MEDIA RELEASE

CSISG 2011 Q3 RESULTS

FOOD & BEVERAGE AND TOURISM
3Q CSISG 2011 Media Briefing

1. 3rd Quarter CSISG 2011 Results Overview
2. Key Findings
3. Results and highlights of Food & Beverage Sector
4. Results and highlights of Tourism Sector
5. Conclusion
6. Discussion
How sampling for the national study works

1. Each year, a randomised list of approximately 15,000 household addresses purchased from Department of Statistics matching housing profile of Singapore resident population

<table>
<thead>
<tr>
<th>Street Address</th>
<th>Postal Code</th>
<th>Housing Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>953 Bukit Timah Road #11-07</td>
<td>589651</td>
<td>Condominium</td>
</tr>
<tr>
<td>640 Portchester Avenue</td>
<td>556346</td>
<td>Landed</td>
</tr>
<tr>
<td>...</td>
<td>...</td>
<td>...</td>
</tr>
<tr>
<td>132 Ang Mo Kio Avenue 3 #15-1619</td>
<td>560132</td>
<td>HDB 5-Room</td>
</tr>
</tbody>
</table>
How sampling for the national study works

2 A random subset of addresses is extracted from the master list for each quarter’s fieldwork

Master List of 15,000 Household Addresses

<table>
<thead>
<tr>
<th>Street Address</th>
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</tr>
</thead>
<tbody>
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<td>560132</td>
<td>HDB 5-Room</td>
</tr>
</tbody>
</table>
Surveyors are sent to each address in the address listing
How sampling for the national study works

4 The person in the household who celebrated their birthday most recently is chosen to answer the survey

Other prerequisites to qualify for the CSISG national survey

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Singapore Citizen, Singapore PR, Student Pass Holder, or Tourist</td>
</tr>
<tr>
<td>2</td>
<td>Between 18 and 84 years of age</td>
</tr>
</tbody>
</table>
How sampling for the national study works

The first part of the survey is an incidence survey for each sub-sector measured in the current quarter.

<table>
<thead>
<tr>
<th>Bars and Pubs</th>
<th>Food Courts</th>
<th>Cafes, Coffee Houses, Snack Bars</th>
<th>Fast Food Restaurants</th>
<th>Restaurants</th>
<th>Tour Operators, Travel &amp; Ticketing Agencies</th>
<th>Hotels</th>
<th>Attractions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q1 Have you dined at a restaurant in the last 3 months?</td>
<td>Q1 Have you visited a place of interest/attraction in the last 6 months?</td>
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</tr>
<tr>
<td>Q2 [If Q1=Yes] Which Restaurant have you dined at most frequently in the last 3 months? (If more than one, record the one with the most frequent contact)</td>
<td>Q2 [If Q1=Yes] Which Place of interest/Attraction have you visited in the past 6 months?</td>
<td>Q2 [If Q1=Yes] Which Place of interest/Attraction have you visited in the past 6 months?</td>
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<td>Q2 [If Q1=Yes] Which Place of interest/Attraction have you visited in the past 6 months?</td>
</tr>
<tr>
<td>Q3 Did you visit (INSERT NAME OF ATTRACTION) with tour group or it was a free and easy arrangement?</td>
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<td>Q3 Did you visit (INSERT NAME OF ATTRACTION) with tour group or it was a free and easy arrangement?</td>
</tr>
</tbody>
</table>
How sampling for the national study works

Based on the answers to the incidence survey, the surveyor will randomly pick two sub-sectors (in different sectors) the respondent had recent activity in.
How sampling for the national study works

The respondent answers up to 17 CSISG questions and 15 touchpoint questions about their experiences with each company they identified earlier in the incidence survey.

<table>
<thead>
<tr>
<th>Restaurants</th>
<th>Attractions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Before your recent experiences in the last 3 months with <strong>Lao Beijing</strong>, using a 1 to 10 scale, how would you rate?</td>
<td>Before your recent experiences in the last 6 months with <strong>Sentosa</strong>, using a 1 to 10 scale, how would you rate?</td>
</tr>
<tr>
<td>Q1</td>
<td>Q1</td>
</tr>
<tr>
<td>the overall quality you were expecting to experience, where 1 means “you were expecting very low quality” and 10 means “you were expecting very high quality”?</td>
<td>the overall quality you were expecting to experience, where 1 means “you were expecting very low quality” and 10 means “you were expecting very high quality”?</td>
</tr>
<tr>
<td>...</td>
<td>...</td>
</tr>
<tr>
<td>Q17</td>
<td>Q17</td>
</tr>
<tr>
<td>If asked, how likely would you recommend <strong>Lao Beijing</strong>, where 1 means very unlikely and 10 means very likely?</td>
<td>If asked, how likely would you recommend <strong>Sentosa</strong>, where 1 means very unlikely and 10 means very likely?</td>
</tr>
</tbody>
</table>
How sampling for the national study works

At the end of the fieldwork period, typically 250 respondents per company would have answered the CSISG questionnaire.

### Attractions (2011)

<table>
<thead>
<tr>
<th>Attraction</th>
<th>n</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jurong Bird Park</td>
<td>250</td>
</tr>
<tr>
<td>Night Safari</td>
<td>250</td>
</tr>
<tr>
<td>Sentosa</td>
<td>252</td>
</tr>
<tr>
<td>Singapore Zoo</td>
<td>250</td>
</tr>
<tr>
<td>Universal Studios</td>
<td>255</td>
</tr>
<tr>
<td>Other Attractions</td>
<td>276</td>
</tr>
</tbody>
</table>
3Q CSISG 2011 Quick Facts

- 3,834 face to face interviews with Singapore residents at their homes (each resident answered up to two questionnaires)
- 3,381 interviews with departing tourists at Changi Airport (each tourist answered one questionnaire) pertaining to their experience with the F&B or Tourism sectors
- In all, 7,215 interviews yielded 8,395 questionnaires covering 390 companies
- The survey was conducted in July and August 2011
Changes to the Index

- First year of measurement for Universal Studios
- Wildlife Reserves’ score separated into its 3 constituent entities, i.e., Singapore Zoo, Night Safari, and Jurong Bird Park
- Underwater World is now tracked under the Sentosa umbrella
CSISG 2011 Q3 RESULTS
CSISG 2011 Q3 Sector Results

CSISG Score

2007: 67.7
2008: 65.4
2009: 65.0
2010: 65.1
2011: 67.5

Tourism: (+4.2)
F&B: (+2.4)
CSISG 2011 Q3 Sector Results

- **Tourism** (+4.2)
  - 2007: 71.0
  - 2008: 68.6
  - 2009: 68.0
  - 2010: 69.3
  - 2011: 73.5

- **F&B** (+2.4)
  - 2007: 67.7
  - 2008: 67.8
  - 2009: 67.1
  - 2010: 67.2
  - 2011: 67.5
CSISG To-Date Sector Results

Q1
Retail
Info-Communications

Q2
Private Education
Public Education
Transport & Logistics

Q3
F&B
Tourism

Q4
Healthcare
Finance & Insurance

Singapore Score
Sector Score

Monday, October 31, 2011
## CSISG 2011 Q3 Results at a Glance

### 67.5 Food & Beverage
- 68.4 Restaurants*
- 70.7 Tung Lok*
- 70.6 RE&S*
- 69.6 Sakae Holdings
- 69.0 Crystal Jade
- 68.1 Other Restaurants

### 67.8 Cafes and Snack Bars
- 69.7 The Coffee Bean & Tea Leaf*
- 68.0 Starbucks
- 67.0 Delifrance
- 67.7 Other Cafes and Snack Bars

### 67.6 Fast Food Restaurants
- 70.3 Burger King*
- 68.2 KFC
- 65.9 McDonalds
- 70.4 Other Fast Food Restaurants*

### 66.9 Bars & Pubs

### 62.6 Food Courts

### 73.5 Tourism

#### 75.3 Attractions
- 76.6 Singapore Zoo
- 75.7 Universal Studios

#### 74.5 Sentosa

#### 73.2 Night Safari

#### 72.6 Jurong Bird Park

#### 75.8 Other Attractions

#### 74.5 Hotels
- 81.3 The Ritz Carlton*
- 80.5 Shangri-La Hotel*
- 79.9 Grand Hyatt*
- 79.8 Mandarin Orchard*
- 79.7 Swissotel the Stamford*
- 72.7 Other Hotels

#### 71.5 Tour Operators, Travel & Ticketing Agencies
CSISG 2011 Q3 Results at a Glance

67.5 Food & Beverage
68.4 Restaurants*
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70.6 RE&S*
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68.2 KFC
65.9 McDonalds
70.4 Other Fast Food Restaurants*
66.9 Bars & Pubs
62.6 Food Courts

73.5 Tourism
73.2 Night Safari
72.6 Jurong Bird Park
75.8 Other Attractions

74.5 Hotels
81.3 The Ritz Carlton*
80.5 Shangri-La Hotel*
79.9 Grand Hyatt*
79.8 Mandarin Orchard*
79.7 Swisstotel the Stamford*
72.7 Other Hotels

71.5 Tour Operators, Travel & Ticketing Agencies

The Ritz-Carlton 81.3

Monday, October 31, 2011
CSISG 2011 Q3 Results at a Glance

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76.6 Singapore Zoo
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79.7 Swisstotel the Stamford*
72.7 Other Hotels

71.5 Tour Operators, Travel & Ticketing Agencies
CSISG 2011 Q3 RESULTS

Key Findings
Finding 1: Shaping Customer Expectations

Disconfirmation of Expectations

Customer Satisfaction

Positive Disconfirmation

Negative Disconfirmation

Disconfirmation of Expectations

Customer Satisfaction
Finding 2: Price Discount an Ineffective Retention Tool

Effect of a 5-point increase in Perceived Value on Retention

- Restaurants
- Fast Food Restaurants
- Cafes, Coffee Houses, & Snack Bars
- Bars & Pubs
- Food Courts
- Attractions
- Hotels
- Tour Operators, Travel & Ticketing Agencies

2010

2011
Finding 3: Lower Price Tolerance

Perceived Value scores on a 0 to 100 scale

Effect of a 5-point increase in Perceived Value on Price Tolerance

Monday, October 31, 2011
CSISG 2011 Q3 RESULTS
FOOD & BEVERAGE (F&B)
Year-on-year changes in **Locals’** satisfaction of F&B sector and sub-sectors

<table>
<thead>
<tr>
<th>F&amp;B Sector</th>
<th>Year-on-Year Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restaurants</td>
<td>(+6.6%)</td>
</tr>
<tr>
<td>Fast-food Restaurants</td>
<td>(+11.3%)</td>
</tr>
<tr>
<td>Cafes et al</td>
<td>(+7.8%)</td>
</tr>
<tr>
<td>Bars &amp; Pubs</td>
<td>(+3.3%)</td>
</tr>
<tr>
<td>Food Courts</td>
<td>(+5.6%)</td>
</tr>
</tbody>
</table>

F&B Average Local Satisfaction Year-on-Year Change

+6.5%
Year-on-year changes in Tourists’ satisfaction of F&B sector and sub-sectors

<table>
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<tr>
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<th>Year-on-Year Change</th>
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<tbody>
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</tr>
<tr>
<td>Cafes et al</td>
<td>(+3.5%)</td>
</tr>
<tr>
<td>Bars &amp; Pubs</td>
<td>(+5.1%)</td>
</tr>
<tr>
<td>Food Courts</td>
<td>(+6.8%)</td>
</tr>
</tbody>
</table>

F&B Average Tourist Satisfaction Year-on-Year Change: +3.1%
CSISG 2011 Q3 F&B Sub-sectors
Year-on-Year Change

<table>
<thead>
<tr>
<th>Change</th>
<th>CSISG 2011</th>
<th>Sub-sector</th>
</tr>
</thead>
<tbody>
<tr>
<td>+5.2</td>
<td>67.6</td>
<td>Fast Food Restaurants</td>
</tr>
<tr>
<td>+3.9</td>
<td>67.8</td>
<td>Cafes et al</td>
</tr>
<tr>
<td>+3.3</td>
<td>62.6</td>
<td>Food Courts</td>
</tr>
<tr>
<td>+2.1</td>
<td>66.9</td>
<td>Bars &amp; Pubs</td>
</tr>
<tr>
<td>+1.9</td>
<td>68.4 *</td>
<td>Restaurants</td>
</tr>
</tbody>
</table>

**Note:** Significant year-on-year changes are represented in red/green
* symbol indicates significantly higher than sector average
**CSISG 2011 Q3**  
**F&B: Fast-Food Restaurants**

<table>
<thead>
<tr>
<th>Change</th>
<th>Score</th>
<th>Restaurant</th>
</tr>
</thead>
<tbody>
<tr>
<td>+5.2</td>
<td>67.6</td>
<td>Fast Food Restaurants</td>
</tr>
<tr>
<td>+8.3</td>
<td>70.3</td>
<td>Burger King</td>
</tr>
<tr>
<td>+7.2</td>
<td>68.2</td>
<td>KFC</td>
</tr>
<tr>
<td>+2.5</td>
<td>65.9</td>
<td>McDonalds</td>
</tr>
<tr>
<td></td>
<td>70.4</td>
<td>Other fast-food restaurants</td>
</tr>
</tbody>
</table>

**Notes:** Significant year-on-year changes are represented in red/green  
* Indicates company is significantly higher than its sub-sector score
## CSISG 2011 Q3
### F&B: Cafes et al

<table>
<thead>
<tr>
<th>Change</th>
<th>Score</th>
<th>Company</th>
</tr>
</thead>
<tbody>
<tr>
<td>+3.9</td>
<td>67.8</td>
<td>Cafes et al</td>
</tr>
<tr>
<td>+8.8</td>
<td>69.7</td>
<td>Coffee Bean</td>
</tr>
<tr>
<td>+3.7</td>
<td>68.0</td>
<td>Starbucks</td>
</tr>
<tr>
<td>+3.1</td>
<td>67.0</td>
<td>Delifrance</td>
</tr>
<tr>
<td></td>
<td>67.7</td>
<td>Other cafes</td>
</tr>
</tbody>
</table>

**Notes:** * Indicates company is significantly higher than its sub-sector score

Significant year-on-year changes are represented in red/green

Monday, October 31, 2011
# CSISG 2011 Q3

## F&B: Restaurants

<table>
<thead>
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<th>Change</th>
<th>Score</th>
<th>Company</th>
</tr>
</thead>
<tbody>
<tr>
<td>+1.9</td>
<td>68.4</td>
<td>Restaurants</td>
</tr>
<tr>
<td>+7.1</td>
<td>70.6</td>
<td>RE&amp;S</td>
</tr>
<tr>
<td>+5.5</td>
<td>70.7</td>
<td>Tung Lok</td>
</tr>
<tr>
<td>+4.1</td>
<td>69.6</td>
<td>Sakae Holdings</td>
</tr>
<tr>
<td>+3.0</td>
<td>69.0</td>
<td>Crystal Jade</td>
</tr>
<tr>
<td></td>
<td>68.1</td>
<td><em>Other restaurants</em></td>
</tr>
</tbody>
</table>

**Notes:** Significant year-on-year changes are represented in red/green.

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CSISG 2011 Q3 F&B Sector
Key Findings

• F&B companies that made very significant gains include:
  - Burger King +8.3 points (13.4%)
  - Coffee Bean +8.8 points (14.5%)
  - RE&S +7.1 points (11.2%)

• Fast-Food sub-sector registered largest year-on-year improvements

• RE&S most improved in Restaurants; touchpoint scores are peer-leading

• Local satisfaction makes bigger improvements than Tourist satisfaction
CSISG 2011 Q3 RESULTS
TURISM
Year-on-year changes in Locals’ satisfaction of Tourism sector and sub-sectors

Tourism Sector

- Attractions: (+4.2%)
- Hotels: (+1.3%)
- Tour Operators, Travel & Ticketing Agencies: (+9.3%)

Tourism Average Local Satisfaction Year-on-Year Change: +5.1%
Year-on-year changes in Tourists’ satisfaction of Tourism sector and sub-sectors

Tourism Sector

Attractions (+8.4%)
Hotels (+0.8%)
Tour Operators, Travel & Ticketing Agencies (+11.0%)

Tourism Average Tourist Satisfaction Year-on-Year Change +6.5%
## CSISG 2011 Q3 Tourism Sub-sectors
### Year-on-Year Change

<table>
<thead>
<tr>
<th>Change</th>
<th>CSISG 2011</th>
<th>Sub-sector</th>
</tr>
</thead>
<tbody>
<tr>
<td>+6.7</td>
<td>71.5</td>
<td><strong>Tour Operators, Travel &amp; Ticketing Agencies</strong></td>
</tr>
<tr>
<td>+5.0</td>
<td>75.3 *</td>
<td><strong>Attractions</strong></td>
</tr>
<tr>
<td>+0.5</td>
<td>74.5</td>
<td><strong>Hotels</strong></td>
</tr>
</tbody>
</table>

**Notes:** Significant year-on-year changes are represented in red/green. * symbol indicates significantly higher than sector average.
<table>
<thead>
<tr>
<th>Change</th>
<th>Score</th>
<th>Attraction</th>
</tr>
</thead>
<tbody>
<tr>
<td>+5.0</td>
<td>75.3</td>
<td>Attractions</td>
</tr>
<tr>
<td>+7.3</td>
<td>76.6</td>
<td>Singapore Zoo</td>
</tr>
<tr>
<td>+5.3</td>
<td>73.2</td>
<td>Night Safari</td>
</tr>
<tr>
<td>+4.6</td>
<td>72.6</td>
<td>Jurong Bird Park</td>
</tr>
<tr>
<td>+4.3</td>
<td>74.5</td>
<td>Sentosa</td>
</tr>
<tr>
<td></td>
<td>75.7</td>
<td>Universal Studios</td>
</tr>
<tr>
<td></td>
<td>75.8</td>
<td>Other attractions</td>
</tr>
</tbody>
</table>

**Notes:** Significant year-on-year changes are represented in red/green

* Indicates company is significantly higher than its sub-sector score

First year of measurement for Universal Studios

First year Wildlife Reserves’ score is separated into its 3 entities
### CSISG 2011 Q3
Tourism: Hotels

<table>
<thead>
<tr>
<th>Change</th>
<th>Score</th>
<th>Company</th>
</tr>
</thead>
<tbody>
<tr>
<td>+0.5</td>
<td>74.5</td>
<td><strong>Hotels</strong></td>
</tr>
<tr>
<td>+2.2</td>
<td>80.5</td>
<td>Shangri-La Hotel</td>
</tr>
<tr>
<td>+2.1</td>
<td>79.8</td>
<td>Mandarin Orchard</td>
</tr>
<tr>
<td>+1.9</td>
<td>79.9</td>
<td>Grand Hyatt</td>
</tr>
<tr>
<td>+0.5</td>
<td>79.7</td>
<td>Swissotel the Stamford</td>
</tr>
<tr>
<td>-2.2</td>
<td>81.3</td>
<td>The Ritz-Carlton</td>
</tr>
<tr>
<td></td>
<td>72.7</td>
<td><em>Other hotels</em></td>
</tr>
</tbody>
</table>

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CSISG 2011 Q3 Tourism Sector
Key Findings

• Tour Operators, Travel & Ticketing Agencies sub-sector makes largest year-on-year improvement; Attractions sub-sector on par with Hotels sub-sector

• USS makes strong debut; peer-leading touchpoint scores

• Measured hotels continue CSISG-leading scores

• Tourist satisfaction show bigger improvement than Local satisfaction
USS leads in touchpoint performance

Attractions – Satisfaction with ease of getting around

- Universal Studios: 8.5 ± 0.13
- Zoo: 8.1 ± 0.14
- Other attractions: 8.1 ± 0.13
- Sentosa: 8.1 ± 0.13
- Night Safari: 8.0 ± 0.14
- Jurong Bird Park: 8.0 ± 0.14

Average Satisfaction Rating: 250, 276, 251, 250, 250
USS leads in touchpoint performance

Attractons – Satisfaction with staff knowledge about the attraction

- Universal Studios: 8.1 ± 0.13
- Sentosa: 7.7 ± 0.14
- Jurong Bird Park: 7.5 ± 0.13
- Other attractions: 7.6 ± 0.13
- Zoo: 7.8 ± 0.13
CSISG 2011 Q3
Overall Findings & Conclusions

- Finding 1: Managing Customer Expectations
- Finding 2: Price Discount is becoming a Less Effective Retention Tool
- Finding 3: Lower Price Tolerance
- Successful companies use an extensive and holistic approach to raise Customer Satisfaction
CSISG 2011 Q3
Questions & Contacts

Institute of Service Excellence at SMU (ISES)
Singapore Management University
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