CSISG 2015 Q1 RESULTS
RETAIL AND INFO-COMMUNICATIONS SECTORS
CSISG 2015 Q1

- CSISG 2015 Q1 Quick Facts & Sampling
- Results Overview
- Results and Highlights of Retail Sector
- Results and Highlights of Info-Communications Sector
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 model that provides the cause-and-effect predictive capabilities employed in 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 approximately 40,000 household addresses that match the housing profile of the Singapore resident population.

Departing tourists are interviewed at Changi Airport.

Each respondent answers up to 17 CSISG questions and 24 touchpoint questions about a company they had recent experiences with.

Typically 250 respondents per company would have answered the CSISG questionnaire.
CSISG 2015 Q1 Quick Facts

Sectors Covered
Retail & Info-Communications

Survey Period
Jan–Mar 2015

Total Questionnaires Completed
9,000

Face-to-face at residents’ homes
7,790

Face-to-face at Changi Airport
1,210

Distinct entities measured
545

Entities with published scores
25
CSISG 2015 QUARTER 1 RESULTS OVERVIEW
CSISG Retail Sector Trends

Motor Vehicles

Petrol Stations

2007 2015

Supermarkets

Fashion Apparels

Jewellery Stores

Clocks & Watches

Departmental Stores

Furniture Stores

Retail Sector
CSISG Info-Comms Sector Trends

- Mobile Telecom
- PayTV
- Broadband
- Wireless@SG

Info-Comms Sector

Years: 2007, 2015

Values: 75, 65, 55
## CSISG 2015 Q1 Results Overview

### 70.0 Retail
- **72.8 Motor Vehicles***
- **70.7 Petrol Service Stations**
  - 71.7 SPC
  - 71.5 Esso
  - 70.1 Shell
  - 67.5 Caltex
- **70.6 Supermarkets**
  - 71.6 Cold Storage
  - 70.7 NTUC Fairprice
  - 69.4 Sheng Siong
  - 67.3 Other supermarkets
- **69.3 Jewellery**
- **69.3 Fashion Apparels**

### 67.4 Info-Communications
- **68.4 Mobile Telecom**
- **69.4 Singtel**
- **69.0 StarHub**
- **63.9 M1**
- **65.1 PayTV**
- **66.6 StarHub**
- **64.4 Singtel**
- **64.9 Broadband**
- **66.9 StarHub**
- **66.2 M1**
- **64.1 Singtel**
- **59.6 Wireless@SG**

### 2015 Q1 Scores

#### Retail

<table>
<thead>
<tr>
<th>Sector</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Motor Vehicles</td>
<td>72.8</td>
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<tr>
<td>Petrol Service Stations</td>
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<tr>
<td>SPC</td>
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<td>Esso</td>
<td>71.5</td>
</tr>
<tr>
<td>Shell</td>
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</tr>
<tr>
<td>Caltex</td>
<td>67.5</td>
</tr>
<tr>
<td>Supermarkets</td>
<td>71.6</td>
</tr>
<tr>
<td>Cold Storage</td>
<td>70.7</td>
</tr>
<tr>
<td>NTUC Fairprice</td>
<td>70.7</td>
</tr>
<tr>
<td>Sheng Siong</td>
<td>69.4</td>
</tr>
<tr>
<td>Other supermarkets</td>
<td>67.3</td>
</tr>
<tr>
<td>Jewellery</td>
<td>69.3</td>
</tr>
<tr>
<td>Fashion Apparels</td>
<td>69.3</td>
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</table>

#### Info-Communications

<table>
<thead>
<tr>
<th>Sector</th>
<th>Score</th>
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</thead>
<tbody>
<tr>
<td>Mobile Telecom</td>
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</tr>
<tr>
<td>Singtel</td>
<td>69.4</td>
</tr>
<tr>
<td>StarHub</td>
<td>69.0</td>
</tr>
<tr>
<td>M1</td>
<td>63.9</td>
</tr>
<tr>
<td>PayTV</td>
<td>65.1</td>
</tr>
<tr>
<td>StarHub</td>
<td>66.6</td>
</tr>
<tr>
<td>Singtel</td>
<td>64.4</td>
</tr>
<tr>
<td>Broadband</td>
<td>64.9</td>
</tr>
<tr>
<td>StarHub</td>
<td>66.9</td>
</tr>
<tr>
<td>M1</td>
<td>66.2</td>
</tr>
<tr>
<td>Singtel</td>
<td>64.1</td>
</tr>
<tr>
<td>Wireless@SG</td>
<td>59.6</td>
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</table>
CSISG 2015 Q1 RESULTS
RETAIL
CSISG 2015 Q1 Retail
Year-on-Year Changes

<table>
<thead>
<tr>
<th>Category</th>
<th>CSISG 2014</th>
<th>CSISG 2015</th>
</tr>
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<tbody>
<tr>
<td>Departmental Stores</td>
<td>68.4</td>
<td>68.6</td>
</tr>
<tr>
<td>Supermarkets</td>
<td>71.1</td>
<td>72.8</td>
</tr>
<tr>
<td>Petrol Service Stations</td>
<td>69.2</td>
<td>70.7</td>
</tr>
<tr>
<td>Motor Vehicles</td>
<td>70.6</td>
<td>70.6</td>
</tr>
<tr>
<td>Fashion Apparels</td>
<td>69.2</td>
<td>69.3</td>
</tr>
<tr>
<td>Furniture</td>
<td>66.7</td>
<td>66.7</td>
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<tr>
<td>Jewellery</td>
<td>68.7</td>
<td>69.3</td>
</tr>
<tr>
<td>Clocks &amp; Watches</td>
<td>67.7</td>
<td>68.6</td>
</tr>
</tbody>
</table>

Year-on-Year Change:
- Supermarkets: 1.0
- Motor Vehicles: 2.2
CSISG 2015 Q1 Retail
Petrol Service Stations

CSISG 2014
69.2

CSISG 2015
70.7

Shell 70.3
SPC 69.6
Caltex 68.6
Esso 68.3

71.7 SPC
71.5 Esso
70.1 Shell
67.5 Caltex
CSISG 2015 Q1 Retail
Supermarkets

<table>
<thead>
<tr>
<th>Supermarkets</th>
<th>CSISG 2014</th>
<th>CSISG 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>NTUC Fairprice</td>
<td>70.9</td>
<td>71.1</td>
</tr>
<tr>
<td>Cold Storage</td>
<td>71.7</td>
<td>71.6</td>
</tr>
<tr>
<td>Sheng Siong</td>
<td>71.6</td>
<td></td>
</tr>
<tr>
<td>Other supermarkets</td>
<td>69.2</td>
<td>69.4</td>
</tr>
<tr>
<td></td>
<td></td>
<td>67.3</td>
</tr>
</tbody>
</table>
CSISG 2015 Q1 Retail

Departmental Stores

- DFS 71.4
- Takashimaya 69.5
- Robinsons 69.4
- Isetan 69.7
- Tangs 67.9
- Metro 68.0
- OG 66.7
- Mustafa 65.6
- Other departmental stores 66.0

CSISG 2014: 68.4
CSISG 2015: 68.6
CSISG 2015 Q1 Retail

Furniture

CSISG 2014
66.7
IKEA 68.1
Other furniture 65.8

CSISG 2015
66.7
68.4 IKEA
66.2 Other furniture
CSISG 2015 Q1 Retail

Year-on-Year Changes in Tourist Respondents’ Satisfaction

Tourists’ year-on-year change in Retail Sector performance

<table>
<thead>
<tr>
<th>Category</th>
<th>2015</th>
<th>2014</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Departmental stores</td>
<td>0.5</td>
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<td>0.5</td>
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<tr>
<td>Fashion Apparels</td>
<td>0.5</td>
<td></td>
<td>0.5</td>
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<tr>
<td>Jewellery stores</td>
<td>-1.6</td>
<td>-1.6</td>
<td>-0.0</td>
</tr>
<tr>
<td>Clocks &amp; Watches</td>
<td>-1.0</td>
<td>-2.0</td>
<td>1.0</td>
</tr>
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</table>

Average Tourist Satisfaction

2015 69.7
2014 69.8
CSISG 2015 Q1 Retail
Year-on-Year Changes in Local Respondents’ Satisfaction

Locals’ year-on-year change in Retail Sector performance

<table>
<thead>
<tr>
<th>Departmental stores</th>
<th>Fashion Apparels</th>
<th>Jewellery stores</th>
<th>Clocks &amp; Watches</th>
</tr>
</thead>
<tbody>
<tr>
<td>-2</td>
<td>-0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>0.2</td>
<td>-0.0</td>
<td>0.9</td>
<td></td>
</tr>
<tr>
<td>0.2</td>
<td>-0.0</td>
<td></td>
<td>2.0</td>
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</table>

Average Local Satisfaction

2015 69.8
2014 69.8
The ability of perceived value to drive satisfaction has been declining, and more pronounced with tourist respondents over the past two years.

Using price promotions can bring customers to the store, but in itself cannot drive satisfaction efficiently.
Different touchpoints affect tourist and local satisfaction differently.

Service-related touchpoints significantly impact perceptions of quality, e.g., courtesy and professionalism.

However, stores with good layout and ambience are relatively more important for tourists.

The Singapore Brand can draw the tourists, but businesses also must be cognisant in ensuring the experience matches the expectations.

<table>
<thead>
<tr>
<th>Impact on Quality (in descending order)</th>
</tr>
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<tbody>
<tr>
<td>Locals</td>
</tr>
<tr>
<td>Courtesy</td>
</tr>
<tr>
<td>Professional</td>
</tr>
<tr>
<td>Variety</td>
</tr>
<tr>
<td>Exchange</td>
</tr>
<tr>
<td>Promotions</td>
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<tr>
<td>Layout</td>
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</tbody>
</table>
CSISG 2015 Q1 RESULTS
INFO-COMMUNICATIONS
CSISG 2015 Q1 Info-communications
Year-on-Year Change

<table>
<thead>
<tr>
<th>Service</th>
<th>2014</th>
<th>2015</th>
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</thead>
<tbody>
<tr>
<td>Mobile Telecoms</td>
<td>67.2</td>
<td>68.4</td>
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<tr>
<td>Broadband</td>
<td>65.3</td>
<td>64.9</td>
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<td>PayTV</td>
<td>66.5</td>
<td>65.1</td>
</tr>
<tr>
<td>Wireless@SG</td>
<td>61.5</td>
<td>59.6</td>
</tr>
</tbody>
</table>

Year-on-Year Change

- Mobile Telecoms: 67.2 to 68.4 (change: 1.2)
- Broadband: 65.3 to 64.9 (change: -0.4)
- PayTV: 66.5 to 65.1 (change: -1.4)
- Wireless@SG: 61.5 to 59.6 (change: -1.9)
CSISG 2015 Q1 Info-communications
Mobile Telecom

CSISG 2014
67.2

Singtel 68.1
StarHub 67.2

CSISG 2015
68.4

69.4 Singtel
69.0 StarHub

63.9 M1

M1 64.4
CSISG 2015 Q1 Info-communications
PayTV

CSISG 2014 66.5
StarHub 67.0
Singtel 65.0

CSISG 2015 65.1
66.6 StarHub
64.4 Singtel
CSISG 2015 Q1 Info-communications
Broadband

CSISG 2014
65.3

M1 66.2
StarHub 65.8
Singtel 65.1

CSISG 2015
64.9

66.9 StarHub
66.2 M1
64.1 Singtel
In 2014, satisfaction for customers with complaints handled well is 3.2% lower than that of customers with no reason to complain.
Have you complained to the company?

Yes

How would you rate the handling of your complaint?

- Poorly handled: 29.9% CSISG
- Well handled: 54.1% CSISG

No

You didn’t complain because...

- No reason: 69.8% CSISG
- Too difficult: 46.4% CSISG
- No point: 38.2% CSISG

In 2015, satisfaction for customers with complaints handled well is 22.5% lower than that of customers with no reason to complain.
CSISG 2015 Q1 Info-communications
Revisiting perceptions of dispute resolution

<table>
<thead>
<tr>
<th></th>
<th>Poorly-handled Complaints</th>
<th>Well-handled Complaints</th>
<th>No Reason to complain</th>
<th>Too difficult to complain</th>
<th>No point complaining</th>
</tr>
</thead>
<tbody>
<tr>
<td>Info-communications sector (2014)</td>
<td>30.6</td>
<td>66.3</td>
<td>68.6</td>
<td>35.9</td>
<td>36.6</td>
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<td></td>
<td></td>
<td></td>
<td>3.2% less than no reason to complain</td>
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<td>Retail sector (2015)</td>
<td>38.3</td>
<td>68.7</td>
<td>70.4</td>
<td>38.3</td>
<td>41.5</td>
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<tr>
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<td></td>
<td></td>
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<td>2.4% less than no reason to complain</td>
</tr>
<tr>
<td>Info-communications sector (2015)</td>
<td>29.9</td>
<td>54.1</td>
<td>69.8</td>
<td>46.4</td>
<td>38.2</td>
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<td></td>
<td></td>
<td>22.5% less than no reason to complain</td>
</tr>
</tbody>
</table>

Well-handled complaints in Infocomm 2015 sector substantially lower than customers with No Reason to Complain
Revisiting perceptions of dispute resolution

Well-handled complaints often result in high satisfaction, but Info-comm sector in 2015 demonstrates otherwise.

Some customer complaints may not be resolvable through customer service channels.

Companies should use customer feedback and complaints as an opportunity to review their value proposition and offerings, and to rethink what customers are looking for and if contact channels’ complaint resolution processes are still relevant.

The recommended long term solution is to shape customer expectations using branding and communications to position the experience such that the customers better know what to expect. By doing this, businesses are ensuring they are attracting the group of customers that will best appreciate their service proposition.
Additional Findings
CSISG 2015 Q1

Below Expectations
- Most Satisfied
- Least Satisfied

Met Expectations
- Most Satisfied
- Least Satisfied

Exceeded Expectations
- Most Satisfied
- Least Satisfied
People with high satisfaction have higher expectations than people with low satisfaction.
Failing to meet high expectations doesn’t mean low satisfaction;
Exceeding low expectations doesn’t mean high satisfaction
People with high expectations have higher satisfaction than those with low expectations, regardless of whether their expectations were met or not.

People with low expectations saw satisfaction scores that were significantly lower than perceived quality scores, also regardless of whether their expectations were met or not.

Note: People with high expectations that were not met still registered satisfaction scores that are higher that the perceived quality. So as long as the gap between the expected quality and perceived quality is managed well, your customers will be satisfied.