Customer Satisfaction Index of Singapore 2010 - Q1 Release
CSISG 2010 Q1 Release
Retail and Infocommunications

1. CSISG 2010 Q1 Release Quick Facts
2. CSISG 2010 Q1 Summary Findings
3. Complaint Behaviour and Customer Loyalty
CSISG 2010 Q1 Quick Facts

3,955 face-to-face interviews with Singapore residents at their homes (each resident answered about two questionnaires)

1,377 interviews with departing tourists at Changi airport (each tourist answered one questionnaire) pertaining to their experience with the retail sector

In all, 9,108 questionnaires about 535 companies were completed between January and February 2010 covering retail and infocomm sectors
CSISG 2010 Q1 SUMMARY FINDINGS

Satisfaction scores for the retail sector has improved significantly from a score of 65.8 last year to 68.2. This increase in satisfaction score for the retail sector was largely contributed by the tourists segment.

Overall tourists’ satisfaction score for retail sector has seen a tremendous improvement of 6.0 points (76.4) compared to last year.

Locals’ overall satisfaction level for retail sector has improved as well by 1.9 points to 67.5 in 2010.
The satisfaction score for the infocomm sector observed a drop of 2 points to 64.4 in 2010. This was largely due to companies not “meeting customer expectations”.

The infocomm sector has experienced 3 consecutive year-on-year decline in customer satisfaction.
Retail and Infocomm Results
CSISG 2010 Q1 Release

![Chart showing CSISG scores for Retail and Infocomm industries from 2007 to 2010.]

- **CSISG Score**
- **Retail**
- **Infocomm**

<table>
<thead>
<tr>
<th>Year</th>
<th>Retail Score</th>
<th>Infocomm Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007</td>
<td>68.5</td>
<td>68.5</td>
</tr>
<tr>
<td>2008</td>
<td>67.4</td>
<td>67.4</td>
</tr>
<tr>
<td>2009</td>
<td>67.2</td>
<td>66.4</td>
</tr>
<tr>
<td>2010</td>
<td>66.4</td>
<td>64.4</td>
</tr>
</tbody>
</table>

Note: The chart shows a general trend of decreasing scores for both industries until 2009, with a notable increase in 2010 for the Infocomm sector.
Retail Sector
Year-on-Year Changes
Customer Satisfaction is not Customer Service

Perceived Product Quality

Perceived Overall Quality

Perceived Value

Perceived Service Quality

Customer Expectations

Customer Complaints

Customer Satisfaction CSISG

Customer Loyalty
**Year-on-year Changes for Retail**

- **Perceived Service Quality**: +2.9* (72.1)
- **Perceived Overall Quality**: +2.9* (72.5)
- **Perceived Product Quality**: +2.9* (73.0)
- **Perceived Value**: +1.4* (71.8)
- **Customer Expectations**: 1.5* (70.5)
- **Customer Complaints**: -1.2 (1.5%)
- **Customer Satisfaction**: +2.4* (68.2)
- **Customer Loyalty**: +1.6* (70.8)

*Explanatory note: An asterisk represents a significant year-on-year change*
## CSISG 2010 1Q Retail Sub-sectors With year-on-year Change

<table>
<thead>
<tr>
<th>CSISG 2010</th>
<th>CSISG 2009</th>
<th>Change</th>
<th>Sub-sector</th>
</tr>
</thead>
<tbody>
<tr>
<td>70.0</td>
<td>65.5</td>
<td>▲ 4.5</td>
<td>Departmental Stores*</td>
</tr>
<tr>
<td>69.6</td>
<td>65.7</td>
<td>▲ 3.9</td>
<td>Motor Vehicles*</td>
</tr>
<tr>
<td>65.9</td>
<td>63.9</td>
<td>▲ 2.1</td>
<td>Furniture Stores</td>
</tr>
<tr>
<td>65.4</td>
<td>64.1</td>
<td>▲ 1.3</td>
<td>Supermarkets</td>
</tr>
<tr>
<td>68.5</td>
<td>66.6</td>
<td>▲ 1.9</td>
<td>Clocks &amp; Watches</td>
</tr>
<tr>
<td>66.4</td>
<td>66.1</td>
<td>▲ 0.3</td>
<td>Fashion Apparels</td>
</tr>
<tr>
<td>69.2</td>
<td>69.0</td>
<td>▲ 0.2</td>
<td>Jewellery Stores</td>
</tr>
<tr>
<td>66.4</td>
<td>67.8</td>
<td>▼ -1.5</td>
<td>Petrol Stations</td>
</tr>
</tbody>
</table>

Note: ▲ symbol indicates significant year-on-year improvement
* symbol indicates significantly higher than sector
## CSISG 2010Q1

### RETAIL SECTOR UP 2.4 TO 68.2

<table>
<thead>
<tr>
<th>Change</th>
<th>Score</th>
<th>Store</th>
</tr>
</thead>
<tbody>
<tr>
<td>+4.5</td>
<td>70.0</td>
<td>Departmental Stores</td>
</tr>
<tr>
<td>+10.5</td>
<td>76.7</td>
<td>DFS*</td>
</tr>
<tr>
<td>+4.7</td>
<td>70.2</td>
<td>CK Tang</td>
</tr>
<tr>
<td>+3.6</td>
<td>70.0</td>
<td>Takashimaya</td>
</tr>
<tr>
<td>+3.6</td>
<td>68.1</td>
<td>Metro</td>
</tr>
<tr>
<td>+4.1</td>
<td>67.0</td>
<td>OG</td>
</tr>
<tr>
<td>+1.7</td>
<td>67.0</td>
<td>Robinson &amp; Co</td>
</tr>
<tr>
<td>+1.9</td>
<td>67.0</td>
<td>Isetan</td>
</tr>
<tr>
<td>+0.2</td>
<td>64.6</td>
<td>All Others</td>
</tr>
</tbody>
</table>

Note: * symbol indicates significantly higher than sub-sector
## CSISG 2010Q1
### RETAIL SECTOR UP 2.4 TO 68.2

<table>
<thead>
<tr>
<th>Sector</th>
<th>Index</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Motor Vehicles</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>+3.9</td>
<td>69.6</td>
<td></td>
</tr>
<tr>
<td>+3.9</td>
<td>69.2</td>
<td></td>
</tr>
<tr>
<td>+3.2</td>
<td>69.1</td>
<td></td>
</tr>
<tr>
<td>+2.2</td>
<td>68.7</td>
<td></td>
</tr>
<tr>
<td>+1.6</td>
<td>68.1</td>
<td></td>
</tr>
<tr>
<td>+4.4</td>
<td>69.8</td>
<td></td>
</tr>
<tr>
<td><strong>Petrol Service Stations</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>-1.5</td>
<td>66.4</td>
<td></td>
</tr>
<tr>
<td>-1.7</td>
<td>66.6</td>
<td></td>
</tr>
<tr>
<td>-2.0</td>
<td>66.4</td>
<td></td>
</tr>
<tr>
<td>-2.3</td>
<td>66.4</td>
<td></td>
</tr>
<tr>
<td>-0.8</td>
<td>66.2</td>
<td></td>
</tr>
<tr>
<td><strong>All Others</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>+3.9</td>
<td>69.6</td>
<td></td>
</tr>
</tbody>
</table>
### CSISG 2010Q1
RETAIL SECTOR UP 2.4 TO 68.2

<table>
<thead>
<tr>
<th>Sector</th>
<th>Index</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supermarkets</td>
<td>65.4</td>
<td>+1.3</td>
</tr>
<tr>
<td>Cold Storage</td>
<td>67.1</td>
<td>+2.7</td>
</tr>
<tr>
<td>Sheng Siong</td>
<td>65.8</td>
<td>+2.0</td>
</tr>
<tr>
<td>NTUC Fairprice</td>
<td>65.4</td>
<td>+0.7</td>
</tr>
<tr>
<td>Mustafa</td>
<td>61.5</td>
<td>−2.1</td>
</tr>
<tr>
<td>All Others</td>
<td>64.9</td>
<td>+1.2</td>
</tr>
<tr>
<td>Jewellery</td>
<td>69.2</td>
<td>+0.2</td>
</tr>
<tr>
<td>Clocks and Watches</td>
<td>68.5</td>
<td>+1.9</td>
</tr>
<tr>
<td>Fashion Apparels</td>
<td>66.4</td>
<td>+0.3</td>
</tr>
<tr>
<td>Furniture</td>
<td>65.9</td>
<td>+2.1</td>
</tr>
</tbody>
</table>
Locals Vs Tourists In Retail Sector
Locals and Tourists Satisfaction Scores Have Risen Significantly

Year-on-year tourists’ satisfaction score has risen significantly across retail sub-sectors namely, Departmental Stores, Fashion Apparels, Jewellery and Clocks & Watches.

Locals’ satisfaction level for the retail sector has also improved significantly compared to last year.

The improvement in tourists’ satisfaction levels has contributed largely to the overall increase in satisfaction for the retail sector.
## Satisfaction Scores for CSISG 2010 1Q Release (Locals Only)

**Departmental Stores***
- 2010: 65.8 (+0.4)
- 2009: 65.4

**Fashion Apparels***
- 2010: 64.2 (–1.0)
- 2009: 65.2

**Jewellery***
- 2010: 68.1 (+0.1)
- 2009: 68.0

**Clocks & Watches***
- 2010: 66.8 (+1.8)
- 2009: 65.0

**Supermarkets**
- 2010: 65.4 (+1.3)
- 2009: 64.1

**Petrol Stations**
- 2010: 66.4 (–1.5)
- 2009: 67.8

**Motor Vehicles**
- 2010: 69.6 (+3.9)
- 2009: 65.7

---

**Retail Average Local Satisfaction**
- 2010: 67.5 +1.9
- 2009: 65.6

* Sub-sectors with tourist respondents.
Satisfaction of Retail sub-sectors in Q1 of CSISG 2010 (Tourists Only)

- **Departmental Stores**
  - 2009: 67.0
  - 2010: 75.3 (+8.3)

- **Fashion Apparels**
  - 2009: 70.9
  - 2010: 76.5 (+5.6)

- **Jewellery**
  - 2009: 73.8
  - 2010: 76.6 (+2.9)

- **Clocks & Watches**
  - 2009: 73.0
  - 2010: 78.3 (+5.3)

Retail Average Tourist Satisfaction
- 2010: 76.4 (+6.0)
- 2009: 70.4
Satisfaction scores by country of residence

1,377 tourist respondents answered about Singapore retail sector
INFOCOMM SUB-SECTOR YOY CHANGES
Year-on-year Changes For Infocomm

- **Perceived Overall Quality**: -0.2
  - Change in average score: 69.2

- **Perceived Value**: -1.8*
  - Change in average score: 67.7

- **Customer Expectations**: +2.2*
  - Change in average score: 69.1

- **Customer Complaints**: +1.4
  - Change in average score: 6.3%

- **Customer Satisfaction**: -2.0*
  - Change in average score: 64.4

- **Customer Loyalty**: +1.7*
  - Change in average score: 72.8

*Explanatory note: An asterisk represents a significant year-on-year change
## CSISG 2010 1Q Infocomm Sub-sectors With Year-on-Year Change

<table>
<thead>
<tr>
<th>CSISG 2010</th>
<th>CSISG 2009</th>
<th>Change</th>
<th>Sub-sector</th>
</tr>
</thead>
<tbody>
<tr>
<td>63.6</td>
<td>65.2</td>
<td>▼-1.6</td>
<td>Internet Service Providers</td>
</tr>
<tr>
<td>64.7</td>
<td>66.6</td>
<td>▼-1.9</td>
<td>Telecommunications</td>
</tr>
</tbody>
</table>

Note: ▼ symbol indicates significant year-on-year decline
CSISG 2010Q1  
INFOCOMM SECTOR DOWN 2.0 TO 64.4

<table>
<thead>
<tr>
<th>Change</th>
<th>Score</th>
<th>Company</th>
</tr>
</thead>
<tbody>
<tr>
<td>-1.9</td>
<td>64.7</td>
<td>Mobile Telecom</td>
</tr>
<tr>
<td>-2.4</td>
<td>65.7</td>
<td>StarHub</td>
</tr>
<tr>
<td>+0.8</td>
<td>65.7</td>
<td>M1</td>
</tr>
<tr>
<td>-2.8</td>
<td>63.5</td>
<td>SingTel</td>
</tr>
<tr>
<td>-1.6</td>
<td>63.6</td>
<td>Internet Service Providers</td>
</tr>
<tr>
<td>-2.3</td>
<td>63.8</td>
<td>StarHub</td>
</tr>
<tr>
<td>-2.0</td>
<td>63.1</td>
<td>SingNet</td>
</tr>
<tr>
<td></td>
<td>65.6</td>
<td>All Others</td>
</tr>
</tbody>
</table>
COMPLAINT BEHAVIOR AND CUSTOMER LOYALTY
Across retail and infocomm sectors, customers who had no reason to complain were the most loyal (73.8). Interestingly, customers who complained and whose complaints were handled well, reported higher loyalty (61.7) than those whose complaints were handled poorly (32.1).
Collectively, customers who felt that there was no point complaining and customers whose complaints were handled poorly reported low levels of customer loyalty.

This signifies a need to devote resources to reduce dissatisfaction through:

- ensuring effectiveness of feedback channels
- developing adequate complaint handling processes
Both Sectors

n=9,107

Have you complained to [company] in the past 3 mths?

Yes 2.08%

No 97.92%

How would you rate the handling of your complaint on a scale from 1 to 10?

Handled poorly 39.36%

Handled well 60.64%

You didn’t complain because...

No reason 96.69%

Too difficult 1.86%

No point 1.45%

Customer Loyalty Scores

Handled poorly 32.1

Handled well 61.7

No reason 73.8

Too difficult 55.8

No point 43.3
Retail Sector

n=7,596

Have you complained to [company] in the past 3 mths?

- Yes: 1.25%
- No: 98.75%

How would you rate the handling of your complaint on a scale from 1 to 10?

- Handled poorly: 64.13%
- Handled well: 35.87%

You didn’t complain because...

- No reason: 97.13%
- Too difficult: 1.61%
- No point: 1.25%

Customer Loyalty Scores

- 33.1
- 59.6
- 73.5
- 56.0
- 43.9
INFOCOMM SECTOR
n=1,511

Have you complained to [company] in the past 3 mths?

Yes 6.22%

Have you complained to [company] in the past 3 mths?

No 93.78%

How would you rate the handling of your complaint on a scale from 1 to 10?

Handled poorly 40.45%

Handled well 59.55%

You didn’t complain because...

No reason 94.42%

Too difficult 3.11%

No point 2.47%

Customer Loyalty Scores

31.2 64.0 75.8 55.4 41.7
Customers Who Were Unhappy but Yet Did not Complain

Complaint rates comprise of customers who complained directly to the company.

However, there exists customers who wanted to complain but yet did not do so.

These customers were unhappy but yet did not complain because they felt it was either too difficult to complain or that there was no point complaining.
Comparing Proportions of Unhappy Customers in Retail and Infocomm

<table>
<thead>
<tr>
<th>Year</th>
<th>Retail</th>
<th>Infocomm</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>10.0%</td>
<td>6.4%</td>
</tr>
<tr>
<td>2009</td>
<td>2.2%</td>
<td>2.3%</td>
</tr>
<tr>
<td>2010</td>
<td>2.8%</td>
<td>5.3%</td>
</tr>
</tbody>
</table>
Appendix A
- Retail Score Excludes Motor Vehicles
Q1 CSISG 2010 Retail Score

With Motor Vehicles

2009: 65.8
2010: 68.2
Change: 2.4*

Without Motor Vehicles

2009: 65.9
2010: 67.1
Change: 1.3*
Retail YOY Changes (Excl Motor Veh)

Perceived Service Quality
+1.1* 70.5

Perceived Overall Quality
+1.2* 71.1

Customer Complaints
-0.4 1.0%

Perceived Product Quality
+1.3* 71.5

Perceived Value
-0.7* 69.8

Customer Satisfaction
+1.3* 67.1

Customer Expectations
+2.0* 69.6

Customer Loyalty
+1.7* 73.6

*Explanatory note: An asterisk represents a significant year-on-year change