pie chart dimensions: Overall Satisfaction, 1 Staff Behavior, 2 Location, 3 Product or service quality, 4 Value to price, 5 Speed, 6 Reliability, 7 Call Center, 8 Website
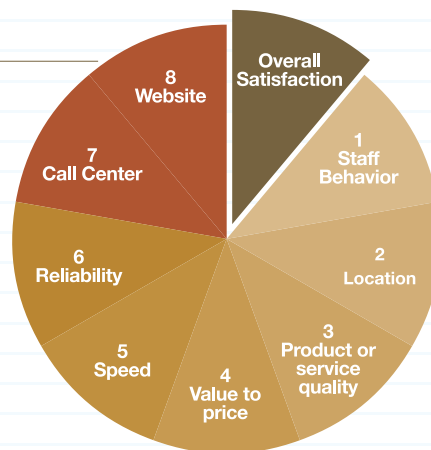
Service Hero Partners with the ACSI

The gold standard in national customer satisfaction measurement

In 2013, Service Hero partnered with the American Customer Satisfaction Index (ACSI), granting Kuwait's only annual customer satisfaction index worldwide recognition and expanding its presence through this strategic affiliation. The ACSI is the only national cross-industry benchmark of customer satisfaction that represents the U.S. economy. It also runs an index in 18 countries, namely across the South American, European and Asian continents.

The partnership stands as testament to the quality service presented by Service Hero to participating companies and consumers, and reinforces the value of it. The affiliation allows Service Hero to apply ACSI's global benchmark system that allows companies a comparison to other similar brands in different markets around the world, hence; increasing the benefits of this exercise to participating companies. Also under the affiliation, all scores that are produced by Service Hero adhere to and are validated by the American Satisfaction Index.
Below:to international market research standards.
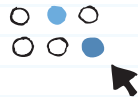
The questionnaire

What respondents actually voted on.

Before	How would you rate	After
Your expectations before your visit		Your expectations after your visit

Before	Question	After
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 **website**	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?**

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

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.

Kuwait population Aimed to exceed 10,000 votes	→	Category population Aimed for 350 votes in each category	→	Biases

↓

Minimum votes/winner Based on collected votes / category and players / category	←	Error margins Aimed for ±2%	←	Probability
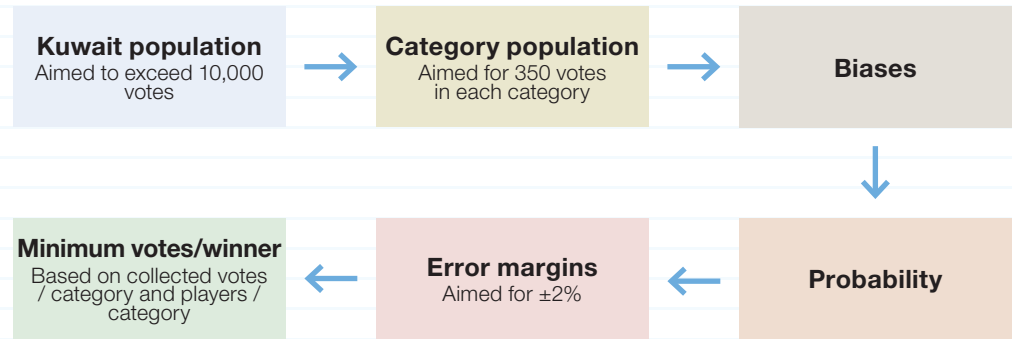
To ensure that Service Hero enjoys statistical integrity, a few statistical elements were examined to determine sample size and accuracy levels.
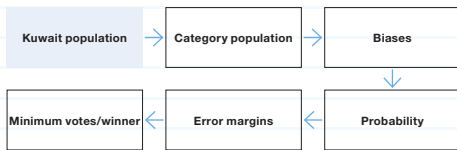
Category population.

The population of individuals which is eligible to vote in Kuwait is **1,959,000.**

This figures **includes**:
• Males and females
• Kuwaiti and non-Kuwaiti nationalities

It **excludes** (around 750,000 individuals):
• Anyone under 16 years
• Laborers

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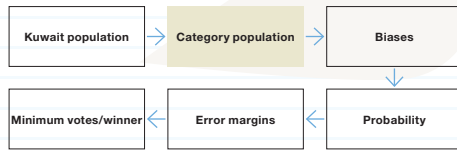
Category population.

1. To ensure statistical relevance, we looked at the **category population** – this is the proportion of Kuwait's total population that is most likely to be a user of the category

2. For example – to compute the size of the Mobile Operator market, the assumption made is that 90% of the Kuwait population is a mobile phone user

3. For some categories the **% user population** was smaller e.g. for Fine Dining restaurants, the assumption made is that 50% of the market may use/visit them

4. A second factor to look at in determining the category population size is looking at **population bias**, because:
   • Service Hero is not a random sample (people were not randomly contacted for feedback)
   • This means of the total population of Kuwait, only X% will actually be inclined to vote
   • We have assumed 5% for Kuwait overall is the population bias - in other words, this is the percent of Kuwait's population who will be inclined to vote online
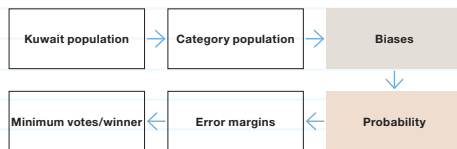
The roles that bias and probability play on the sample.

1. Probability of choice is:
   • Based on the total population of consumers per category as well as the number of brands in a category
   • An example is the clothes category where around 80 brands were evaluated and the probability of choice is 2%, while in the mobile sector only three competitors exist, which means each one has a 33% chance of obtaining votes from the total category sample

2. Voting bias:
   • Refers to the likelihood of obtaining positive votes for a brand because the respondents who chose to participate in the survey are the types of individuals who want to praise a brand
   • Because they may be affected by the term "service hero", voting bias may have taken place

Note: A review of both these factors was made. The **probability of choice** factor has been accounted for. Moreover, the **voting bias** review found some statistically significant bias that was identified and removed in the data cleansing stage.

Sampling approach (continued)

The categories included in the Service Hero assessment.

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

Regional Arab Airlines

Automotive: Sales + Service

Banks: Conventional + Islamic

Communications: Mobile + ISPs

Leisure: Health club
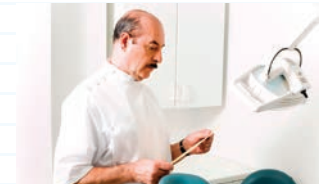
Health care: Private Hospitals

Restaurants: Café + Fast food
Formal dining + Casual dining

Specialty Stores: Electronics
Supermarkets + Furniture + Clothes

Minimum sample sizes and error margins for all categories.

Confidence level: 95%

Sector	Biased Population	Sample @ 5%	Total Votes
Airlines	88,186	293	1,224
New Car Sales	88,186	293	598
Car Service	88,186	293	1,437
Clothing	88,186	293	1,461
Mobile Operator	88,186	293	1,261
ISPs	88,186	293	584
Café	88,186	293	1,066
Fast Food	88,186	293	1,643
Casual Dining	88,186	293	1,641
Fine Dining	48,992	242	216
Electronics	88,186	293	822
Commercial banks	68,505	273	1,224
Islamic banks	30,833	196	1,071
Furniture	58,791	259	714
Private Hospital	37,421	216	606
Supermarkets	88,186	293	1,250
Health Clubs	37,421	216	133

This table shows the 17 categories included in the 2016 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 votes obtained

Source of votes and platforms used to vote from

Since the Service Hero CSI is mostly online (70% of assessments), we deploy a promotion plan that utilizes digital marketing. Digital advertising on leading news, search engines, and social media sites, comprised the bulk of our advertising. A selection of private companies also encouraged their customers to vote for them. Thus, consumers could directly search for the name 'service hero' to reach our voting engine, or click on an online banner, or click on a company banner.

■ SH Email	28%		■ Direct Traffic	30%
■ SH Social Media	14%		■ Private Co.	9%
■ SH Phone Calls	33%		■ SH Other	3%
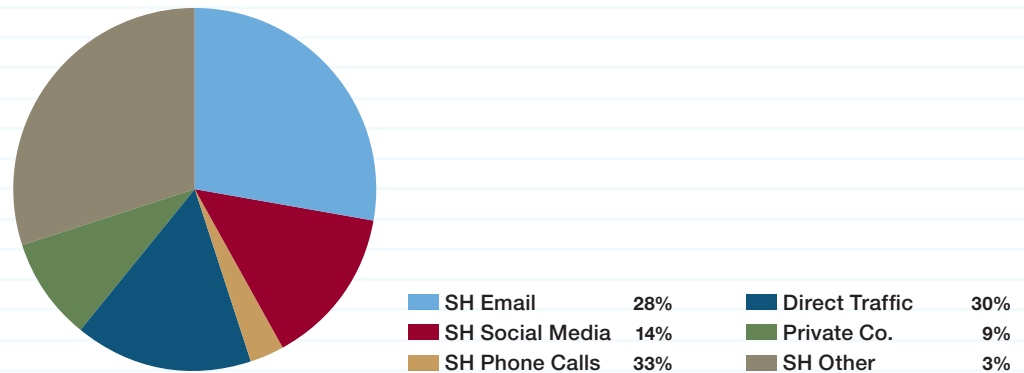
The phone based assessments were collected using our proprietary database of consumers to ensure all demographic groups and categories were well represented.

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
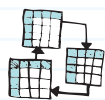
Rules applied to ensure data integrity

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 4,933 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 **17,074** 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	**3,996**
	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	**(4,933)**
	Total votes obtained	**22,007**
	Total votes assessed	**17,074**

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.

Dr. Reinhold Leichtfuss

Senior Partner and Managing Director, Boston Consulting Group

Dr. Leichtfuss possesses 24 years of experience in consulting financial services companies in all areas of expertise.

Dr. Leichtfuss has carried out numerous projects in the following:
- Corporate strategy; leadership organization and controlling
- Marketing and sales including market positioning, development of value propositions based on customer insights and customer feedback
- Distribution-channel design for single channels
- Process optimization in many product areas and businesses as well as cost reduction in sales and back office and corporate center functions
- Risk management in both market and credit risk
- Capital markets, investment banking and asset management strategies, performance improvements in sales and cost positions
- Regional expansion strategies and post merger programs
- Insurance multichannel management, campaign management, MIS, regional strategies, processes

Having worked in the Middle East since 2002, Dr. Leichtfuss has developed numerous concepts and is the lead author and editor of "Achieving Excellence in Retail Banking" as well as the BCG report "The Future of Retail Banking".

Dr. Nabil El-Hilali

Former Dean of Marketing and International Business, K.M.B.S

Dr. Nabil El-Hilali has extensive experience that spreads over 23 years across various industries and academia.
Amongst the most important multinationals he worked for:
- AEI Cables Ltd (UK)
- SKF (UK)
- Thomson Electronics (Spain)

The positions he held range from operations/Marketing manager to project manager in the areas of Marketing, operations and production management and quality management.
In the academic field he apart from lecturing in various Universities (England, Spain, China and Taiwan), and he also held various positions within the International Offices of Northumbria University and the Northern Consortium of British Universities at Manchester University (UK).

Abdulmajeed Al-Shatti

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

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

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

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

Nauman S Sehgal

Chief Operating Officer, Noor Investment Financial Company

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

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

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

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

Dr. Carol A. Ross-Scott
President, Kuwait Community College

Dr. Carol A. Ross-Scott currently serves as the President at the Kuwait Community College, arriving with over 20 years of experience in higher education.

She earned her Bachelor's of Science degree in Business Management from the University of Maryland, a Masters of Education in Human Resource Education and Human Services from Boston University, and a Doctorate of Education in Higher Education Administration from Florida State University.

Her career in higher education began with the City Colleges of Chicago and other positions included:
• Admissions Counsellor
• Residence Director
• Recruitment and Retention Specialist
• And Greek Organizations Advisor

Dr. Carol takes pride in the opportunity to serve generations of talented students and help prepare them to be the future leaders of Kuwait.

Dr. John P. Hayes, Ph.D
Assistant professor of Business Administraton, Gulf University for Science and Technology

Educator, author, and speaker, Dr. John Hayes is a member of the Business Administration faculty at Gulf University for Science & Technology in Kuwait where he teaches a variety of marketing and management courses. Dr. Hayes has authored more than 20 non-fiction books, countless articles on business topics, and has spoken to Fortune 500 companies, business associations and franchise companies. A frequent speaker at business conferences, Dr. Hayes's most popular seminars include "How To Capture & Keep Customers", and "Leading With Your Personality". He is the co-author of "Franchising: The Inside Story", "You Can't Teach A Kid To Ride A Bike At A Seminar", "Start Small, Finish Big", and "Network Marketing for Dummies".

Abdulwahab Al Ghanim
Marketing & PR Manager, Australian College of Kuwait

Abdulwahab Al Ghanim started at the Australian College of Kuwait (ACK) as Projects Development Manager in 2012. Within a few months time, he then became the Marketing & PR Manager of the college. In his current role, he manages all marketing, public relations, advertising and branding related activities on behalf of the college and its respective Diploma & Degree programs.

Prior to joining ACK, Abdulwahab co-founded El Boutique Creative Group in 2005 – a branding & design consultancy group devoted to social development and raising creative standards in the Arab world. By 2008, he co-founded "The en.v Initiative", an initiative dedicated to promoting social responsibility in the Arab world through multimedia platforms and campaigns, as well as through its educational and development programs.

Upon graduating from Florida International University in Miami, he began his professional career with a position at the National Bank of Kuwait where he eventually served as a Marketing Analyst for Private Banking.

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

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

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

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

Process overview of the key survey steps

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

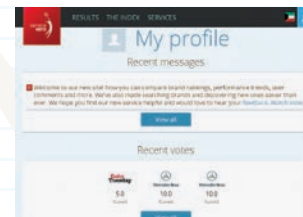1. Web banner / Social media promoting Service Hero
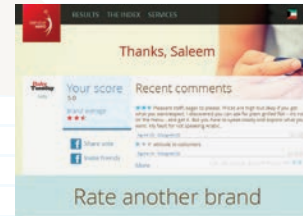
5. Respondent votes for other companies

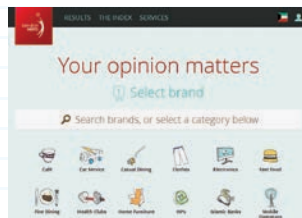

9. Results in permanent database once confirmed

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.

service
Hero

Thank you!

6

About Khayal
Consultants

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Khayal Consultants

A note about Khayal Consultants

Khayal Consultants was awarded Exclusive Licensee for Service Hero WLL due to its unique ability to deliver core competencies needed for the successful execution of Service Hero.

Khayal was responsible for:

Branding
Logo design and standards manual

Advertising
Campaign in traditional media (print and audio visual media)

Digital marketing
Campaign management and tracking

Social media
Communication on social networks

SEO
Search engine optimization

Website
Design, hosting and maintenance

Online survey engine
Questionnaire platform, security measures, tracking and reporting of results

Who is Khayal?

Khayal is a boutique firm specializing in distinct marketing communication fields to help companies maximize effectiveness. It provides complete corporate communication solutions of high quality and creativity.

Experience
Kuwaiti management - Established in 1996

Variety of Backgrounds
Retail, packaging, marketing, banking, design, and software development and integration

Dedication
Teams of committed professionals

Khayal Consultants
working ideas

Design

Print
Annual Reports
Corporate Brochures
Marketing Collateral
Newsletters
Calendars
Greetings & Occasions
Articles & Guides

Branding
Logo Development
Usage Manuals
Stationary Design

Motion
Motion Graphics
Interactive

Web

Websites & Portals
Design & Animation
Development

Consulting
Strategy & Planning
Benchmarking
Traffic & Performance
Analysis
Retail Analytics

Mobile Engagement
Mobile Optimized Websites
Mobile Apps

e-Marketing Services
SEO & SEM
Online Advertising
Digital Signage

Social Media
Development
Monitoring & Managing

Solutions & Support
Content Management
Hosting & Monitoring
Maintenance & Support

Marketing

Consulting
Strategy Review
Business Model Review
Value Chain
Image / Brand Audit

Research
Focus Groups
In-Depth Interviews
Online Surveys
Phone Surveys
Mystery Shopping

Manpower Development
Service Quality ABC Training
Employee Morale

Partners Technology   SDL   webtrends   URBAN AIRSHIP   beabloo *Communicate everywhere*   22MILCS

A selection of some of Khayal's clients

www.khayal.com

service
Hero