

Service Dimensions

Airlines

Automotive: Car Service

Automotive: New Car Sales

Clothes & Accessories: Clothing

Communication: Mobile Operator

Communication: Internet

Financial: Retail Banking

Financial: Islamic Banking

Furniture: Home Furniture

Healthcare: Hospital

Restaurant

Fast Food

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*

**2025**

Credibility.  
Integrity.  
Relevance.



Powered by



Academic Advisors



AU



Member of



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

# Our Services

To ensure organizations use a complete service excellence framework, we usually work with them to guide them through a four-phase program:



## Understand

- ✓ 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

- ✓ 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

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



## Recalibrate

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



# Index

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## Word from the president



In a market filled with choice, the real differentiator is no longer what brands say, it's what customers experience, consistently, day after day. That is why Service Hero exists: to give Kuwait a trusted way to listen at scale, and to reward the brands that turn feedback into action.

This year, Kuwait's Customer Satisfaction Index reached **84.0**, a meaningful step up from **78.9** last year (6% growth). But the number that matters just as much is the discipline behind it. In 2025, consumers submitted **69,398** ratings, and after verification our report is built on **27,582** validated ratings, because confidence in the outcome matters as much as the outcome itself.

We also see a healthy signal in expectations. Customers' overall expectation stands at **85.0**, while actual experience is **84.0**, a gap of **-1.0**. That gap is not a failure; it is a reminder that expectations rise faster than most organizations change. The leaders among brands understand that closing the last mile is where reputation is won.

The data also tells us where excellence is showing up and where work remains. Categories such as **Malls, Entertainment, Cafes and Dining** sit at the top of the experience spectrum, while **telecom-related services** (mobile operators and internet providers) continue to lag behind the national benchmark. Across service dimensions, customers viewed **Location (89.2)** and **Staff (87.6)** most strongly, while **Value (79.2)** remains the clearest pressure point, an important message in today's cost-conscious environment.

Finally, when we model what drives satisfaction, the strongest themes are consistent: **reliability** (23% impact), the ability to **resolve issues when things go wrong** (21%) and **value** (13% impact). In other words, customers are not demanding perfection, they are demanding consistency, fairness, and accountability.

To every consumer who shared their experience: thank you for strengthening a culture of transparency. And to every winning brand: congratulations, not for a trophy, but for earning trust in the moments that customers remember. Our invitation to all organizations is simple: use this data not only to celebrate, but to improve, because the next standard is already being set by the people you serve.

**Faten Abu Ghazaleh**  
President



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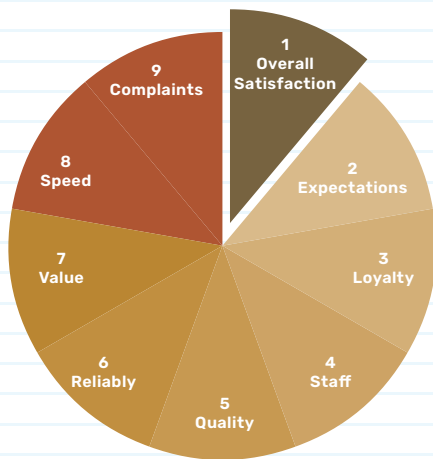
Executive  
summary



# Executive summary

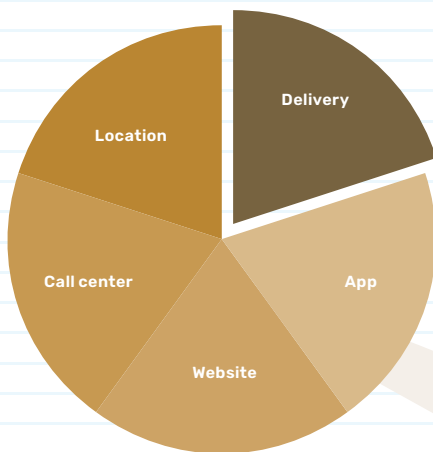
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## Core questions



**Note:** 19 categories assessed all 9 service dimensions with an additional 'bonus' page with 5 service dimensions.

## Bonus questions



## Methodology

Service Hero is a 100% based consumer rating platform. From January 1<sup>st</sup> - December 31<sup>st</sup> 2025 consumers leave their assessment on the website or via phone calls. We adhere to the research protocols of ESOMAR and 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 14 service dimensions. Respondents also gave free comments.

## Security

A sophisticated multi-factorial algorithm is used to verify the authenticity of each review in order to remove suspicious data and ensure its integrity. This includes the deployment of a number of security measures.

## Sample

A total sample of 69,398 assessments were reviewed to arrive at the final 27,582 sample of valid ratings for Kuwait with a minimum of 500 reviews 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 85.0 on Expected (before dealing with a brand) and 84.0 for Actual Satisfaction (after dealing with it). Since there is a minimal gap of 1.0, it means expectations are met. The highest service dimensions are Location (89.2), Staff (87.6), and Delivery (86.7). While the lowest are Complaints (77.7), Value (79.2), and Website (83.9).

## Demographics

Females, Non Arabs, consumers aged 18-29, those with a High School education, and Jahra residents have the highest satisfaction scores while Kuwaitis, Males, customers with a higher education, those aged 50-59, and Farwaniya residents have the lowest satisfaction score.

## Loyalty and NPS

Kuwait scored an Ordinary score of 83.7 on the likelihood to recommend a brand (Loyalty). Females, Non Arabs, customers aged 18-29, those with a Elementary education, and Ahmadi residents are the most loyal. Looking at the Net Promoter Score (ratio of customers promoting the brand versus being detractors), we see that Kuwait scores 55% with Non Arabs, Females, those aged 18-29, those with an Elementary education, and Ahmadi & Jahra residents as being the most loyal.



# Executive summary

2 of 2

## Categories

Of the 19 categories assessed, 9 of them matched, or exceeded, the Kuwait Index score. The highest were Entertainment, Malls, and Cafes, while the lowest scoring were Mobile Operators, Internet Providers, and Airlines.

## Interaction and visit frequency

Based on where consumers interacted with the brand (Over the phone, Online, App, and In-store), consumers who interacted on Brand App\* had the highest satisfaction (85.6), while Over the phone interaction scored lowest (77.8). Most consumers interacted with a brand In store (62%), with Brand Apps getting 28% interaction. Only 4% interacted Online and Over the phone, with 2% using Other Apps.

Regarding the Frequency of Interaction with the brand, we find that Weekly interactions scored highest (85.7), and Annual interaction scored lowest (78.0). This suggests that consumers visit the brands they are satisfied with more than those that do not, which they visit less frequently. 31% of consumers visit brands on a monthly basis, followed by Weekly (20%). Consumers who visit brands semi-annually account for 10% of the sample.

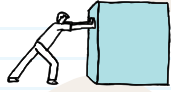
## Changes since last year

Kuwait increased its satisfaction significantly from last year by 5.1 points, or 6%.

All dimensions increased significantly from last year. The biggest improvements were for Location, Speed of Service, and Staff.

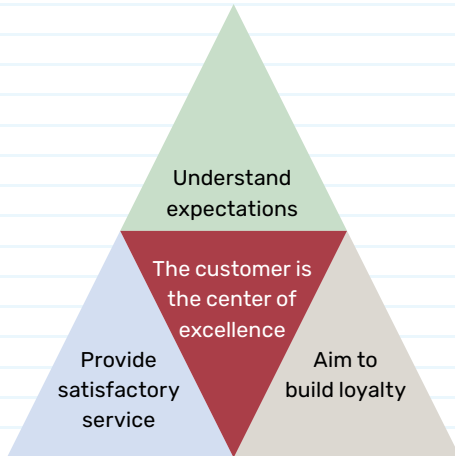
All categories improved but Private Hospitals (16%), Car Service (10%), and Car Sales (7%) increased the most.

**Note:** \*Other App scored highest but had insufficient sample size.



# Strategic implications for Kuwait

Which factors affect service excellence in Kuwait across industries?



**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

Customer expectations for service standards are critical in earning satisfaction. If expectations are high and are not met, this will lead to dissatisfaction.

- **Recommendation:** Understand what customers expect from you by collecting as much information regularly using qualitative research as well as quantitative data such as a Customer Satisfaction Index. Conduct customer journey map exercises as well as other tools to hone in on what their needs are and how to satisfy them.

## Satisfaction

Satisfaction is achieved when customer needs are fulfilled in a way that makes the customer feel valued.

- **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 23% impact on satisfaction and Complaints has 21%, with Reliability 13% on a national level. These drivers differ by brand and by category, so understand which ones are relevant to your customers.

## Loyalty

Customer loyalty is the aim of any service excellence program as it assures an emotional connection with a customer that is usually hard to break.

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



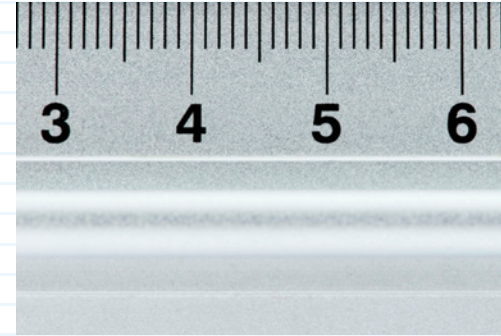
# Service Hero's benefits

Service Hero taps into an unexploited market niche



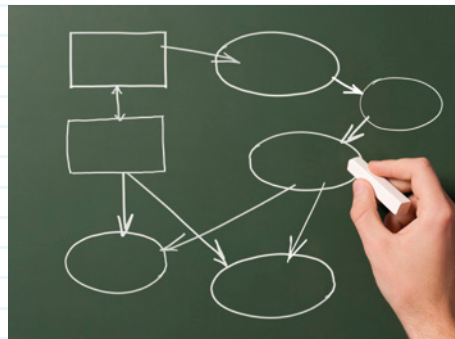
## People powered

Determines market standards using the mechanism of a poll by real consumers regarding the companies they deal with.



## Empirical

Robust sample sizes across industry categories with built in checks to ensure data validity. Study across 14 dimensions for assessment to compare to the service benchmark.



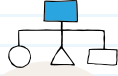
## Actionable

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



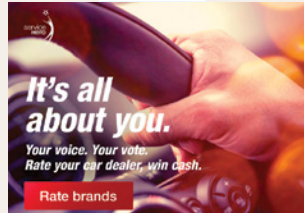
## Helps Kuwait

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

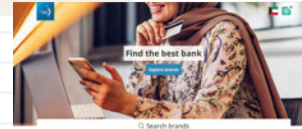


# Process overview of the key survey steps

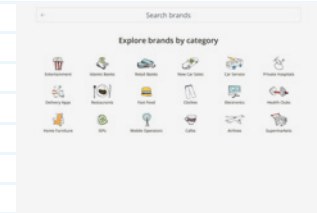
Shown here are the key 12 high-level steps followed prior to publically announcing the results.



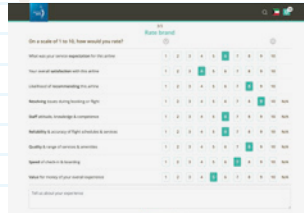
1. Digital banner



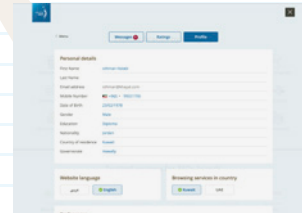
2. Directs to servicehero.com



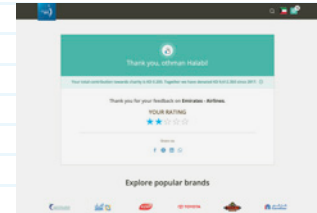
3. Respondent chooses category & brand



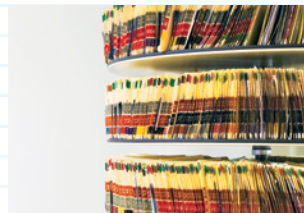
4. Respondent rates their first company



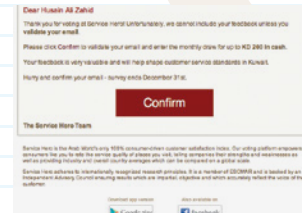
5. Respondent submits rating



6. Respondent rates other companies



7. Responses stored in temporary database



8. Email sent to respondent to confirm identity



9. Results in permanent database once confirmed



10. Data cleansing & verification procedures applied



11. High-level results shared with Advisory Council

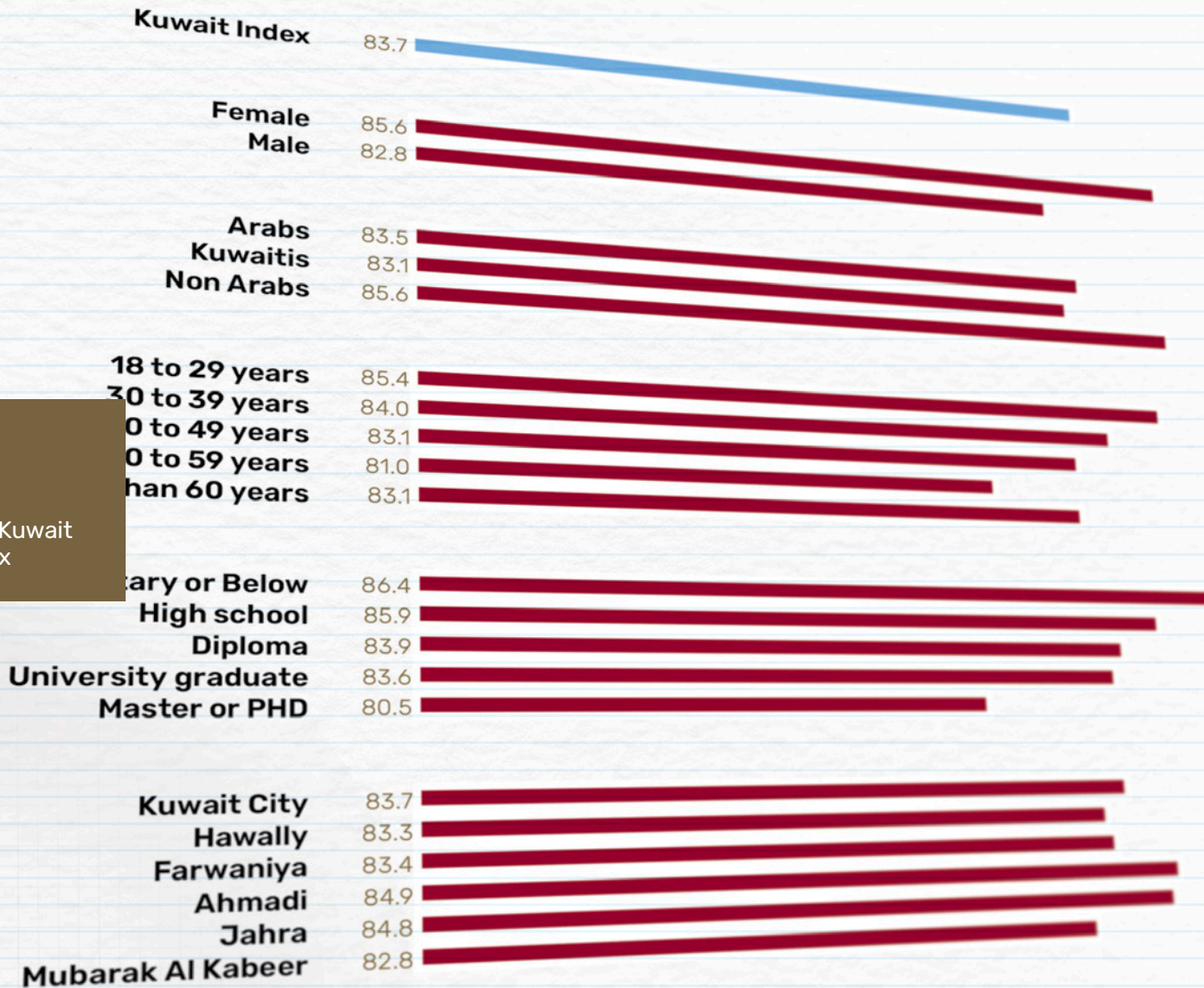


12. Service Hero winners announced publicly



# Loyalty

Kuwait Index demographics recommend scores 2025



2

The Kuwait Index

The age groups that are more likely to recommend a brand are 18-29. The least likely age group to recommend a brand is those aged 50-59 who may be less tolerant to poor service. Females are more likely to recommend a brand than Males. Kuwaitis are the least likely nationality to recommend a brand.



## 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>Ratings 2025</b>	<b>Rating 2025 Distribution</b>	<b>Kuwait eligible population distribution</b>
<b>Gender</b>			
Female	7,188	26%	33%
Male	18,301	66%	67%
<b>Nationality</b>			
Arabs	10,099	37%	See note <sup>1</sup>
Kuwaiti	10,872	39%	32%
Non Arabs	3,574	13%	See note <sup>1</sup>
<b>Age Groups</b>			
16 to 17 Years	76	0%	10%
18 to 29 Years	4,116	15%	29%
30 to 39 Years	8,968	33%	29%
40 to 49 Years	6,908	25%	20%
50 to 59 Years	3,014	11%	10%
More Than 60 Years	717	3%	2%
<b>Education</b>			
Elementary or below	214	1%	See note <sup>2</sup>
High school	3,678	13%	See note <sup>2</sup>
Diploma	4,646	17%	See note <sup>2</sup>
University graduate	13,110	48%	See note <sup>2</sup>
Master or PHD	2,757	10%	See note <sup>2</sup>
<b>Governorate</b>			
Kuwait City	2,759	10%	13%
Hawally	8,851	32%	21%
Farwaniya	3,516	13%	25%
Ahmadi	3,443	12%	21%
Jahra	1,607	6%	13%
Mubarak Al Kabeer	1,275	5%	6%
<b>Total</b>	<b>27,582</b>	<b>100%</b>	<b>100%</b>

From the 4.25 million overall population above 16 years, 3 million are eligible to rate. 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.

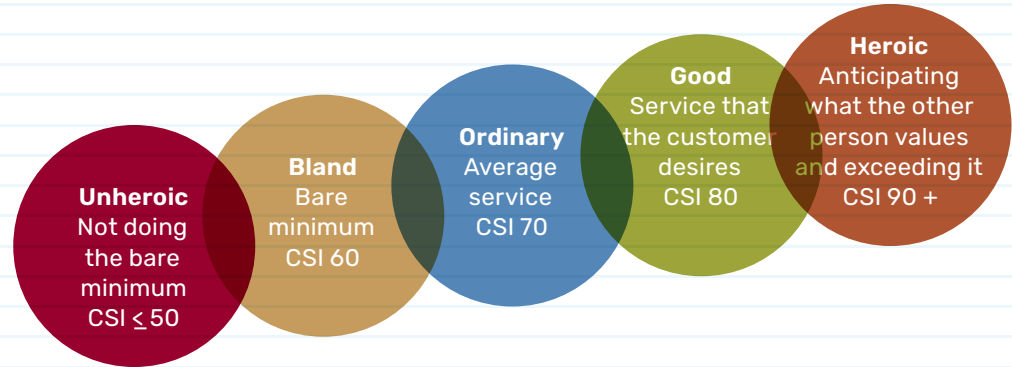
**Note 1:** Kuwait population data is only split by Kuwaiti or Non-Kuwaiti.

**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 rating count does not reflect these scores which amount to less than 9% of reviews.



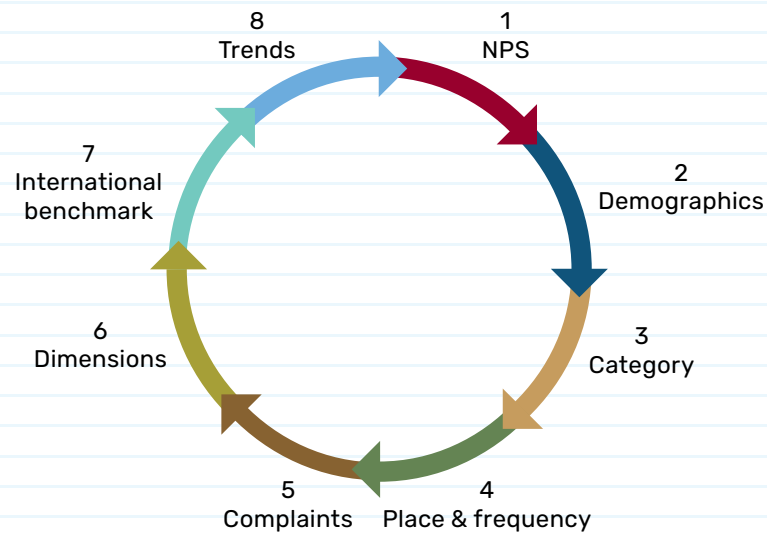
## Interpreting the score



Companies fall into one of the **five groups** 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.



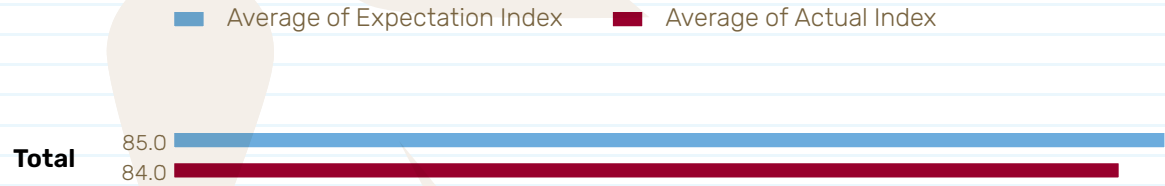
## How results will be displayed





## Kuwait Index: Before and after

Service Hero Index - Kuwait 2025



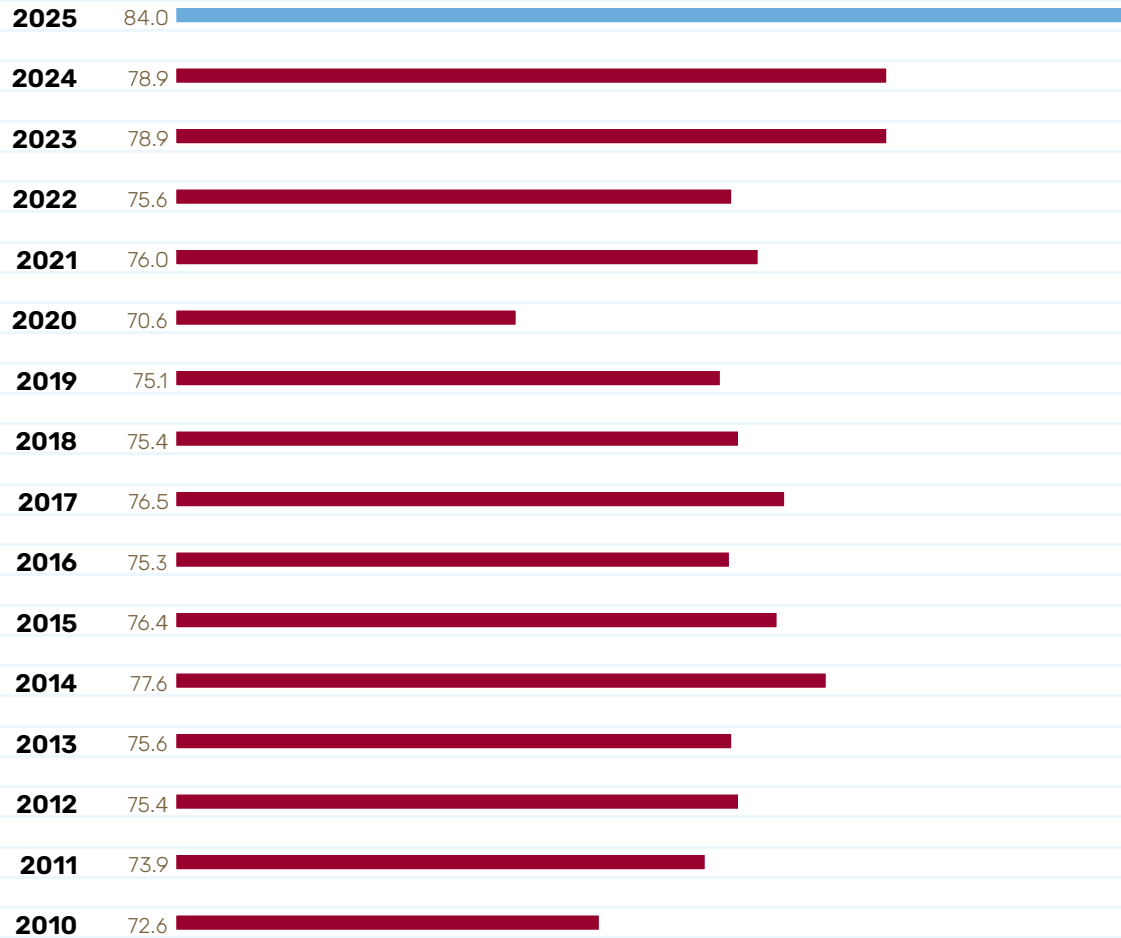
### A gap of -1.0 between expected and actual

Usually, consumer expectations will be higher than actual service assessments. In 2025, consumers had higher expectations and lower satisfaction, meaning they are slightly below expectations.

Kuwait scored 85.0 on average for **Expected** standards and it scored 84.0 on **Actual** service standards - placing it in the **Good** service level.



## Satisfaction across the years 2010 vs. 2025



Over the past 16 years since 2010, we have seen satisfaction improve annually before dipping in 2020 due to the pandemic. In the following years, Kuwait bounced back to normal levels and increasing satisfaction in 2025 from last year's peak. This means companies have been focusing on ensuring high quality service in Kuwait.



## Index by demographic factors

	Expected	Actual	Gap
Female	86.8	86.0	-0.8
Male	84.0	83.0	-1.0
Arabs	84.7	83.9	-0.9
Kuwaiti	84.6	83.5	-1.1
Non Arabs	86.9	85.8	-1.1
18 to 29 years	86.0	85.2	-0.8
30 to 39 years	85.3	84.3	-0.9
40 to 49 years	84.3	83.5	-0.9
50 to 59 years	83.3	81.5	-1.8
More than 60 years	84.2	82.8	-1.4
Elementary or below	87.0	86.4	-0.6
High school	86.8	86.5	-0.3
Diploma	85.2	84.3	-0.9
University graduate	84.9	83.8	-1.1
Master or PHD	82.4	80.9	-1.6
Kuwait City	85.2	84.6	-0.6
Hawally	84.5	83.5	-1.0
Farwaniya	84.6	83.3	-1.3
Ahmadi	86.0	85.3	-0.7
Jahra	86.1	85.5	-0.6
Mubarak Al Kabeer	85.7	83.7	-2.0
<b>Total</b>	<b>85.0</b>	<b>84.0</b>	<b>-1.0</b>
Highest			
Lowest			

Females are more satisfied than Males in 2025 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 18-29 age group has the highest satisfaction and those aged 50-59 have the lowest.



## Demographic comparisons 2021 vs. 2025

Actual Satisfaction

	'21	'22	'23	'24	2025
Female	78.2	77.3	80.5	79.8	86.0
Male	74.9	74.5	78.0	78.4	83.0
Arabs	75.1	74.4	76.2	81.0	83.9
Kuwaiti	73.9	74.1	78.0	75.8	83.5
Non Arabs	79.4	78.0	80.5	83.2	85.8
16 to 17 years	82.8	73.4	83.2	79.9	86.9
18 to 29 years	79.0	77.4	78.4	78.9	85.2
30 to 39 years	76.3	76.2	79.9	80.0	84.3
40 to 49 years	74.0	75.4	77.9	78.3	83.5
50 to 59 years	75.4	71.9	76.9	75.8	81.5
More than 60 years	75.6	73.4	80.4	78.6	82.8
Elementary or Below	78.7	77.8	77.7	81.4	86.4
High school	77.1	78.2	79.2	80.9	86.5
Diploma	75.8	76.2	80.5	77.0	84.3
University graduate	73.0	75.7	78.5	79.1	83.8
Master or PHD	76.0	74.9	77.9	77.9	80.9
Highest					
Lowest					

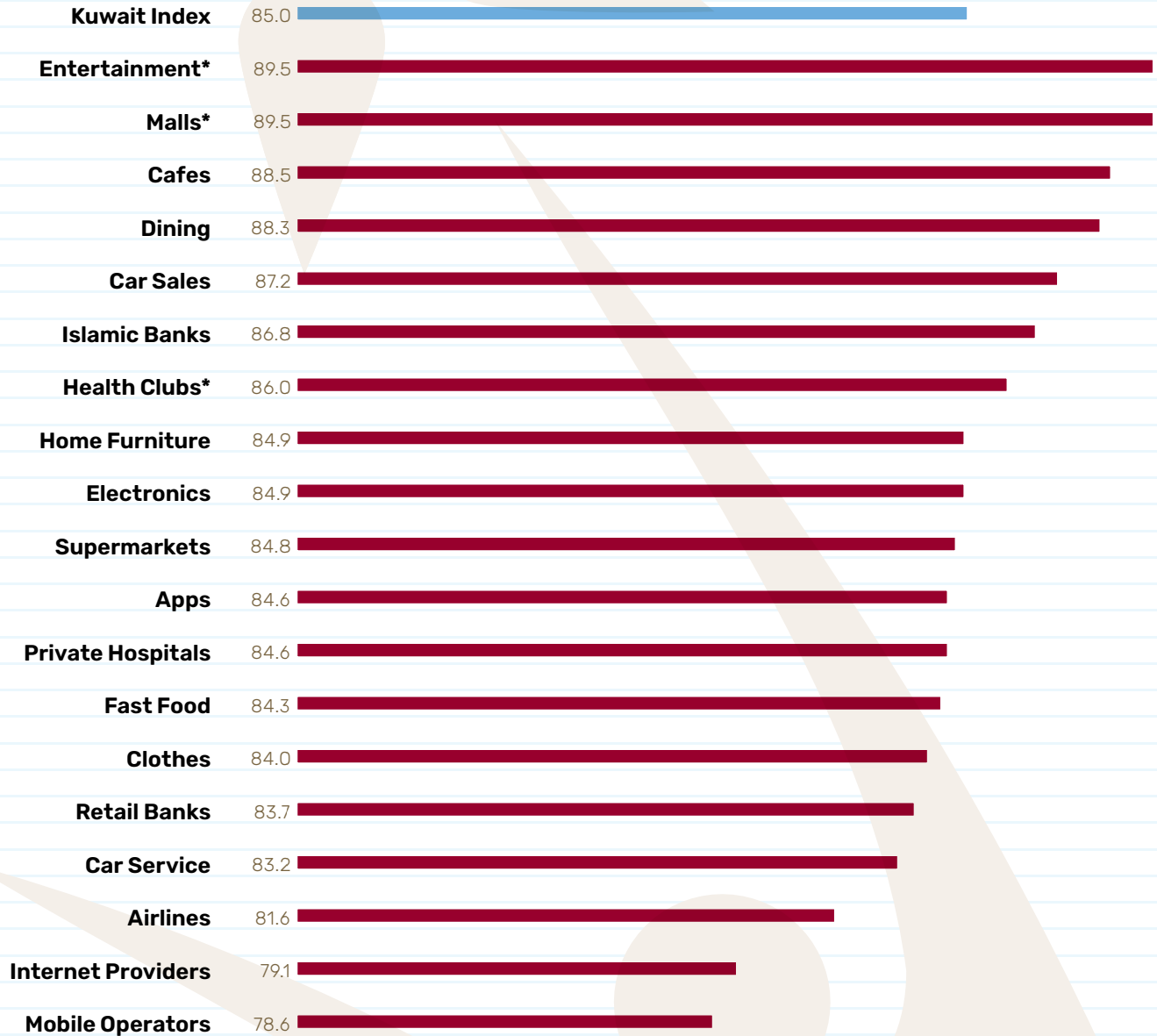
All demographic groups experienced an increase in satisfaction since last year.

The groups with the largest increase in satisfaction are Kuwaitis, those aged 16-17, Diploma holders, and Females.



# The Kuwait expected index across all categories

Expected Index



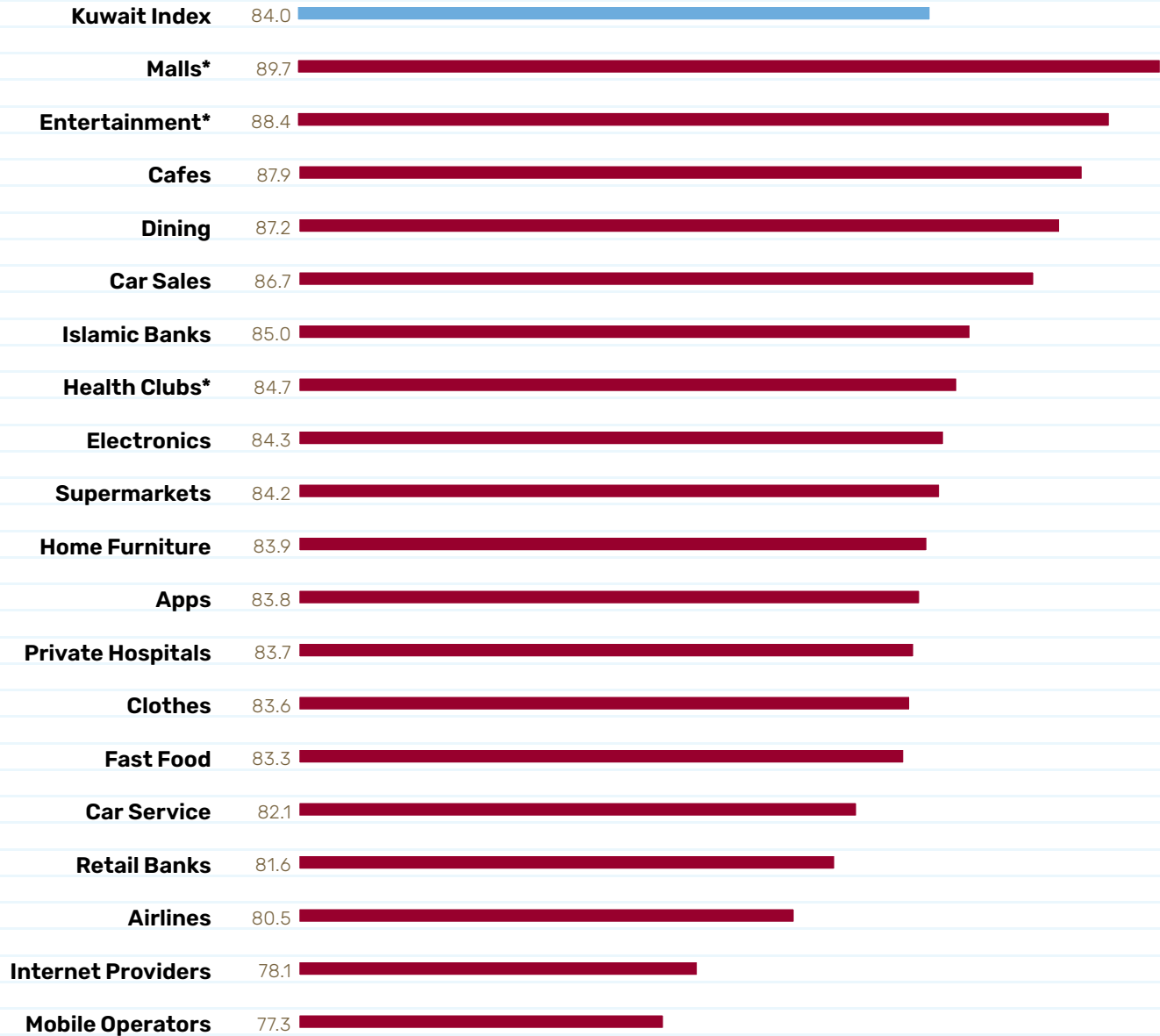
The top expectations are for Entertainment, Malls, and Cafes. The lowest expectations are for Mobile Operators, Internet Providers, and Airlines.

Note: \*insufficient sample size.



# The Kuwait actual index across all categories

Actual Index



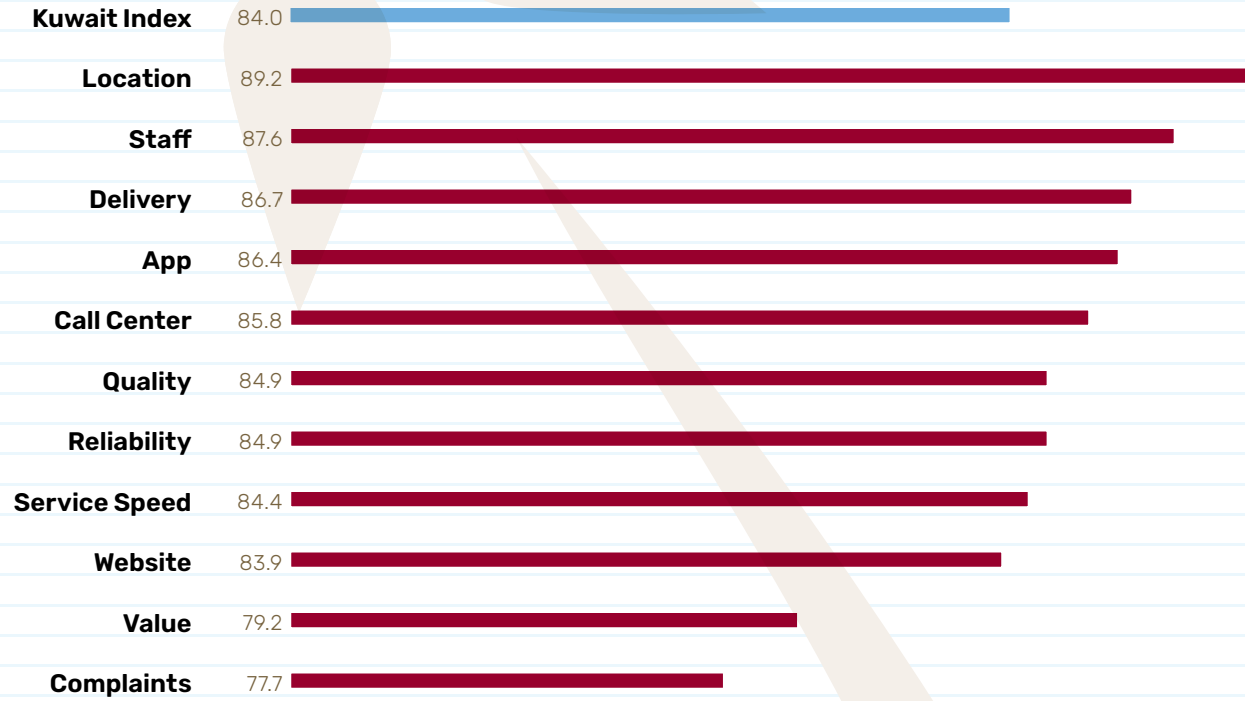
The top three scoring industries are Entertainment, Malls, and Cafes. The lowest industries in Satisfaction are Mobile Operators, Internet Providers, and Airlines.

Note: \*insufficient sample size.

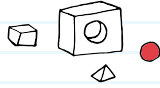


# Kuwait Index by service dimension

Kuwait Index 2025 service dimension



When we look at dimension scores, Location, Staff, and Delivery scored highest. Complaints, Value, and Website scored lowest.



## Interaction category

Point of Interaction

	In store / branch	Website	Phone	Brand App	Other App
<b>Kuwait Index</b>	<b>83.0</b>	<b>83.8</b>	<b>77.8</b>	<b>85.6</b>	<b>89.2</b>
Apps	N/A	83.2	75.9	83.8	N/A
Entertainment*	87.9	94.4	88.9*	87.4	N/A
Malls*	89.7	96.3*	79.6*	85.7	N/A
Cafes	87.6	90.1	83.3*	90.8	92.9
Fast Food	83.5	80.3	79.7	81.4	84.5
Dining	87.2	90.2	83.0	78.1	88.6
Health Clubs*	84.6	88.9*	N/A	N/A	N/A
Supermarkets	84.3	77.1	75.3	87.4	85.9
Electronics	84.2	77.3	72.2*	80.9	N/A
Home Furniture	84.2	70.1	77.8*	83.2	N/A
Clothes	83.3	86.6	N/A	84.0	83.3
Private Hospitals	83.7	66.7	90.3	100.0*	N/A
Internet Providers	70.8	82.4	71.5	79.9	N/A
Mobile Operators	77.5	78.7	68.1	78.1	N/A
Retail Banks	77.9	81.7	66.9	84.3	N/A
Islamic Banks	77.9	86.3	83.4	87.9	N/A
Airlines	81.7	80.1	61.7	81.0	79.8
Car Sales	86.7	95.5	81.6	94.4*	N/A
Car Service	82.0	86.1*	82.6	91.7*	N/A
Highest					
Lowest					

On a country level, App scored highest with 85.6 and Website scored 83.8 and Over the phone scored lowest with 77.8. Companies focusing more on digital efforts by expanding, refining, their services could be the reason for the high satisfaction scores.

Malls scored highest for In-store. Entertainment scored highest for Website with Private Hospitals scoring highest for Over the phone. Cafes had the highest score for Apps. Internet Providers scored lowest for In-store, with Private Hospitals scoring lowest for Website. Over the phone, Airlines scored lowest with Mobile Operators scoring lowest for Brand App.

**Note:** \*insufficient sample.



## Interaction category

Point of Interaction

	In store / branch	Online	Phone	Brand App	Other App
<b>Kuwait Index</b>	<b>62%</b>	<b>4%</b>	<b>4%</b>	<b>28%</b>	<b>2%</b>
Apps	0%	10%	2%	89%	0%
Entertainment*	76%	7%	1%	17%	0%
Malls*	95%	1%	1%	2%	0%
Cafes	91%	1%	0%	2%	7%
Fast Food	60%	3%	3%	14%	21%
Dining	87%	2%	2%	2%	8%
Health Clubs*	98%	2%	0%	0%	0%
Supermarkets	96%	2%	1%	1%	0%
Electronics	92%	2%	0%	6%	0%
Home Furniture	95%	2%	0%	2%	0%
Clothes	91%	3%	0%	6%	1%
Private Hospitals	97%	1%	2%	0%	0%
Internet Providers	8%	4%	9%	79%	0%
Mobile Operators	9%	8%	10%	73%	0%
Retail Banks	19%	6%	6%	70%	0%
Islamic Banks	21%	6%	8%	66%	0%
Airlines	46%	15%	2%	24%	13%
Car Sales	95%	1%	3%	1%	0%
Car Service	97%	0%	2%	0%	0%
Highest					
Lowest					

Most consumers interact with brands In-store (62%) followed by Brand App (28%). Other App is the least frequent with only 2%.

**Note:** \*insufficient sample.



## Frequency category

Frequency of Visits

	Daily	Weekly	Monthly	3 months	6 months	Yearly
<b>Kuwait Index</b>	<b>85.5</b>	<b>85.7</b>	<b>84.5</b>	<b>81.6</b>	<b>78.7</b>	<b>78.0</b>
Apps	89.4	84.9	81.8	79.2	55.7	56.9
Entertainment*	N/A	83.3	88.6	85.3	87.0	94.6
Malls*	90.8	90.8	90.7	85.6	78.7	85.4
Cafes	92.9	88.9	84.6	83.5	70.4	80.7
Fast Food	88.7	85.1	83.7	74.6	69.0	61.2
Dining	92.6	92.3	88.0	84.6	84.0	70.2
Health Clubs*	84.2	87.4	94.4	N/A	88.9	72.2
Supermarkets	88.3	84.9	81.2	80.4	80.1	74.9
Electronics	N/A	86.9	84.7	84.2	84.5	82.2
Home Furniture	N/A	78.9	86.2	84.2	84.1	81.6
Clothes	66.7	85.4	84.8	82.4	87.0	73.8
Private Hospitals	N/A	92.2	85.8	83.2	83.2	80.1
Internet Providers	78.5	73.5	79.5	78.7	73.2	73.0
Mobile Operators	78.2	73.9	76.5	80.7	72.7	78.5
Retail Banks	87.5	84.4	81.9	78.3	69.7	79.0
Islamic Banks	88.0	85.9	84.6	76.7	81.4	88.6
Airlines	N/A	92.6	80.9	80.1	80.0	81.2
Car Sales	N/A	90.9	86.5	85.0	84.1	86.9
Car Service	N/A	N/A	81.1	82.5	80.8	80.7
Highest						
Lowest						

Weekly interactions with a brand scored highest with 85.7. Annual interactions scored lowest with a score of 78.0.

**Note:** \*insufficient sample.



## Frequency category

Frequency of Visits

	Daily	Weekly	Monthly	3 months	6 months	Yearly
<b>Kuwait Index</b>	<b>11%</b>	<b>20%</b>	<b>31%</b>	<b>15%</b>	<b>10%</b>	<b>13%</b>
Apps	19%	55%	21%	3%	1%	1%
Entertainment*	0%	16%	23%	21%	11%	29%
Malls*	7%	41%	38%	9%	3%	3%
Cafes	22%	49%	21%	6%	2%	1%
Fast Food	5%	47%	36%	8%	3%	2%
Dining	1%	17%	51%	22%	5%	5%
Health Clubs*	58%	28%	4%	0%	2%	8%
Supermarkets	39%	43%	15%	2%	1%	1%
Electronics	0%	3%	22%	36%	27%	12%
Home Furniture	0%	5%	15%	32%	29%	19%
Clothes	0%	21%	33%	30%	12%	4%
Private Hospitals	0%	6%	22%	28%	17%	27%
Internet Providers	2%	1%	80%	2%	3%	11%
Mobile Operators	3%	2%	76%	3%	3%	13%
Retail Banks	12%	27%	26%	7%	7%	20%
Islamic Banks	17%	24%	26%	8%	9%	16%
Airlines	0%	1%	4%	22%	32%	42%
Car Sales	0%	2%	6%	14%	13%	66%
Car Service	0%	0%	8%	56%	30%	6%
Highest						
Lowest						

On a national level, most interactions with brands occur Monthly (31%), followed by Weekly (20%). Semi-Annual interactions were the lowest with 10% of consumers.

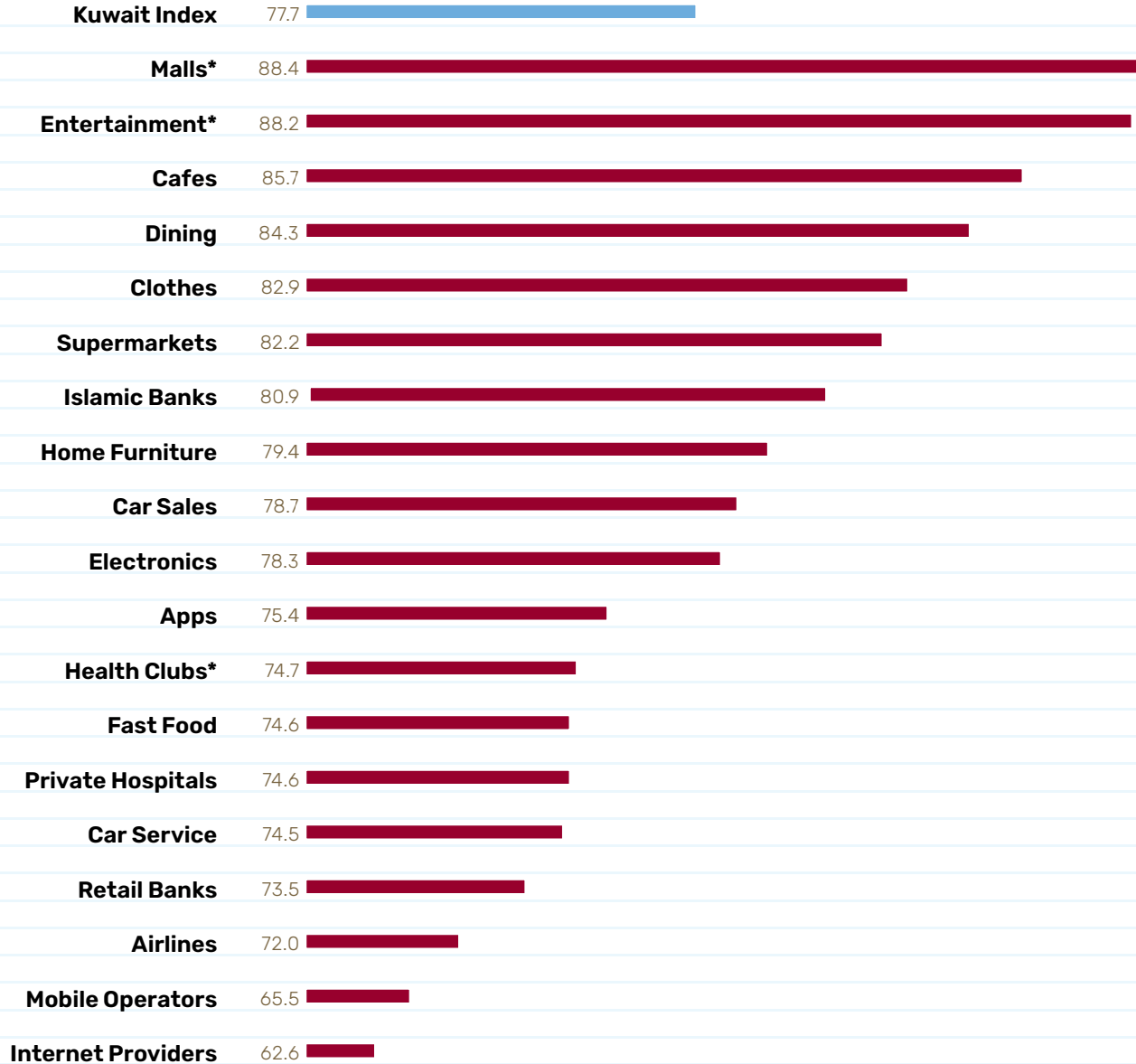
Some exceptions include Electronics which is interacted with Every 3 months while Car Sales is on an annual basis. On the other hand, Health Clubs is interacted with most on a Daily basis.

**Note:** \*insufficient sample.



# Complaint resolution category

Kuwait Index complaint average score 2025



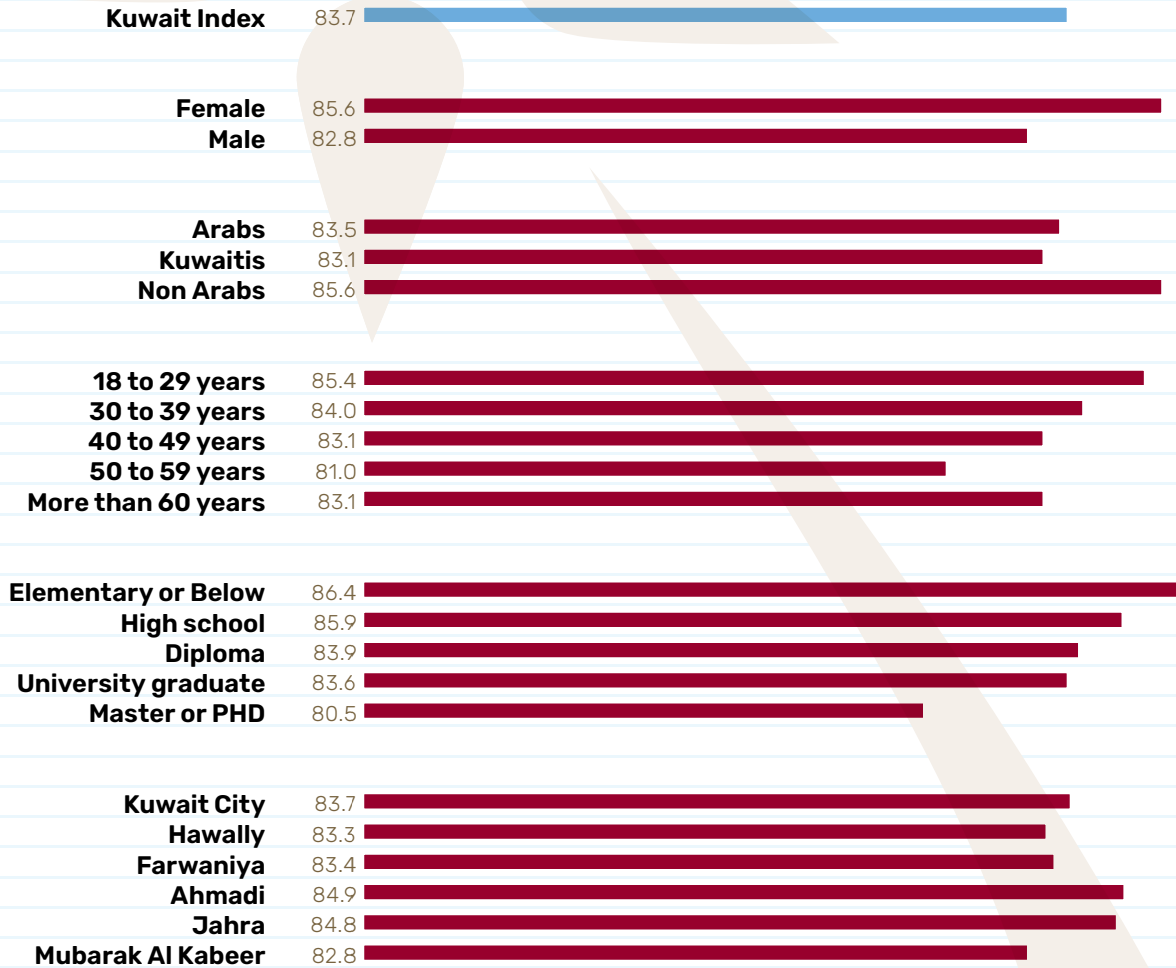
Complaints in Kuwait scored an ordinary score of 77.7 on how brands deal with them. Malls, Entertainment, and Cafes scored highest. Internet Providers, Mobile Operators, and Airlines scored lowest.

Note: \*insufficient sample.



# Loyalty

Kuwait Index demographics recommend scores 2025



The age groups that are more likely to recommend a brand are 18-29. The least likely age group to recommend a brand is those aged 50-59 who may be less tolerant to poor service.

Females are more likely to recommend a brand than Males. Kuwaitis are the least likely nationality to recommend a brand.



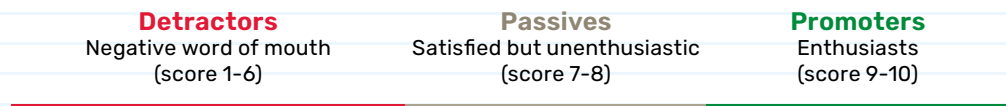
# Net Promoter Score

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.

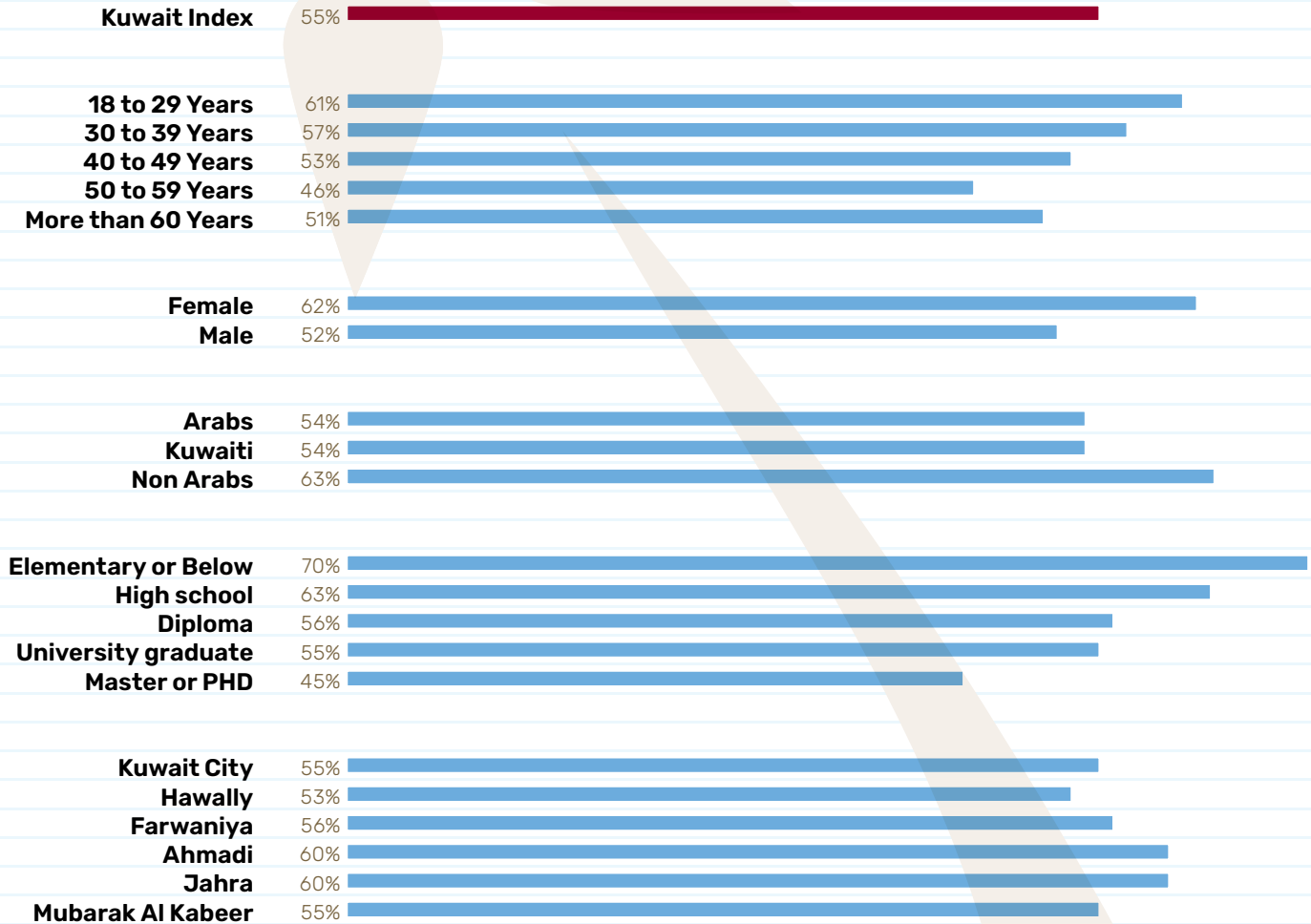
**Passives** (score 7-8) are satisfied but unenthusiastic customers who are vulnerable to competitive offerings.

**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 55%

Net promoter score - Service Hero Index 2025



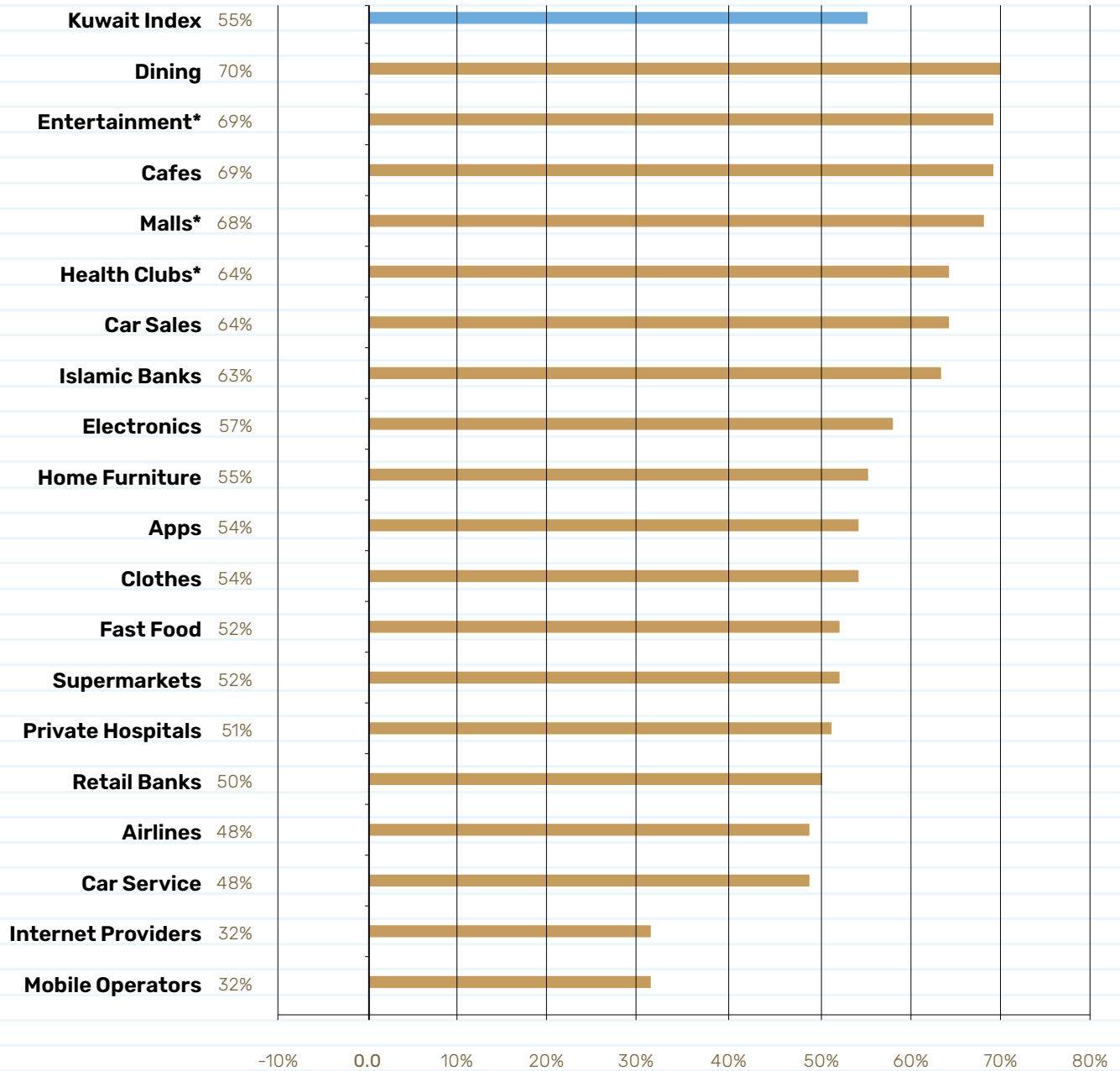
Demographic groups are all Promoters with Kuwait scoring 55% NPS score. The largest concentration of Promoters are Females, Non Arabs, those with a lower education, and the 18-29 age group. There are no demographic groups with a high concentration of Detractors.

**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).



# Category NPS

Service Hero CSI Category 2025 Net Promoter Score



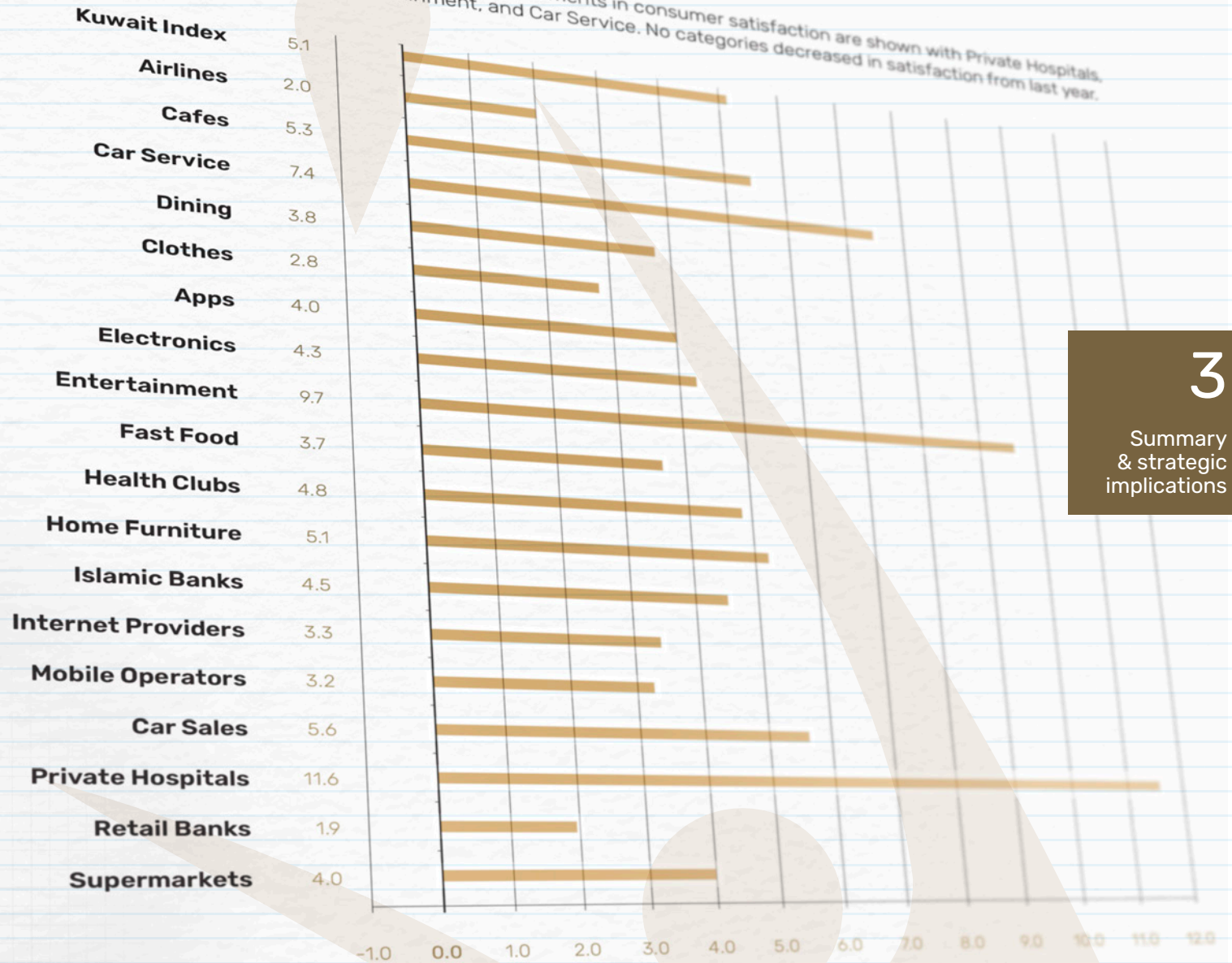
With the country average at 55%, lowest scoring categories are: Mobile Operators, Internet Providers, and Car Service & Airlines. The highest NPS scores are for Dining, Entertainment, and Cafes.

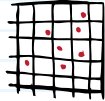
Note: \*insufficient sample.



## Category Growth 2024 vs. 2025

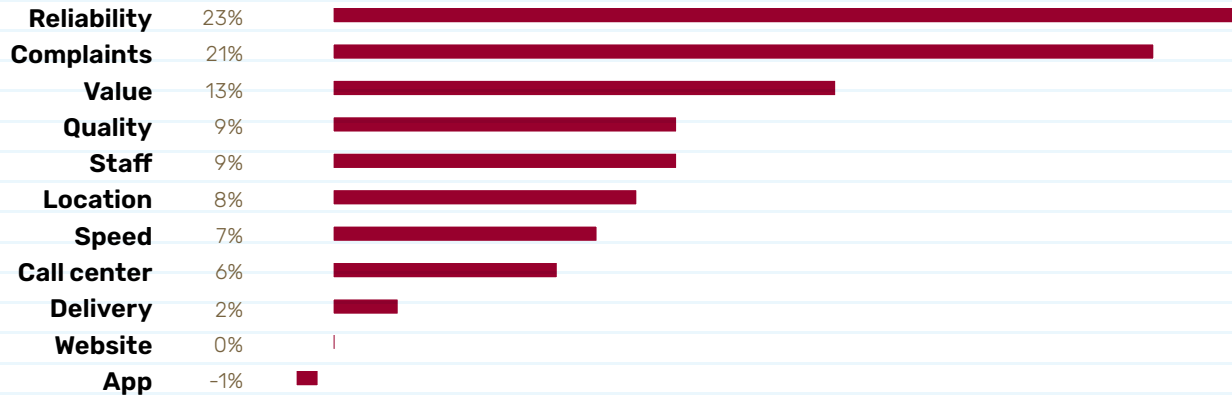
Notable point improvements in consumer satisfaction are shown with Private Hospitals, Entertainment, and Car Service. No categories decreased in satisfaction from last year.





# Correlation of dimensions to overall satisfaction

Service dimensions most influential to overall satisfaction (R Square 85%, 27,582 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 8 dimensions that are critical in influencing overall satisfaction: Reliability (23%), Complaints (21%), and Value the most impactful. If companies prioritize their effort on these dimensions it would help them improve satisfaction.

Channel impact by dimension	All channels	In store / branch	On the phone	Website	Brand App	Other App
Staff	9%	13%	5%	-17%	12%	27%
Location	8%	11%	-8%	4%	4%	-19%
Value	13%	12%	18%	6%	17%	7%
Quality	9%	10%	11%	17%	-2%	33%
Reliability	23%	21%	36%	17%	31%	-23%
Speed	7%	5%	-2%	17%	10%	0%
Call center	6%	4%	17%	9%	6%	4%
Complaints	21%	18%	27%	23%	22%	34%

## In store / branch interactions

If the last last interaction was in a store or a branch: Reliability has 21% impact, and Complaints 18%, followed by Staff at 13%.

## Phone transactions

Reliability has the highest impact on satisfaction On the phone (36%), followed by Complaints at 27%.

## App transactions

If the last interaction was via app, Reliability has the most impact at 31%, followed by Complaints.



## CSI comparison to the US market

Comparing Kuwait to the American ACSI, we note that Kuwait is higher by 10% overall. All categories in Kuwait outperform the US notably in Cafes, Car sales, and Supermarkets.

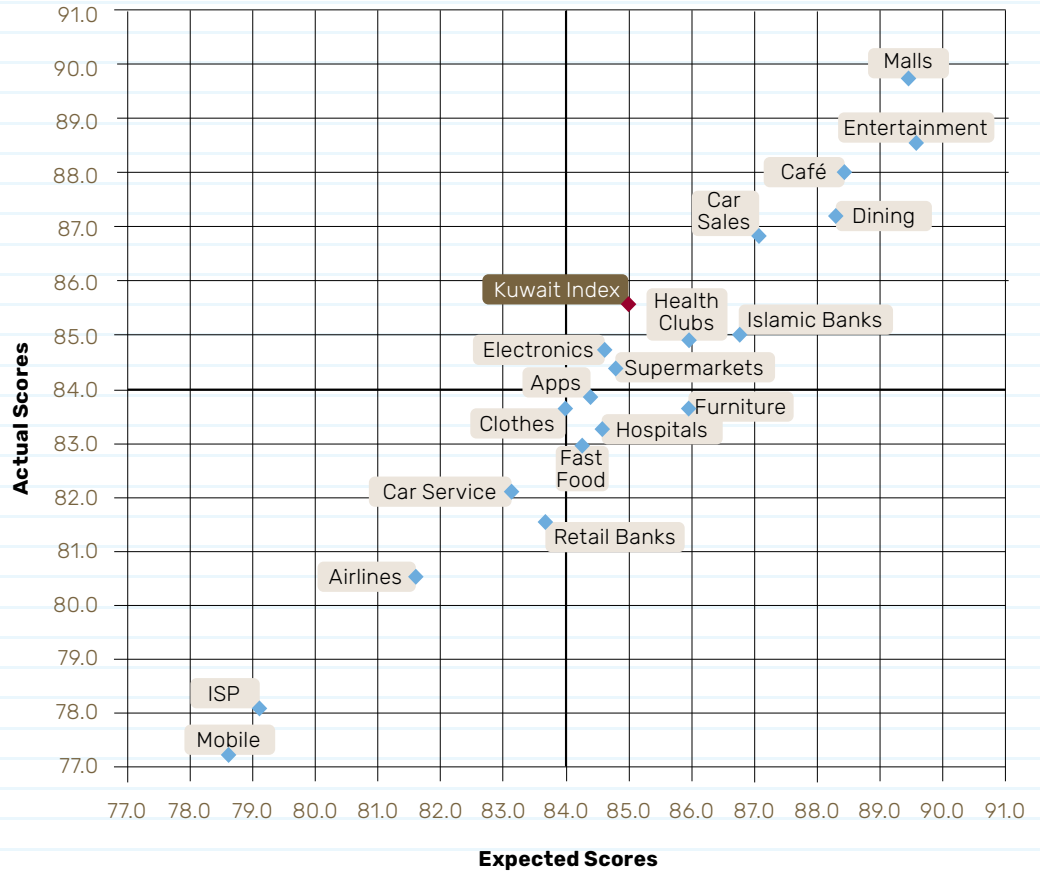
Category	Kuwait Service Hero CSI	US ACSI Index	Difference
Airlines	80.5	74.0	6.5
Cafes	87.9	79.0	8.9
Car Service	82.1	79.0	3.1
Dining	87.2	82.0	5.2
Clothes	83.6	80.0	3.6
Electronics	84.3	80.0	4.3
Fast Food	83.3	79.0	4.3
Home Furniture	83.9	79.0	4.9
Islamic Banks	85.0	80.0	5.0
Internet Providers	78.1	72.0	6.1
Mobile Operators	77.3	75.0	2.3
Car Sales	86.7	79.0	7.7
Private Hospitals	83.7	79.0	4.7
Retail Banks	81.6	80.0	1.6
Supermarkets	84.2	78.0	6.2
Apps	83.8	79.0	4.8
Entertainment	88.4	N/A	N/A
Malls	89.7	N/A	N/A
<b>Overall Score</b>	<b>84.0</b>	<b>76.9</b>	<b>7.1</b>

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



# Market position of all categories

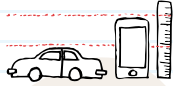
Mapping categories on expectation and actual scores to understand their market position



Industry categories in the top right quadrant such as Entertainment, Malls, and Cafes are in the best position as they score high and their actual scores match their expected scores. They need to sustain this position over time.

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 Internet Providers 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 2021 vs 2025

Actual Satisfaction

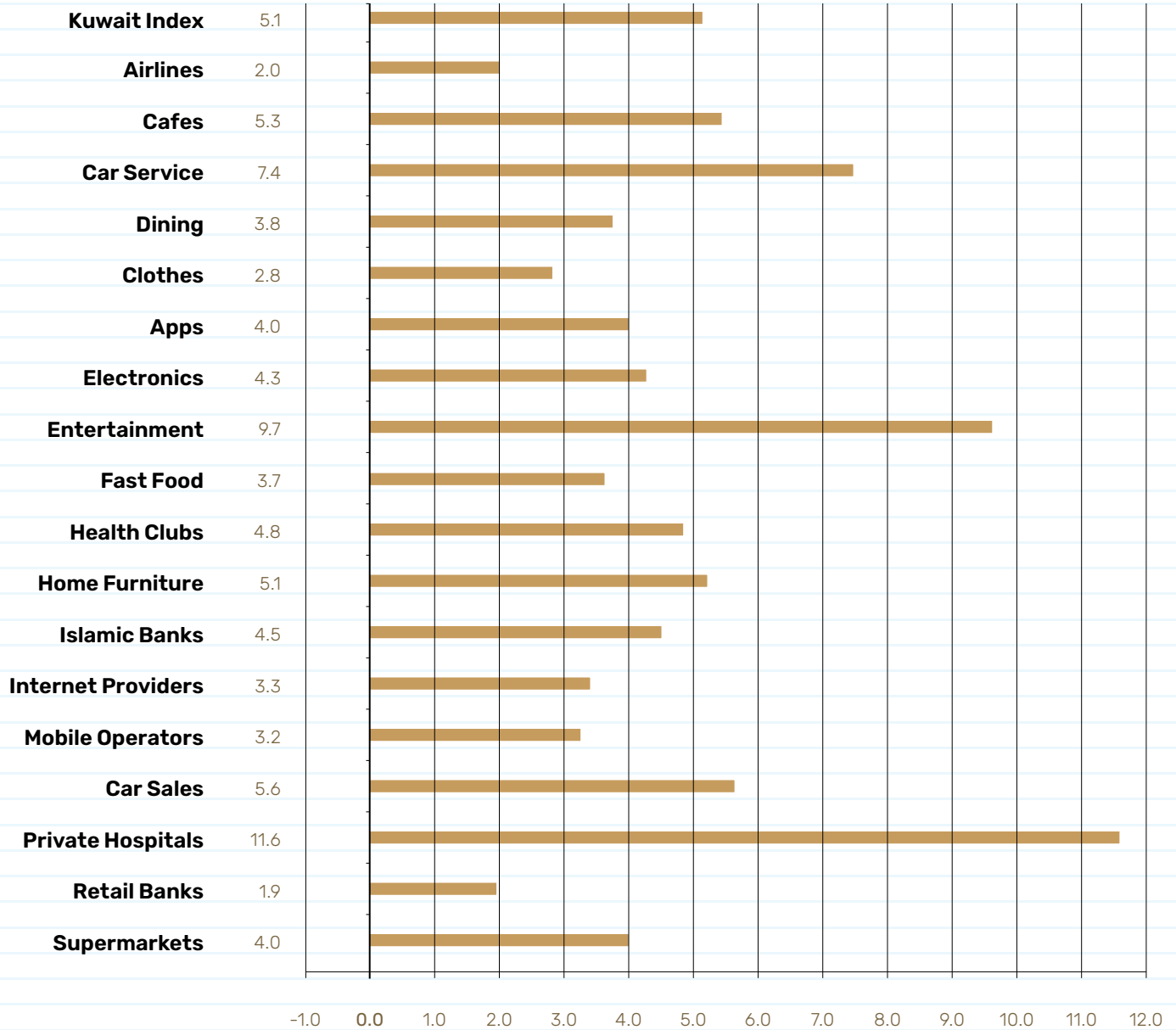
Satisfaction in Kuwait increased its score from last year. The top scoring categories throughout the years have traditionally been Cafes, Dining, and Car Sales. Notable improvements since last year are Internet Providers, Private Hospitals, and Apps.

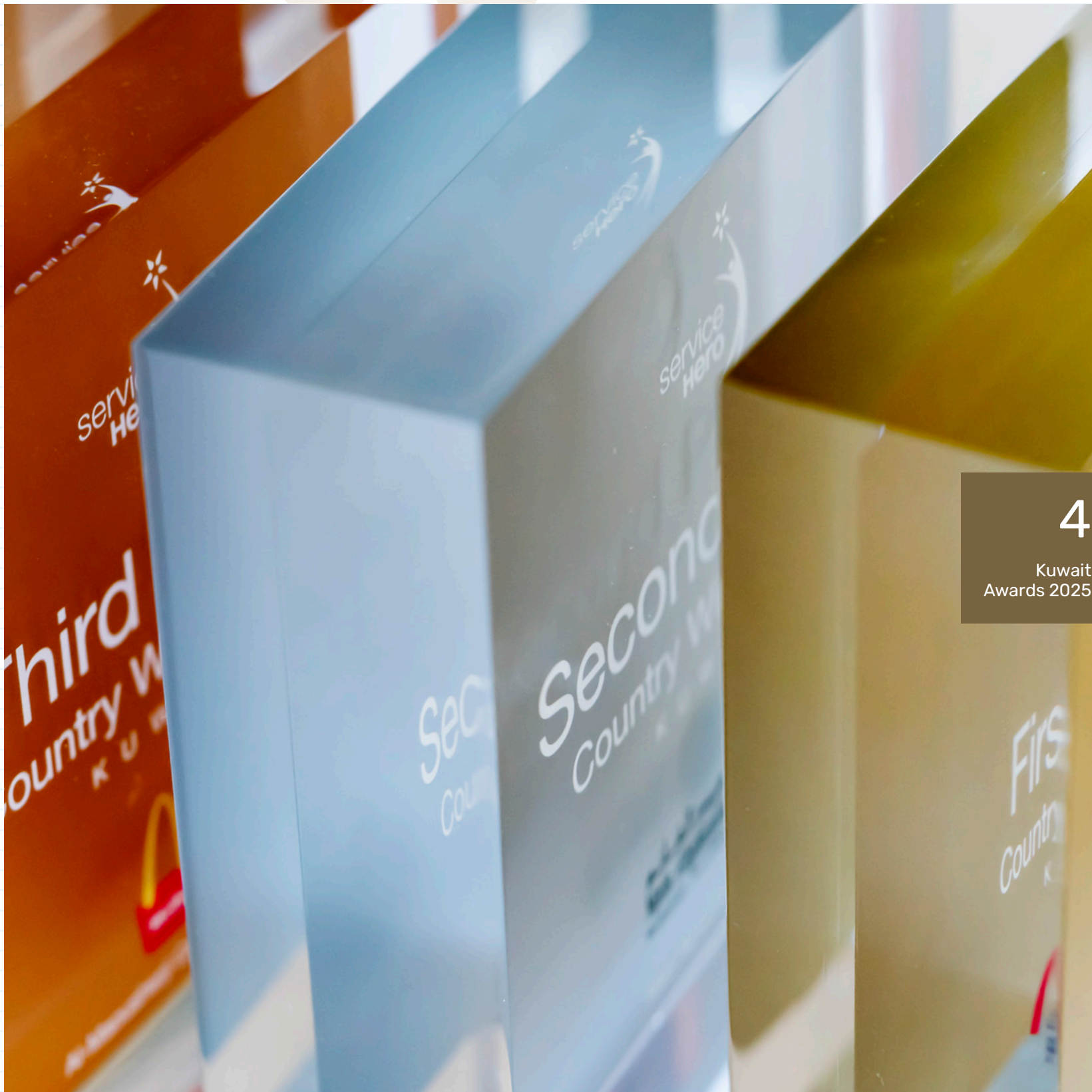
	'21	'22	'23	'24	2025
<b>Kuwait Index</b>	<b>76.0</b>	<b>75.6</b>	<b>78.9</b>	<b>78.9</b>	<b>84.0</b>
Airlines	77.0	74.2	77.1	78.6	80.5
Cafes	81.9	77.6	82.4	82.6	87.9
Car Service	73.6	74.6	77.6	74.7	82.1
Dining	79.8	76.4	80.5	83.4	87.2
Clothes	79.3	74.2	80.7	80.8	83.6
Apps	73.9	76.9	75.8	79.8	83.8
Electronics	75.2	74.8	81.3	80.0	84.3
Entertainment	N/A	N/A	N/A	78.7	88.4
Fast Food	74.4	75.6	78.3	79.6	83.3
Health Clubs	78.6	81.9	76.3	79.9	84.7
Home Furniture	74.7	73.0	78.4	78.8	83.9
Islamic Banks	76.6	78.5	82.1	80.5	85.0
ISPs	66.5	66.5	71.0	74.8	78.1
Mobile Operators	68.6	67.9	74.6	74.1	77.3
Car Sales	80.9	80.2	81.6	81.1	86.7
Private Hospitals	72.8	70.6	73.0	72.1	83.7
Retail Banks	77.3	77.4	81.9	79.7	81.6
Supermarkets	77.0	77.1	78.3	80.2	84.2
Malls	N/A	N/A	N/A	N/A	89.7
Highest					
Lowest					



# Category Growth 2024 vs. 2025

Notable point improvements in consumer satisfaction are shown with Private Hospitals, Entertainment, and Car Service. No categories decreased in satisfaction from last year.





4

Kuwait  
Awards 2025



## Top three country winners

These are the highest scoring three brands across all 19 categories and among 500+ brands.



### FIRST PLACE

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



### SECOND PLACE

It all started back in the year 2010, with Kuwaiti Food Entrepreneurs, Jassem Alduaij & Bader Aloqaili. Both Founders of the company were working together as employees in Kuwait's Financial sector with a very busy day to day schedule. The two spent a whole year contemplating the idea of developing the concept, they had gone through 28 recipes of the PICK YO original mix conclusively coming up with the perfect pick and never been changed since.



### THIRD PLACE

Embarking on a journey of excellence since 1989, Lexus, the luxury division of Toyota Motor Corporation, has undergone a remarkable brand evolution, transforming into a powerhouse in auto design, technology, and market presence. Over 35 years, Lexus has grown its market presence worldwide, captivating customers with its unmatched offerings.



## Top 10 winners

We wanted to recognize the highest scoring brands in Kuwait by identifying the 10 highest rated brands in Kuwait.

Two brands are being recognized for winning their category for 16 years in a row.



**The Coffee Bean Tea Leaf**



**MG Motor**



**Caribou Coffee**



**Keeta**



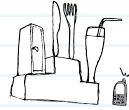
**Mais Alghanim**



**Royale Hayat Hospital**



**Honda**



## Comparing the winners of 2021 to 2025

The Service Hero CSI awarded 15 category winners in 2010 expanding to 19 since 2011, of which 2 companies were 16 time consecutive winners in the 2025 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 2021 to 2025**

<b>Service Hero Category</b>	<b>2025 Winner</b>	<b>'24</b>	<b>'23</b>	<b>'22</b>	<b>'21</b>
Car Sales	<b>Lexus</b>	No	Yes	No	No
Car Service	<b>MG</b>	No	No	No	No
Airlines	<b>Emirates</b>	No	Yes	Yes	No
Clothes	<b>Al Nasser</b>	No	Yes	Yes	No
Internet Providers	<b>Zain</b>	Yes	Yes	Yes	Yes
Mobile Operators	<b>Zain</b>	Yes	Yes	Yes	Yes
Islamic Banks	<b>Boubyan</b>	Yes	Yes	Yes	Yes
Retail Banks	<b>NBK</b>	Yes	Yes	Yes	Yes
Private Hospitals	<b>Royale Hayat</b>	Yes	Yes	Yes	Yes
Cafes	<b>Coffee Bean &amp; Tea Leaf</b>	Yes	Yes	No	No
Fast Food	<b>Pick Yo!</b>	Yes	Yes	Yes	No
Dining	<b>Mais Alghanim</b>	Yes	Yes	Yes	No
Electronics	<b>X-cite</b>	Yes	No	Yes	No
Home Furniture	<b>IKEA</b>	No	No	No	Yes
Supermarkets	<b>City Hypermarket</b>	Yes	No	No	Yes
Apps*	<b>Keeta</b>	No	No	No	No

\* Category added in SH CSI 2021.

On a scale of 1 to 10, how would you rate?

What was your service expectation for this airline

Your overall satisfaction with this airline

Likelihood of recommending this airline

Resolving issues during booking or flight

Staff attitude, knowledge & competence

Reliability & accuracy of flight schedules & services

Quality & range of services & amenities

Speed of check-in & boarding

Value for money of your overall experience

Tell us about your experience

3/3  
Rate brand

☹️

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

1 2 3 4 5 6 7 8

1 2 3 4 5 6 7 8

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

😊

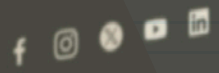
5  
Methodology

Submit rating

The Index

For Businesses

Promote your company





# Overview

## High-level overview of the Service Hero index approach.

### Methodology

Service Hero is an online survey where respondents rated 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> 2025.

### Sample

The index aimed to collect a total sample of 10,000 valid ratings for Kuwait distributed with 19 category industries included in the assessment. Each category had a quota of 500 ratings. 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. Fourteen 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 reviewer, or later, at the data cleansing stage, to remove any suspicious data.

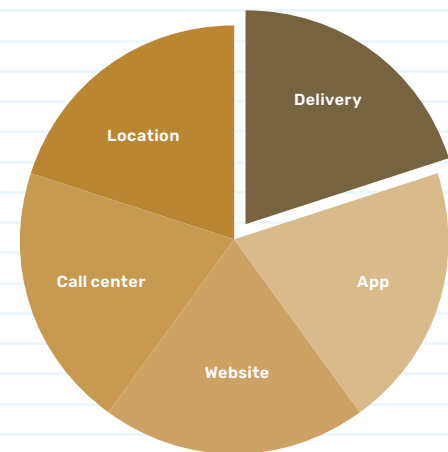
### Rigor

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 14 dimensions



Core questions



Bonus questions



## Security measures and rules for valid ratings

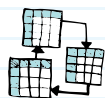
**To ensure that each visitor is a legitimate customer, a number of security measures have been put in place.**

### 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 reviewers are asked to submit a correct email upon registration
- No ratings were tabulated unless this email address is authenticated by the user via an automated trigger
- No single user can rate for the same company more than once a month
- IP address monitoring which statistically measures incoming connections against usage anomalies was made
- All eligible reviewers 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 review accuracy. These were implemented resulting in the removal 41,816 ratings. Other investigations were also conducted that did not result in the removal of any ratings as seen in the table. The final count used in the analysis is **27,582** ratings.

### Our rules that have been implemented (Automated & Manual)

	Ratings removed
1 Respondent did not confirm his/her email	yes
2 Respondent less than 16 years	yes
3 Respondent unable to rate more than once for the same brand	yes
4 Respondent with the same mobile number but different email and rated twice for the same brand	yes

**Total ratings removed (11,839)**

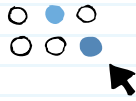
### Data Cleansing (Automated & Manual)

	Ratings removed
1 Remove reviews that are NA across all dimensions in the <b>after</b> evaluation	yes
2 Remove reviews that are only made for <b>before</b> assessment and NA ratings for <b>after</b> evaluation	yes
3 Respondent rated brands that should not be in the assessment	yes
4 Ratings exhibited suspicious behavior patterns which raised alarms regarding the authenticity of the assessment.	yes

**Total ratings removed (29,977)**

**Total ratings obtained 69,398**

**Total ratings assessed 27,582**



# The questionnaire

4 Rate brand  
of 4

**How would you rate** ☹️ ☺️

How well did the brand meet your <b>expectations</b>	1	2	3	4	5	6	7	8	9	10
Your overall <b>satisfaction</b> with this company	1	2	3	4	5	6	7	8	9	10
Likelihood of <b>recommending</b> this brand	1	2	3	4	5	6	7	8	9	10
How well the brand <b>fixed</b> any issues	1	2	3	4	5	6	7	8	9	N/A
<b>Staff</b> attitude, knowledge & competence	1	2	3	4	5	6	7	8	9	10 N/A
<b>Reliability</b> and consistency	1	2	3	4	5	6	7	8	9	10 N/A
<b>Quality</b> of product or service	1	2	3	4	5	6	7	8	9	10 N/A
Service <b>speed</b>	1	2	3	4	5	6	7	8	9	10 N/A
<b>Value</b> for money	1	2	3	4	5	6	7	8	9	10 N/A

What suggestions do you have?

---

**How would you rate** ☹️ ☺️

<b>Delivery</b> services	1	2	3	4	5	6	7	8	9	10 N/A
<b>App</b>	1	2	3	4	5	6	7	8	9	10 N/A
<b>Website</b>	1	2	3	4	5	6	7	8	9	10 N/A
Any <b>phone</b> based interaction	1	2	3	4	5	6	7	8	9	10 N/A
<b>Location</b> convenience & attractiveness	1	2	3	4	5	6	7	8	9	10 N/A

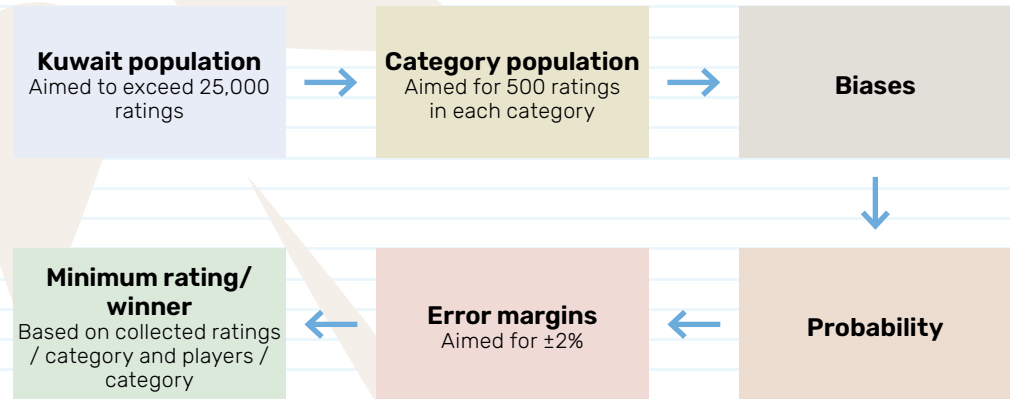
**Note** Some questions were exempt from certain categories.

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



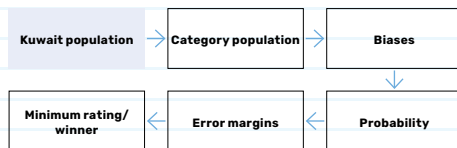
# Sampling approach

**Critical factors for a robust category sample and minimum rating 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 rate in Kuwait is 3 million.

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

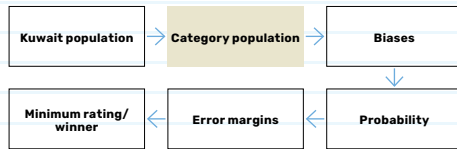
- Anyone under 16 years
- Laborers

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



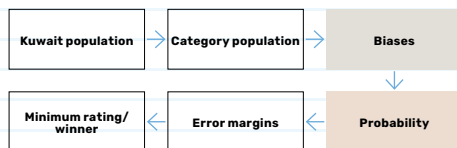
## Sampling approach (continued)

### 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 Car Sales, or Fine Dining, 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 rate
  - 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 rate 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 ratings from the total category sample

#### 2. Rating bias:

- Refers to the likelihood of obtaining positive reviews 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”, rating 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 **rating 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
- 9 categories were assessed
- Each category can be further broken down into sub categories



**Airlines**



**Automotive:** Sales + Service



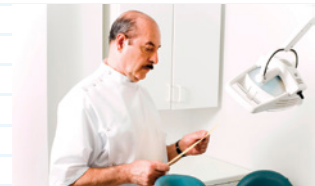
**Banks:** Retail + Islamic



**Communications:** Mobile + ISPs



**Leisure:** Health Clubs + Entertainment + Malls



**Health care:** Private Hospitals



**Restaurants:** Café + Dining + Fast food



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



**Apps**



## Sampling approach (continued)

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

**Confidence level: 95%**

<b>Sector</b>	<b>Biased Population</b>	<b>Sample @ 5%</b>	<b>Total Ratings</b>
Airlines	88,186	293	913
Car Sales	88,186	293	1,344
Car Service	88,186	293	2,051
Clothing	88,186	293	974
Mobile Operator	88,186	293	2,946
Internet Providers	88,186	293	2,319
Café	88,186	293	865
Fast Food	88,186	293	1,485
Dining	88,186	293	979
Electronics	88,186	293	1,876
Retail banks	68,505	273	1,650
Islamic banks	30,833	196	1,710
Furniture	58,791	259	1,016
Private Hospital	37,421	216	1,023
Supermarkets	88,186	293	4,897
Health Clubs	37,421	216	53
Apps	88,186	293	927
Entertainment	48,992	242	221
Malls	48,992	242	333

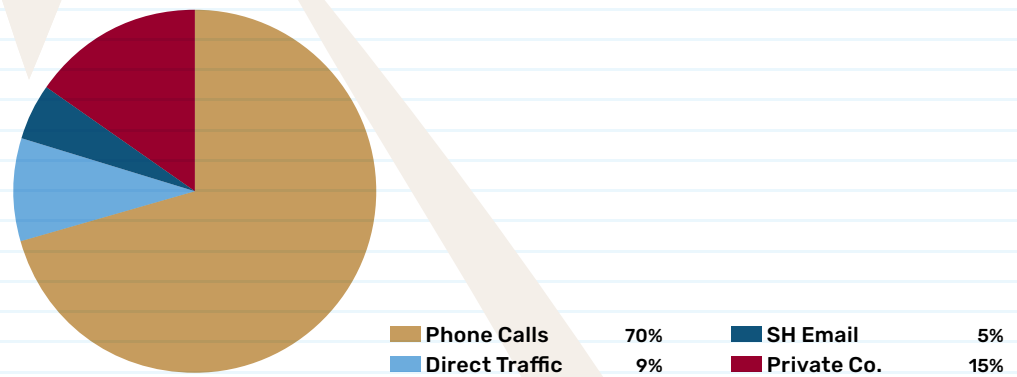
This table shows the 19 categories included in the 2025 index. It shows:

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

\*Did not meet our minimum categorical quota requirements.

## Source of ratings and platforms used to review from

The Service Hero CSI uses a hybrid model of online and phone based assessments. We deploy a digital marketing promotion plan. A selection of private companies also encouraged their customers to rate them. Below are the source of ratings that passed our validation process. To reach our rating engine, consumers can directly search 'service hero', click on a banner, respond to an email, or assess with our call center agents.



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 rate on major decisions regarding sampling methods used.

### Independent Advisors



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



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



**Dr. Forrest V. Morgeson**  
Director of Research at the American Customer Satisfaction Index (ACSI)



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

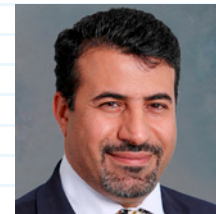
### Academic Advisors



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



**Dr. Fahad Al Sumait**  
Associate Professor of Communication and Media at the American University of Kuwait



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



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6

About Khayal  
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# About Khayal Consultants

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

■ Kuwaiti managed ■ 28+ years experience ■ Multidisciplinary ■ Passionate



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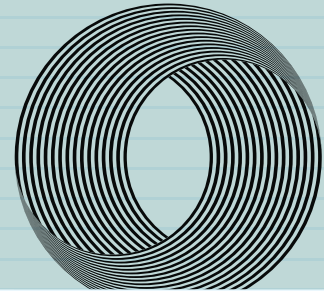
## CREATE

**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

**Digital Transformation:** Automation | AI | Machine Learning

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

**Solutions & Support:** Content Management | Mobile  
Engagement | WhatsApp Business | Social Management &  
Analytics | Cloud Infrastructure | Maintenance & Support



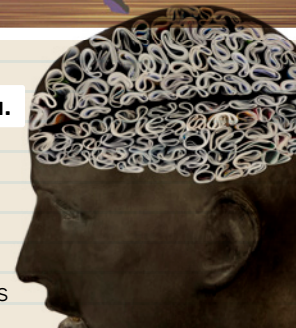
## TRANSFORM

**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

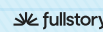
**Manpower Development:** Service Excellence Training |  
Coaching & Mentoring | Shadow Coaching | Presentation Skills



## CLIENTS



## PARTNERS



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