ISES INDUSTRY FORUM

CSISG 2014 Q3 RESULTS
F&B AND TOURISM
CSISG 2014 Q3

- Results Overview
- Results and Highlights of F&B Sector
- Results and Highlights of Tourism Sector
- CSISG 2014 Q3 Quick Facts & Sampling
CSISG 2014 Q1 & Q2 Sector Results

- Retail
- Infocomm
- Transport & Logistics
- Public Education
- Private Education
CSISG 2014 QUARTER 3
RESULTS OVERVIEW
CSISG F&B Sector Trends

85

Restaurants

Cafes & Snack Bars

70

2007 2014

Bars & Pubs

Fast Food

Food Courts

Food & Beverage Sector
CSISG Tourism Sector Trends

Attractions

Hotels

Travel & Tour Services

Tourism

2007

2014
CSISG 2014 Q3 Results Overview

This chart summarises the results of the CSISG 2014 satisfaction scores in the Food & Beverage and Tourism sectors at the sector, sub-sector and company levels. The sector scores (in gold) represent a weighted average of their respective sub-sector scores (in blue). Satisfaction scores for sub-sectors with individual company scores are weighted averages of these individual company scores.

All scores displayed are accurate to one-decimal place. Entities are presented in decreasing levels of satisfaction.

* Companies indicated with an asterisk (*) are companies that have performed significantly above their sub-sector average.

* Sub-sectors indicated with an asterisk (*) are sub-sectors that have performed significantly above their sector average.

The sparklines indicate the satisfaction score of their respective sectors, sub-sectors and companies over the past few years.

**69.1 Tourism**
- 72.6 Attractions*  
  - 73.2 Universal Studios  
  - 71.6 Sentosa  
  - 70.8 Singapore Zoo  
  - 70.7 Night Safari  
  - 70.1 Jurong Bird Park  
  - 69.1 Other attractions

**69.4 Hotels**
- 74.4 MBS*  
  - 72.9 Shangri-La*  
  - 72.8 The Ritz-Carlton*  
  - 72.6 Swissotel the Stamford*  
  - 71.9 RWS Hotels*  
  - 71.2 Mandarin Orchard*  
  - 69.6 Grand Hyatt  
  - 68.1 Other hotels

**67.4 Travel & Tour Services**

**65.8 Food & Beverage**
- 70.0 Bars & Pubs*  
  - 69.0 Fast Food Restaurants*  
  - 71.6 McDonalds*  
  - 69.6 Burger King  
  - 67.9 KFC  
  - 62.6 Other fast food restaurants

**65.6 Cafes & Snack Bars**
- 69.3 Coffee Bean & Tea Leaf*  
  - 69.1 Starbucks*  
  - 65.6 Other cafes & snack bars

**66.1 Food Courts**
- 67.7 Food Republic  
  - 66.7 Koufu  
  - 66.0 Kopitiam  
  - 65.1 Other food courts

**64.1 Restaurants**
- 70.0 Tung Lok*  
  - 68.8 RE&S*  
  - 68.7 Sakae Holdings*  
  - 68.6 Crystal Jade*  
  - 63.4 Other restaurants
CSISG 2014 Q3 RESULTS
Food & Beverage
CSISG 2014 Q3 F&B

Year-on-Year Changes

<table>
<thead>
<tr>
<th>Category</th>
<th>CSISG 2013</th>
<th>CSISG 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restaurants</td>
<td>71.6</td>
<td>69.0</td>
</tr>
<tr>
<td>Cafes &amp; Snack Bars</td>
<td>71.1</td>
<td>66.2</td>
</tr>
<tr>
<td>Bars &amp; Pubs</td>
<td>70.6</td>
<td>70.0</td>
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<tr>
<td>Fast Food Restaurants</td>
<td>67.9</td>
<td>69.0</td>
</tr>
<tr>
<td>Food Courts</td>
<td>65.5</td>
<td>66.1</td>
</tr>
</tbody>
</table>

70.3 Restaurants
69.0 Fast Food Restaurants
66.2 Cafes & Snack Bars
70.0 Bars & Pubs
66.1 Food Courts
64.1 Restaurants
CSISG 2014 Q3 F&B

Restaurants

<table>
<thead>
<tr>
<th>Restaurant</th>
<th>CSISG 2013</th>
<th>CSISG 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tung Lok</td>
<td>73.1</td>
<td>64.1</td>
</tr>
<tr>
<td>Sakae Holdings</td>
<td>67.9</td>
<td></td>
</tr>
<tr>
<td>RE&amp;S</td>
<td>70.8</td>
<td></td>
</tr>
<tr>
<td>Crystal Jade</td>
<td>71.3</td>
<td></td>
</tr>
<tr>
<td>Other Restaurants</td>
<td>71.8</td>
<td>63.4</td>
</tr>
</tbody>
</table>

Tung Lok: 73.1
Sakae Holdings: 67.9
RE&S: 70.8
Crystal Jade: 71.3
Other Restaurants: 71.8

64.1: CSISG 2014
63.4: Other Restaurants
CSISG 2014 Q3 F&B

Fast Food Restaurants

- McDonalds 67.6
- KFC 66.8
- Burger King 68.8
- Other Fast Food 69.5

Comparison:
- CSISG 2013: 67.9
- CSISG 2014: 69.0
- 71.6 McDonalds
- 67.9 KFC
- 69.6 Burger King
- 62.6 Other Fast Food
CSISG 2014 Q3 F&B  
*Cafes & Snack Bars*
CSISG 2014 Q3 F&B

Food Courts

CSISG 2013
65.5

CSISG 2014
66.1

Other Food Courts 66.0
Food Republic 65.8
Koufu 65.1
Kopitiam 63.7

67.7 Food Republic
66.7 Koufu
66.0 Kopitiam
65.1 Other Food Courts
CSISG 2014 Q3 F&B
Year-on-Year Changes in Local Respondents’ Satisfaction

Locals’ year-on-year F&B Sector performance

<table>
<thead>
<tr>
<th>Category</th>
<th>2014</th>
<th>2013</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cafes &amp; Snack Bars</td>
<td>-1.7</td>
<td>-0.8</td>
<td>-0.9</td>
</tr>
<tr>
<td>Restaurants</td>
<td>0.4</td>
<td>1.1</td>
<td>-0.7</td>
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<tr>
<td>Bars &amp; Pubs</td>
<td>2.2</td>
<td>1.1</td>
<td>1.1</td>
</tr>
<tr>
<td>Fast Food Restaurants</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Food Courts</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Average Local Satisfaction

2014  67.2
2013  67.6
CSISG 2014 Q3 F&B

Year-on-Year Changes in Tourist Respondents’ Satisfaction

Tourists’ year-on-year F&B Sector performance

<table>
<thead>
<tr>
<th>Category</th>
<th>Change</th>
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<tbody>
<tr>
<td>Restaurants</td>
<td>-11.5</td>
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<tr>
<td>Cafes &amp; Snack Bars</td>
<td>-11.4</td>
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<tr>
<td>Bars &amp; Pubs</td>
<td>-9.5</td>
</tr>
<tr>
<td>Fast Food Restaurants</td>
<td>-6.7</td>
</tr>
<tr>
<td>Food Courts</td>
<td>-5.0</td>
</tr>
</tbody>
</table>

Average Tourist Satisfaction

- 2014: 71.1
- 2013: 81.1
## CSISG 2014 Q3 Food & Beverage

**Restaurants sub-sector**

Touchpoints analysis, arranged in order of importance to Perceived Quality

<table>
<thead>
<tr>
<th>Touchpoints</th>
<th>Rating 2013</th>
<th>Rating 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality of food</td>
<td>7.6</td>
<td>7.5</td>
</tr>
<tr>
<td>Staff responsiveness</td>
<td>7.4</td>
<td>7.6</td>
</tr>
<tr>
<td>Order process</td>
<td>7.4</td>
<td>7.5</td>
</tr>
<tr>
<td>Bill timeliness and accuracy</td>
<td>7.9</td>
<td>7.7</td>
</tr>
<tr>
<td>Ease of reservation</td>
<td>7.4</td>
<td>7.8</td>
</tr>
<tr>
<td>Time taken to receive food</td>
<td>7.3</td>
<td>7.6</td>
</tr>
<tr>
<td>Cleanliness</td>
<td>7.7</td>
<td>7.6</td>
</tr>
<tr>
<td>Waiting time to be seated</td>
<td>7.2</td>
<td>7.6</td>
</tr>
<tr>
<td>Time taken to receive menu</td>
<td>7.5</td>
<td>7.6</td>
</tr>
</tbody>
</table>
## CSISG 2014 Q3 Food & Beverage

### Restaurants sub-sector

<table>
<thead>
<tr>
<th>Touchpoints (importance to <strong>locals</strong>)</th>
<th>Rating 2013</th>
<th>Rating 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Quality of food</td>
<td>7.3 ▶</td>
<td>7.6 ▼</td>
</tr>
<tr>
<td>2 Staff responsiveness</td>
<td>7.1 ▶</td>
<td>7.6 ▼</td>
</tr>
<tr>
<td>3 Order process</td>
<td>7.2 ▶</td>
<td>7.5 ▼</td>
</tr>
<tr>
<td>4 Time taken to receive food</td>
<td>7.0 ▶</td>
<td>7.6 ▼</td>
</tr>
<tr>
<td>5 Waiting time to be seated</td>
<td>6.9 ▶</td>
<td>7.6 ▼</td>
</tr>
<tr>
<td>6 Ease of reservation</td>
<td>7.1 ▶</td>
<td>7.9 ▼</td>
</tr>
<tr>
<td>7 Bill timeliness and accuracy</td>
<td>7.7 ▼</td>
<td>7.8 ▼</td>
</tr>
<tr>
<td>- Cleanliness</td>
<td>7.5 ▼</td>
<td>7.5 ▼</td>
</tr>
<tr>
<td>- Time taken to receive menu</td>
<td>7.3 ▶</td>
<td>7.6 ▼</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Touchpoints (importance to <strong>tourists</strong>)</th>
<th>Rating 2013</th>
<th>Rating 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Bill timeliness and accuracy</td>
<td>8.8 ▼</td>
<td>7.6 ▼</td>
</tr>
<tr>
<td>2 Cleanliness</td>
<td>8.8 ▼</td>
<td>7.8 ▼</td>
</tr>
<tr>
<td>3 Quality of food</td>
<td>8.8 ▼</td>
<td>7.3 ▼</td>
</tr>
<tr>
<td>4 Ease of reservation</td>
<td>8.5 ▼</td>
<td>7.6 ▼</td>
</tr>
<tr>
<td>5 Time taken to receive food</td>
<td>8.5 ▼</td>
<td>7.5 ▼</td>
</tr>
<tr>
<td>- Waiting time to be seated</td>
<td>8.5 ▼</td>
<td>7.6 ▼</td>
</tr>
<tr>
<td>- Staff responsiveness</td>
<td>8.6 ▼</td>
<td>7.6 ▼</td>
</tr>
<tr>
<td>- Order process</td>
<td>8.5 ▼</td>
<td>7.5 ▼</td>
</tr>
<tr>
<td>- Time taken to receive menu</td>
<td>8.5 ▼</td>
<td>7.5 ▼</td>
</tr>
</tbody>
</table>
## CSISG 2014 Q3 Food & Beverage

### Quality drivers

<table>
<thead>
<tr>
<th>Fast Food Restaurants</th>
<th>Food Courts</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Locals</strong></td>
<td><strong>Tourists</strong></td>
</tr>
<tr>
<td>Quality of food</td>
<td>Cleanliness</td>
</tr>
<tr>
<td>Cleanliness</td>
<td>Quality of food</td>
</tr>
<tr>
<td>Staff courtesy</td>
<td>Accuracy of change</td>
</tr>
<tr>
<td>Queue time</td>
<td>Ease of finding seat</td>
</tr>
<tr>
<td>Ease of finding seat</td>
<td>Staff courtesy</td>
</tr>
<tr>
<td>Order process</td>
<td>Order process</td>
</tr>
<tr>
<td>Accuracy of change</td>
<td>Queue time</td>
</tr>
</tbody>
</table>

- **Locals**
  - Ease of finding seat
  - Courtesy of staff
  - Accuracy of change
  - Quality of food
  - Ease of finding seat
  - Cleanliness
  - Order taking
  - Queue
  - Order taking
  - Courtesy of staff

- **Tourists**
  - Quality of food
  - Cleanliness
  - Order taking
  - Ease of finding seat
  - Accuracy of change
  - Queue
  - Courtesy of staff

Touchpoints analysis, arranged in order of importance to Perceived Quality.
Quality is the most important driver of customer satisfaction. Different touchpoints affect quality to varying degrees.

Different F&B outlets and customer types also determine what factors are important. For example:

- Tourists customers are relatively more sensitive to cleanliness at the restaurant, compared to local customers
- Cleanliness at a fast food restaurant ranks higher than in restaurants

F&B operators should determine what matters most to its specific customer segment and ensure it performs well in these aspects.
CSISG 2014 Q3 RESULTS
TOURISM
CSISG 2014 Q3 Tourism

Year-on-Year Change

CSISG 2013
72.7

CSISG 2014
69.1

Attractions 79.8
Hotels 77.5
Travel & Tour Services 68.6

72.6 Attractions
69.4 Hotels
67.4 Travel & Tour Services
CSISG 2014 Q3 Tourism
Attractions

CSISG 2013
79.8

CSISG 2014
72.6

Jurong Bird Park 76.3
Singapore Zoo 78.7
Night Safari 76.2
Sentosa 78.1
Universal Studios 81.6
Other attractions 79.3

Jurong Bird Park
70.1
Singapore Zoo
70.8
Night Safari
70.7
Sentosa
71.6
Universal Studios
73.2
Other attractions
69.1
CSISG 2014 Q3 Tourism

Hotels

- Grand Hyatt 80.5
- Mandarin Orchard 80.7
- Shangri-La Hotel 84.4
- Swissotel the Stamford 81.5
- The Ritz Carlton 83.4
- MBS 84.1
- RWS Hotels 78.5
- Other Hotels 74.9

CSISG 2013

- Shangri-La Hotel 84.4
- MBS 84.1
- The Ritz Carlton 83.4
- Swissotel the Stamford 81.5
- Mandarin Orchard 80.7
- Grand Hyatt 80.5
- RWS Hotels 78.5
- Other Hotels 74.9

CSISG 2014

- Shangri-La Hotel 72.9
- MBS 74.4
- The Ritz Carlton 72.8
- Swissotel the Stamford 72.6
- RWS Hotels 71.9
- Mandarin Orchard 71.2
- Grand Hyatt 69.6
- Other Hotels 68.1
CSISG 2014 Q3 Tourism

Year-on-Year Changes in Local Respondents’ Satisfaction

Locals’ year-on-year Tourism Sector performance

<table>
<thead>
<tr>
<th>Service Type</th>
<th>Change</th>
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<tr>
<td>Hotels</td>
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<tr>
<td>Attractions</td>
<td>-4.6</td>
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<tr>
<td>Travel &amp; Tour Services</td>
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</table>

Average Local Satisfaction

<table>
<thead>
<tr>
<th>Year</th>
<th>Satisfaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>67.2</td>
</tr>
<tr>
<td>2013</td>
<td>71.5</td>
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</tbody>
</table>
CSISG 2014 Q3 Tourism

Year-on-Year Changes in Tourist Respondents’ Satisfaction

<table>
<thead>
<tr>
<th>Tourism Sector</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Tourist Satisfaction</td>
<td>72.5</td>
<td>80.1</td>
</tr>
</tbody>
</table>

Tourists’ year-on-year performance

- Hotels: -10.2
- Attractions: -7.5
- Travel & Tour Services: -4.4
CSISG 2014 Q3 Tourism
Attractions Sub-sector
Importance to customer satisfaction

Local Tourists

Perceived Quality
Perceived Value
Customer Expectations

Tourists

Perceived Quality
Perceived Value
Customer Expectations
Local customer satisfaction is increasingly dependent on what they thought of the attraction before the visit.

Tourist customer satisfaction is still largely dependent on what they thought of the attraction during the visit.

Attractions targeting local residents should corroborate this observation with the behaviour of their own customers and tweak promotional efforts to shape and optimise the visitor experience.
CSISG 2014 Q3 Tourism

Hotels Sub-sector

Locals

2007 2014

60 66 72 78 84 90

Tourists

2007 2014

60 66 72 78 84 90

Customer Expectations
Perceived Quality
Perceived Value
Customer Satisfaction
## CSISG 2014 Q3 Tourism

### Hotels Sub-sector

<table>
<thead>
<tr>
<th>Touchpoints (importance to <strong>locals</strong>)</th>
<th>Rating 2013</th>
<th>Rating 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Amenities in the room such as TV, air-con, and hair-dryer</td>
<td>8.0</td>
<td>7.6</td>
</tr>
<tr>
<td>2. Clarity of directions within the hotel</td>
<td>7.8</td>
<td>7.8</td>
</tr>
<tr>
<td>3. Cleanliness of the room</td>
<td>8.1</td>
<td>7.6</td>
</tr>
<tr>
<td>4. Quality of F&amp;B served in the hotel</td>
<td>7.7</td>
<td>7.7</td>
</tr>
<tr>
<td>5. Efficiency of the check-out process</td>
<td>7.9</td>
<td>7.8</td>
</tr>
<tr>
<td>6. Helpfulness of the hotel staff</td>
<td>7.8</td>
<td>7.5</td>
</tr>
<tr>
<td>- Ease of making reservations</td>
<td>7.7</td>
<td>7.7</td>
</tr>
<tr>
<td>- Ease of getting to the hotel</td>
<td>7.7</td>
<td>7.9</td>
</tr>
<tr>
<td>- Efficiency of the check-in process</td>
<td>7.7</td>
<td>7.7</td>
</tr>
<tr>
<td>- Courtesy of the hotel staff</td>
<td>7.8</td>
<td>7.7</td>
</tr>
<tr>
<td>- Timeliness and accuracy of the bill</td>
<td>8.1</td>
<td>8.1</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Touchpoints (importance to <strong>tourists</strong>)</th>
<th>Rating 2013</th>
<th>Rating 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Amenities in the room such as TV, air-con, and hair-dryer</td>
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</tbody>
</table>
CSISG 2014 Q3 F&B and Tourism

Reliability Scores for Tourists

F&B Sector

Tourism Sector

wrongx  pwrongq  swrongq

2008  2014
In conclusion

Observations from both F&B and Tourism sectors revealed lower tourists’ ratings of reliability.

To improve satisfaction, it is timely for businesses to review their operating model.

Furthermore, industry leadership should be continuously cognisant of the different customer segments and the different levers that drive their satisfaction.
CSISG 2014 Q3
Quick Facts & Sampling
The CSISG Score

Each CSISG score is a weighted average of customer ratings to three questions, summarised as:

• The customer’s holistic satisfaction rating based on all experiences with the company
• How well the company has met the customer’s expectations
• How similar the company is with the customer’s imagined ideal company

These questions form part of the CSISG structural equation model that provides the cause-and-effect predictive analysis capabilities employed by this national study.
Overview of the CSISG Main Fieldwork

Singapore citizens and PRs are interviewed at their homes. Homes are selected from a random listing of 40,000 household addresses that match housing profile of Singapore resident population.

Departing tourists are interviewed at Changi Airport.

Each respondent answers up to 17 CSISG questions and 11 touchpoint questions about a company they had recent experiences with.

Typically 250 respondents per company would have answered the CSISG questionnaire.
<table>
<thead>
<tr>
<th>Sectors Covered</th>
<th>F&amp;B</th>
</tr>
</thead>
<tbody>
<tr>
<td>Survey Period</td>
<td>Tourism</td>
</tr>
<tr>
<td>June–September 2014</td>
<td></td>
</tr>
</tbody>
</table>

| Total Questionnaires Completed | 8,600 |
| Face-to-face at residents’ homes | 4,850 |
| Face-to-face at Changi Airport | 3,750 |
| Distinct entities measured    | 901   |
| Entities with published scores | 24    |
More information

CSISG 2014 Q3 Executive Summary is available at ises.smu.edu.sg

If you are from a CSISG-measured company, email ise@smu.edu.sg with your professional contact information for your complimentary company-specific CSISG score card

The ISES Membership Programme provides a comprehensive CSISG benchmarking report for your company along with a host of associated benefits. An application form is available in your Forum folder and also at ises.smu.edu.sg