

7 Eleven ABA Seguros Aeroméxico Al precio Allianz American Express AM-PM
Applebee's Axa Axtel Banamex Banco Azteca Banco Walmart
BBVA Bancomer Bancoppel Banorte Best Western Bodega Aurrera Burger King
C&A Cablemás Cablevisión Café Punta del Cielo Café Society California Pizza Kitchen
Carl's Jr Chedraui Chili's Cinemark Cinemas Lumiere Cinemex Cinépolis
Circulo K City Club City Express City Market Coffee Bar Comercial Mexicana Costco
DHL Dish Domino's Pizza El Palacio de Hierro El Portón Estafeta Extra
Fabricas de Francia Fedex Fiesta Inn Finca Santa Veracruz GNP Hampton Inn

VITAL SIGNS AND BRAND LOYALTY

MEXICO 2011

H-E-B Holiday Inn Hospitales ABC Hospitales Ángeles Hospitales Christus Muguerza
Hospitales Medica Sur HSBC Ibis Hotel Inbursa Interjet Italian Coffee Company
Italiannis Iusacell Ixe Kentucky Fried Chicken Liverpool Lumen Mapfre Tepeyac
Martí Mc Donald's Megacable Metlife Mexicana MM Cinemas Movistar
Nextel Office Depot Office Max One Oxxo Papa John's Pizza Hut Quálitas
Ramada Red Pack Sam's Club Sanborns Santander Scotiabank Sears
Seguros Monterrey New York Life Sky Soriana Starbucks Suburbia Subway
Superama Telcel Telmex TGI Fridays Toks Unefon
UPS Vips Viva Aerobus Volaris Walmart Wings Zurich

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OBJECTIVES

GENERAL OBJECTIVES

- **Measure Mexican consumers' loyalty to main service brands in the country**
- **Develop a benchmarking tool that will enable companies to compare their performance with that of their competitors and market leaders.**
- **Develop a reliable source of reference to support different types of activities like business, educational, teaching and information in general**

SPECIFIC OBJECTIVES

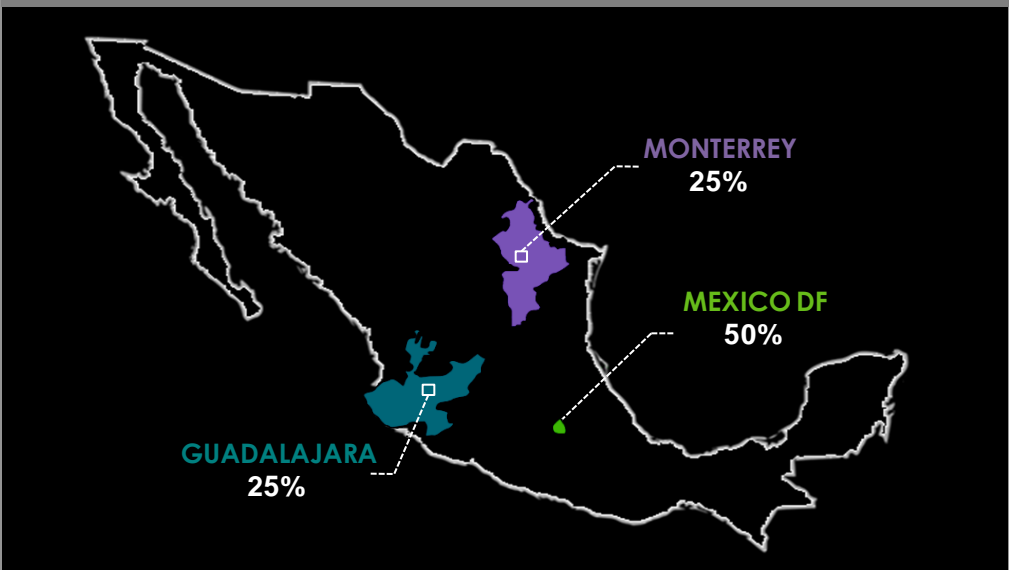
- For each brand, analyze three vital signs that determine its health in the middle and long term: **overall satisfaction, willingness to repurchase and willingness to recommend**
- Build up a Customer Loyalty Index based on the findings in these three indicators
- Explore elements that trigger word-of-mouth recommendation in each brand

METHODOLOGY AND SAMPLE DISTRIBUTION

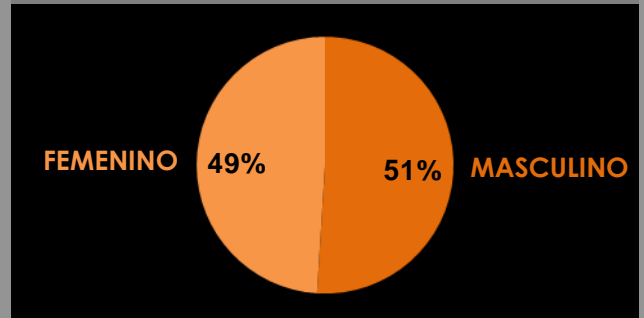
METHODOLOGY

DATA GATHERING TECHNIQUE:	Telephone interviews
INTERVIEW DURATION:	15 minutes
TOTAL SAMPLE:	843
FIELDWORK PERIOD:	February – March 2011
RESPONDENT PROFILE:	Consumers who had a first-hand experience with the services or products of each brand in 2010

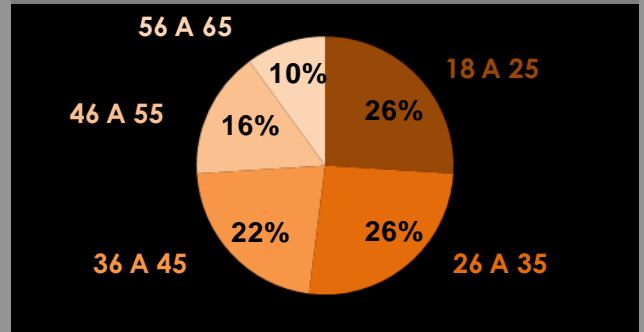
CITIES



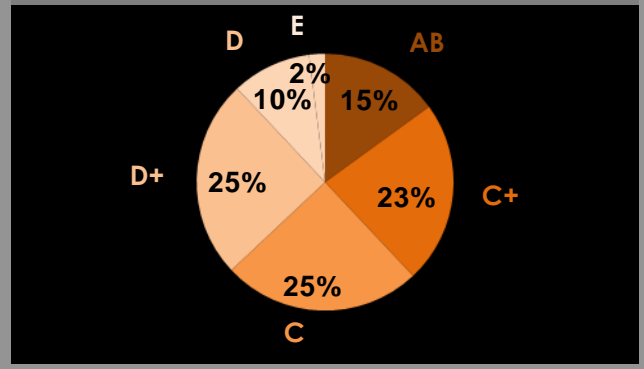
SEX



AGE



SOCIOECONOMIC STATUS (SES)



SAMPLE OBTAINED BY BRAND

Did you have a first-hand experience with any of the following brands in 2010?

Base = number of respondents who rated the brand

BRAND	BASE	M.E.*	BRAND	BASE	M.E.*	BRAND	BASE	M.E.*	BRAND	BASE	M.E.*
Oxxo	709	±3.7	Subway	221	±6.6	HSBC	100	±9.8	ABA Seguros	43	NA
Walmart	653	±3.8	Bancomer	220	±6.6	Santander	98	±9.9	American Express	43	NA
Telcel	639	±3.9	Toks	219	±6.6	Café Punta del Cielo	97	±10.0	Fedex	42	NA
Telmex	595	±4.0	Costco	208	±6.8	Megacable	91	±10.3	Banco Walmart	41	NA
7 Eleven	594	±4.0	Banamex	203	±6.9	Cinemás Lumiere	89	±10.4	Hospitales Ángeles	40	NA
Bodega Aurrera	578	±4.1	Cablevisión	200	±6.9	Aeromexico	83	±10.8	Bancoppel	37	NA
Soriana	553	±4.2	Italiannis	195	±7.0	Holiday INN	79	±11.0	Finca Santa Veracruz	32	NA
Cinopolis	514	±4.3	Superama	191	±7.1	Volaris	70	±11.7	City Express	29	NA
Kentucky Fried Chicken	425	±4.8	Office Max	186	±7.2	Fiesta INN	67	±12.0	Hospitales Medica Sur	29	NA
McDonald's	413	±4.8	MM Movie Theaters	176	±7.4	Mexicana	66	±12.1	TGI Fridays	29	NA
Burger King	410	±4.8	El Palacio de Hierro	174	±7.4	Axa	64	±12.3	Coffee Bar	28	NA
Domino's Pizza	405	±4.9	H-E-B	171	±7.5	Circulo K	64	±12.3	Mapfre Tepeyac	27	NA
Office Depot	389	±5.0	El Portón	170	±7.5	Interjet	64	±12.3	Seguros Monterrey	24	NA
Starbucks	386	±5.0	DHL	164	±7.7	Papa John's	62	±12.4	City Market	21	NA
Vips	375	±5.1	C&A	161	±7.7	City Club	60	±12.7	Hospitales Christus Muguerza	21	NA
Comercial Mexicana	357	±5.2	Movistar	161	±7.7	Metlife	60	±12.7	Ixe	20	NA
Sam's Club	355	±5.2	Estafeta	154	±7.9	Viva Aerobús	55	NA	Unefon	19	NA
Pizza Hut	347	±5.3	Dish	141	±7.3	Qualitas	54	NA	Best Western	14	NA
Sanborns	338	±5.3	Fabricas de Francia	139	±8.3	Axtel	51	NA	Ibis Hotel	12	NA
Cinemex	333	±5.4	Marti	136	±8.4	Al precio	49	NA	One	11	NA
Liverpool	329	±5.4	Banorte	134	±8.5	Banco Azteca	49	NA	Hampton INN	10	NA
Suburbia	327	±5.4	Lumen	130	±8.6	Iusacell	48	NA	Hospitales ABC	10	NA
Sears	264	±6.0	Wings	119	±9.0	California Pizza Kitchen	47	NA	Cablemás	8	NA
Chedraui	260	±6.1	Applebee's	114	±9.2	UPS	47	NA	Café Society	8	NA
Extra	248	±6.2	Nextel	106	±9.5	Red Pack	46	NA	Ramada	8	NA
Cinemark	231	±6.4	GNP	104	±9.6	Scotiabank	45	NA	Zurich	8	NA
Carl's Jr.	226	±6.5	Sky	104	±9.6	AM - PM	44	NA	Allianz	4	NA
Chilli's	226	±6.5	Italian Coffee Company	103	±9.7	Inbursa	44	NA			

■ Brands with samples of insufficient size

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LOYALTY INDEX

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UPS Vips Viva Aerobus Volaris Walmart Wings Zurich **leventer** | group

EXPLANATION

The Loyalty Index summarizes consumer attitudes in three main aspects:

- Overall satisfaction with the brand
- Willingness to repurchase the brand's products/ services
- Willingness to recommend the brand























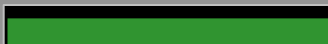












Leventer Group uses an innovative analysis to calculate the percentage of loyal customers and the percentage of customers at risk of abandoning the brand.



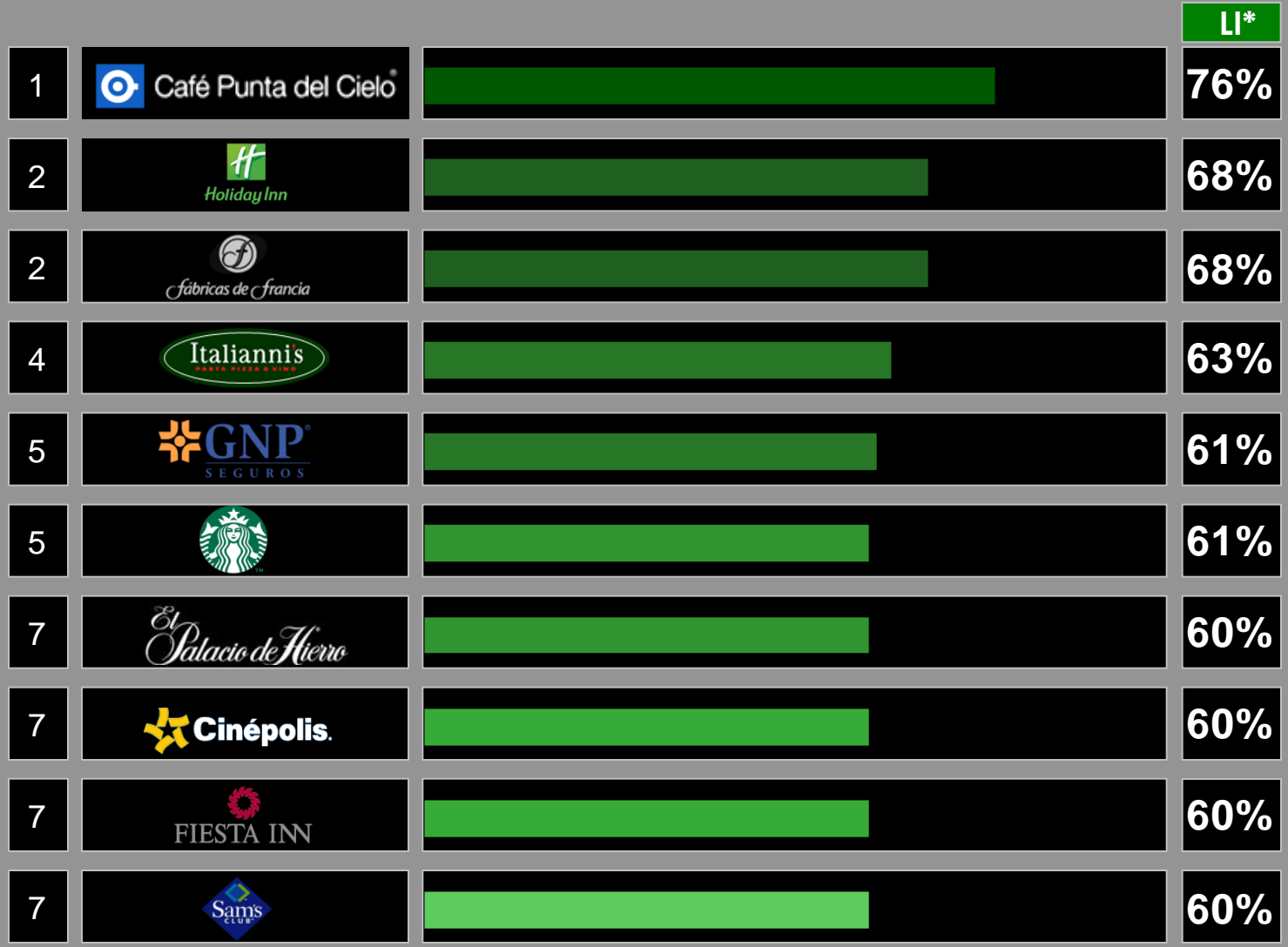
Loyalty Index is the net result obtained by subtracting the percentage of customers at risk from the percentage of loyal customers.

$$\% \text{ Loyal} - \% \text{ At risk} = \text{Loyalty Index}$$

RANKING BY INDUSTRY

	1	Hospitals		75%
	2	Price Clubs		59%
	3	Cafés		58%
	4	Hotels		57%
	5	Casual-type restaurants		53%
	6	Messenger company		51%
	6	Department Stores		51%
	6	Movie Theaters		51%
	9	Airlines		47%
	10	Insurance Companies		44%
	11	Banks		38%
	11	Specialized Stores		38%
	13	Triple Play		36%
	13	Supermarkets		36%
	15	Mobile Telephone Operators		35%
	16	Fast Food		34%
	17	Café-type restaurants		31%
	18	Convenience Stores		23%

THE 10 BRANDS WITH HIGHEST LOYALTY INDEX



* LI = Loyalty Index

GENERAL RANKING

RK	Brand	LI	RK	Brand	LI	RK	Brand	LI	RK	Brand	LI
1	Café Punta del Cielo	76%	19	BANORTE	53%	36	lumen	42%	55	dish NETWORK	31%
2	Holiday Inn	68%	19	marti	53%	36	movistar	42%	56	LUMIERE GENERAL	30%
2	Fabricas de Francia	68%	21	MMCINEMAS	52%	39	CINEMARK	41%	56	Punto	30%
4	Italiannis	63%	21	CITY SUB	52%	40	TELMEX	40%	58	7 ELEVEN	29%
5	GNP SEGUROS	61%	23	Applebee's	51%	40	MetLife	40%	58	OXXO	29%
5	Starbucks	61%	23	Walmart	51%	42	Suburbia	39%	60	Superama	28%
7	El Palacio de Hierro	60%	25	chili's	50%	43	Office DEPOT	38%	61	KFC	27%
7	Cinépolis	60%	26	estafeta	49%	44	PIZZA PAPA JOHN'S	37%	62	El Popton	25%
7	FIESTA INN	60%	27	The Home Depot	48%	44	TOKS	37%	63	C&A	24%
7	Sams	60%	27	Cinemex	48%	46	BURGER KING	36%	63	Wings	24%
11	Carl's Jr.	59%	29	SEARS	47%	46	BBVA Bancomer	36%	63	CASA DE PASAJES	24%
11	COSTCO	59%	30	AWA	45%	46	telcel	36%	66	SORIANA	23%
13	mexicana	58%	31	PIZZA HUT	44%	49	OfficeMax	35%	67	NEXTEL	19%
14	DHL	57%	31	BodegaAurrera	44%	49	Banamex	35%	68	Comercial mexicana	15%
14	H-E-B	57%	31	volaris	44%	51	CABLEVISION	34%	68	McDonald's	15%
16	interjet	56%	34	SKY	43%	52	VIPS	33%	70	MEGACABLE	13%
16	Liverpool	56%	34	SUBWAY	43%	53	HSBC	32%	71	extra	5%
18	AEROMEXICO	54%	36	Santander	42%	53	Sanborns	32%	72	K	-8%

* LI = Loyalty Index

LOYAL CUSTOMERS AND CUSTOMERS AT RISK BY BRAND

Brand	LI	L	R
Café Punta del Cielo	76%	76	0
Holiday Inn	68%	68	0
Fabricas de Francia	68%	69	1
Italiannis	63%	64	1
GNP SEGUROS	61%	63	2
Starbucks	61%	64	3
El Palacio de Hierro	60%	62	2
Cinépolis	60%	61	1
FIESTA INN	60%	61	1
Sams	60%	61	1
Carl's Jr.	59%	63	4
COSTCO	59%	61	2
mexicana	57%	59	2
DHL	57%	59	2
H-E-B	57%	59	2
Interjet	56%	56	0
Liverpool	56%	57	1
AEROMEXICO	55%	57	2

Brand	LI	L	R
BANORTE	53%	55	2
marti	53%	54	1
MMCINEMAS	52%	53	1
CITY SUPER	52%	55	3
Applebee's	51%	54	3
Walmart	51%	53	2
chili's	50%	54	4
estafeta	49%	52	3
The Home Depot	47%	52	5
Cinemex	47%	50	3
SEARS	47%	48	1
AWA	45%	50	5
Pizza Hut	44%	46	2
BodegaAurrera	44%	47	3
volaris	44%	47	3
SKY	43%	52	9
SUBWAY	43%	46	3
Santander	42%	46	4

Brand	LI	L	R
lumen	42%	45	3
movistar	42%	48	6
CINEMARK	41%	43	2
TELMEX	40%	47	7
MetLife	40%	50	10
Suburbia	39%	43	4
Office DEPOT	38%	41	3
PAPA JOHN'S	37%	47	10
TOSTITOS	37%	42	5
BURGER KING	36%	40	4
BBVA Bancomer	36%	44	8
telcel	36%	45	9
OfficeMax	35%	37	2
Banamex	35%	43	8
CABLEVISION	34%	43	9
VIPS	33%	38	5
HSBC	32%	42	10
Sanborns	32%	37	5

Brand	LI	L	R
dish NETWORK	30%	41	11
LUMIERE CINEMA	30%	33	3
Walmart	30%	36	6
7 ELEVEN	29%	36	7
OXXO	29%	37	8
Superama	28%	39	11
KFC	27%	33	6
El Popton	25%	31	6
C&A	24%	35	11
Wings	24%	29	5
CRISTAL	24%	31	7
SORIANA	23%	31	8
NEXTEL	19%	37	18
Comercial mexicana	15%	26	11
McDonald's	14%	25	11
MEGACABLE CONECTAMOS TU VIDA	13%	30	17
extra	4%	20	16
K	-7%	16	23

* LI = Loyalty Index

L Loyal **R** At Risk

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VITAL SIGNS

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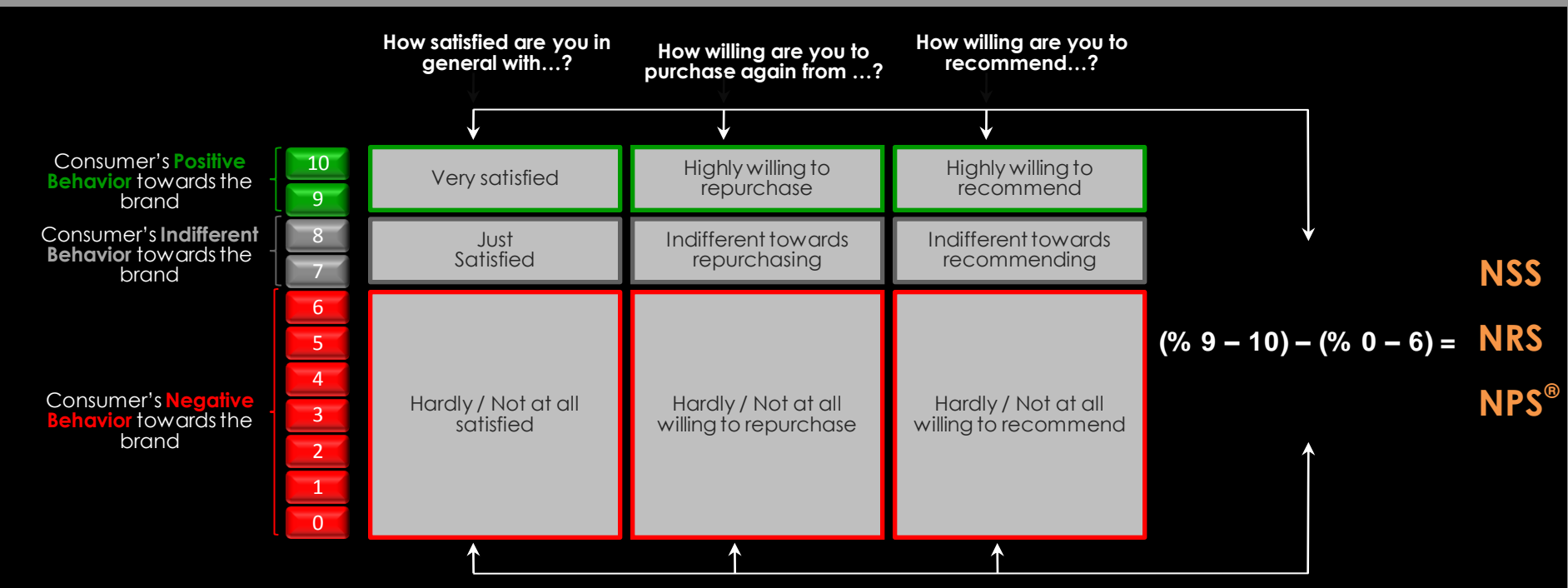
EXPLANATION

The indices NSS (Net Satisfaction Score), NRS (Net Repurchase Score) and NPS® (Net Promoter Score) are based on the theory and researches of Noriaki Kano, Philip Kotler, Edward Deming and Fred Reichheld, who determined that a consumer's favorable or unfavorable behavior towards a brand is defined when he shows extreme attitudes towards it, whether positive or negative.

In a 0-to-10 scale, these extreme attitudes are represented by the ranges 0 – 6 (negative attitude towards a brand) and 9 – 10 (positive attitude towards a brand)

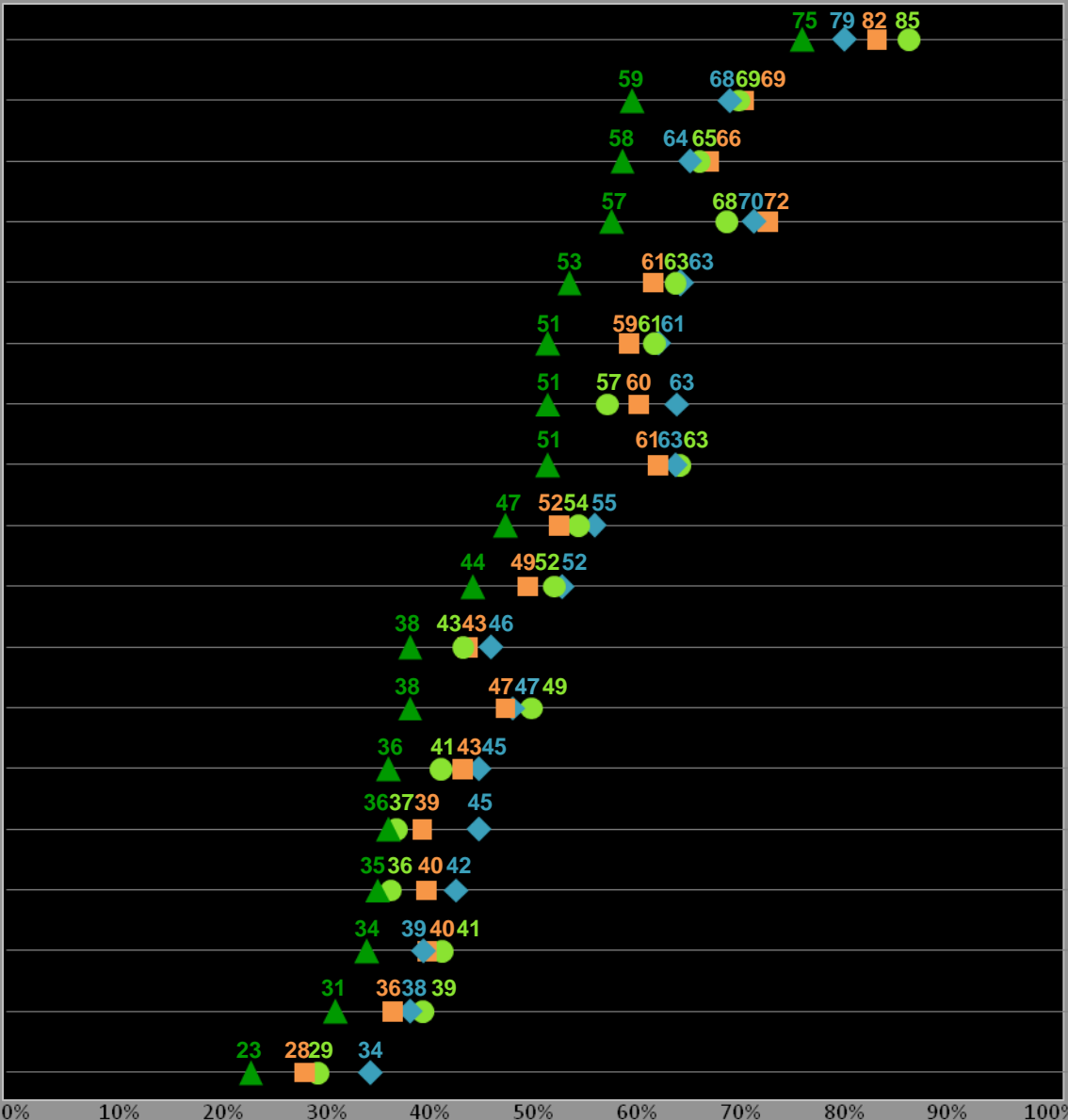
The net index is obtained by calculating the percentage of customers with positive attitudes (9 – 10) and subtracting from it the percentage of customers with negative attitudes (0 – 6). This net index can move from -100 to 100.

In a 0-to-10 scale ...



RANKING BY INDUSTRY

	Hospitals
	Price Clubs
	Cafés
	Hotels
	Casual-type restaurants
	Department Stores
	Movie Theaters
	Messenger company
	Airlines
	Insurance Companies
	Banks
	Specialized Retail Stores
	Supermarkets
	Triple Play
	Mobile Telephone Operators
	Fast Food
	Café-type restaurants
	Convenience Stores



▲ LI ● NSS ◆ NRS ■ NPS®

Net Promoter, NPS, and Net Promoter Score are registered terms, owned by Satmetrix Systems, Inc., Bain & Company, Inc., and Fred Reichheld.

VITAL SIGNS BY BRAND

BRAND	NSS	NRS	NPS®	BRAND	NSS	NRS	NPS®	BRAND	NSS	NRS	NPS®	BRAND	NSS	NRS	NPS®
Café Punta del Cielo®	81	78	78	BANORTE	59	60	54	lumen	52	50	51	dish NETWORK	43	32	33
Holiday Inn	76	75	75	marti	68	65	66	movistar	43	45	45	LUMIERE	35	42	35
fabricas de francia	80	74	71	MCMCINEMAS	54	60	60	CINEMARK	50	53	50	Cinemark	35	39	40
Italiannis	72	71	69	CITY CLUB	61	63	62	TELMEX	39	52	46	7 ELEVEN	35	41	35
GNP SEGUROS	63	73	67	Applebee's	60	66	63	MetLife	55	51	42	OXXO	36	43	37
Starbucks	68	66	69	Walmart	57	62	60	Suburbia	45	48	47	Superama	35	35	33
El Palacio de Hierro	71	65	63	chili's	60	60	57	Office DEPOT	50	48	49	KFC	33	29	29
Cinépolis	65	73	70	estafeta	60	62	57	PAPA JOHN'S	45	45	47	El Popton	33	26	29
FIESTA INN	76	69	79	The Italian Kitchen	55	58	56	TOKS	49	43	46	C&A	26	29	28
Sams	70	69	71	Cinemex	55	63	57	BURGER KING	47	44	45	Wings	34	35	27
Carls Jr.	66	67	66	SEARS	56	58	54	telcel	38	44	43	Santitas	32	27	25
COSTCO	68	68	67	AXA	49	57	50	BBVA Bancomer	38	47	43	SORIANA	27	32	29
MEXICANA	73	61	58	Pizza Hut	55	49	52	OfficeMax	50	42	43	NEXTEL	17	20	20
PDL	71	68	68	Bodega Aurrera	50	55	53	Banamex	41	44	44	Comercial mexicana	20	24	20
H-E-B	64	67	70	volaris	50	51	47	CABLEVISION	31	33	34	McDonald's	20	17	15
interJet	59	64	62	SKY	46	50	48	VIPS	40	41	37	MEGACABLE	18	21	11
Liverpool	68	69	67	SUBWAY	49	45	48	HSBC	38	39	38	extra	6	7	1
AEROMEXICO	64	64	60	Santander	48	47	43	Santitas	37	38	36	K	5	-9	-17

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NSS

NET SATISFACTION SCORE

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UPS Vips Viva Aerobus Volaris Walmart Wings Zurich

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RANKING BY INDUSTRY

	1	Hospitals		85%
	2	Price Clubs		69%
	3	Hotels		68%
	4	Cafés		65%
	5	Messenger company		63%
	5	Casual-type Restaurants		63%
	7	Department Stores		61%
	8	Movie Theaters		57%
	9	Airlines		54%
	10	Insurance companies		52%
	11	Specialized Retail Stores		49%
	12	Banks		43%
	13	Fast Food		41%
	13	Supermarkets		41%
	15	Café-type Restaurants		39%
	16	Triple Play		37%
	17	Mobile Telephone Operators		36%
	18	Convenience Stores		29%

THE 10 BRANDS WITH HIGHEST SATISFACTION LEVEL



GENERAL RANKING

RK	Brand	NSS	RK	Brand	NSS	RK	Brand	NSS	RK	Brand	NSS
1	Café Punta del Cielo®	81%	19	BIM CLUB	62%	33	BodegaAurrera	50%	55	OXXO	36%
2	fabricas de francia	80%	20	estafeta	61%	38	TOKS	49%	55	Bodega Aurrera	36%
3	FIESTA INN	76%	21	chili's	60%	38	SUBWAY	49%	57	Superama	35%
3	Holiday Inn	76%	21	Applebee's	60%	38	AXA	49%	57	7-Eleven	35%
5	MEXICANA	73%	23	BANORTE	59%	41	Santander	48%	57	LUMIERE	35%
6	Italiannis	72%	23	interjet	59%	42	BURGER KING	47%	60	Wings	34%
7	DHL	71%	25	Walmart	57%	43	SKY	46%	61	KFC	33%
7	El Palacio de Hierro	71%	26	SEARS	56%	44	Suburbia	45%	61	El Popton	33%
9	Sams Club	70%	27	The System Center	55%	44	PIZZA JOHN'S	45%	63	Cablevision	32%
10	marti	68%	27	MetLife	55%	46	movistar	43%	64	CABLEVISION	31%
10	COSTCO	68%	27	Pizza Hut	55%	46	dish NETWORK	43%	65	SORIANA	27%
10	Starbucks	68%	27	Cinemex	55%	48	Banamex	41%	66	C&A	26%
10	Liverpool	68%	31	MMCINEMAS	54%	49	VIPS	40%	67	McDonald's	20%
14	Carl's Jr.	66%	32	lumen	52%	50	TELMEX	39%	68	Comercial mexicana	20%
15	Cinépolis.	65%	33	CINEMARK	50%	51	BBVA Bancomer	38%	69	MEGACABLE CONECTAMOS TU VIDA	18%
16	AEROMEXICO.	64%	33	OfficeMax	50%	51	telcel.	38%	70	NEXTEL	17%
16	H-E-B	64%	33	Office DEPOT	50%	51	HSBC	38%	71	extra	6%
18	GNP SEGUROS	63%	33	volaris	50%	54	Sanborns	37%	72	K	5%

GENERAL RANKING – DISTRIBUTION

Brand	NSS	0-6	7-8	9-10
Café Punta del Cielo®	81%	2	15	83
fabricas de francia	80%	1	18	81
FIESTA INN	76%	2	20	78
Holiday Inn	76%	1	22	77
MEXICANA	73%	3	21	76
Italiannis	72%	2	24	74
DHL	71%	3	23	74
El Palacio de Hierro	71%	3	23	74
Sams Club	70%	2	26	72
marti	68%	4	24	72
COSTCO	68%	2	28	70
Starbucks	68%	4	24	72
Liverpool	68%	2	28	70
Carl's Jr.	66%	4	26	70
Cinépolis.	65%	3	29	68
AEROMEXICO.	64%	4	28	68
H-E-B	64%	5	26	69
GNP SEGUROS	63%	6	25	69

Brand	NSS	0-6	7-8	9-10
Cruz Blanca	62%	7	24	69
estafeta	61%	5	29	66
chili's	60%	5	30	65
Epplebee's	60%	5	30	65
BANORTE	59%	5	31	64
*interjet	59%	2	37	61
Walmart*	57%	5	33	62
SEARS	56%	4	36	60
The Home Center	55%	5	35	60
MetLife	55%	12	21	67
Pizza Hut	55%	5	35	60
Cinemex	55%	5	35	60
CINEMAS	54%	6	34	60
lumen	52%	5	38	57
CINEMARK	50%	5	40	55
OfficeMax	50%	3	44	53
Office DEPOT	50%	6	38	56
volaris	50%	6	38	56

Brand	NSS	0-6	7-8	9-10
Bodega Aurrera <small>La compañía de los grandes negocios</small>	50%	6	38	56
toks	49%	7	37	56
SUBWAY	49%	8	35	57
AXA	49%	9	33	58
Santander	48%	11	30	59
BURGER KING	47%	6	41	53
SKY	46%	14	26	60
Sb Suburbia	45%	6	43	51
PIZZA PAPA JOHN'S	45%	13	29	58
M movistar	43%	11	35	54
dish NETWORK	43%	14	29	57
Banamex	41%	12	35	53
VIPS	40%	8	44	48
TELMEX	39%	13	35	52
BBVA Bancomer	38%	11	40	49
telcel.	38%	15	32	53
HSBC	38%	13	36	51
Sanborns	37%	9	45	46

Brand	NSS	0-6	7-8	9-10
OXXO	36%	12	40	48
Superama	36%	10	44	46
7-ELEVEN	35%	15	35	50
7-ELEVEN	35%	11	43	46
LUMIERE	35%	8	49	43
Wings	34%	8	50	42
KFC	33%	10	47	43
El Pottón	33%	8	51	41
CABLEVISION	32%	11	46	43
SORIANA	31%	15	39	46
SORIANA	27%	14	45	41
C&A	26%	17	40	43
McDonald's	20%	15	50	35
Comercial mexicana	20%	15	50	35
MEGACABLE <small>CONECTAMOS TU VIDA</small>	18%	26	30	44
NEXTEL	17%	22	39	39
extra	6%	22	50	28
K	5%	25	45	30

7 Eleven ABA Seguros Aeroméxico Al precio Allianz American Express AM-PM
Applebee's Axa Axtel Banamex Banco Azteca Banco Walmart
BBVA Bancomer Bancoppel Banorte Best Western Bodega Aurrera Burger King
C&A Cablemás Cablevisión Café Punta del Cielo Café Society California Pizza Kitchen
Carl's Jr Chedraui Chili's Cinemark Cinemas Lumiere Cinemex Cinépolis
Circulo K City Club City Express City Market Coffee Bar Comercial Mexicana Costco
DHL Dish Domino's Pizza El Palacio de Hierro El Portón Estafeta Extra
Fabricas de Francia Fedex Fiesta Inn Finca Santa Veracruz GNP Hampton Inn

NRS

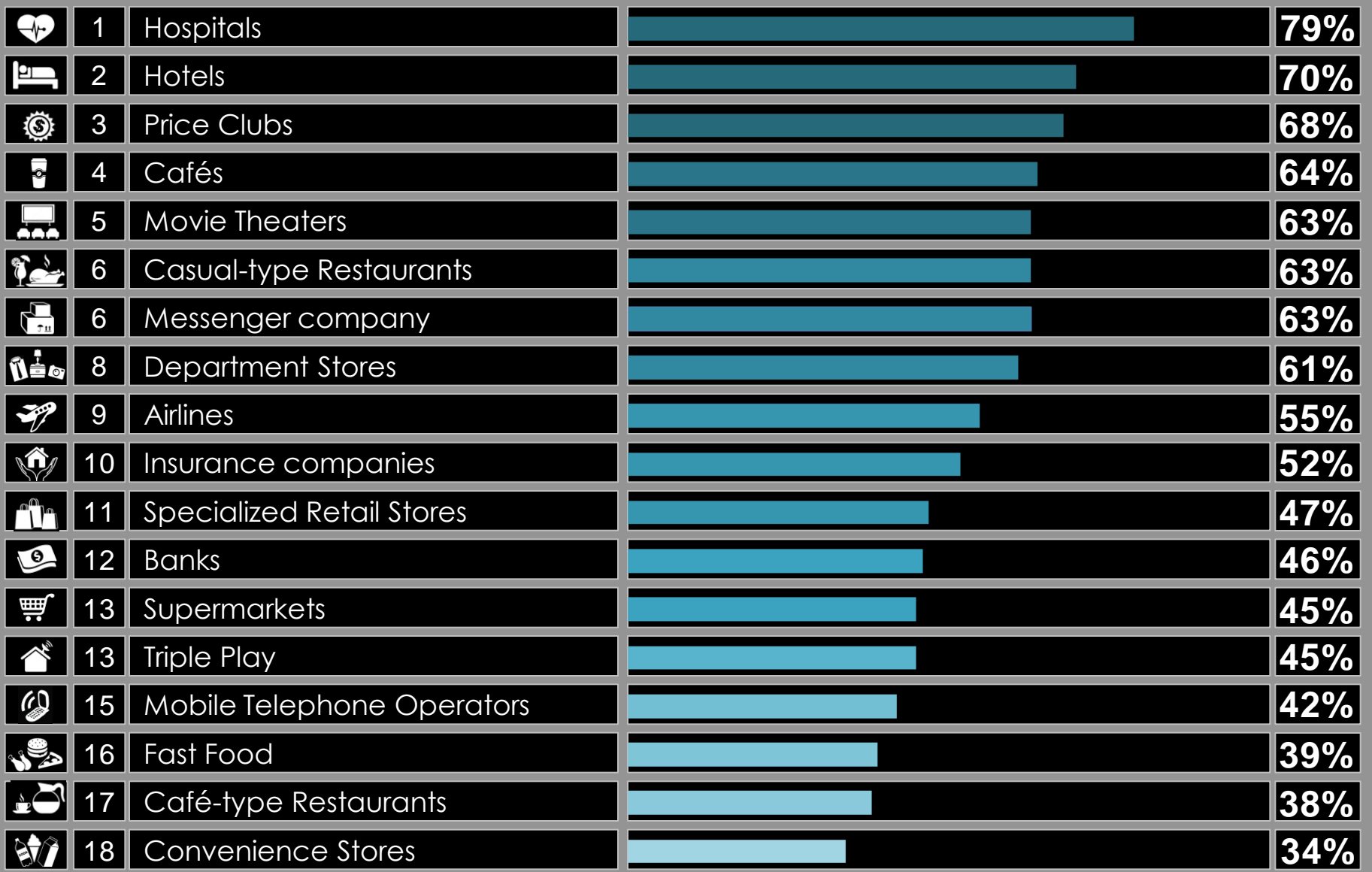
NET REPURCHASE SCORE

H-E-B Holiday Inn Hospitales ABC Hospitales Ángeles Hospitales Christus Muguerza
Hospitales Medica Sur HSBC Ibis Hotel Inbursa Interjet Italian Coffee Company
Italiannis Iusacell Ixe Kentucky Fried Chicken Liverpool Lumen Mapfre Tepeyac
Martí Mc Donald's Megacable Metlife Mexicana MM Cinemas Movistar
Nextel Office Depot Office Max One Oxxo Papa John's Pizza Hut Quálitas
Ramada Red Pack Sam's Club Sanborns Santander Scotiabank Sears
Seguros Monterrey New York Life Sky Soriana Starbucks Suburbia Subway
Superama Telcel Telmex TGI Fridays Toks Unefon
UPS Vips Viva Aerobus Volaris Walmart Wings Zurich

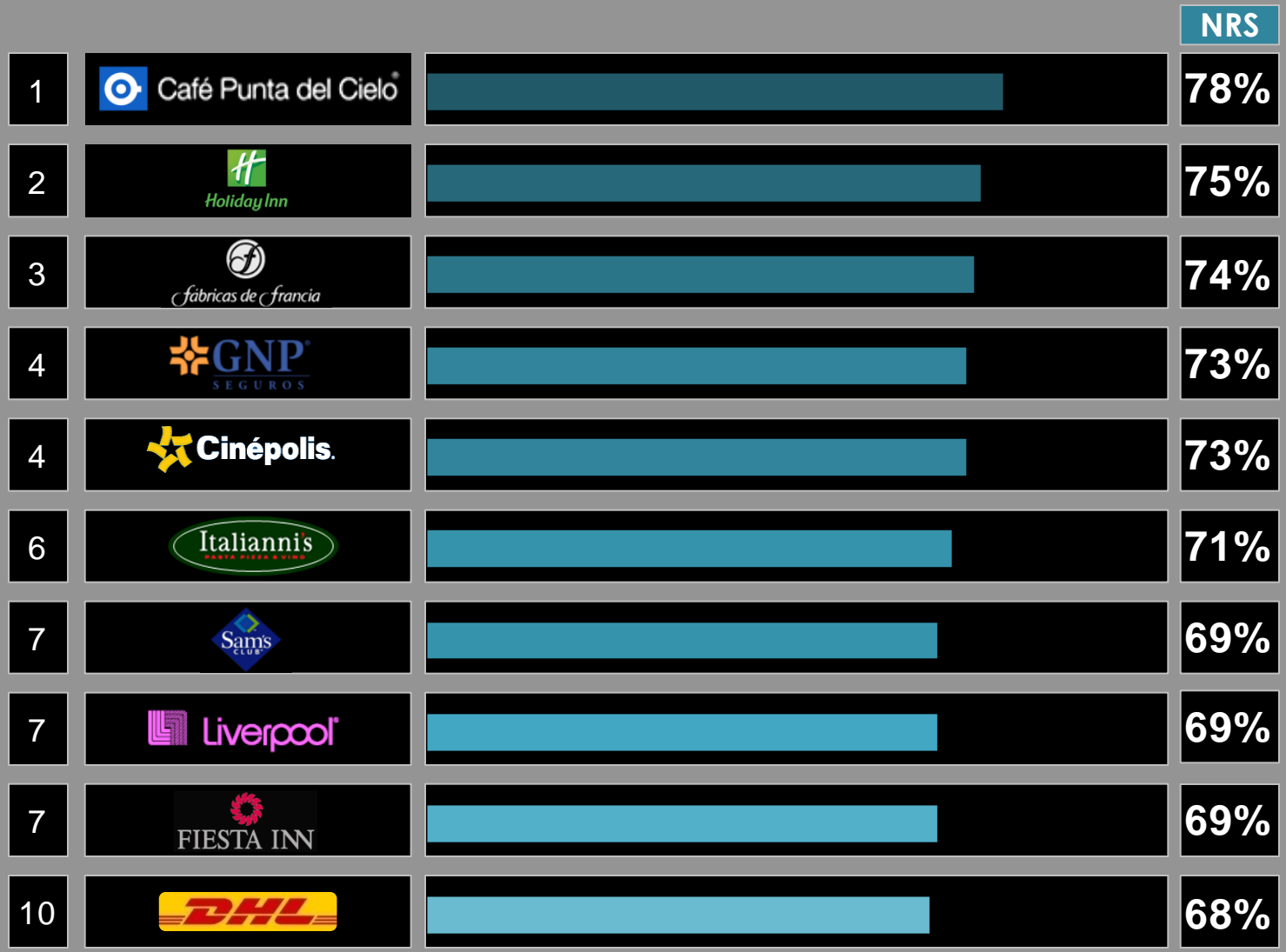
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Net Promoter, NPS, and Net Promoter Score are registered terms, owned by Satmetrix Systems, Inc., Bain & Company, Inc., and Fred Reichheld.

RANKING BY INDUSTRY



THE 10 BRANDS WITH HIGHEST WILLINGNESS TO REPURCHASE



GENERAL RANKING

RK	Brand	NRS
1	Café Punta del Cielo®	78%
2	Holiday Inn	75%
3	Fábricas de Francia	74%
4	GNP SEGUROS	73%
4	Cinépolis.	73%
6	Italiannis	71%
7	Sams Club	69%
7	Liverpool	69%
7	FIESTA INN	69%
10	DHL	68%
10	COSTCO	68%
12	Carl's Jr.	67%
12	H-E-B	67%
14	Starbucks	66%
14	Epplebee's	66%
16	El Palacio de Hierro	65%
16	Martí	65%
18	Interjet	64%

RK	Brand	NRS
18	AEROMEXICO.	64%
20	CITY CLUB	63%
20	Cinemex.	63%
22	estafeta	62%
22	Walmart	62%
24	mexicana	61%
25	chili's	60%
25	MMCINEMAS	60%
25	BANORTE	60%
28	The Italian Kitchen	58%
28	SEARS	58%
30	AVA	57%
31	BodegaAurrera La compañía de los precios bajos	55%
32	CINEMARK	53%
33	TELMEX	52%
34	volaris	51%
34	MetLife	51%
36	lumen	50%

RK	Brand	NRS
36	SKY	50%
38	PIZZA HUT	49%
39	Office DEPOT	48%
39	Sb Suburbia	48%
41	telcel	47%
41	Santander	47%
43	SUBWAY	45%
43	PAPA JOHN'S	45%
43	movistar	45%
46	BURGER KING	44%
46	BBVA Bancomer	44%
46	Banamex	44%
49	OXXO	43%
49	TOKS	43%
51	OfficeMax	42%
51	LUMIERE CINEMAS	42%
53	7 ELEVEN	41%
53	VIP'S	41%

RK	Brand	NRS
55	Sanborns	38%
56	HSBC	39%
56	Banco de México	39%
58	Superama	35%
59	Wings	34%
60	CABLEVISION	33%
61	dish NETWORK	32%
61	SORIANA	32%
63	KFC	29%
63	C&A	29%
65	Cajun	27%
66	El Popton	26%
67	Comercial mexicana	24%
68	MEGACABLE CONECTAMOS TU VIDA	21%
69	NEXTEL	20%
70	McDonald's	17%
71	extra	7%
72	K	-9%

GENERAL RANKING - DISTRIBUTION

Brand	NRS	0-6	7-8	9-10
Café Punta del Cielo	78%	2	18	80
Holiday Inn	75%	5	15	80
Fabricas de Francia	74%	4	18	78
GNP SEGUROS	73%	3	21	76
Cinépolis	73%	2	23	75
Italiannis	71%	5	19	76
Sams CLUB	69%	4	23	73
Liverpool	69%	3	25	72
FIESTA INN	69%	3	25	72
PHL	68%	4	24	72
COSTCO	68%	4	24	72
Carl's Jr.	67%	7	19	74
H-E-B	67%	4	25	71
Starbucks	66%	7	20	73
Applebee's	66%	8	18	74
El Palacio de Hierro	65%	5	25	70
marti	65%	4	27	69
Interjet	64%	8	20	72

Brand	NRS	0-6	7-8	9-10
AEROMEXICO	64%	4	28	68
CITY CLUB	63%	5	27	68
Cinemex	63%	5	27	68
estafeta	62%	5	28	67
Walmart	62%	4	30	66
MEXICANA	61%	9	21	70
chili's	60%	7	26	67
MAMCINEMAS	60%	6	28	66
BANORTE	60%	6	28	66
The Italian Center	58%	9	24	67
SEARS	58%	5	32	63
AVA	57%	8	27	65
BodegaAurrera	55%	7	31	62
CINEMARK	53%	7	33	60
TELMEX	52%	11	26	63
volaris	51%	6	37	57
MetLife	51%	13	23	64
lumen	50%	9	32	59

Brand	NRS	0-6	7-8	9-10
SKY	50%	14	22	64
Pizza Hut	49%	8	35	57
Office DEPOT	48%	9	34	57
Suburbia	48%	10	32	58
telcel	47%	13	27	60
Santander	47%	11	31	58
SUBWAY	45%	13	29	58
PAPA JOHN'S	45%	13	29	58
movistar	45%	12	31	57
BURGER KING	44%	9	38	53
BBVA Bancomer	44%	11	34	55
Banamex	44%	11	34	55
OXXO	43%	12	33	55
toks*	43%	9	39	52
OfficeMax	42%	9	40	51
LUMIERE	42%	9	40	51
7-ELEVEN	41%	12	35	53
VIPS	41%	11	37	52

Brand	NRS	0-6	7-8	9-10
Sanborns	38%	13	36	51
HSBC	39%	18	25	57
Banco de Mexico	39%	13	35	52
Superama	35%	17	31	52
Wings	34%	10	46	44
CABLEVISION	33%	15	37	48
d'sh	32%	18	32	50
SORIANA	32%	15	38	47
KFC	29%	16	39	45
C&A	29%	20	31	49
Banco de America	27%	13	47	40
El Potosi	26%	15	44	41
Comercial mexicana	24%	15	46	39
MEGACABLE	21%	31	17	52
NEXTEL	20%	26	28	46
McDonald's	17%	22	39	39
extra	7%	23	47	30
K	-9%	31	47	22

7 Eleven ABA Seguros Aeroméxico Al precio Allianz American Express AM-PM
Applebee's Axa Axtel Banamex Banco Azteca Banco Walmart
BBVA Bancomer Bancoppel Banorte Best Western Bodega Aurrera Burger King
C&A Cablemás Cablevisión Café Punta del Cielo Café Society California Pizza Kitchen
Carl's Jr Chedraui Chili's Cinemark Cinemas Lumiere Cinemex Cinépolis
Circulo K City Club City Express City Market Coffee Bar Comercial Mexicana Costco
DHL Dish Domino's Pizza El Palacio de Hierro El Portón Estafeta Extra
Fabricas de Francia Fedex Fiesta Inn Finca Santa Veracruz GNP Hampton Inn

































NPS®

NET PROMOTER SCORE

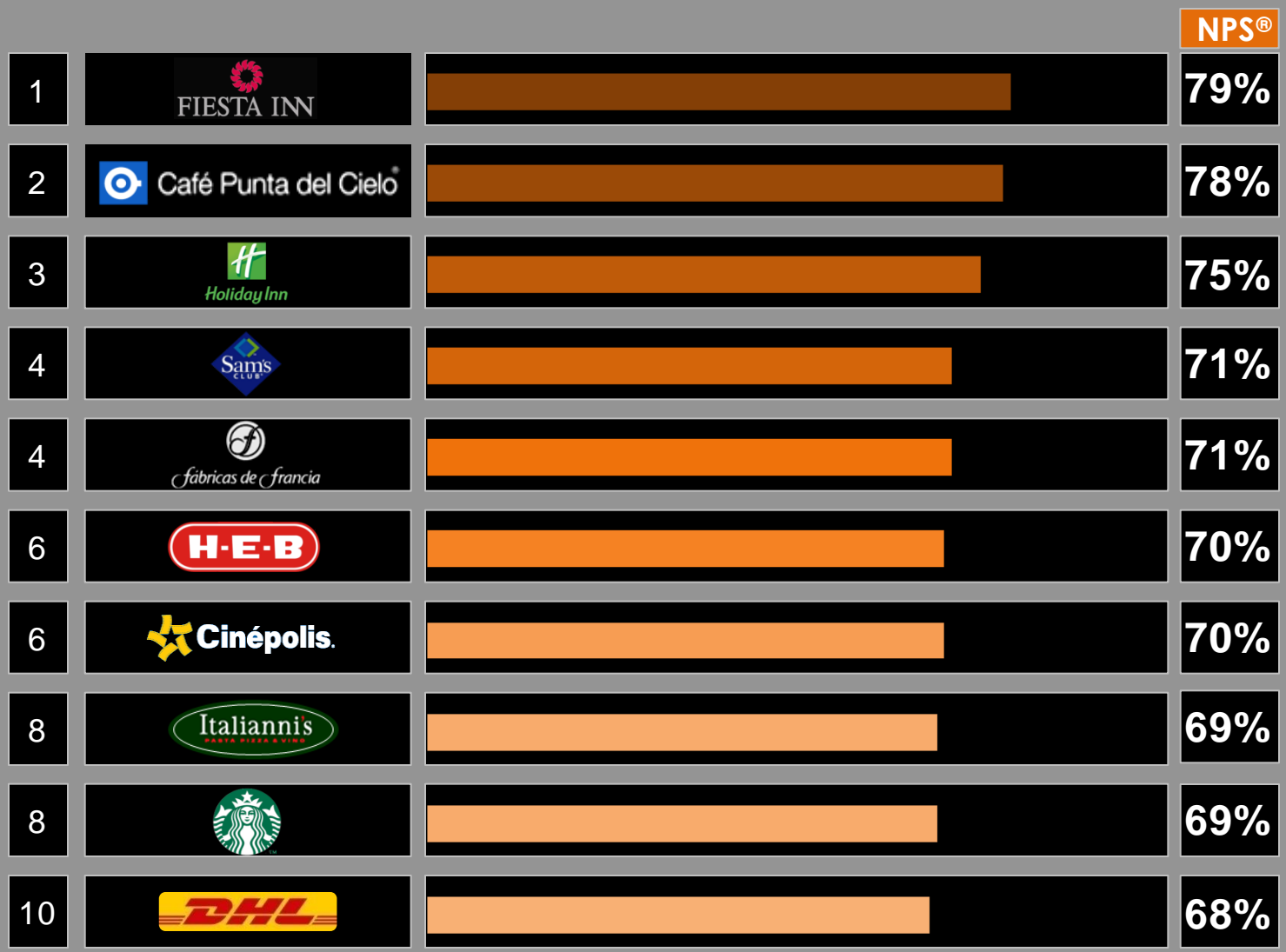
H-E-B Holiday Inn Hospitales ABC Hospitales Ángeles Hospitales Christus Muguerza
Hospitales Medica Sur HSBC Ibis Hotel Inbursa Interjet Italian Coffee Company
Italiannis Iusacell Ixe Kentucky Fried Chicken Liverpool Lumen Mapfre Tepeyac
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Ramada Red Pack Sam's Club Sanborns Santander Scotiabank Sears
Seguros Monterrey New York Life Sky Soriana Starbucks Suburbia Subway
Superama Telcel Telmex TGI Fridays Toks Unefon
UPS Vips Viva Aerobus Volaris Walmart Wings Zurich

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RANKING BY INDUSTRY

	1	Hospitals		82%
	2	Hotels		72%
	3	Price Clubs		69%
	4	Cafés		66%
	5	Messenger company		61%
	5	Casual-type Restaurants		61%
	7	Movie theaters		60%
	8	Department Stores		59%
	9	Airlines		52%
	10	Insurance companies		49%
	11	Specialized Retail Stores		47%
	12	Banks		43%
	12	Supermarkets		43%
	14	Fast Food		40%
	14	Mobile Telephone Operators		40%
	16	Triple Play		39%
	17	Café-type Restaurants		36%
	18	Convenience Stores		28%

THE 10 BRANDS WITH HIGHEST NPS



GENERAL RANKING

RK	Brand	NPS®	RK	Brand	NPS®	RK	Brand	NPS®	RK	Brand	NPS®
1	 FIESTA INN	79%	18	 CITY CLUB	62%	36	 SUBWAY	48%	55	 Sanborns	36%
2	 Café Punta del Cielo®	78%	20	 Walmart	60%	38	 volaris	47%	56	 7-Eleven	35%
3	 Holiday Inn	75%	20	 AEROMEXICO.	60%	38	 Suburbia	47%	56	 LUMIERE	35%
4	 Sams Club	71%	20	 MMCINEMAS	60%	38	 PAPA JOHN'S	47%	58	 CABLEVISION	34%
4	 Fabricas de Francia	71%	23	 MEXICANA	58%	41	 TOKS	46%	59	 dsh NETWORK	33%
6	 H-E-B	70%	24	 Cinemex.	57%	41	 TELMEX	46%	59	 Superama	33%
6	 Cinépolis.	70%	24	 estafeta	57%	43	 BURGER KING	45%	61	 El Popton	29%
8	 Italiannis	69%	24	 chili's	57%	43	 movistar	45%	61	 KFC	29%
8	 Starbucks	69%	27	 The United States	56%	45	 Banamex	44%	61	 SORIANA	29%
10	 DHL	68%	28	 SEARS	54%	46	 telcel.	43%	64	 C&A	28%
11	 GNP SEGUROS	67%	28	 BANORTE	54%	46	 OfficeMax	43%	65	 Wings	27%
11	 COSTCO	67%	30	 BodegaAurrera	53%	46	 Santander	43%	66	 CHALUPA	25%
11	 Liverpool	67%	31	 PIZZA HUT	52%	46	 BBVA Bancomer	43%	67	 Comercial mexicana	20%
14	 Carls Jr.	66%	32	 lumen	51%	50	 MetLife	42%	67	 NEXTEL	20%
14	 marti.	66%	33	 CINEMARK	50%	51	 BANCO DE MÉXICO	40%	69	 McDonald's	15%
16	 Applebee's	63%	33	 AXA	50%	52	 HSBC	38%	70	 MEGACABLE	11%
16	 El Palacio de Hierro	63%	35	 Office DEPOT	49%	53	 VIPS	37%	71	 extra	1%
18	 interJet	62%	36	 SKY	48%	53	 OXXO	37%	72	 K	-17%

GENERAL RANKING - DISTRIBUTION

Brand	NPS®	0-6	7-8	9-10
FIESTA INN	79%	5	11	84
Café Punta del Cielo	78%	4	14	82
Holiday Inn	75%	2	21	77
Sams Club	71%	3	23	74
Fabricas de Francia	71%	6	16	77
H-E-B	70%	3	24	73
Cinépolis	70%	2	26	72
Italiannis	69%	5	21	74
Starbucks	69%	6	19	75
PDL	68%	5	22	73
GNP SEGUROS	67%	4	25	71
COSTCO	67%	5	23	72
Liverpool	67%	3	27	70
Carls Jr.	66%	6	22	72
Marti	66%	4	26	70
Applebee's	63%	5	27	68
El Palacio de Hierro	63%	6	25	69
Interjet	62%	8	22	70
CITY CLUB	62%	5	28	67
Walmart	60%	5	30	65
AEROMEXICO	60%	6	28	66
AMC CINEMAS	60%	6	28	66
MEXICANA	58%	7	28	65
Cinemex	57%	8	27	65
estafeta	57%	5	33	62
chili's	57%	8	27	65
The Pollard Centre	56%	10	24	66
SEARS	54%	6	34	60
BANORTE	54%	8	30	62
Bodega Aurrera	53%	7	33	60
Pizza Hut	52%	7	34	59
lumen	51%	8	33	59
CINEMARK	50%	7	36	57
AXA	50%	9	32	59
Office DEPOT	49%	10	31	59
SKY	48%	13	26	61
SUBWAY	48%	10	32	58
volaris	47%	12	29	59
Suburbia	47%	8	37	55
PAPA JOHN'S	47%	13	27	60
toks	46%	8	38	54
TELMEX	46%	13	28	59
BURGER KING	45%	10	35	55
movistar	45%	11	33	56
Banamex	44%	12	32	56
telcel	43%	14	29	57
OfficeMax	43%	9	39	52
Santander	43%	10	37	53
BBVA Bancomer	43%	11	35	54
MetLife	42%	13	32	55
HSBC	40%	11	38	51
VIPS	37%	12	39	49
OXXO	37%	15	33	52
Sanborns	36%	12	40	48
7-ELEVEN	35%	14	37	49
LUMIERE	35%	12	41	47
CABLEVISION	34%	17	32	51
dish NETWORK	33%	17	33	50
Superama	33%	15	37	48
El Pottón	29%	15	41	44
KFC	29%	16	39	45
SORIANA	29%	15	41	44
C&A	28%	20	32	48
Wings	27%	17	39	44
Comercial mexicana	25%	18	39	43
NEXTEL	20%	24	32	44
McDonald's	15%	21	43	36
MEGACABLE CONECTAMOS TU VIDA	11%	28	33	39
extra	1%	28	43	29
K	-17%	39	39	22

RECOMMENDATION TRIGGERS

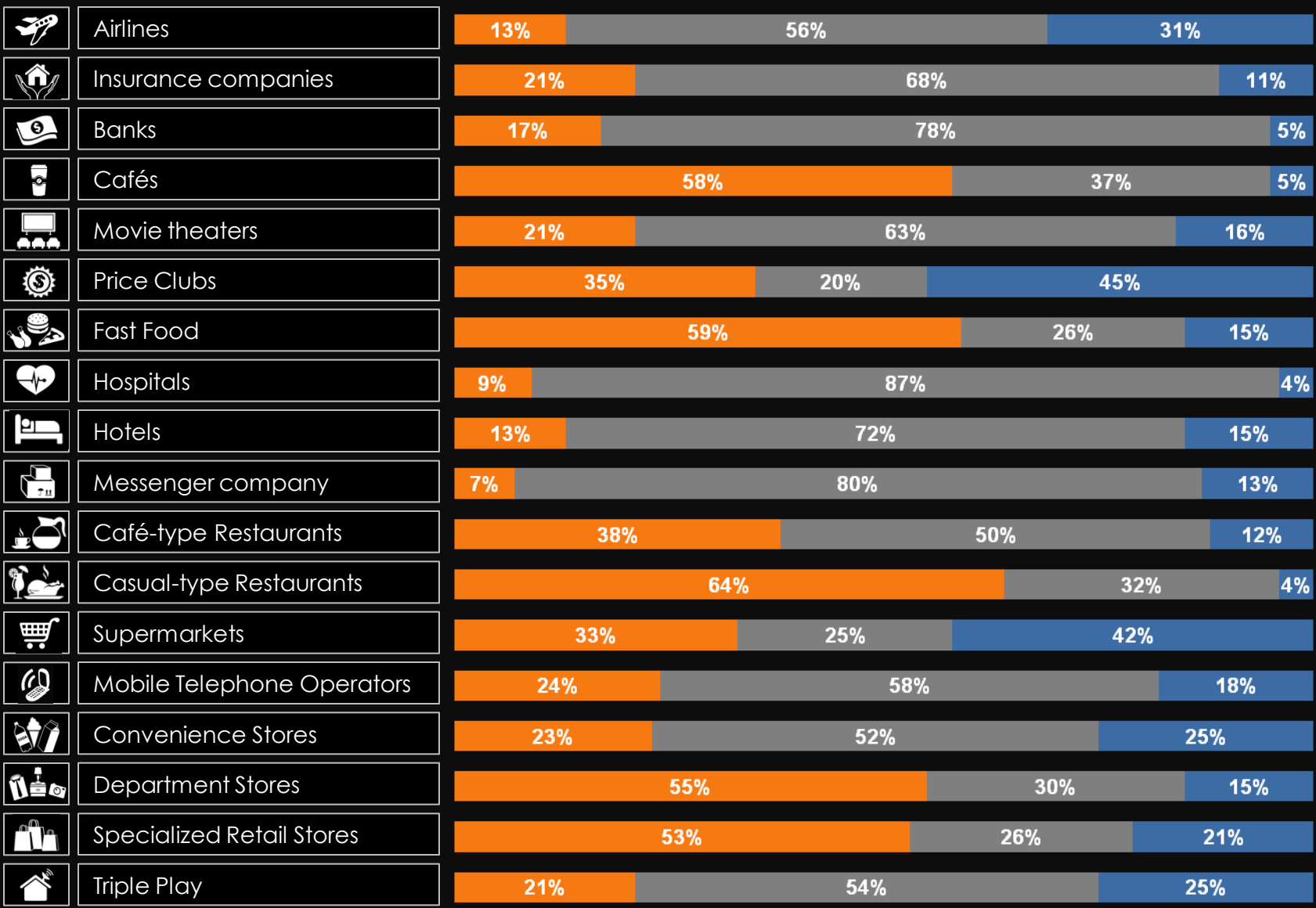
Besides identifying the percentage of customers willing to recommend each brand, this study analyzed at greater depth the reasons underlying this intent.

So, promoter customers (9 or 10 in the 0-to-10 scale) were asked which of the following aspects is the **main** reason that sparks the desire to share their positive experiences with acquaintances:

- a)Product Quality
- b)Service Quality
- c)Price



RECOMMENDATION TRIGGERS BY INDUSTRY



■ Product Quality
 ■ Service Quality
 ■ Price

* NPS is a registered term, owned by Statmetrix Systems, Bain & Company and Fred Reichheld

RECOMMENDATION TRIGGERS BY BRAND

Brand	CP	CS	\$
FIESTA INN	9%	80%	11%
Café Punta del Cielo	64%	30%	6%
Holiday Inn	13%	84%	3%
Sams Club	34%	18%	48%
Fabricas de Francia	53%	31%	16%
H-E-B	45%	21%	34%
Cinépolis	21%	70%	9%
Italiannis	66%	31%	3%
Starbucks	64%	34%	2%
PDL	3%	90%	7%
GNP Seguros	23%	72%	5%
Costco	47%	18%	35%
Liverpool	63%	32%	5%
Carls Jr.	76%	16%	8%
Marti	71%	13%	16%
Applebee's	63%	35%	2%
El Palacio de Hierro	62%	33%	5%
Interjet	4%	65%	31%

Brand	CP	CS	\$
City Club	25%	25%	50%
Walmart	32%	24%	44%
Aeromexico	24%	67%	9%
MCM Cinemas	21%	55%	24%
Mexicana	12%	72%	16%
Cinemex	21%	62%	17%
Estafeta	10%	78%	12%
Chili's	51%	44%	5%
The Pollard Centre	59%	35%	6%
Sears	57%	35%	8%
Banorte	10%	88%	2%
Bodega Aurrera	15%	13%	72%
Pizza Hut	65%	22%	13%
Lumen	57%	27%	16%
Cinemark	20%	65%	15%
AXA	26%	66%	8%
Office Depot	46%	36%	18%
Sky	38%	54%	8%

Brand	CP	CS	\$
Subway	66%	22%	12%
Volaris	15%	51%	34%
Suburbia	41%	17%	42%
Papa John's	60%	32%	8%
Toks	29%	56%	15%
Telmex	22%	68%	10%
Burger King	59%	25%	16%
Movistar	16%	56%	28%
Banamex	20%	79%	1%
Telcel	22%	67%	11%
OfficeMax	45%	34%	21%
Santander	15%	79%	6%
BBVA Bancomer	14%	83%	3%
MetLife	42%	52%	6%
Banco de Mexico	59%	27%	14%
HSBC	15%	83%	2%
VIPS	39%	45%	16%
Oxxo	26%	53%	21%

Brand	CP	CS	\$
Sanborns	32%	63%	5%
7-Eleven	25%	51%	24%
Lumiere	23%	60%	17%
Cablevision	24%	61%	15%
Dish Network	20%	37%	43%
Superama	52%	30%	18%
El Pottón	48%	41%	11%
KFC	55%	26%	19%
Soriana	33%	21%	46%
C&A	47%	18%	35%
Wings	42%	44%	14%
Comercial Mexicana	21%	22%	57%
Comercial Mexicana	33%	30%	37%
Nextel	24%	61%	15%
McDonald's	36%	35%	29%
Megacable	14%	63%	23%
Extra	25%	59%	16%
K	29%	64%	7%

CP % Product Quality CS % Service Quality \$ % Price

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