



ISE INDUSTRY FORUM

CSISG 2021 Q3 RESULTS ANNOUNCEMENT

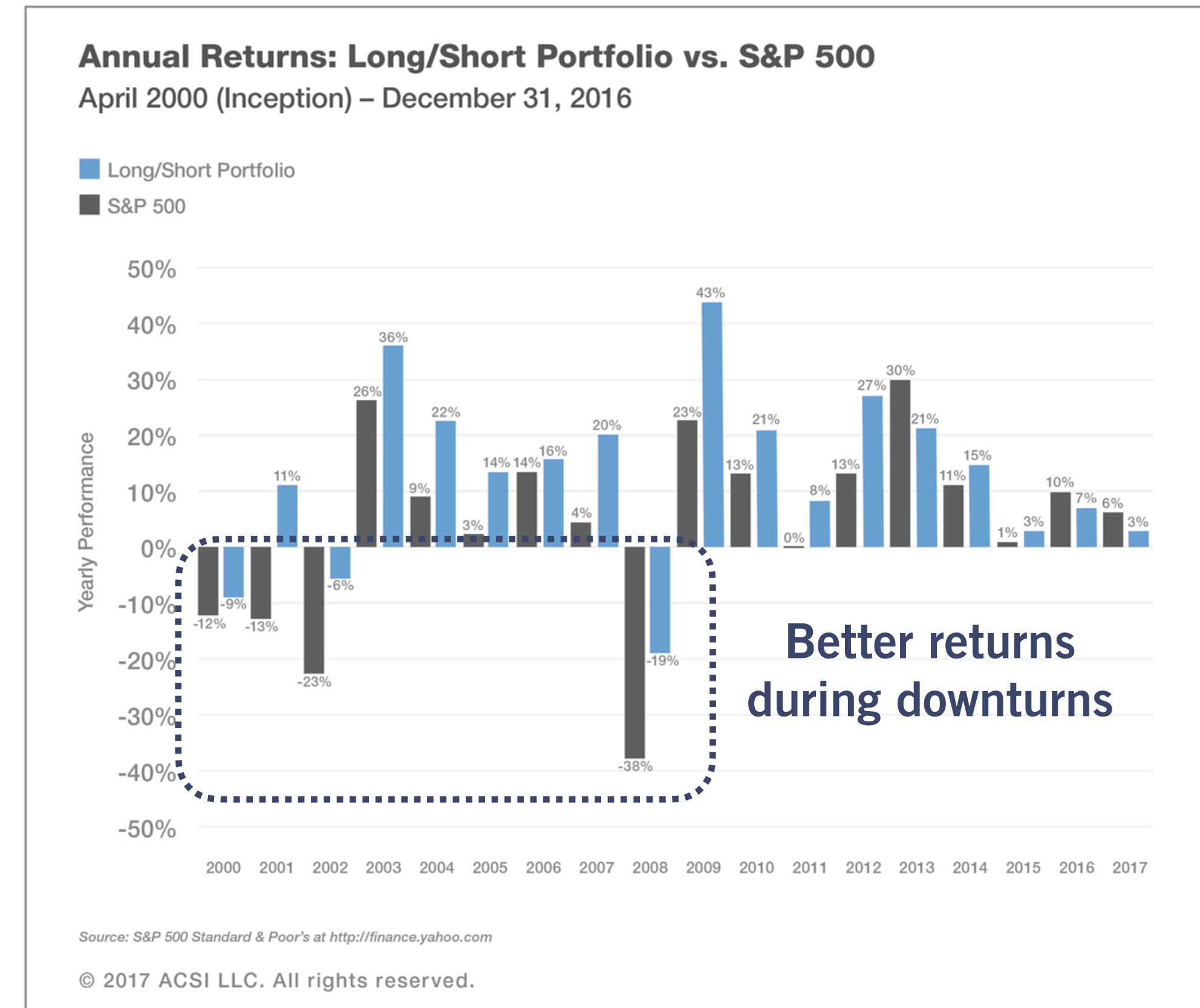
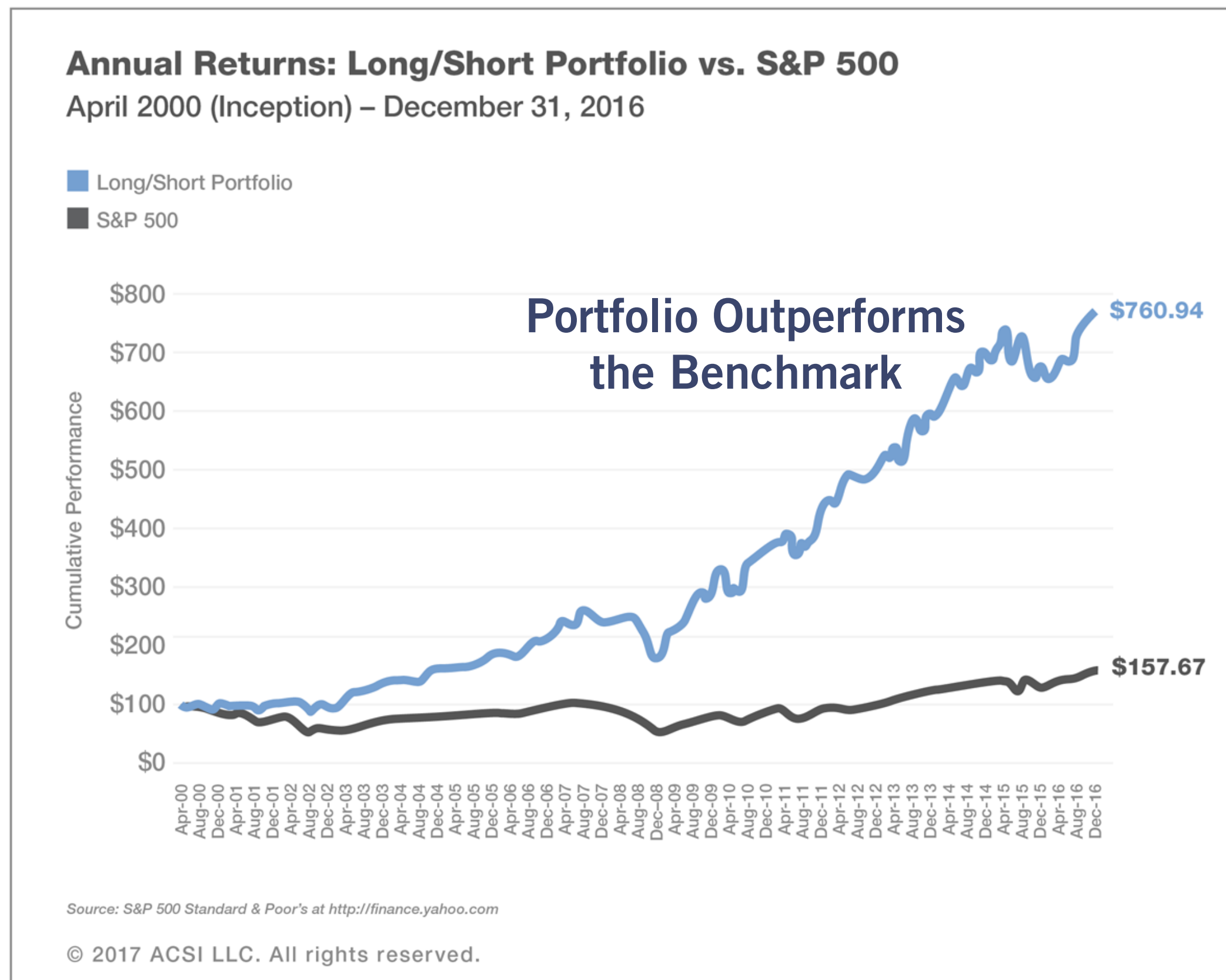
F&B AND TOURISM

**DOES CUSTOMER SATISFACTION
STILL MATTER?**

Research Shows A Positive Relationship Between Customer Satisfaction And Financial Performance

Companies Performing Well on Customer Satisfaction Outperform the Benchmark Index

Companies with more satisfied customers generally more resilient even during downturns



Source: <http://www.theacsi.org/>
 Note: Fund is named The American Customer Satisfaction Core Alpha ETF (ticker: ACSI)

Why Customer Experience & Satisfaction Matters



- Great customer experiences tend to lead to satisfaction or even delight.
- Happy customer tend to be more loyalty to the brand.
- Poor experiences tend to lead to customer dissatisfaction and defection and negative word-of-mouth.

- High repurchase behaviour
- Price insensitivity
- Positive word-of-mouth
- Higher customer referrals
- Stays longer with brand in downturns
- Returns to the brand faster in a recovery



CSISG METHODOLOGY

How Well Did Companies Satisfy Their Customers?

The CSISG Score



- 1. Overall Satisfaction**
- 2. Ability to Meet Expectations**
- 3. Similarity to Ideal**

CSISG Structural Model for Q3

Perceived Product Quality
Perceived Product Customisation
Perceived Product Reliability

**Perceived
Product Quality**

**Perceived
Service Quality**

Perceived Service Quality
Perceived Service Customisation
Perceived Service Reliability

**Perceived
Overall Quality**
(After Recent
Experience)

Price / Quality
Quality / Price

**Perceived
Value**

**Customer
Expectations**
(Predicted Quality
Before Recent
Experience)

Predicted Overall Quality
Predicted Customisation
Predicted Reliability

**Customer
Satisfaction**

Overall Satisfaction
Ability to Meet Expectations
Similarity to Ideal

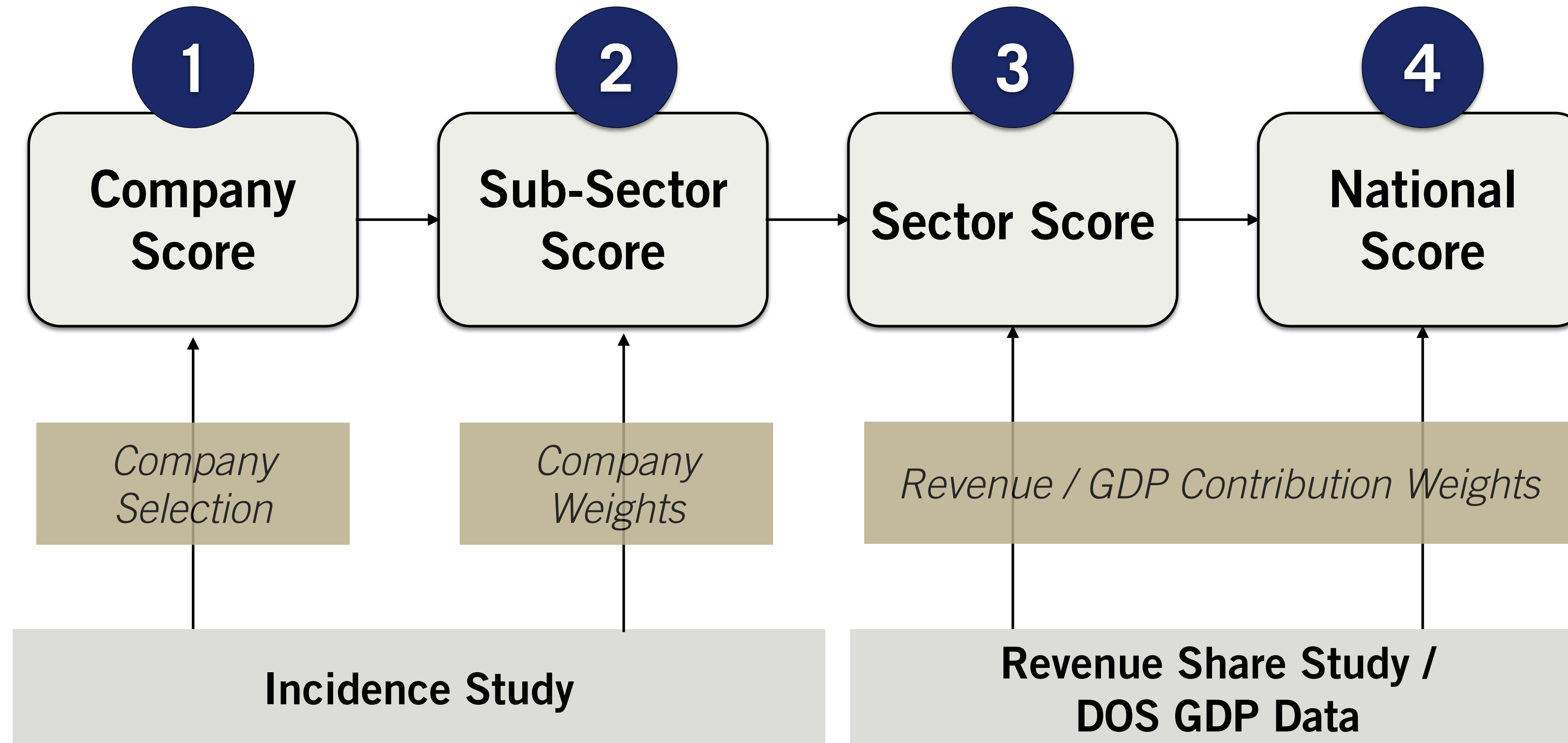
Complaint Behaviour

**Customer
Complaints**

**Customer
Loyalty**

Repurchase Intention
Price Tolerance

Overview of Score Calculation



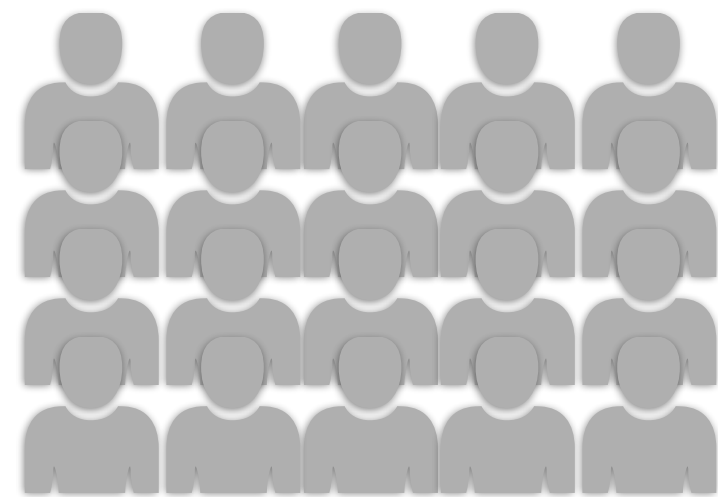
- Identify companies with highest interactions with locals.
- Locals surveyed through nationally representative online panels.

- Identify revenue contribution of each sub-sector to its respective sector.
- Identify GDP contribution of each sector to the total GDP of sectors measured in the CSISG.

General CSISG Fieldwork Methodology for Q3

Singapore citizens and PRs were asked to complete an online survey. Respondents were randomly selected from a nationally representative online panel.

Each respondent answers up to 21 CSISG questions and about 25 industry-specific attribute/touchpoint questions about the company/brand they had recent experiences with. Each respondent evaluates only 1 company/brand.



Typically 50-200 respondents per company would have answered the CSISG questionnaire.

CSISG 2021 Q3 Quick Facts

Sectors Covered	Food & Beverages Tourism (Attractions)
Survey Period	Jul to Sep 2021
Total Questionnaires Completed	2,600
Online (Locals)	2,600
Distinct entities measured	77
Entities with published scores	20

Dynamic Shifts In Safe Management Since The Last Measurement

Changes To COVID-19 Measures For F&B and Attractions

	2020 Circuit Breaker	2020 Post-Circuit Breaker		2021 Phase 3/ Phase 3 HA		2021 Phase 2 HA/ 3 HA/ 2 HA			Preparatory & Stabilisation Phases	
Phase period:	CB 7 Apr -1 Jun 2020	Phase 1 2 -18 Jun 2020	Phase 2 19 Jun - 27 Dec 2020	Phase 3 28 Dec 2020 - 7 May 2021	Phase 3 HA 8 -15 May 2021	Phase 2 HA 16 May - 13 Jun 2021	Phase 3 HA 14 Jun - 21 Jul 2021	Phase 2 HA 22 Jul - 18 Aug 2021	Preparatory 19 Aug - 26 Sep 2021	Stabilisation 27 Sep - 21 Nov 2021
F&B	Take-away/ delivery	Take-away/ delivery	5pax	8pax	5pax	2-5pax	5 pax (w.e.f. 21 Jun)	Take-away/ delivery	2-5 pax	2-5pax
Attractions	Closed	Closed	25% - 50% capacity (Reopened Jul'20)	65% Capacity	50% capacity	25% capacity	50% capacity	25% capacity	50% capacity	50% capacity

2020 Fieldwork

2021 Fieldwork

CSISG 2021 Q3 Sub-sectors

Survey Methodology : **Online Self-Administered Surveys** of Locals Only for 2021 Q3

Food and Beverage Sector

- Restaurants
- Fast Food Restaurants
- Cafes & Coffee Houses

Tourism Sector

- Attractions

How Well Did Companies Satisfy Their Customers?

CSISG 2021 Q3 Results Overview

↔ 75.4 Tourism

↔ 75.4 Attractions

- ↔ 75.9 Gardens By The Bay
- ↔ 75.7 Universal Studios
- ↔ 74.5 Singapore Zoo
- ↔ 74.4 Sentosa
- ↔ 75.6 Other attractions

↔ 72.7 Food & Beverage

↔ 74.0 Fast Food Restaurants

- ↔ 75.9 Subway
- ↔ 73.2 McDonald's
- ↔ 72.5 Burger King
- ↔ 69.8 KFC
- ↔ 77.1 Other fast food restaurants*

↔ 73.1 Restaurants

- ↔ 76.8 Din Tai Fung*
- ↔ 75.6 Crystal Jade Kitchen
- ↔ 73.5 Sakae Sushi
- ↔ 72.6 Pizza Hut
- ↔ 71.7 Swensen's
- ↔ 72.6 Other restaurants

↔ 69.6 Cafes & Coffee Houses

- ↔ 72.3 Starbucks
- ↔ 68.8 Coffee Bean & Tea Leaf
- ↔ 65.6 Ya Kun
- ↔ 65.5 Toast Box

QUALIFIER FOR RESPONDENT

- (1) Recently interacted with company (Past 3 months for F&B, Past 6 months for Attractions)
- (2) Each respondent evaluates satisfaction with 1 company within the F&B or Attractions sub-sectors

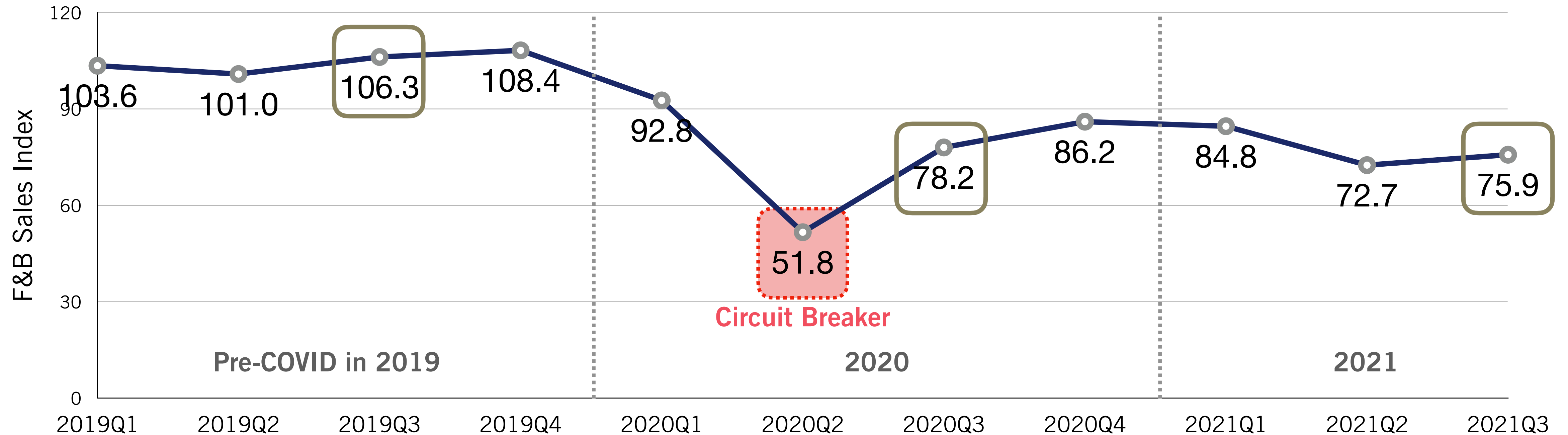
* Refers to companies/sub-sectors that are statistically significantly above their sub-sector/sector scores

Entities shown in this scorecard have samples of $N \geq 50$.

FOOD AND BEVERAGE SECTOR RESULTS

Singstats: Some Recovery In F&B Services Sales Index Post Circuit Breaker

(F&B Services Sales Index at Current Prices, 2017=100)

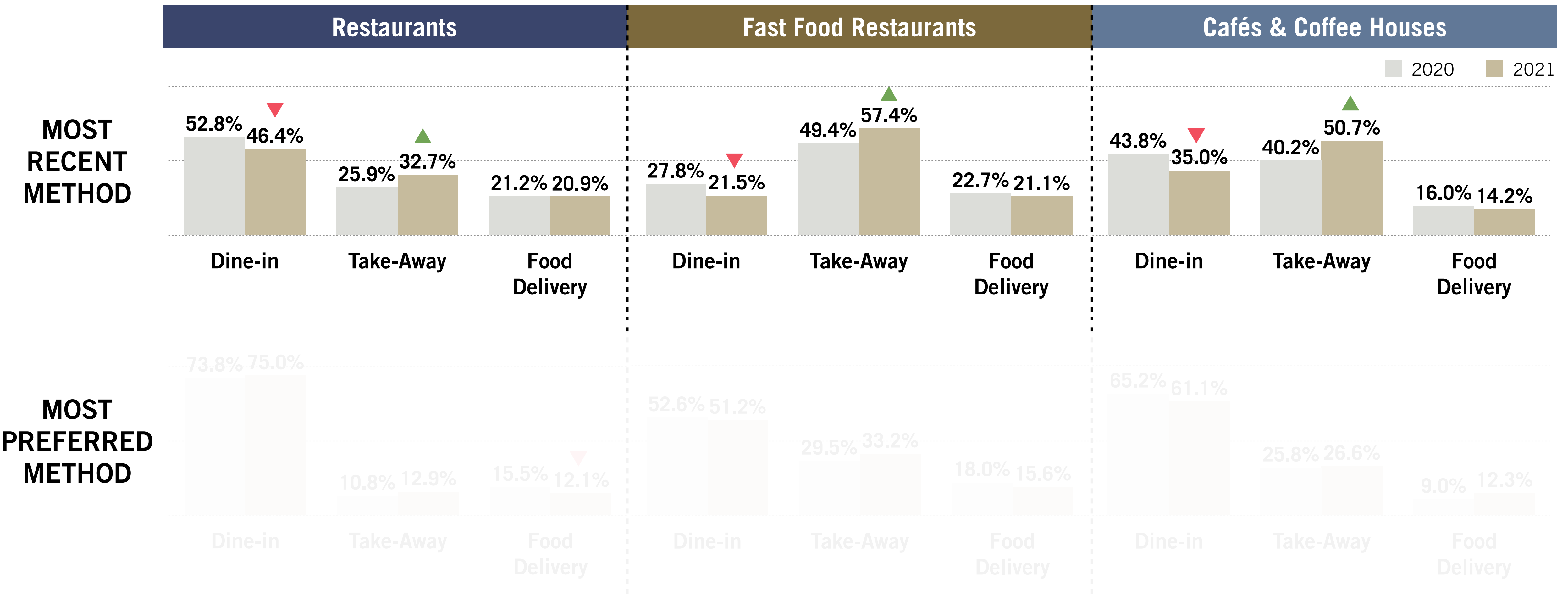


Source: Singapore Department of Statistics, Link: <https://www.singstat.gov.sg/find-data/search-by-theme/industry/services/latest-data> (Accessed 28 Nov 2021)

CHANGES IN DINING BEHAVIOUR

Significant Increase in Take-Away But Delivery Stayed Flat...

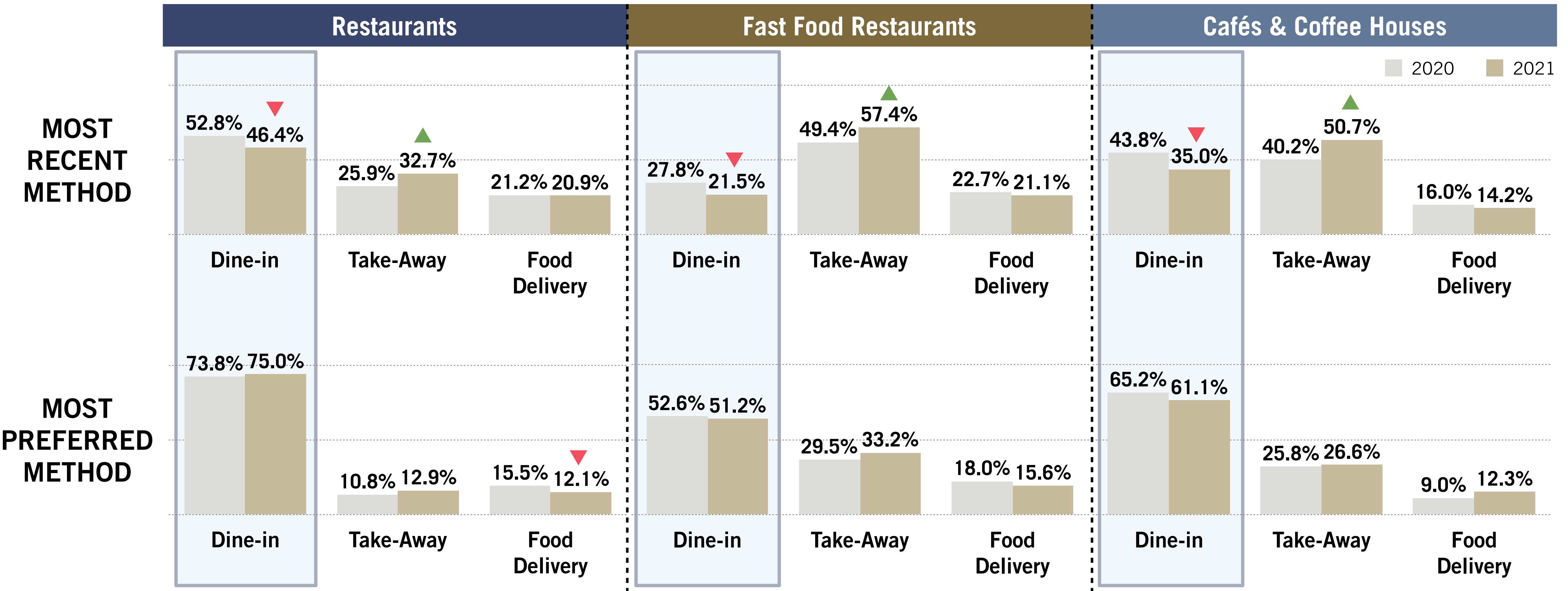
(F&B Sector: Comparing Dine-In, Take-Away and Food Delivery Respondents)



▲ ▼ Statistically significant year-on-year increase/drop in proportions at 90% confidence

...Preference For Dine-In However Remains High

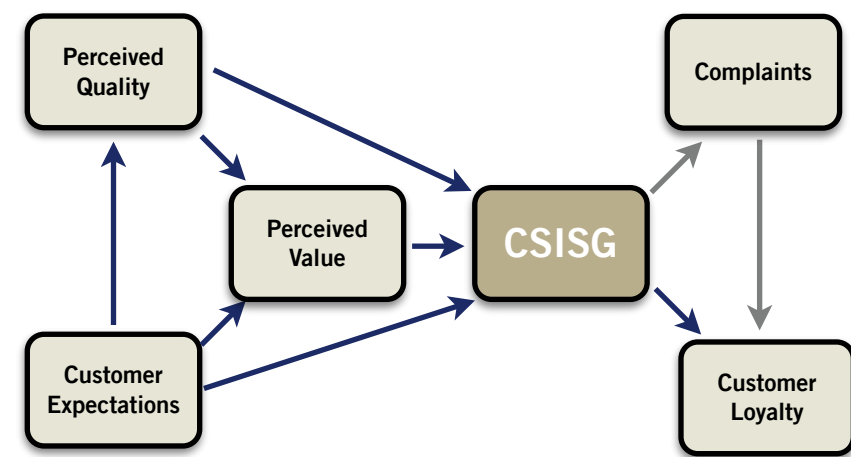
(F&B Sector: Comparing Dine-In, Take-Away and Food Delivery Respondents)



▲ ▼ Statistically significant year-on-year increase/drop in proportions at 90% confidence

Decline in Satisfaction & Loyalty for Cafe & Coffee Houses

(F&B Scores: Year-on-Year Movement in Satisfaction Drivers)



	Customer Expectations (Predicted Quality Before Recent Experience)	Perceived Product Quality (After Recent Experience)	Perceived Service Quality (After Recent Experience)	Perceived Value	CSISG	Customer Loyalty
Restaurants Sub-Sector	75.5 ■ (-1.3%)	77.5 ■ (+1.0%)	76.4 ■ (+1.1%)	70.4 ■ (-1.0%)	73.1 ■ (-1.0%)	70.9 ■ (-0.1%)
Fast Food Restaurants Sub-Sector	75.2 ■ (+0.5%)	76.7 ■ (+1.1%)	76.1 ■ (+2.5%)	71.1 ■ (+1.2%)	74.0 ■ (+1.2%)	71.1 ■ (-1.3%)
Cafés & Coffee Houses Sub-Sector	74.0 ■ (-2.4%)	75.8 ■ (-2.3%)	74.4 ■ (-3.4%)	67.2 ■ (-4.0%)	69.6 ▼ (-5.4%)	66.6 ▼ (-5.6%)

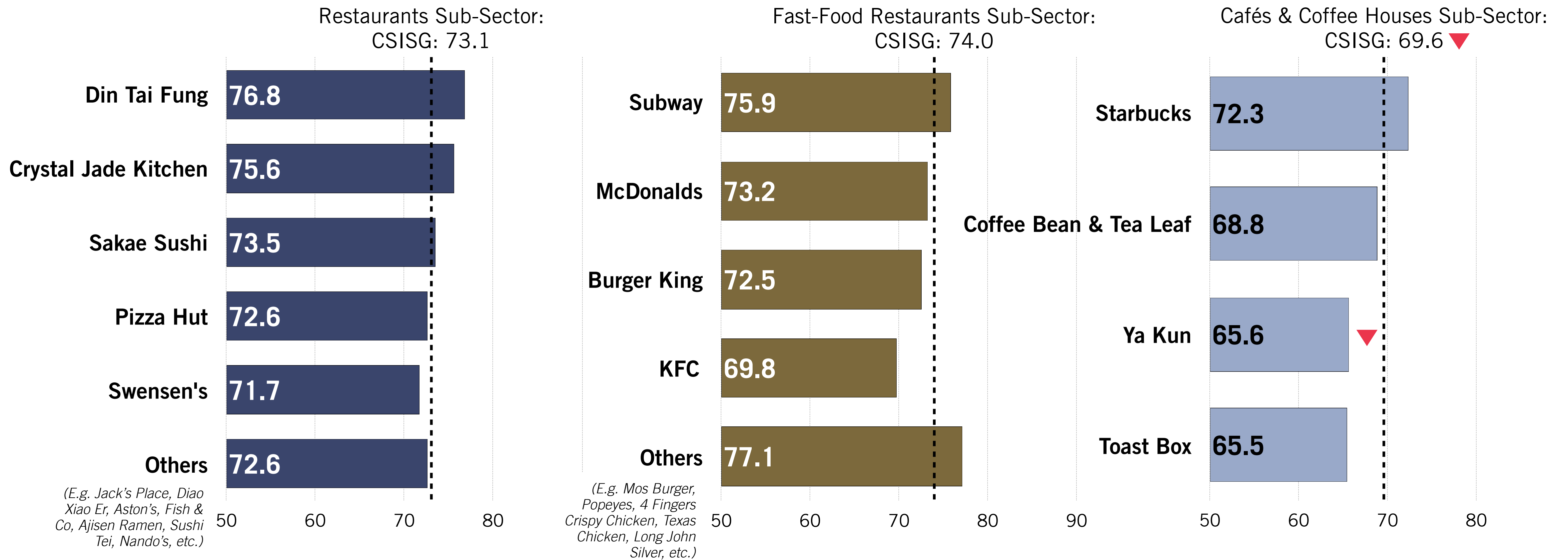
Significant declines

▲ ▼ Statistically significant year-on-year increase/decrease at 90% confidence
 ■ No statistically significant year-on-year change at 90% confidence

Respondents: Locals Who Patronised F&B in The Past 3 Months

F&B Sector Company CSISG Scores

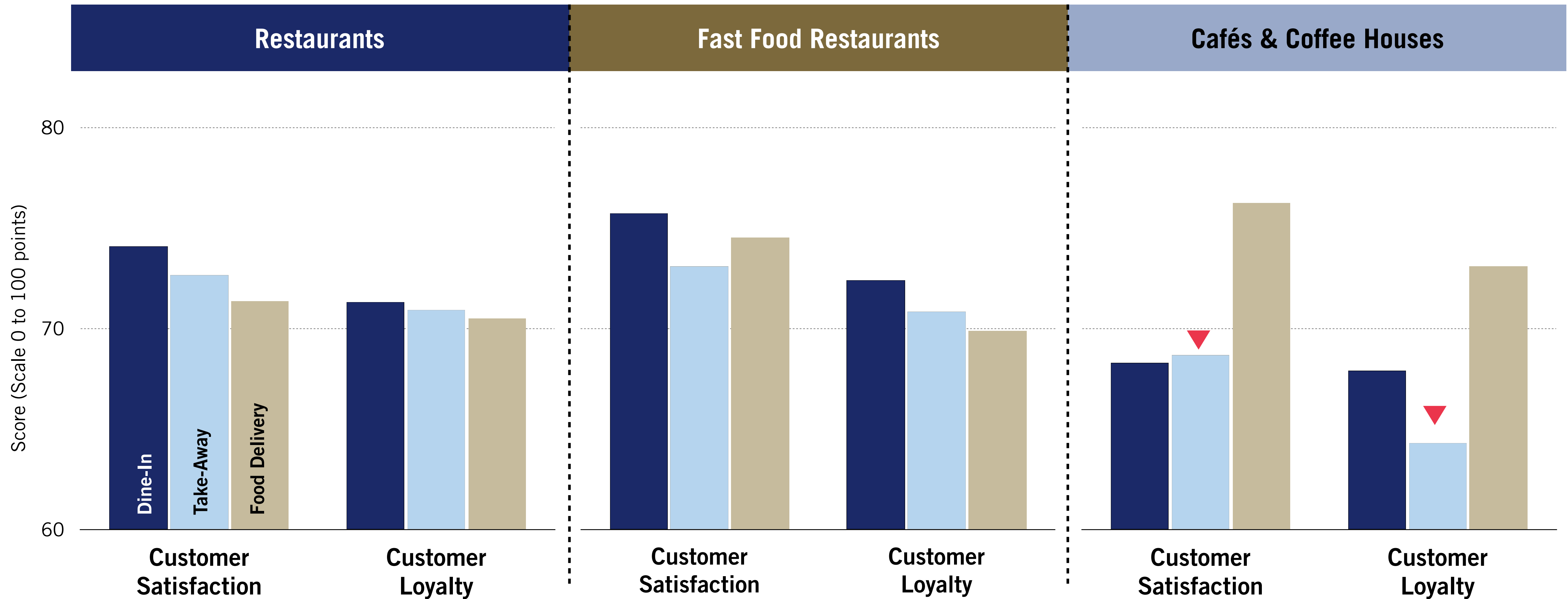
(Locals Who Patronised F&B Companies in The Past 3 Months)



▲ ▼ Statistically significant year on year increase/decrease at 90% confidence

Decline In Cafés & Coffee Houses Driven By the Take-Away Segment

(F&B Sector: Customer Satisfaction & Loyalty By Dining Method)



Respondents: Locals Who Patronised F&B in The Past 3 Months

■ Dine-In
 ■ Take-Away
 ■ Food Delivery
▲ ▼ Statistically significant year on year **increase/decrease** at 90% confidence

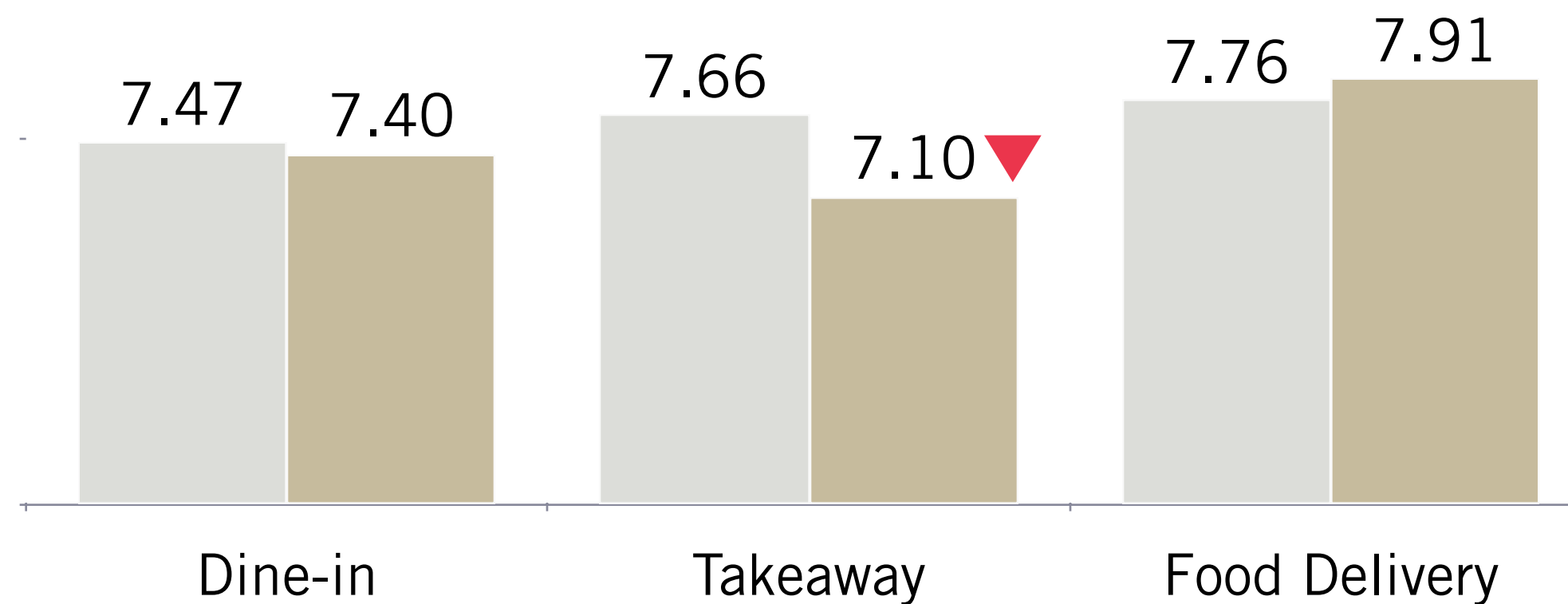
Takeaway Segment Less Likely To Return & More Price Sensitive Than In 2020

Cafés & Coffee Houses: Components of Customer Loyalty By Segments

Cafés & Coffee Houses: Components of Customer Loyalty

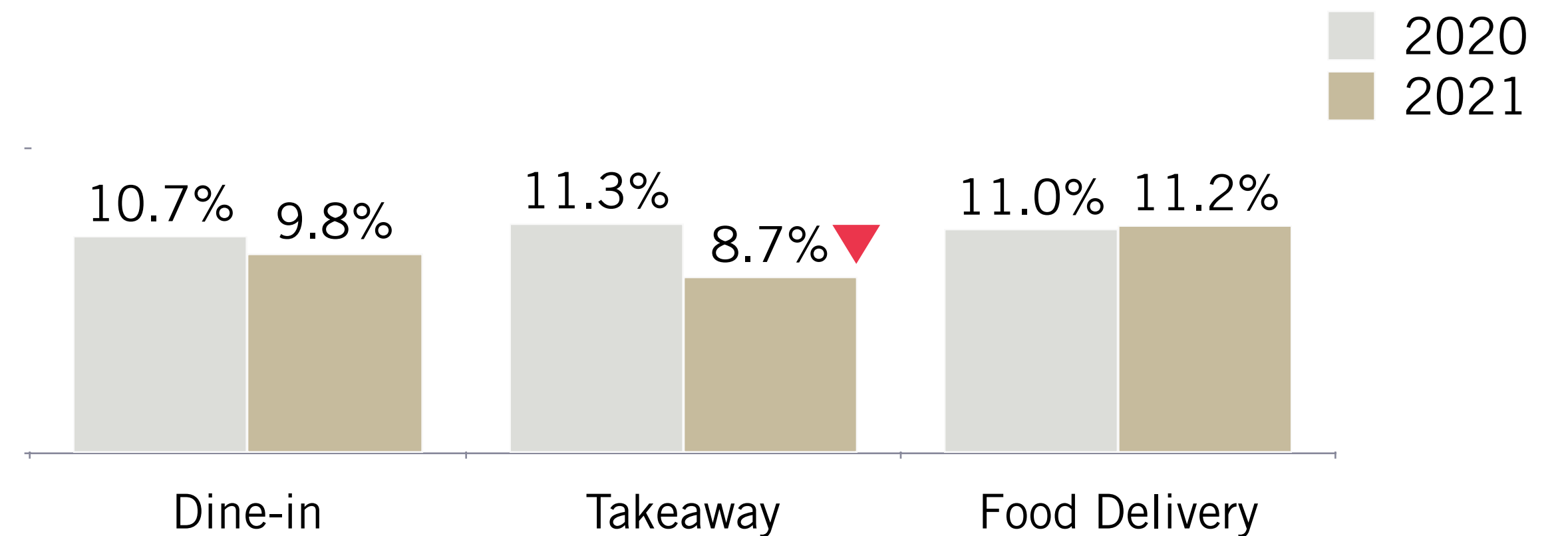
Repurchase Intention

How likely are you to choose the same F&B Company again?
(Scale of 1 to 10)



Price Tolerance

How much can the F&B company raise its prices before you definitely would not choose them again?
(Percentage)



▲ ▼ Statistically significant year on year **increase/decrease** at 90% confidence

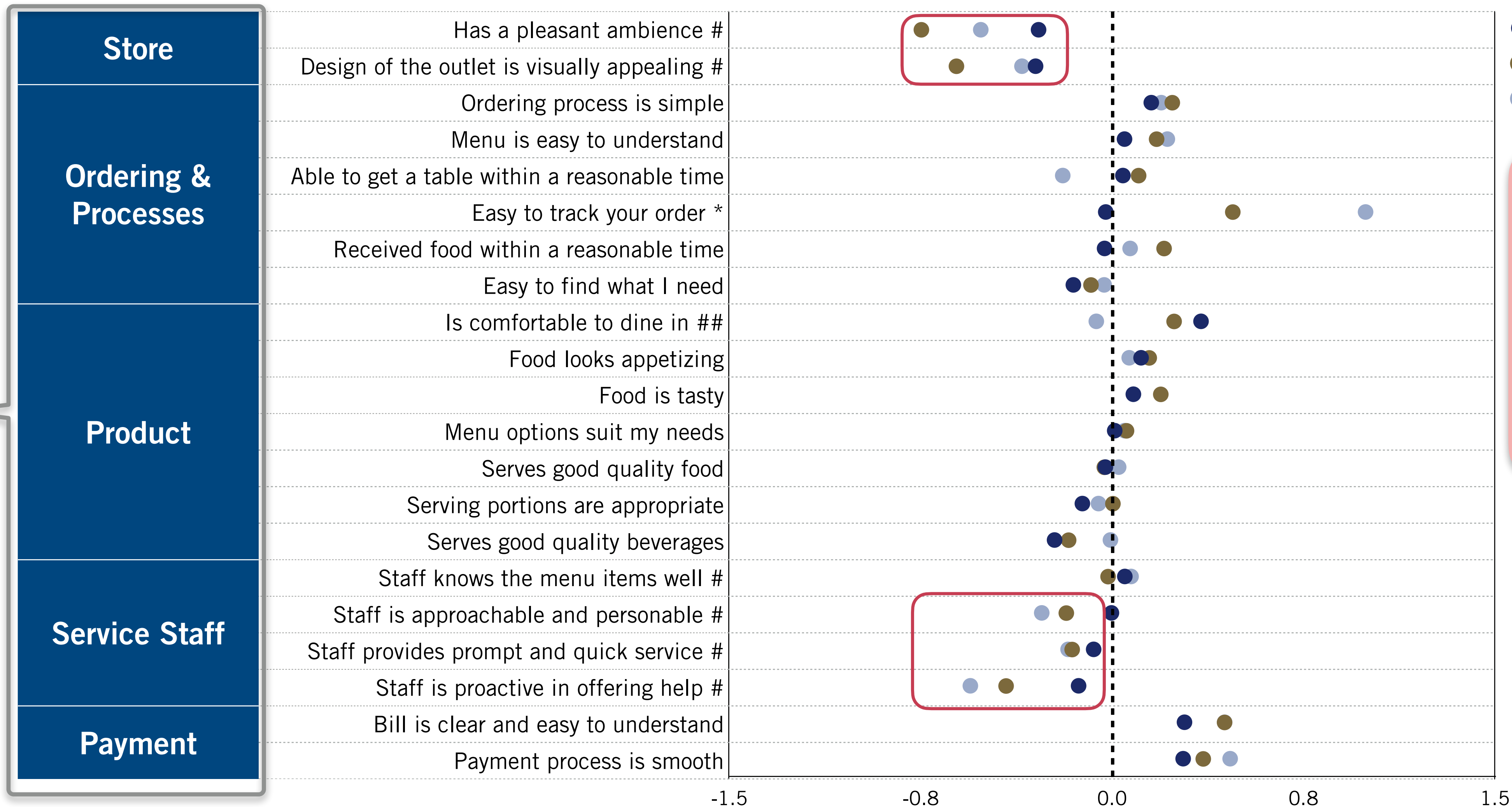
ATTRIBUTE PERFORMANCE

Store & Service Staff Areas of Underperformance

F&B Sector: Performance of Attributes vs Sub-Sector Average

Difference from Sub-Sector Average

Customer Journey



- Restaurants
- Fast Food Restaurants
- Cafés & Coffee Houses

Similar to 2020, the Store, Staff attributes underperformed for all 3 sub-sectors

Note: In descending order of Restaurant attribute ratings within each Customer Journey Dimensions

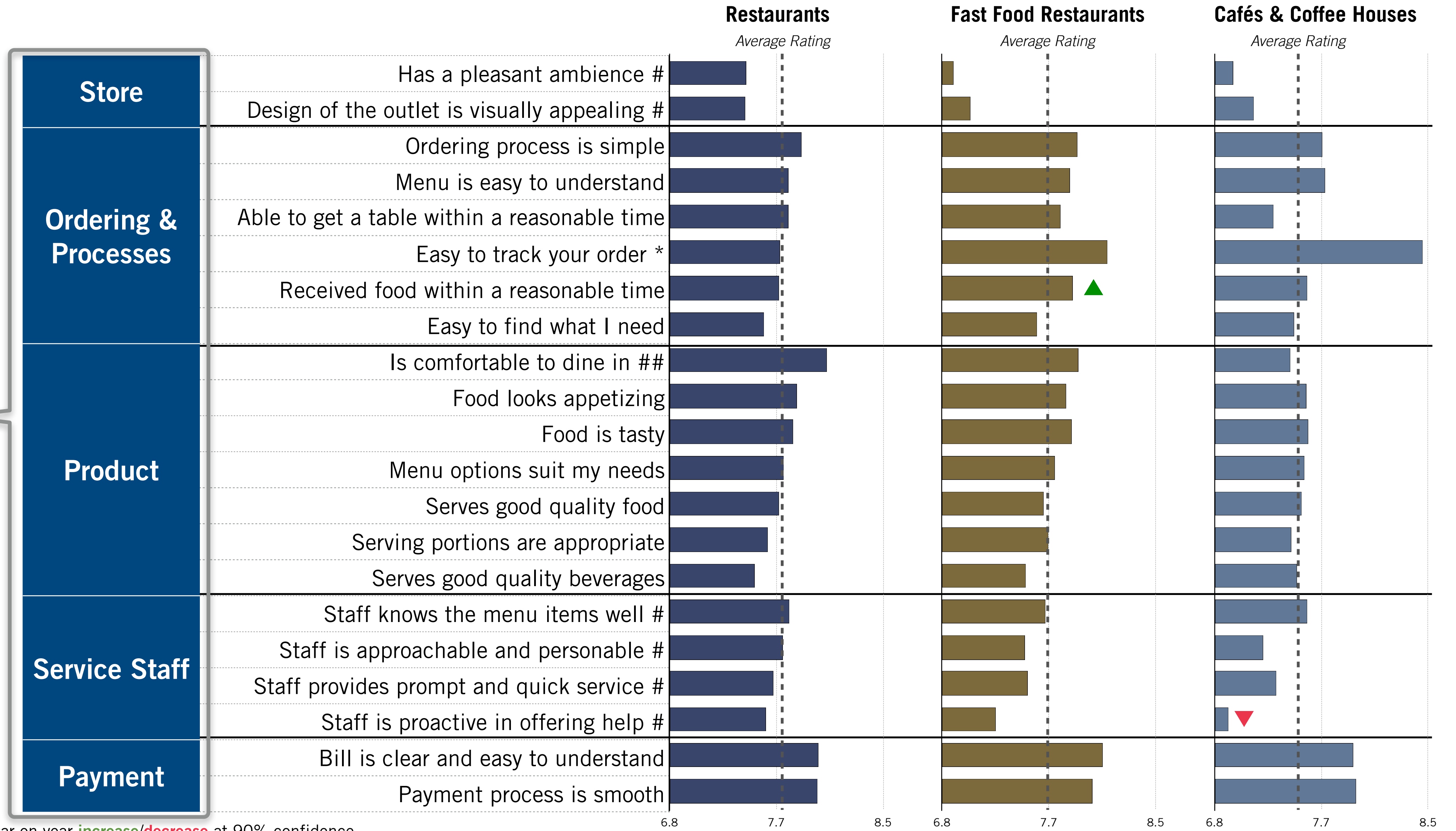
denotes questions answered only by respondents that DINED-IN or ordered TAKE-AWAY

denotes questions answered only by respondents that DINED-IN

* denotes questions answered only by respondents who ordered FOOD DELIVERY

F&B Sector: Marginal Movements Year-on-Year For Most Attributes

Customer Journey



Note: In descending order of Restaurant attribute ratings within each Customer Journey Dimensions

denotes questions answered only by respondents that DINED-IN or ordered TAKE-AWAY

denotes questions answered only by respondents that DINED-IN

* denotes questions answered only by respondents who ordered FOOD DELIVERY

▲ ▼ Statistically significant year on year increase/decrease at 90% confidence

Cafés & Coffee Houses: Decline In Various Attributes for Takeaway

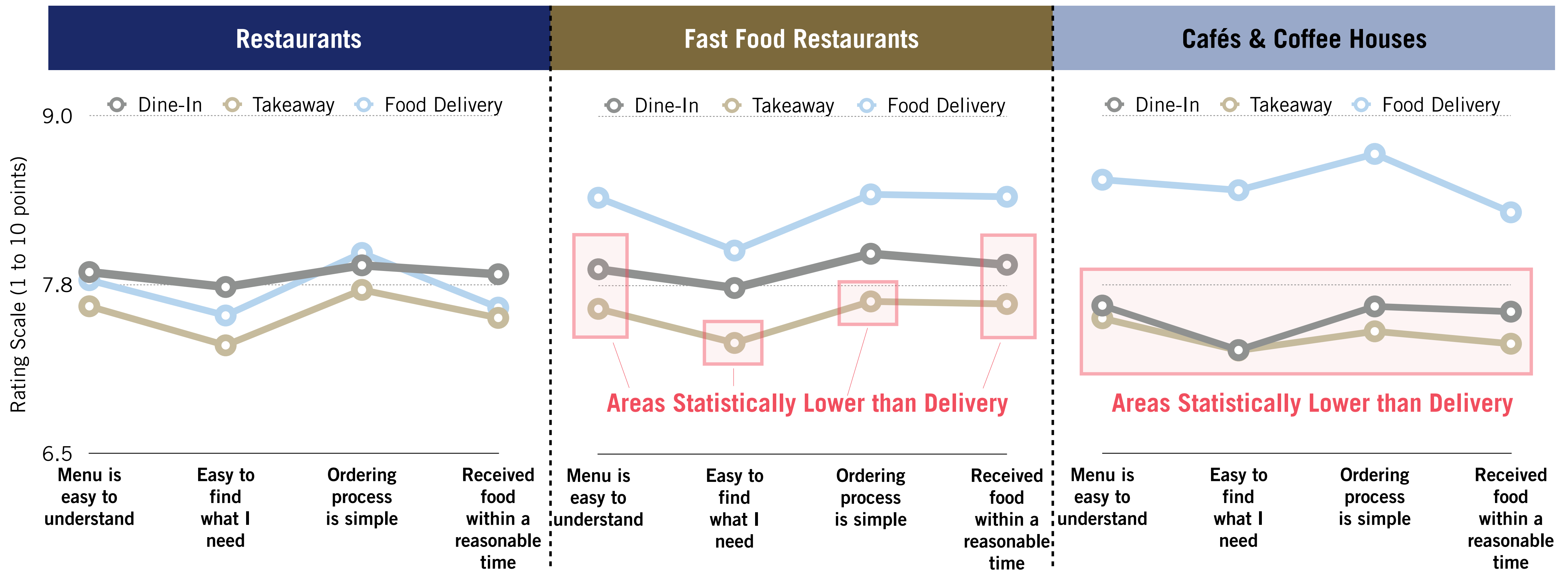
Cafés & Coffee Houses: Attribute Performance By Segment



Onsite Ordering & Processes for Fast Food And Cafés & Coffee Houses

Underperformed Delivery

(F&B Sector: Ordering & Processes By Segments)



Onsite Ordering & Processes for Fast Food And Cafés & Coffee Houses

Underperformed Delivery

(F&B Sector: Ordering & Processes By Segments)

	Restaurants	Fast Food Restaurants	Cafés & Coffee Houses	
	Dine-In Takeaway Food Delivery	Dine-In Takeaway Food Delivery	Dine-In Takeaway Food Delivery	
	Selected Dine-In & Takeaway Verbatim		Selected Dine-In & Takeaway Verbatim	
Rating Scale (1 to 10 points)	Takeaway	Improve on their app as I find it complicated to use scan QR on the touch machine to order deals...often need to go to the counter service staff for help.	Takeaway	Had bad experience with the serving staff for the last encounters, at different outlets but with same treatment! They are rude, impatient and not listening....
		[F&B Name] ordering procedure may not be very straightforward and easy for new customers to understand.		...Sometimes customer service can be confusing. They are not really focused on your order . They rush through ordering process .
		[Improve] Speed of the ordering kiosk...		Too expensive and always get the order wrong .
6.5	Dine-In	Ordering is too slow in the outlets that don't have self service kiosks . May be hard to get a seat in busy outlets.	Dine-In	...No proper Q system now that there's constraint in the number of tables available due to safe distancing measures.
		I waited unreasonably for my food when we were the only customers.		Staff keep on chatting with each other and forgot my order
		Order taking takes too long .		The waiting time for a seat takes way too long...

FOOD DELIVERY PLATFORMS

Growth In Online Food Ordering in Singapore

Existing Players



OddleEats



New



Food delivery sector booms since the pandemic¹

- Increase in number of F&B businesses on Food Delivery Platforms such as GrabFood, Deliveroo, Foodpanda, WhyQ and Oddle Eats

Singaporeans more reliant on food delivery services, survey reveals²

- About 7 out of 10 people say ordering from their favourite restaurant during COVID-19 has contributed to their mental health.

Food Delivery Offers Convenience

- Schedule Orders in Advance
- Arrange for delivery or pick-up

Sources:

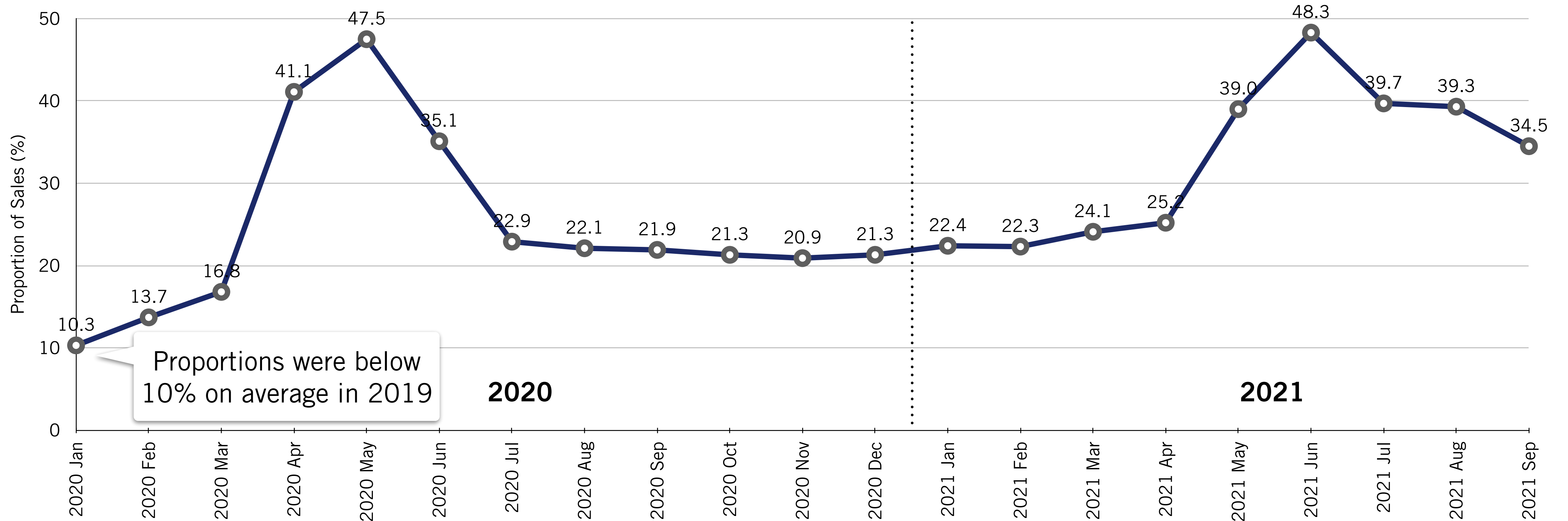
- (1) <https://www.straitstimes.com/singapore/transport/sector-booms-in-a-time-of-coronavirus>
- (2) <https://qsrmedia.asia/research/in-focus/singaporeans-more-reliant-food-delivery-services-survey-reveals>
- (3) <https://www.posist.com/restaurant-times/singapore/food-delivery-growth-singapore.html>

Other Players and Communities



Singstats: Online F&B Sales Remain Elevated Amidst Tighter COVID Restrictions

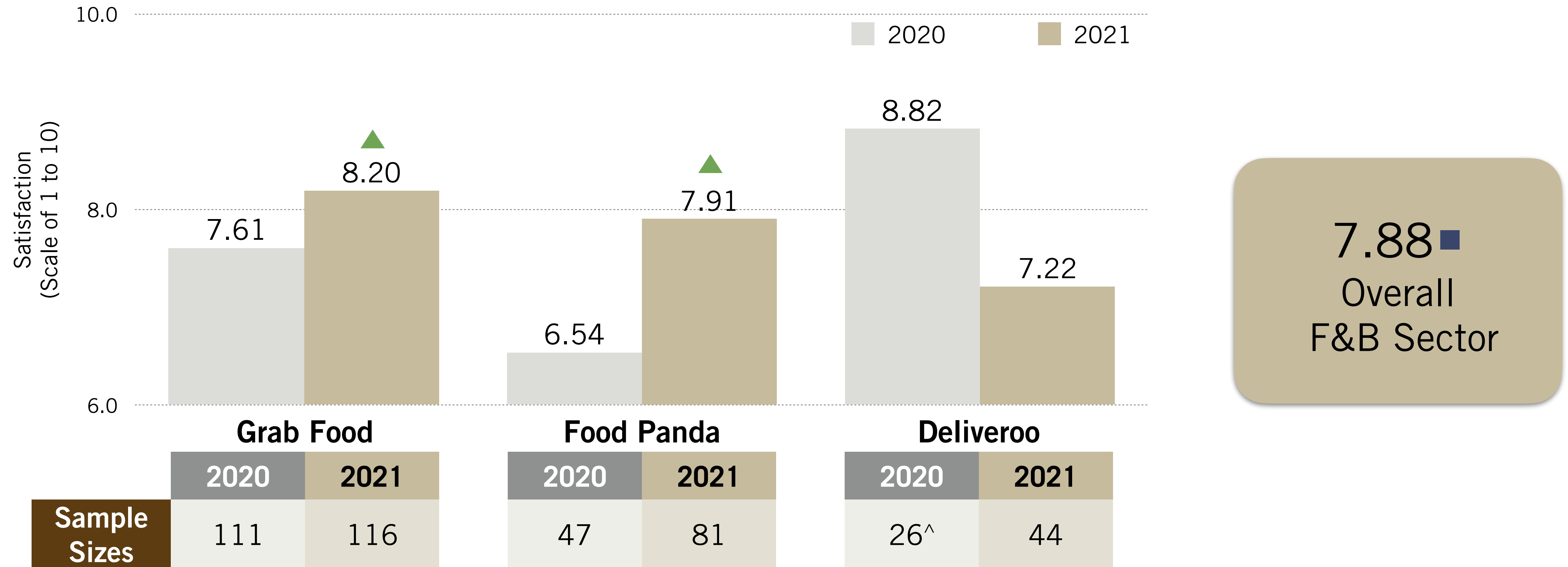
Online Food & Beverage Sales Proportion (Out Of The Respective Industry's Total Sales)



Source: Singapore Department of Statistics, Link: <https://www.singstat.gov.sg/find-data/search-by-theme/industry/services/latest-data> (Accessed 28 Nov 2021)

Satisfaction with Delivery Platforms Increased From Last Measurement

(F&B Sector: How Satisfied Are Respondents With Delivery Service by Delivery Platforms)



[^] Low samples, hence findings indicative only.

▲ ▼ Statistically significant year-on-year **increase/decrease** at 90% confidence
 ■ No statistically significant year-on-year change at 90% confidence

Selected Verbatim From Delivery Respondents

(F&B Sector: How Satisfied Are Respondents With Delivery Service by Delivery Platforms)

Selected Positive Verbatim

...Now, when I order from home, the **orders have never been wrong** and the food tastes delicious! Also, it's usually still warm when it's delivered to me...

The **ordering process is simple and the meals are diversified** (*variety*)

Overall, I'm very satisfied. The meal was **delivered very quickly.**

The **ordering process** of meals is very **simple.**

Selected Verbatim: Areas For Improvement

I wish there are **options to customise the order...**

Maybe **simpler promos without all kinds of codes** to key in.

Wider **range of menus** and **more promotional deals.**

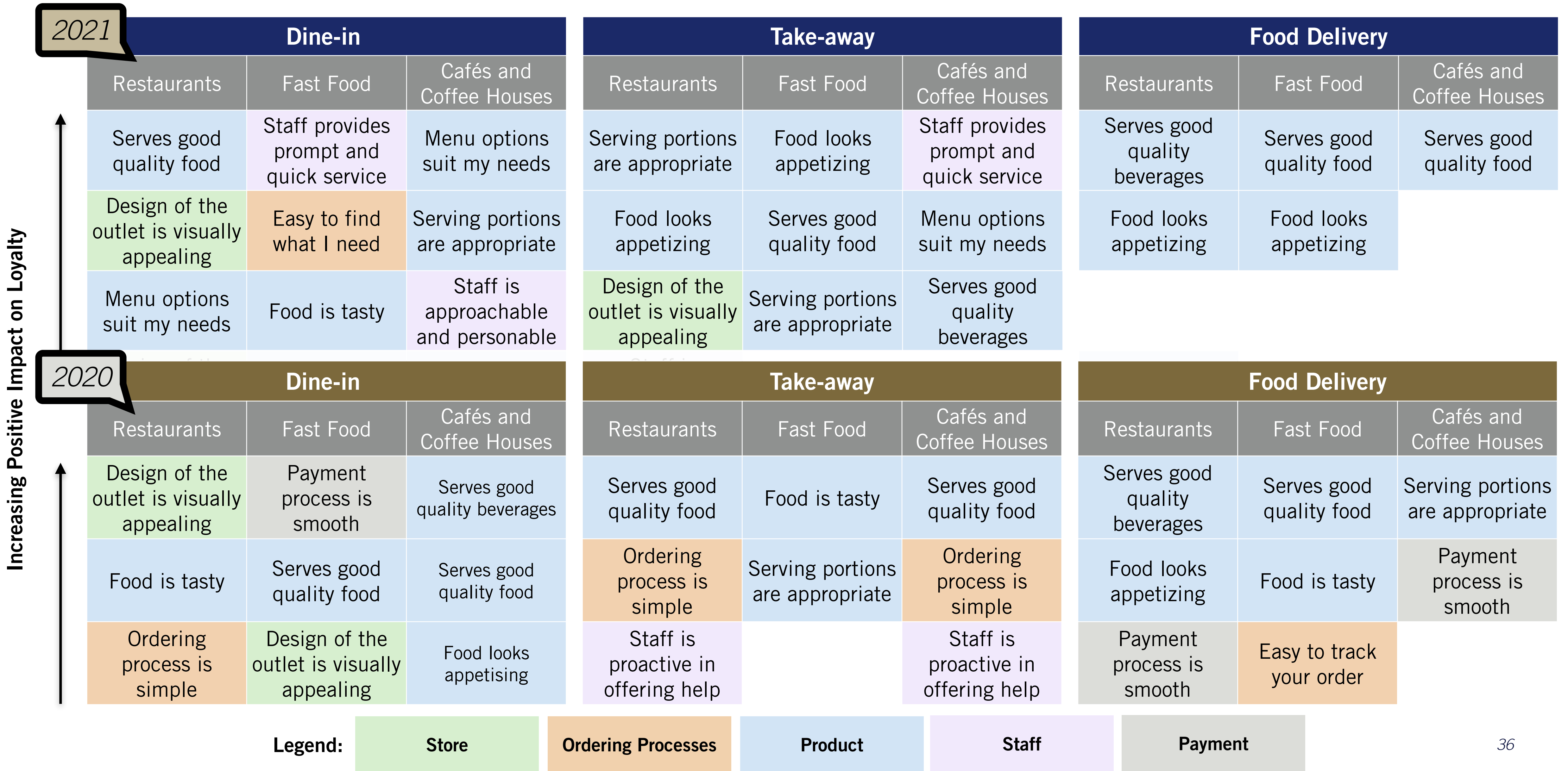
More variety or sets deals to choose from.

KEY DRIVERS OF LOYALTY

F&B Sector Top 3 Loyalty Drivers

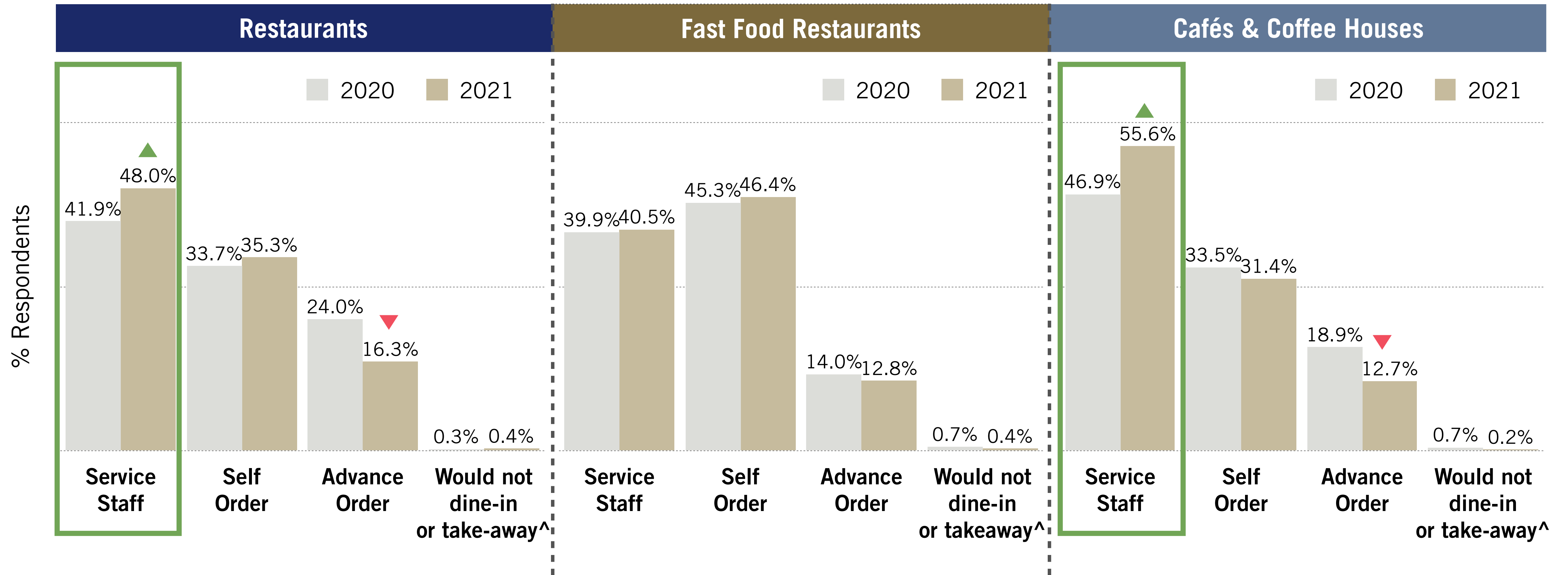


F&B Sector Top 3 Loyalty Drivers: Staff Attributes More Critical In 2021



Preference for Ordering Through Service Staff Increased From 2020

(F&B Sector: Preferred Ordering Methods)



[^] Only respondents who ordered delivery for their most recent meal and prefer delivery were given this option.

▲ ▼ Statistically significant year-on-year increase/drop in proportions at 90% confidence

F&B Sector: Selected Verbatim (Areas For Improvement)

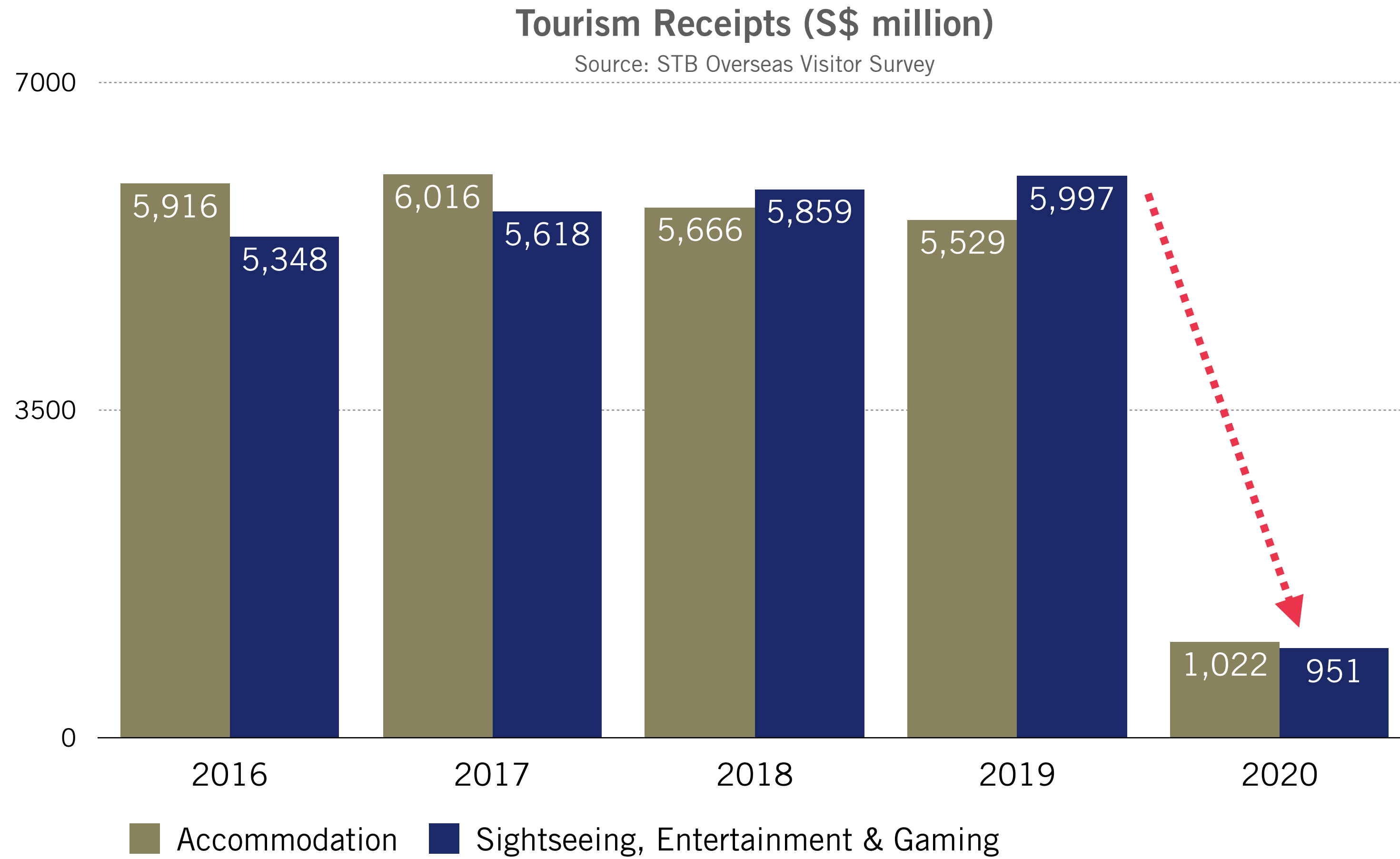
Restaurants	Fast Food Restaurants	Cafés & Coffee Houses
Price and quality of food does not tally. I can think of good ...places that charges less and cook better food with greater quantity too.	Sell the real thing at more affordable price. And not some new products that taste so-so but priced so high.	The quality of food needs drastic improvement. The customer is able to tell that the food is microwaved yet the prices are steep.
Improve on menu in the iPad to have clearer pictures and set meals	Their food is quite salty compared to other fast food restaurants, and sometimes the food is too hard to bite through...	Improve the value of the food items. Lower the prices and have more healthier food options.
More description on the food such as the ingredients used	The quality of the food can be improved for e.g. the fries are a bit too big and soft & not crispy enough	Quality of the coffee and bread. The butter should be spread evenly on the bread so that the taste is even...
Increase the portion sizes for their price point	Maintain good and hot food upon arrival...	The coffee and tea needs to be done better... Also food presentation...not consistent at every outlet.
Not good experience, the Service Staff were slow and passive.	Used to be very good. My fave. Recent years, standard of food slips. Staff also not friendly...	Service staff are super unfriendly and no response when I order pickup
The service staff knowledge and in-house training provided to them. Healthier choice of dessert and Ice cream should be made less sweet.	Service staff are always unfriendly, slow, unprofessional.	Had bad experience with the serving staff for the last encounters, at different outlets but with same treatment! They are rude, impatient and not listening....
Service Staff and better quality food.	The staff customer services were not as good as before. I hope can improve their customer services...	Better customer service, the counter staff are a bit unfriendly, not very willing to listen to requests.
...Staff were unprofessional and unfriendly.	The staff (should) be more focused and polite	Personnel prefer to serve all items at one time... Staff need to be train and serve customer like other branded cafe.

Product

Service

TOURISM SECTOR RESULTS

Steep Fall In Tourism Receipts



Some tourist attractions finding it hard to woo locals, others unable to meet demand

By **LORAINEE LEE**

68 SHARES

Published Aug 08, 2020 | Updated Aug 11, 2020



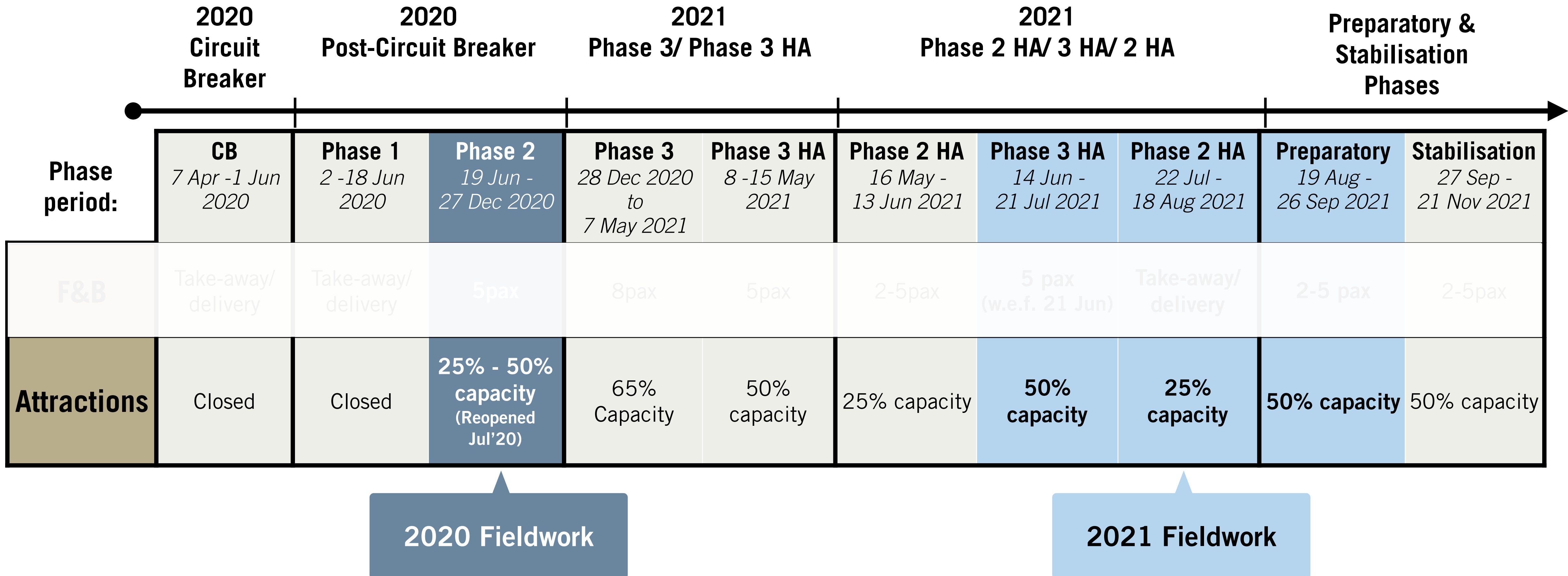
The Trick Eye Museum was quiet when TODAY visited on July 27, 2020.

Follow us on [Instagram](#) and join our [Telegram](#) channel for the latest updates.

- Tourist attractions turning to local market, with varying degrees of success
- Some are unable to keep up with demand and have seen visitorship rise since reopening
- Experts suggest that attractions can rebrand themselves, target different segments and relook prices

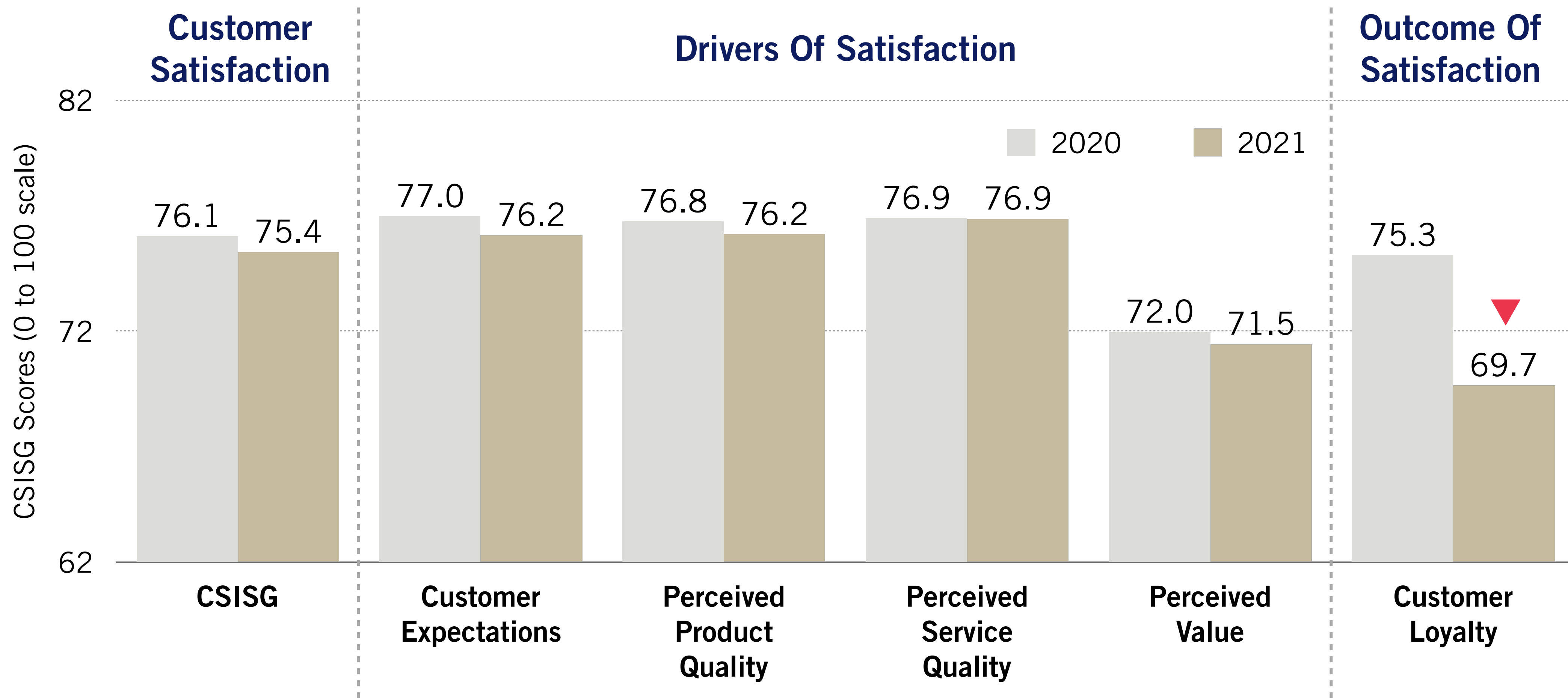
Dynamic Shifts In Safe Management Since The Last Measurement

Changes To COVID-19 Measures For F&B and Attractions



Statistically Significant Decline In Customer Loyalty

(Attraction Sub-Sector Scores: Year-on-Year Movement in Satisfaction Drivers)



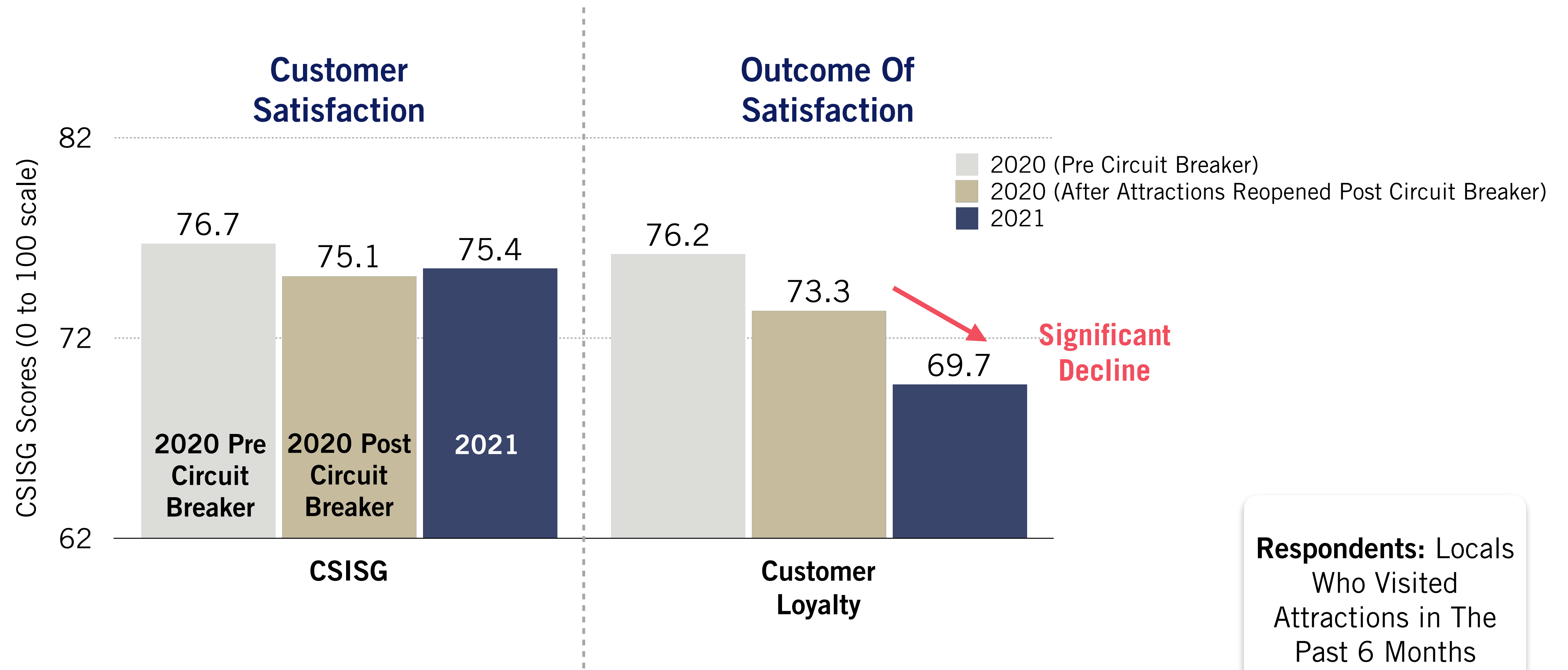
Respondents:
Locals Who Visited Attractions in The Past 6 Months

▲ ▼ Statistically significant year-on-year **increase/decrease** at 90% confidence

Notes: The previously measured Hotels (Tourism) sub-sector was not measured this year, due to the COVID-19 travel restrictions on tourist arrivals since 2020.

Customer Loyalty On The Decline Since Pre-Circuit Breaker

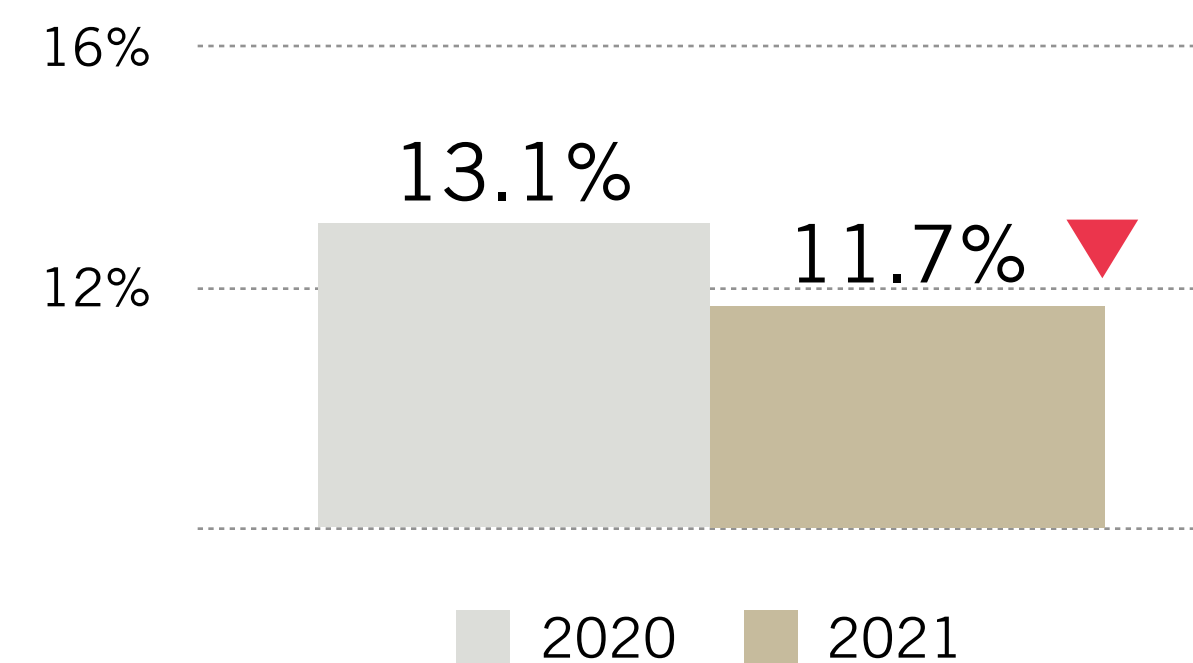
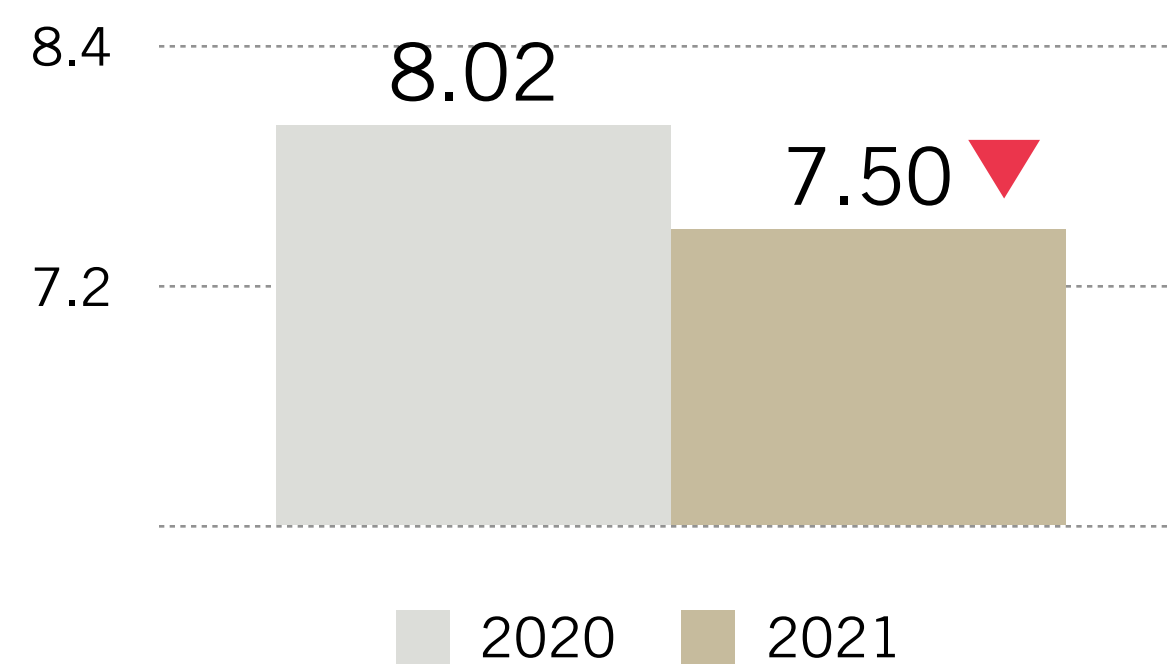
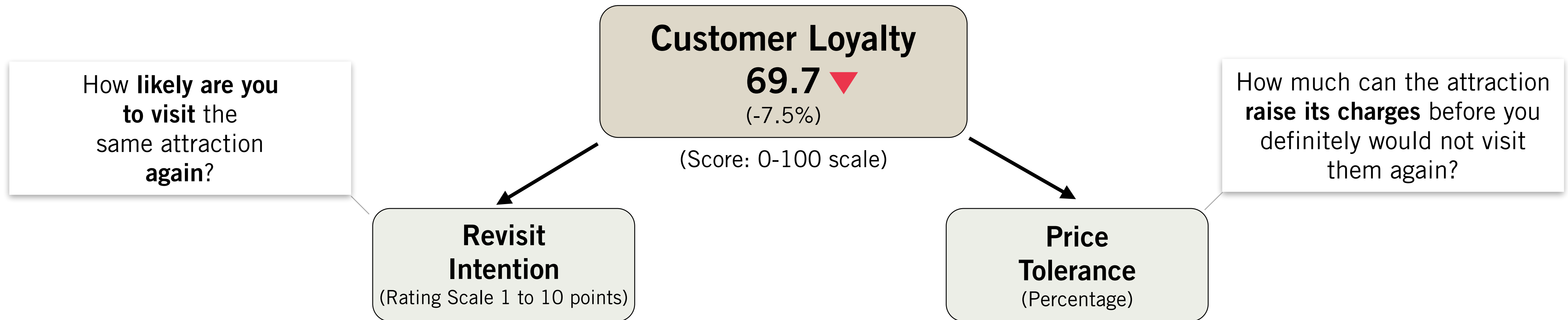
(Attractions Sub-Sector: Performance Across COVID-19 Phases)



↑ ↓ indicates statistically significant increase/decrease at 90% confidence

Decrease In Revisit Intentions & Increase in Price Sensitivity

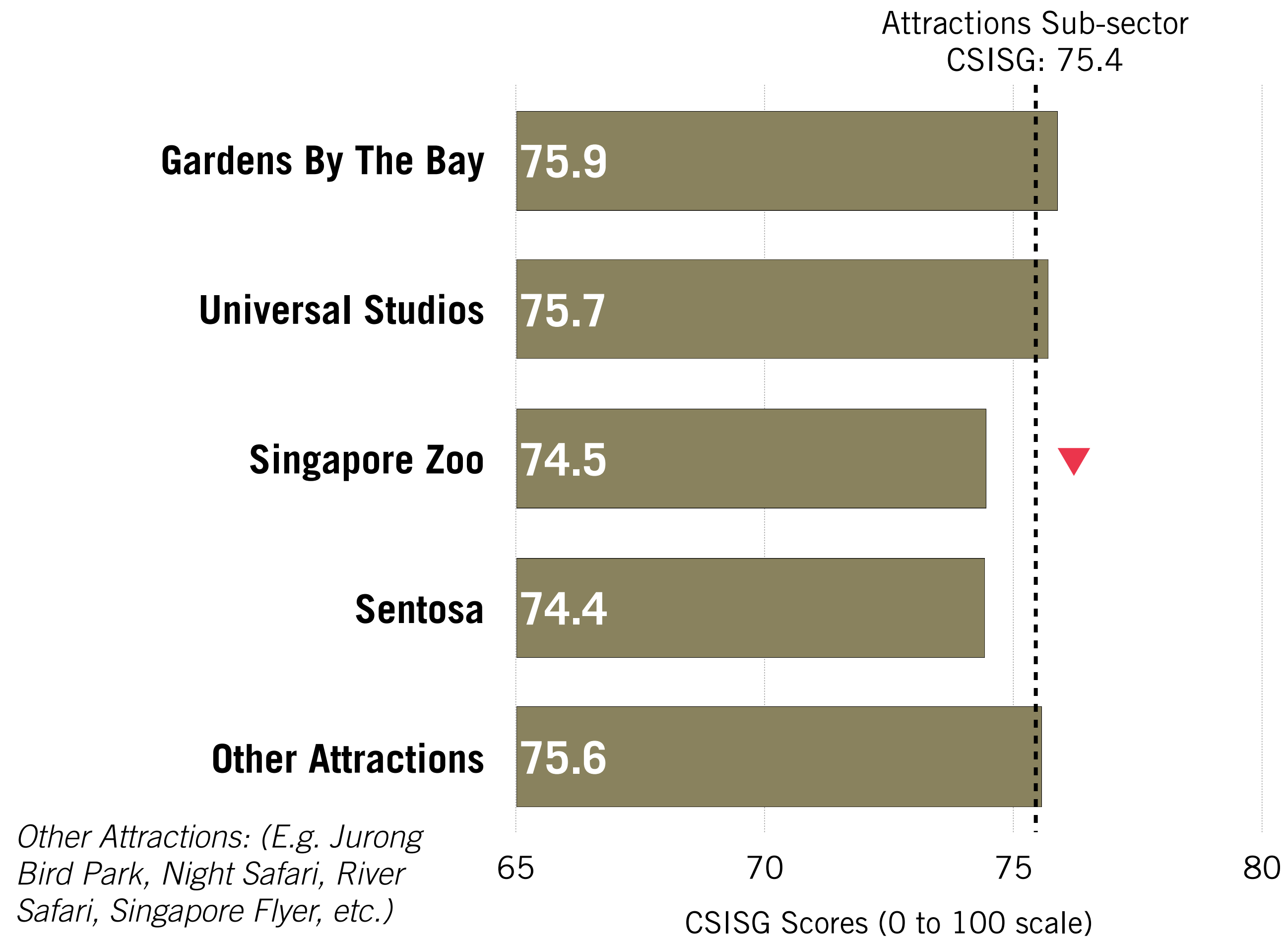
Components of Customer Loyalty for Attractions



▲ ▼ Statistically significant year on year increase/decrease at 90% confidence

Marginal Year-on-Year Movements In CSISG Scores For Most Attractions

(Attractions Company CSISG Scores)

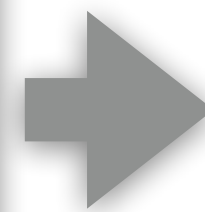


Respondents:
Locals Who Visited Attractions in The Past 6 Months

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SINGAPOREDISCOVERS VOUCHERS

SingapoRediscovers Vouchers (SRVs)



Vouchers, new tie-ups boost Singapore's domestic tourism market



Visitors taking photos in front of Universal Studios at Sentosa on Dec 6, 2020. ST PHOTO: KEVIN LIM

Jessie Lim and Cheryl Teh TL

UPDATED DEC 31, 2020, 9:25 AM



Also kicking off this month was the **\$320 million SingapoRediscovers voucher scheme** to entice Singaporeans to explore the city. All Singaporeans aged 18 and above were given \$100 each to spend on hotels, attractions and tours.

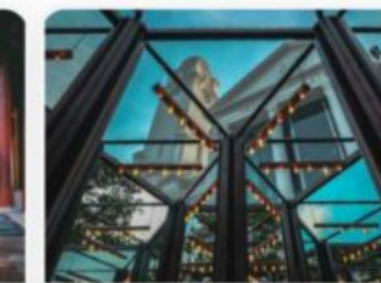
Singapore tourism industry offers bundled 'Singapoliday' promotions to entice locals



Changi / East Coast
3 Day Singapoliday in Changi/East Coast



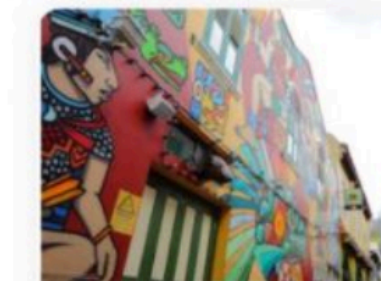
Chinatown
3 Day Singapoliday in Chinatown



Civic District
3 Day Singapoliday in Civic District



Joo Chiat/Katong
3 Day Singapoliday in Joo Chiat/Katong



Kampong Gelam
3 Day Singapoliday in Kampong Gelam



Little India
3 Day Singapoliday in Little India



Mandai/Kranji
3 Day Singapoliday in Mandai/Kranji



Marina Bay
3 Day Singapoliday in Marina Bay

The promotions are designed around 10 areas of Singapore which have specific attractions or cultural interest. PHOTO: VISITSINGAPORE.COM

Another element of the SingapoRediscovers campaign were the **Singapolidays** rolled out in November.

The initiative encapsulated by the portmanteau comprises 50 bundled promotions by hotels, attractions, tour operators, restaurants and shops. One can, for instance, stay at a boutique hotel in Chinatown before going on a mystery-inspired tour in the Keong Saik area.

Sources:

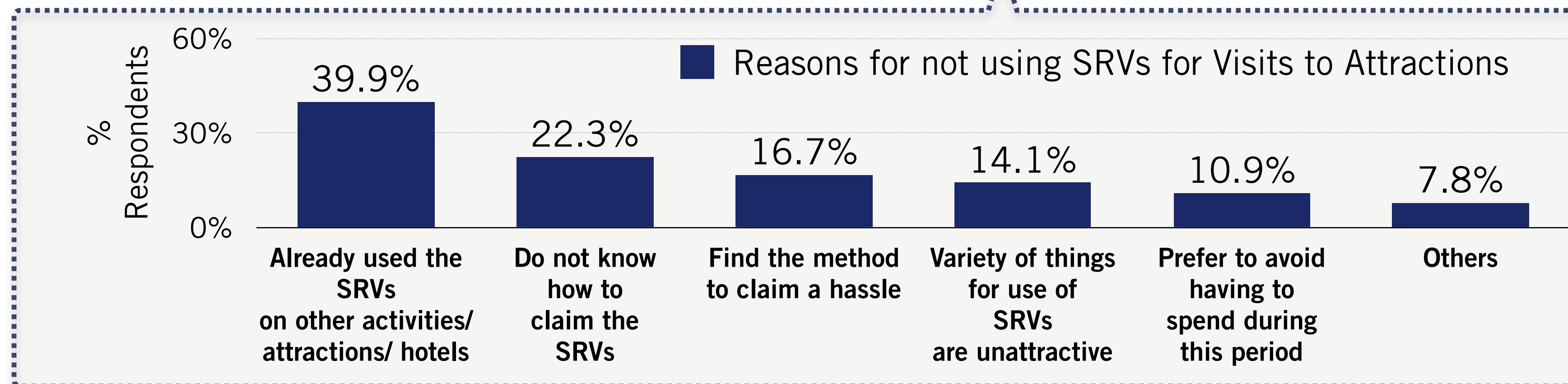
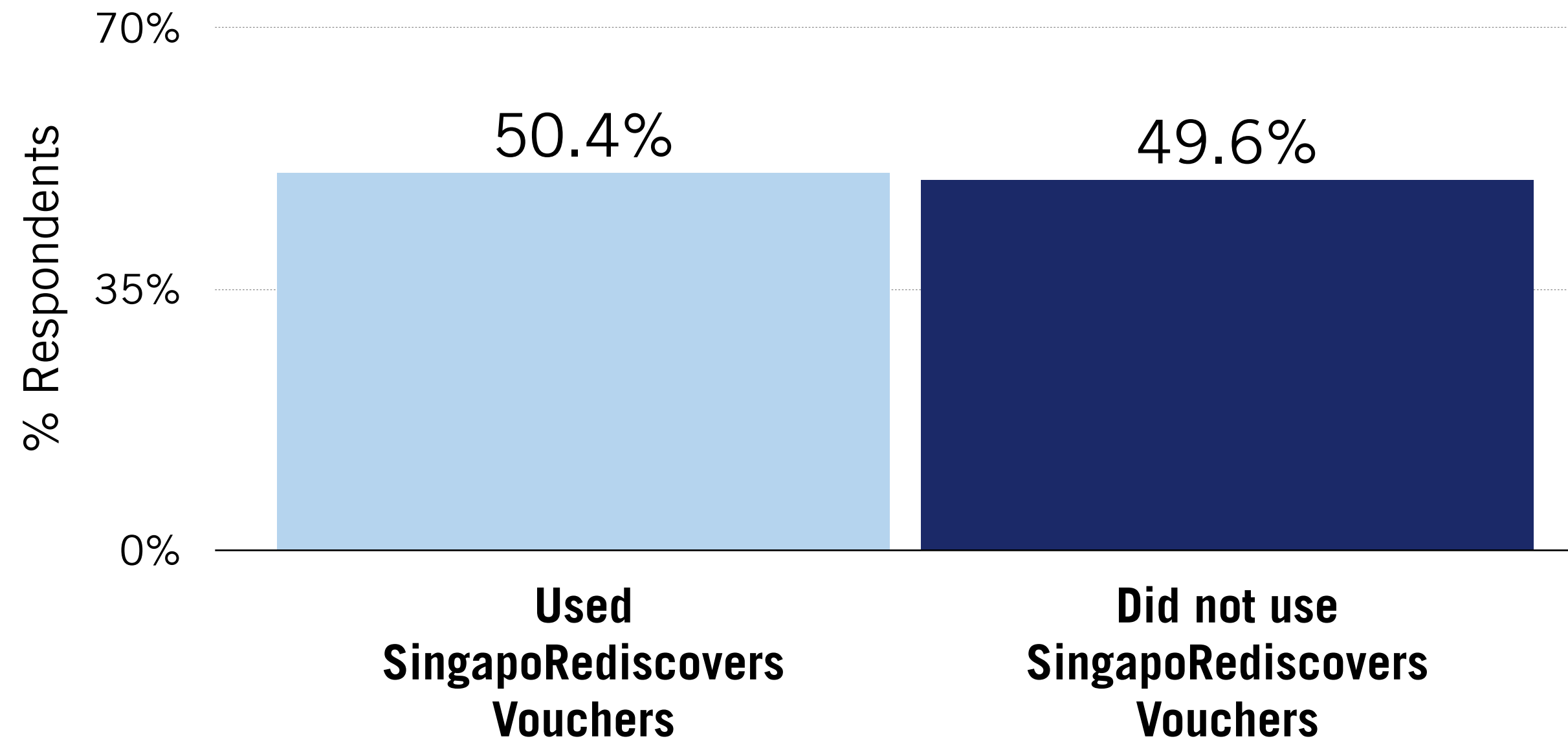
(1)<https://www.straitstimes.com/singapore/singapore-tourism-industry-offers-bundled-promotions-to-entice-locals>

(2)<https://www.straitstimes.com/singapore/consumer/a-long-winter-for-tourism-but-early-signs-of-spring>

SRVs Were Well Utilised Among Attractions Respondents

Attractions: SRV Usage & Reasons For Not Using

All respondents
n=1000



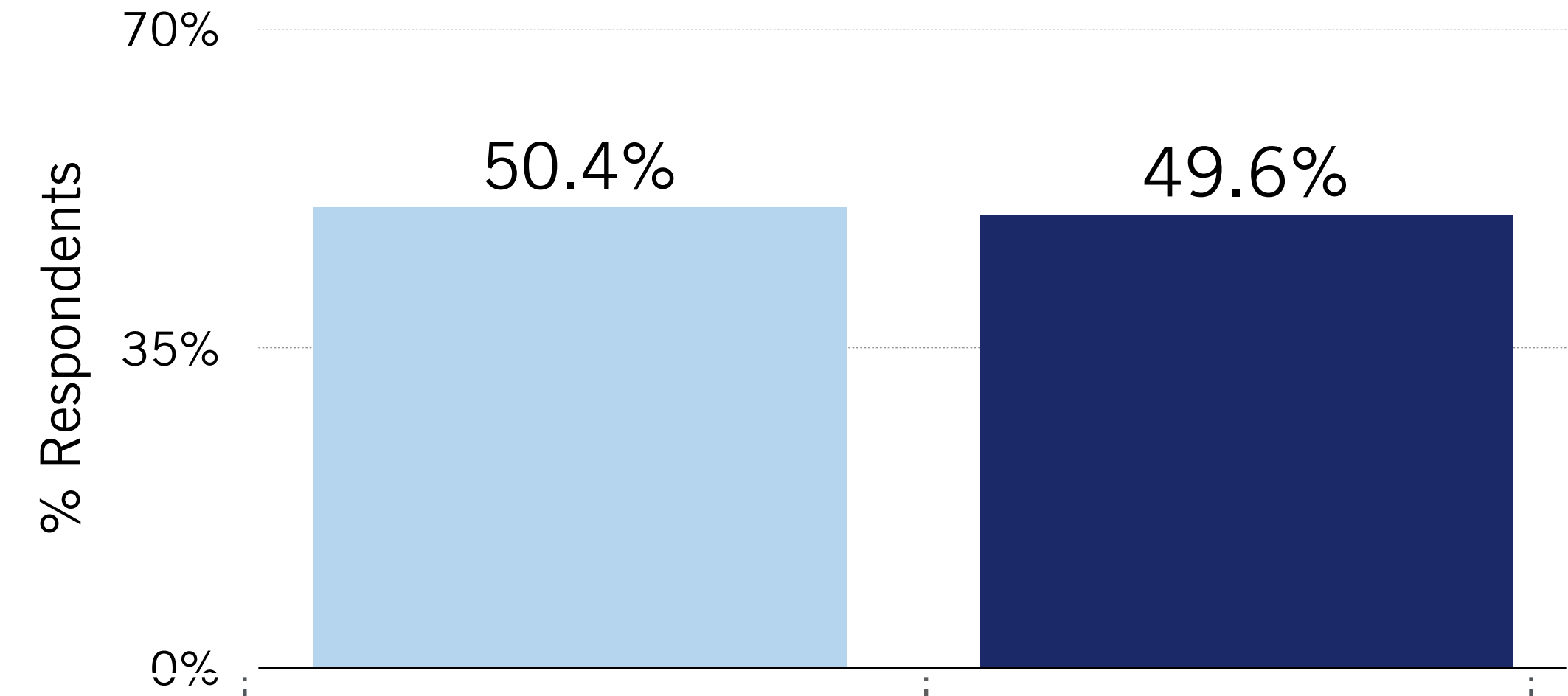
No Significant Impact of SRVs on Customer Loyalty

(Attractions: Customer Loyalty By SRV Usage)



Introduced in **December 2020**
 Valid until **31 March 2022**

Book Experiences with Your **SingapoRediscovered** Vouchers



	Used SingapoRediscovered Vouchers	Did not use SingapoRediscovered Vouchers
Customer Loyalty	68.5	70.7
Repurchase Intention (Rating scale 1 to 10)	7.38	7.61

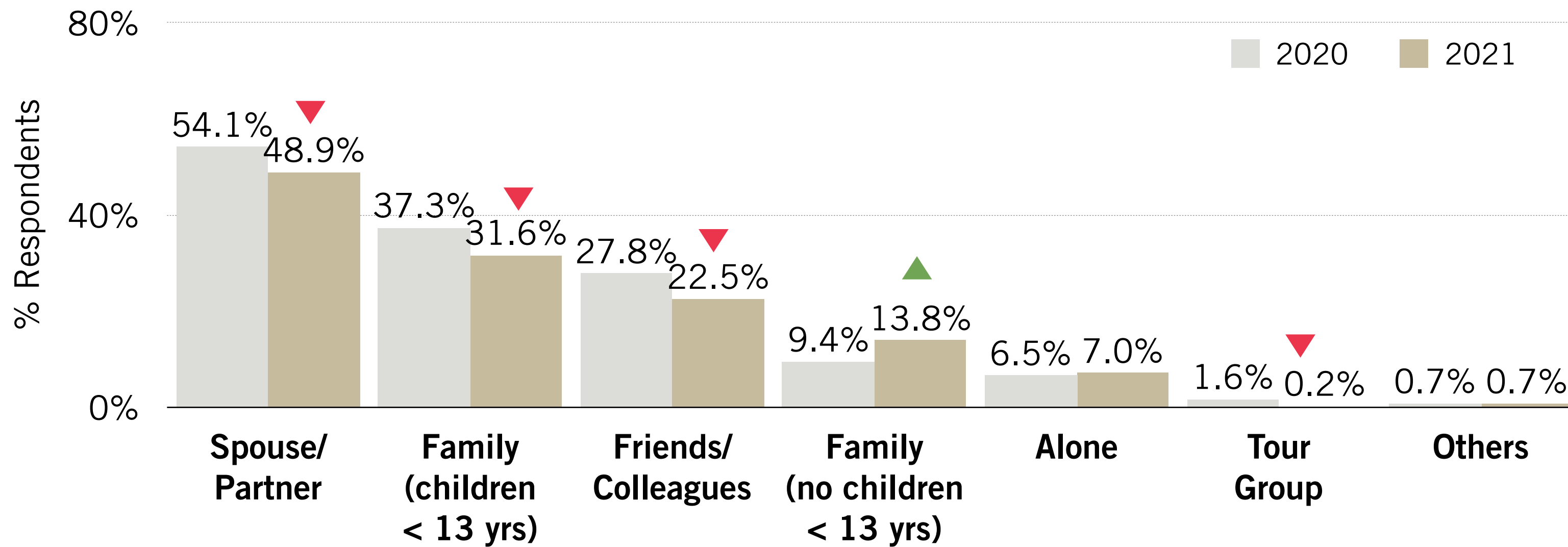
No statistical differences between the two groups

CHANGE IN VISITOR PROFILE

Profile of Visitors Have Changed

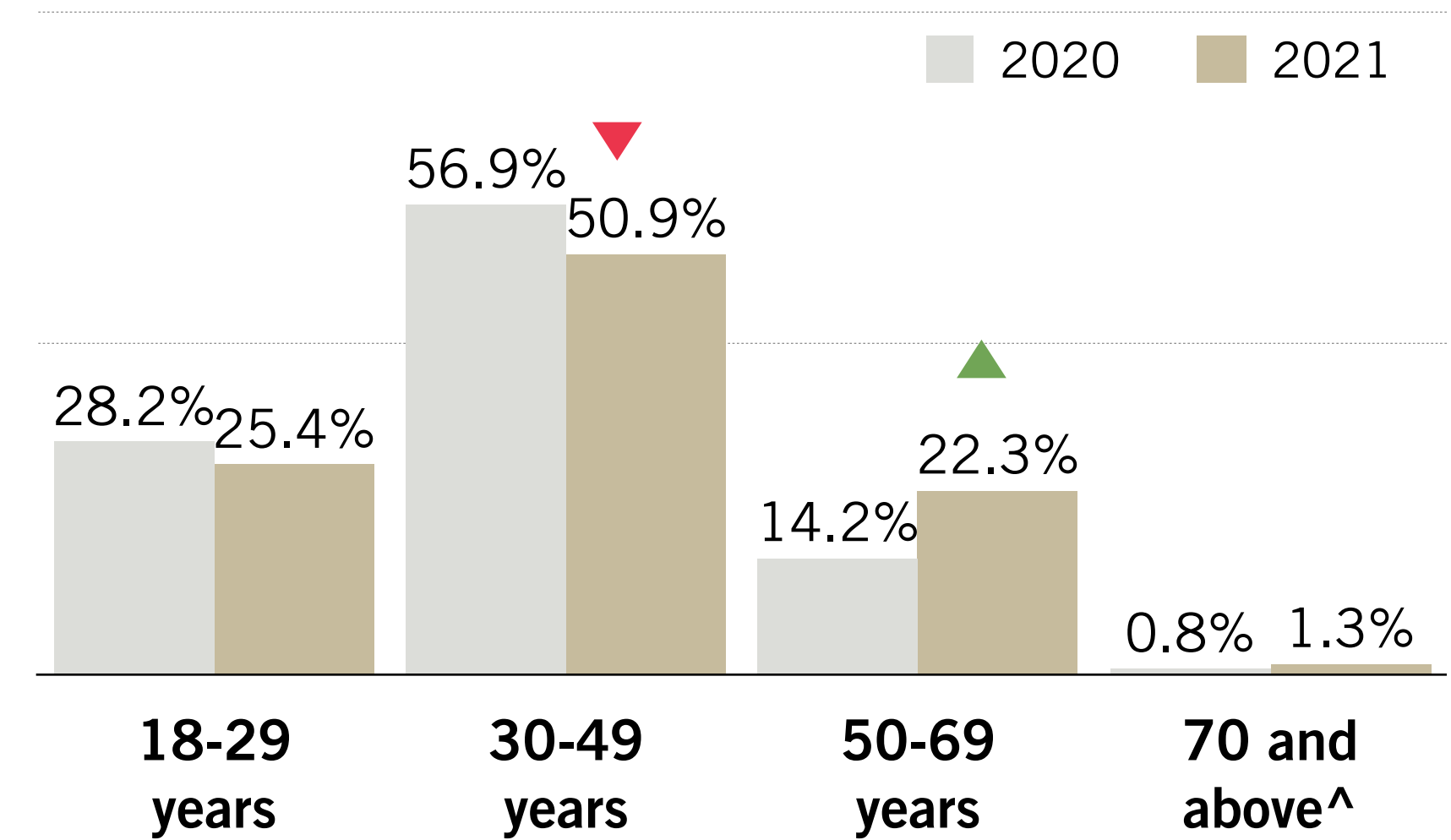
(Attractions: Year on Year Comparison of Visitor Profile)

Respondent Visitor Groups



Decline in visits with couples, families with young children, and friend/colleagues

Year-on-Year Visitor Comparison by Age



Increase in visits by older visitors

▲ ▼ Statistically significant year on year increase/drop in proportions at 90% confidence

Promotions For Seniors Offered By Attractions

Wildlife Reserve Promotions



The **\$10 Seniors Admission Promotion** is limited to local residents and tickets purchased are valid for same-park, same day admission from **7 July – 8 October 2021**.

Passion Card Silver Promotions



PASSION SILVER PRIVILEGE*:

(Valid till 31 December 2021)

- 50% off Sentosa 4D AdventureLand 4-in-1 Combo (One-time admission).



PASSION CARD PRIVILEGES:

Valid till 31 August 2022

- 10% off any individual Combo package
- 10% off online individual Combo package

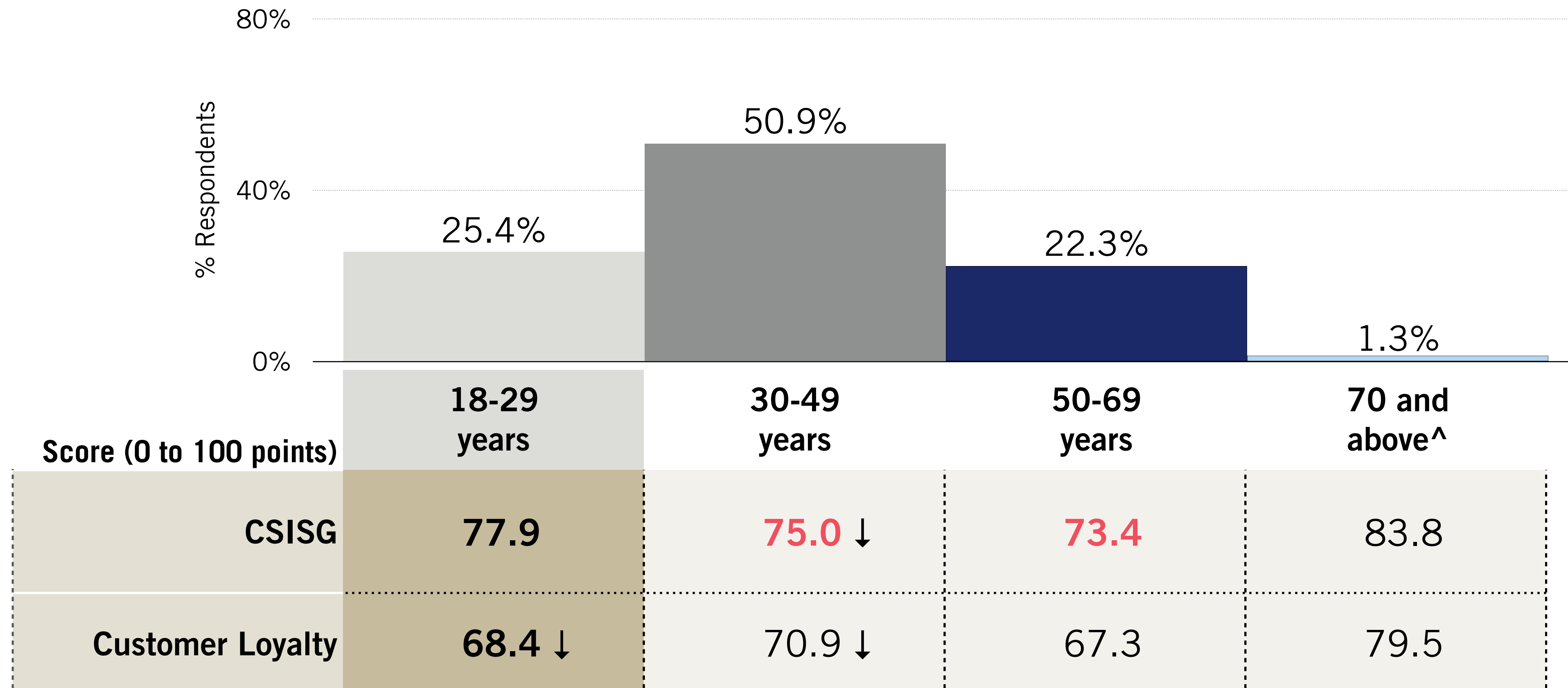
Mount Faber Cable Car Ride + Dining



Satisfaction & Loyalty for 50-69 Year-Olds Lowest Among Age Groups

(Attractions: Customer Satisfaction & Loyalty By Age Groups)

Respondent Age Groups



[^]Low samples for this group, hence findings are indicative only.

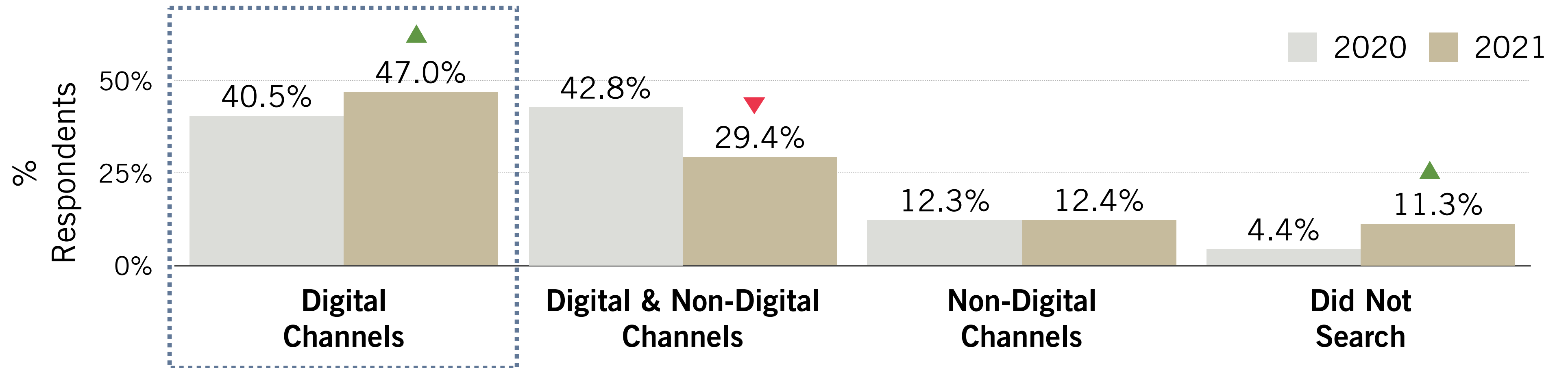
↑ ↓ denotes statistically significant year-on-year **increase/decrease** at 90% confidence.

GREEN/RED indicates statistically significant **better/worse** performance than those aged 18-29 years at 90% confidence

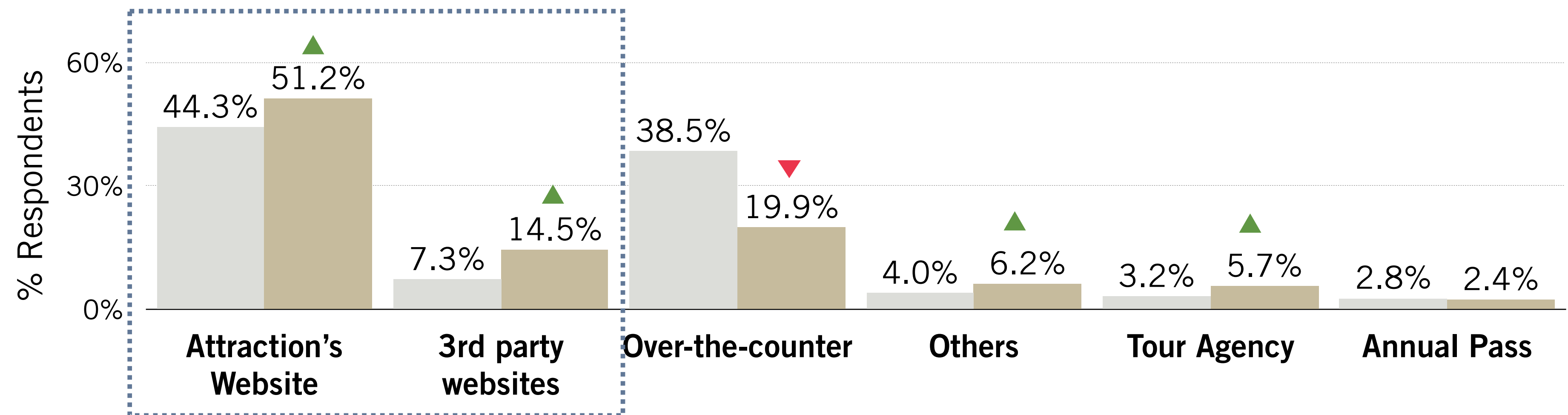
Channels Used For Information Search & Ticket Purchase Increasingly Digital

(Attractions: Mode of Information Search & Ticket Purchase)

Mode of Information Search Before Visit



Method of Ticket Purchase

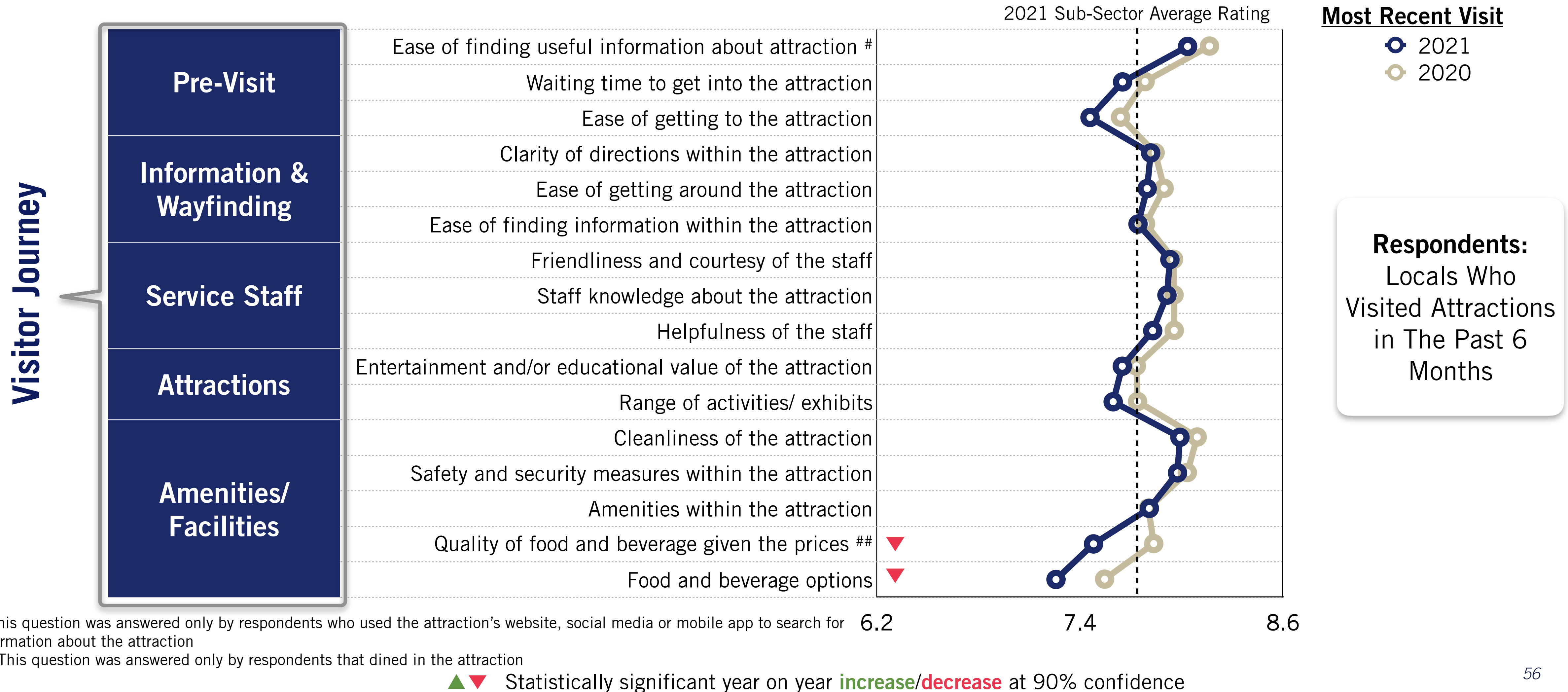


▲ ▼ Statistically significant year on year increase/drop in proportions at 90% confidence

VISITOR EXPERIENCE

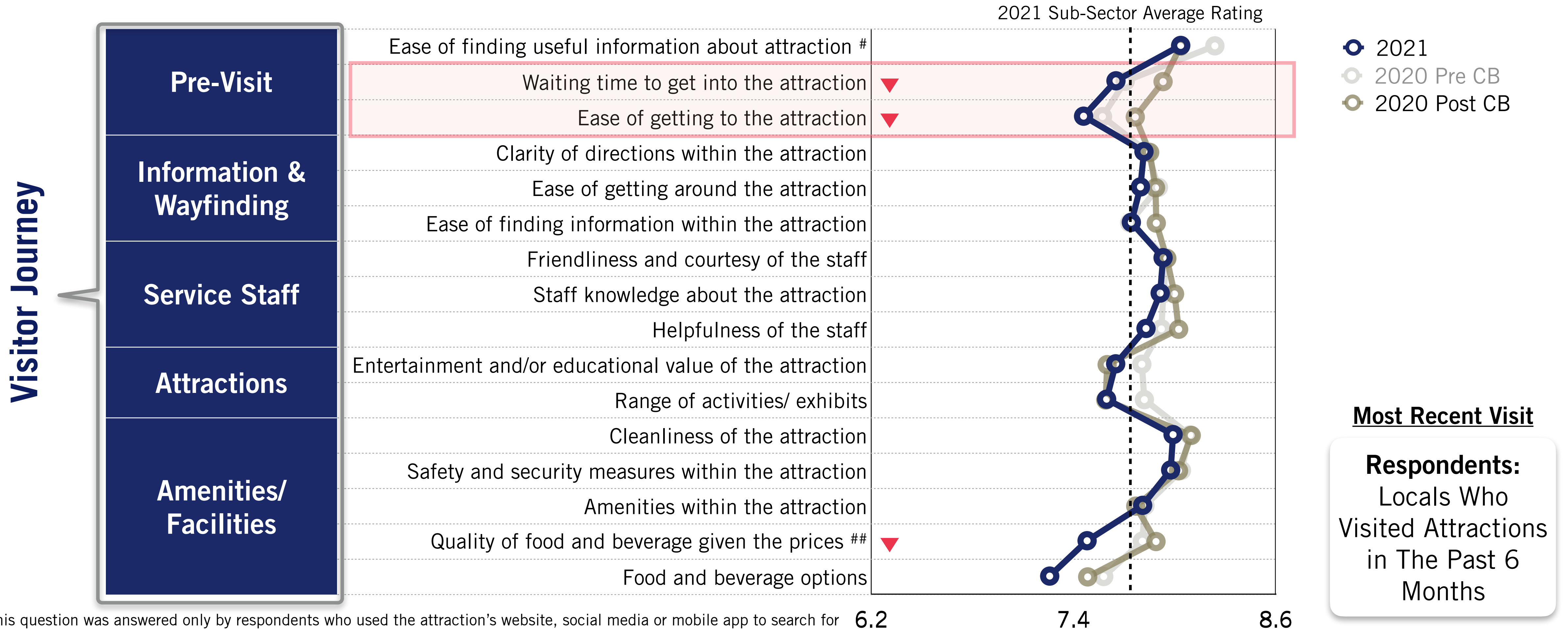
F&B Related Attributes Saw Significant Decline from 2020

(Attractions: Year-on-Year Attribute Performance)



Pre-Visit Attribute Ratings Fell When Compared to Reopening Phase in 2020

(Attractions: Attributes By COVID-19 Phases)

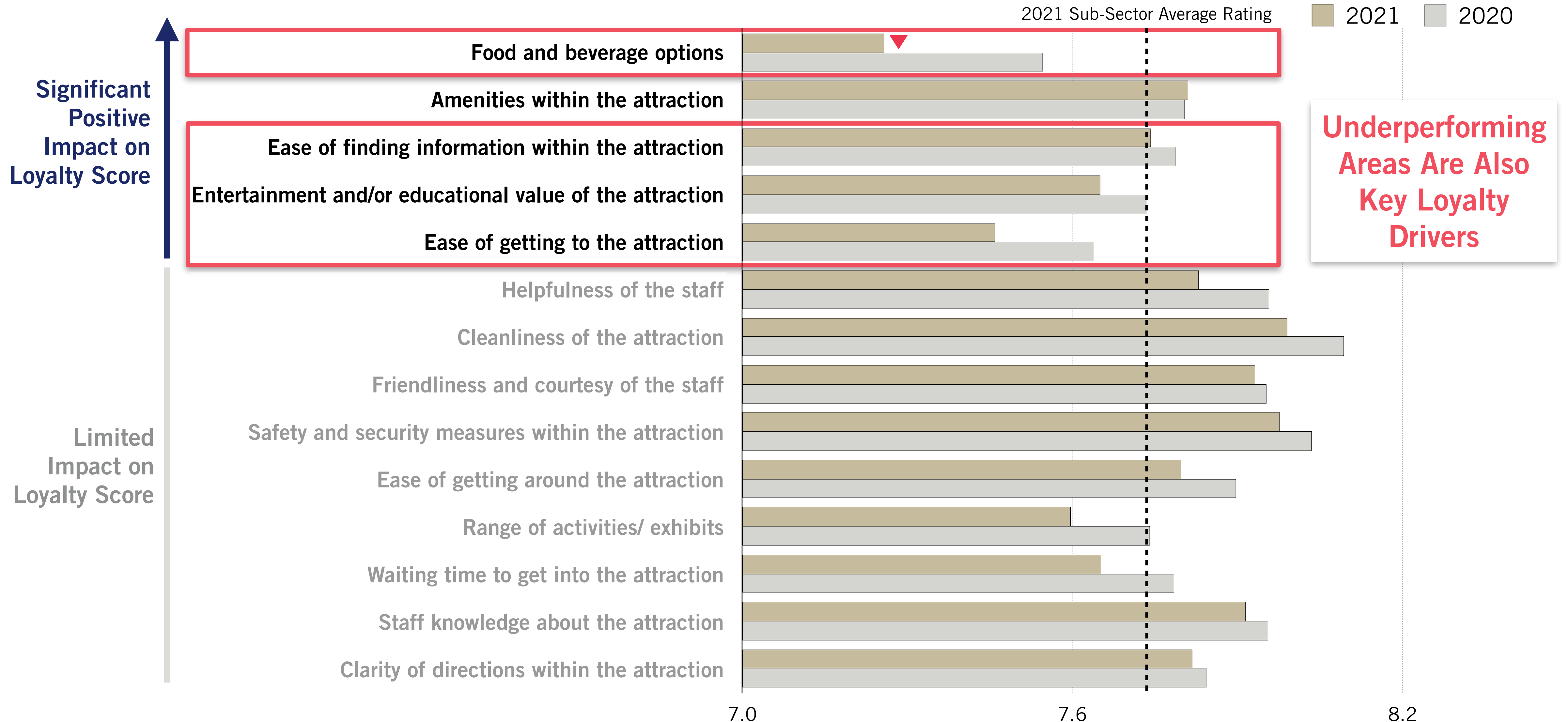


This question was answered only by respondents who used the attraction's website, social media or mobile app to search for information about the attraction

This question was answered only by respondents that dined in the attraction

▲ ▼ Statistically significant increase/decrease from 2020 Post Circuit Breaker period when attractions reopened at 90% confidence

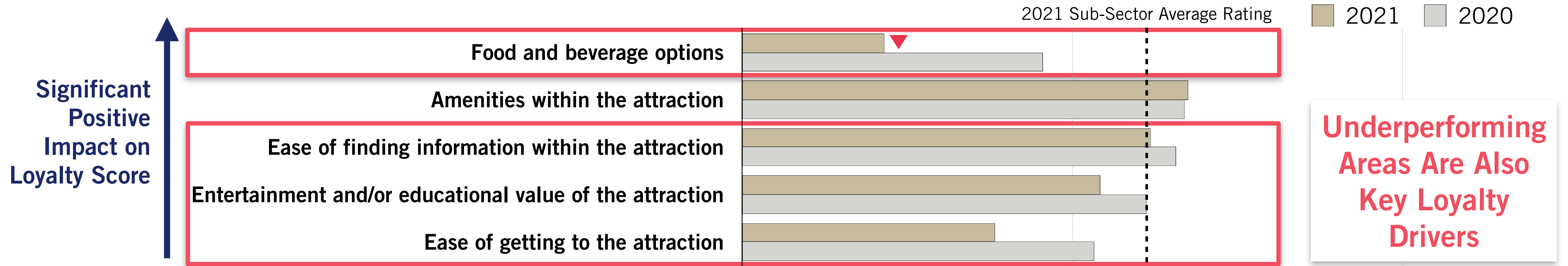
Attractions Attributes - Impact on Loyalty



▲ ▼ Statistically significant year on year **increase/decrease** at 90% confidence

Satisfaction Rating (Scale of 1 to 10)

Selected Verbatim On Key Underperforming Area: F&B Options



F&B Options	Attraction Experience & Accessibility
Improve on the quantity, quality, variety of food and lower the price is too expensive.	The exhibits are too little and not very attractive . Also, the location is too far for most of us.
Lower prices. Make food prices more reasonable.	Lower entry price, provide free shuttle service to nearby MRT station
The food pricing are very expensive . The only affordable range is <i>[F&B name]</i> , which is always CROWDED . Tables outside are full of birds fighting for leftovers by customers.	Was looking forward to learning about <i>[attraction]</i> . Exhibits did not change from a year ago.
The food offers there are expensive as well. I tried satay there and found that they were not cooked well...	Last trip was disappointing as there were a lot of upgrading works and many exhibits not available.
I feel that the quality of food and its pricing can be improved because they are mediocre.	<i>[Attraction name]</i> is supposed to be a world-class attraction, yet the exhibits aren't very attractive nor interesting at all. It's go-once-is-enough again type of location. The overall layout of the place is also quite bizarre.

7.0

7.6

8.2

How Some Local Attractions Offered Bundled Packages

Cablecar diversified services to include dining

Destination-themed Cabin



Singapore Flavours Cabin



Champagne Cabin



Singapore Flyer Sky Dining Packages

The world's first full-service sky dining



Madame Tussaud's Bundled Packages

Also participating is the wax sculpture museum Madame Tussauds in Sentosa, which is pairing with fast-food restaurant Marrybrown and Sentosa's Island Bus Tour for a bundle.



The wax museum is also launching new activities to attract more visitors, such as the Behind the Magic tour where guests learn the craft of making wax figures, including skills like wax painting and hair insertion.

Sources:

(1) <https://www.mountfaberleisure.com/restaurant/cable-car-sky-dining/>

(2) <https://www.singaporeflyer.com/en/ticket/singapore-flyer-sky-dining>

(3) <https://www.madametussauds.com/singapore/>

Staff Key To Perceived Quality of Attractions

Attractions: Attributes with Significant Impact on Perceived Overall Quality and Customer Loyalty

Key Drivers of Perceived Overall Quality & Customer Loyalty	
Quality	Loyalty
Staff knowledge about the attraction	Food and beverage options
Safety and security measures within the attraction	Amenities within the attraction
Food and beverage options	Ease of finding information within the attraction
Friendliness and courtesy of the staff	Entertainment and/or educational value of the attraction
Entertainment and/or educational value of the attraction	Ease of getting to the attraction

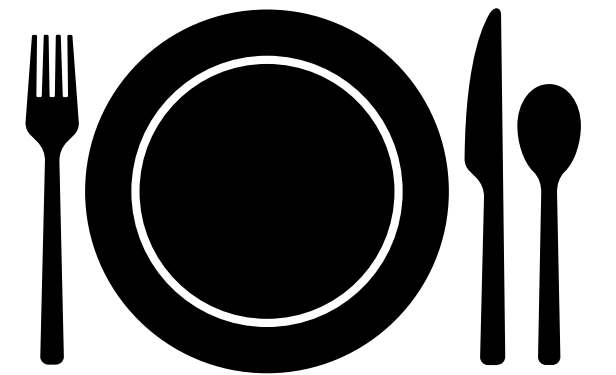
Legend:

Information & Accessibility	Staff	Product	Amenities & Facilities
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Key Takeaways

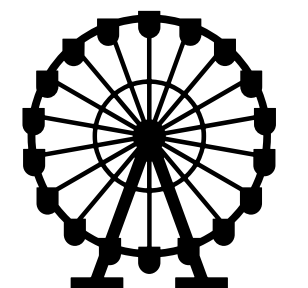
F&B

- **Performance:** Scores flat, except for lower loyalty and satisfaction for Cafés & Coffee Houses, driven by the takeaway segment.
- **Pain-Points:** Store & staff attributes continue to underperform. Onsite ordering and processes poorer when compared to Delivery.
- **Focus Areas:** Think about (1) leveraging on takeaways in the short-term, and (2) apart from the food, focus on service staff to retain customers.



Attractions

- **Performance:** Decline in (1) Loyalty, (2) Accessibility, and (3) F&B related attributes when compared to post-circuit breaker in 2020.
- **Focus Areas:** Consider (1) focusing on service staff, accessibility, and F&B to retain customers, and (2) leverage on the increase in older visitors.



QUESTIONS?



ISE INDUSTRY FORUM

CSISG 2021 Q3 RESULTS ANNOUNCEMENT

F&B AND TOURISM