



# ISE INDUSTRY FORUM

## CSISG 2022 Q3 RESULTS ANNOUNCEMENT

### F&B AND TOURISM

**DOES CUSTOMER SATISFACTION  
STILL MATTER?**

# Research Shows A Strong Relationship Between Customer Satisfaction And Financial Performance

**Companies Performing Well on Customer Satisfaction Outperform the Benchmark Index**



Source: <http://www.theacsi.org/>

Note: Fund is named The American Customer Satisfaction Core Alpha ETF (ticker: ACSI)

# Customer Satisfaction & Financial Indicators

Research Shows Satisfaction Metrics Predicts Various Financial Performance Indicators

**Table 4 Managerial Value of Different Customer Feedback Metrics in Predicting Future Business Performance**

Customer feedback metric	Future business performance dependent				
	Net operating cash flows	Total shareholder returns	Annual sales growth	Gross margin	Market share
Average satisfaction score	High	High	High	High	High
Top 2 Box satisfaction score	High	Weak	High	High	High
Proportion of customers complaining	Nil	Nil	High	High	Nil
Net promoters	Nil	Nil	Nil	Nil	Nil
Average repurchase likelihood score	Nil	Nil	High	High	High
Average number of WOM recommendations	Nil	Nil	Nil	Nil	High

Source: Morgan & Rego (2006), *The Value of Different Customer Satisfaction and Loyalty Metrics in Predicting Business Performance*, *Marketing Science* 25(5):426-439

**Note:** Research done using 80 firms across different industries measured on the American Customer Satisfaction Index from 1994 to 2000. Summary findings are derived from a regression analysis which includes variables to control for the effects of other financial metrics known to impact the target performance metrics.

# Why Customer Satisfaction Matters



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

- 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**

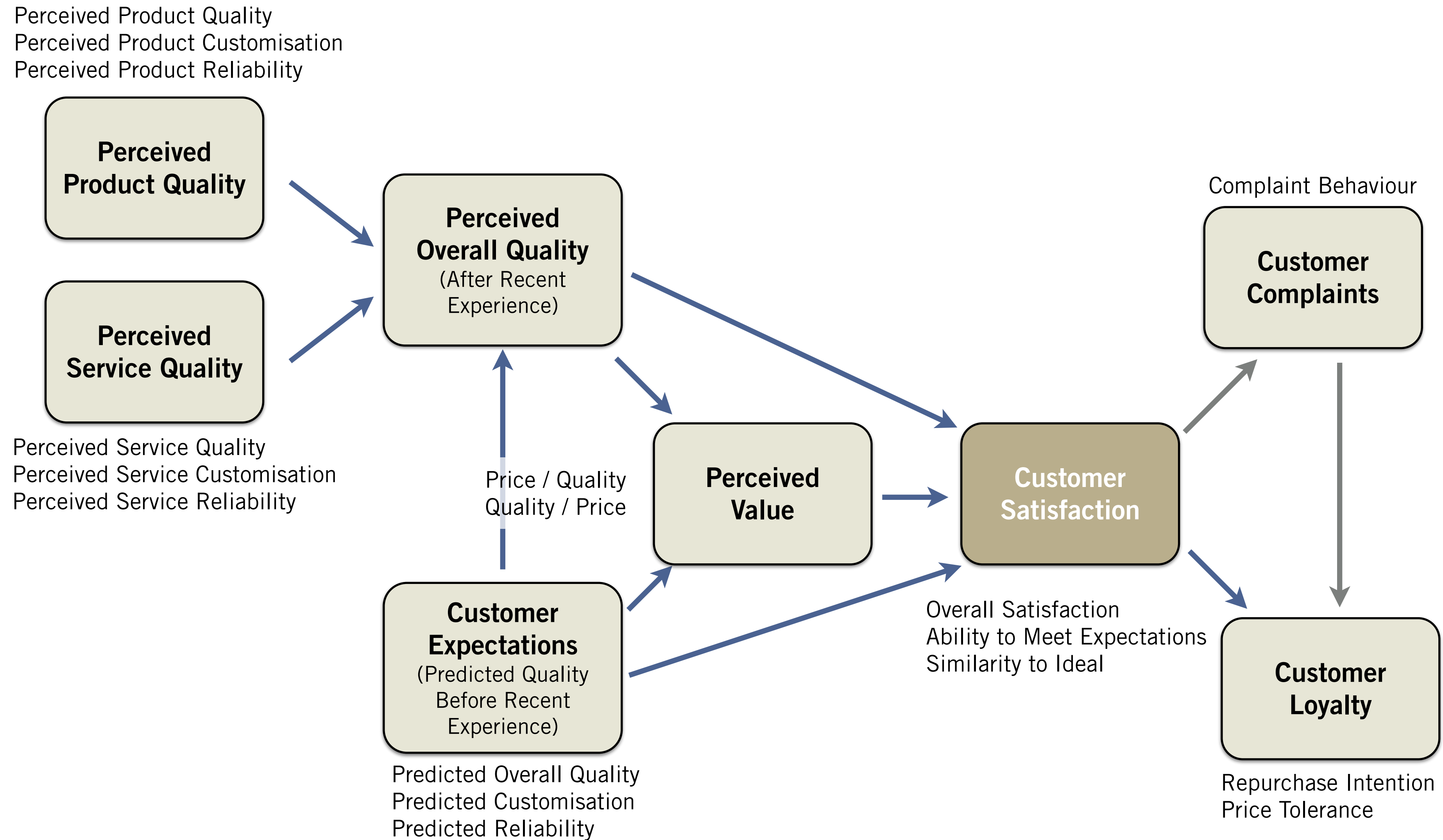
Overall Satisfaction  
 Ability to Meet Expectations  
 Similarity to Ideal

Complaint Behaviour

**Customer Complaints**

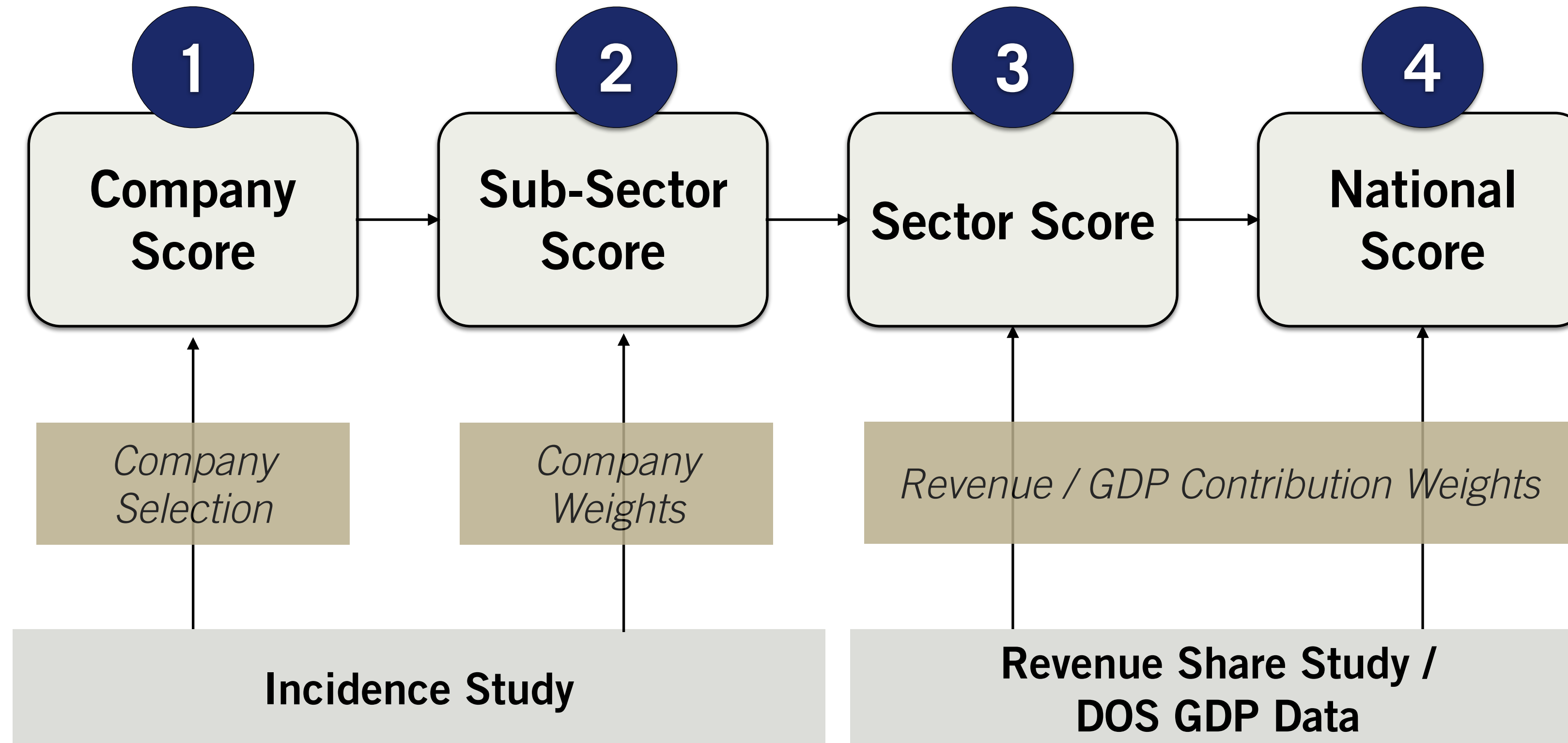
**Customer Loyalty**

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.

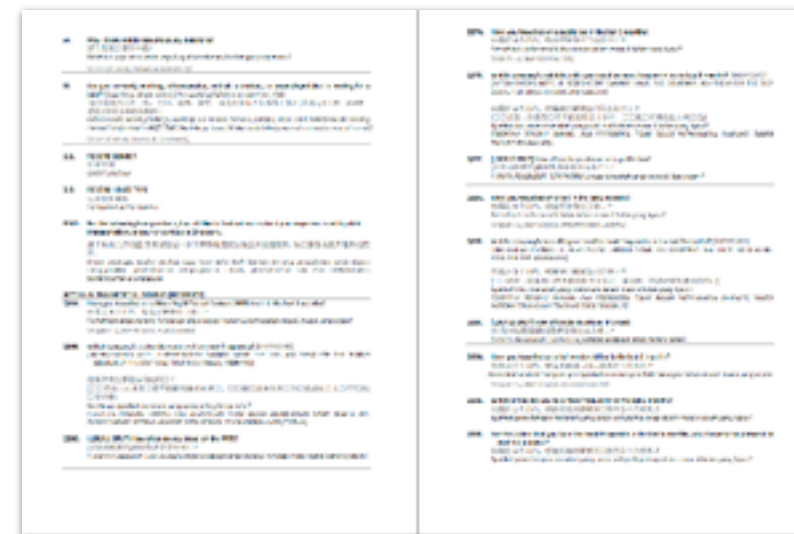
# CSISG 2022 Q3 Quick Facts

Sectors Covered	<b>Food &amp; Beverages Tourism (Attractions)</b>
Survey Period	<b>Jul to Sep 2022</b>
Total Questionnaires Completed Online (Locals)	<b>2,600</b>
Distinct entities measured	<b>88</b>
Entities with published scores	<b>20</b>

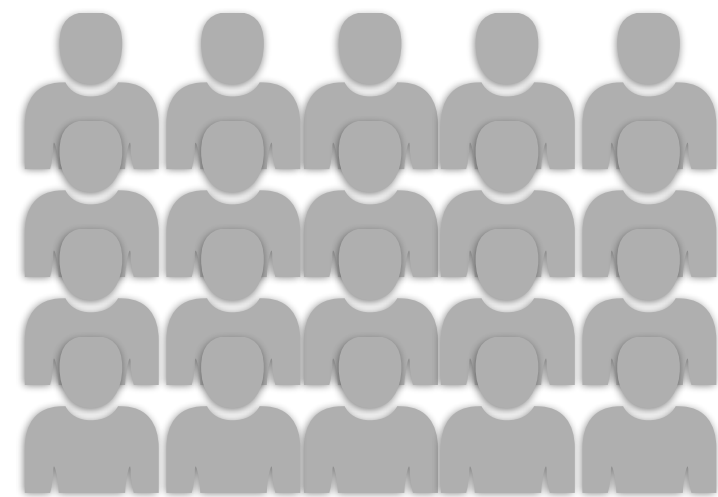
# General CSISG Fieldwork Methodology for Q3



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 2022 Q3 Sub-sectors

### **Food and Beverage Sector**

- Restaurants
- Fast Food Restaurants
- Cafes & Coffee Houses

### **Tourism Sector**

- Attractions

Note: The previously measured Snack Bars & Food Kiosks (F&B) and Hotels (Tourism) were not measured this year.

# How Well Did Companies Satisfy Their Customers?

## CSISG 2022 Q3 Results Overview

### 74.1 Tourism

#### 74.1 Attractions

- 75.2 Singapore Zoo
- 75.1 Gardens By The Bay
- 73.7 Universal Studios
- 73.4 Sentosa
- 73.9 Other attractions

### 71.5 Food & Beverage

#### 71.9 Fast Food Restaurants

- 73.8 McDonald's
- 72.3 Burger King
- 69.9 KFC
- 69.5 Subway
- 72.2 Other fast food restaurants

### 71.6 Restaurants

- 76.5 Din Tai Fung\*
- 73.3 Sakae Sushi
- 71.4 Pizza Hut
- 71.2 Crystal Jade Kitchen
- 70.4 Swensen's
- 71.2 Other restaurants

### 70.6 Cafes & Coffee Houses

- 71.9 Coffee Bean & Tea Leaf
- 71.4 Starbucks
- 71.1 Toast Box
- 71.0 Ya Kun

#### 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

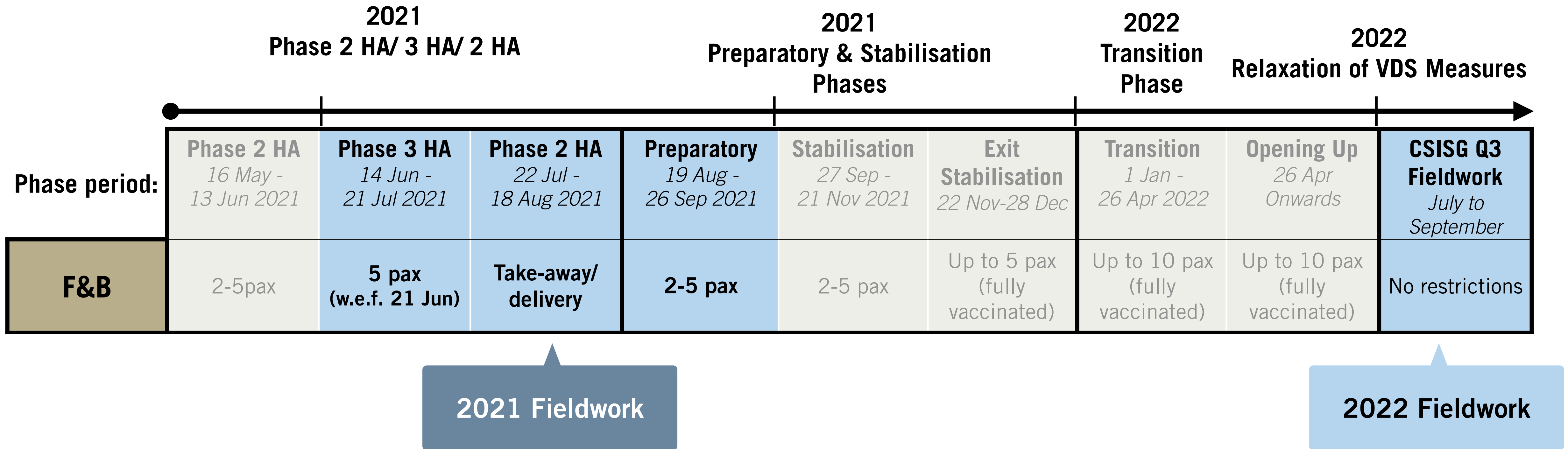
\* Refers to companies/sub-sectors that are statistically significantly above their sub-sector/sector scores

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

# **FOOD AND BEVERAGE SECTOR RESULTS**

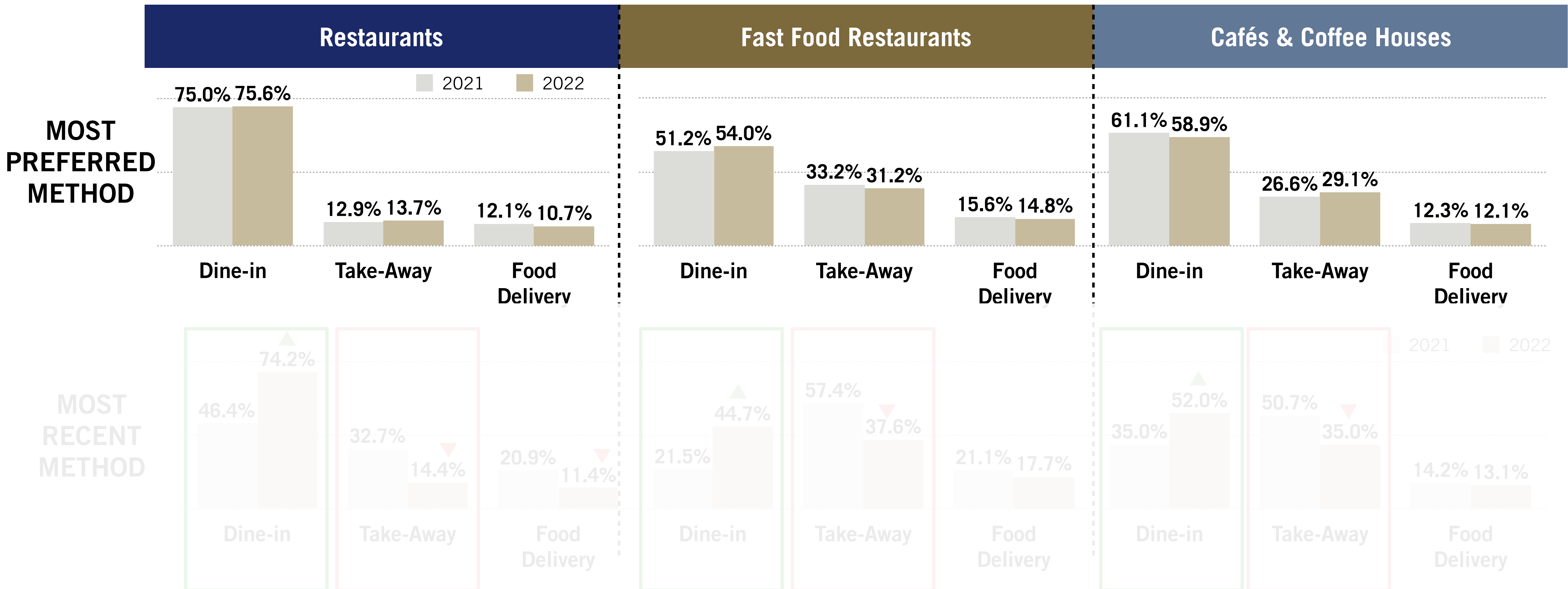
# **CHANGES IN DINING BEHAVIOUR**

# Major Changes In Capacity Allowed Since The Last Measurement



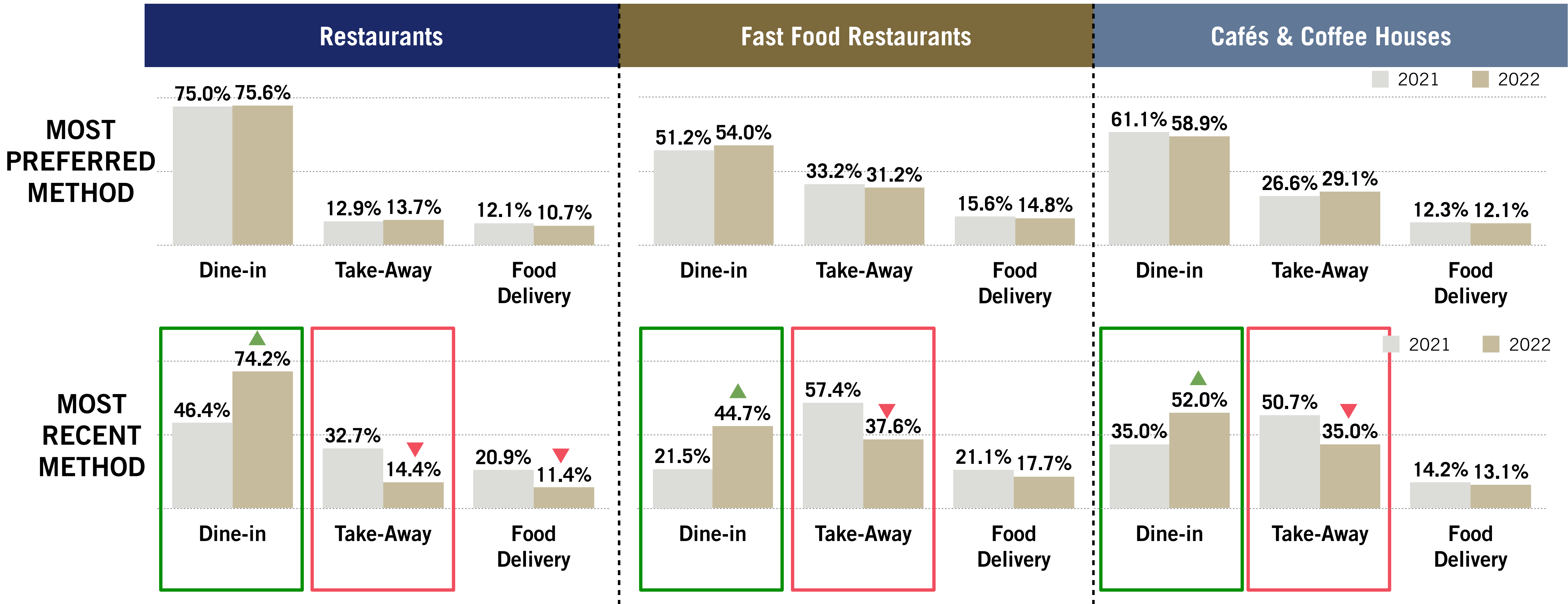


# Preference To Dine-In Remains High Across All Three Sub-Sectors



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

# With Easing Of Pandemic Restrictions, Significant Increase in Dine-In

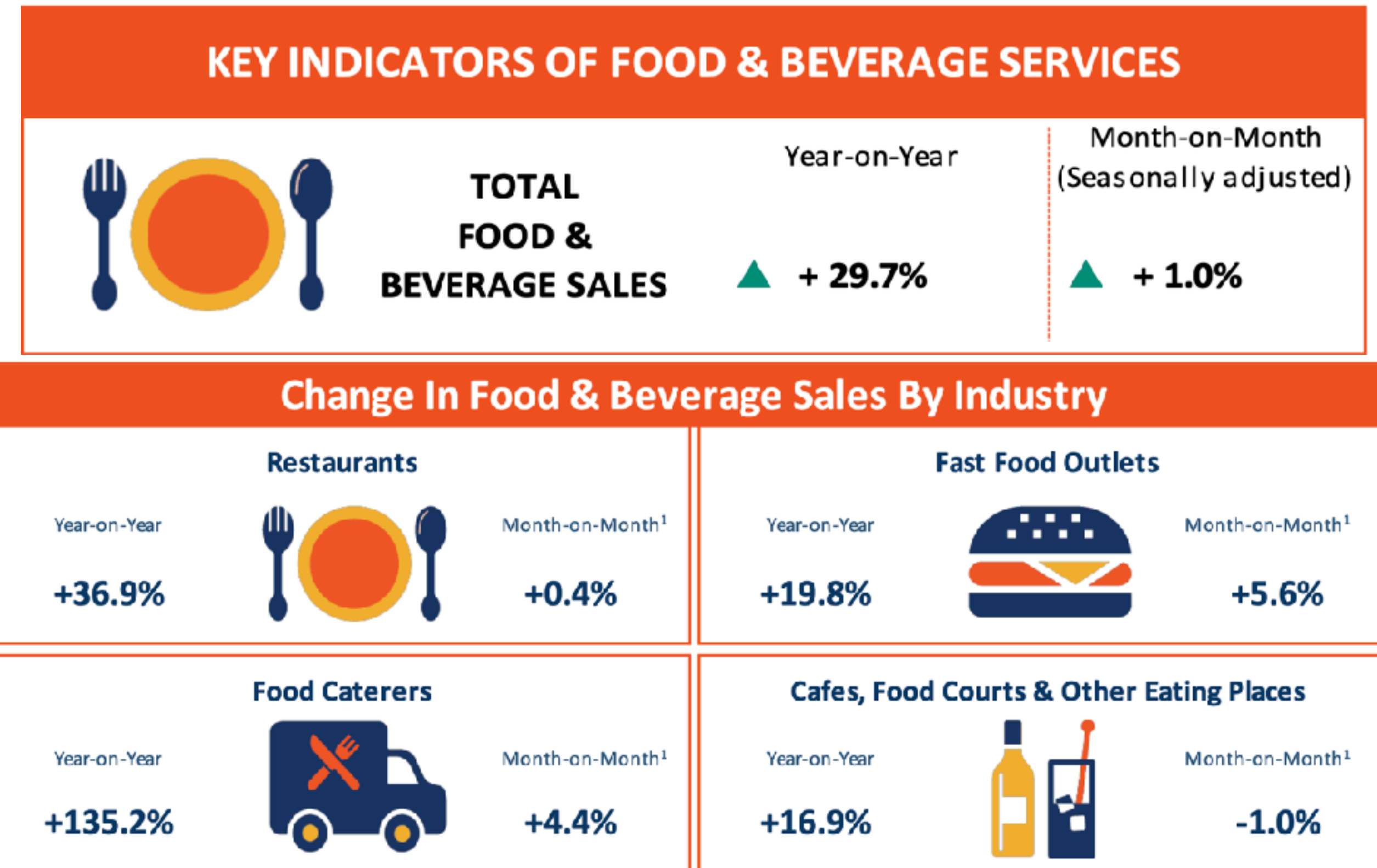


▲ ▼ Statistically significant year-on-year increase/decrease in proportions at 90% confidence

# F&B Saw Demand For Dine-in Increase With Easing Of Restrictions



## Food & Beverage Services Index: September 2022



## Easing of dine-in services increases F&B sales by 11.4% in April

It grew by 5.2% month-on-month on a seasonally adjusted basis.

Food and Beverage (F&B) sales went up by 11.4% year-on-year (YoY) in April 2022 after indoor dining was allowed for groups of up to 10 fully vaccinated people starting 29 March 2022, data from the Department of Statistics showed.

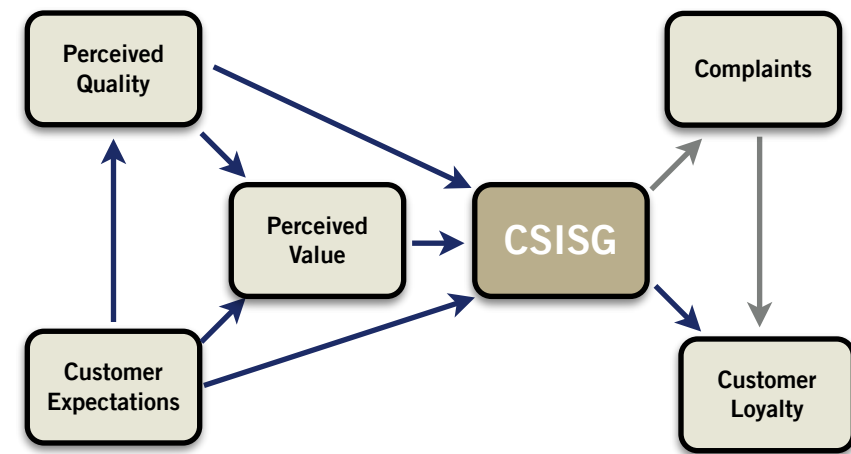
<sup>1</sup> Seasonally adjusted

<sup>2</sup> In 2021, dine-in at F&B establishments was allowed for groups of up to 5 vaccinated persons from 1 September to 26 September 2021 and groups of up to 2 vaccinated persons from 27 September 2021. In September 2022, there were no dine-in restrictions (for vaccinated persons).

**Source:**

- (1) <https://sbr.com.sg/food-beverage/news/easing-dine-in-services-increases-fb-sales-114-in-april>
- (2) <https://www.singstat.gov.sg/-/media/files/news/mrssep2022.ashx>

# Decline in Quality & Loyalty for Restaurants; Fast Food Saw Service Quality Drop

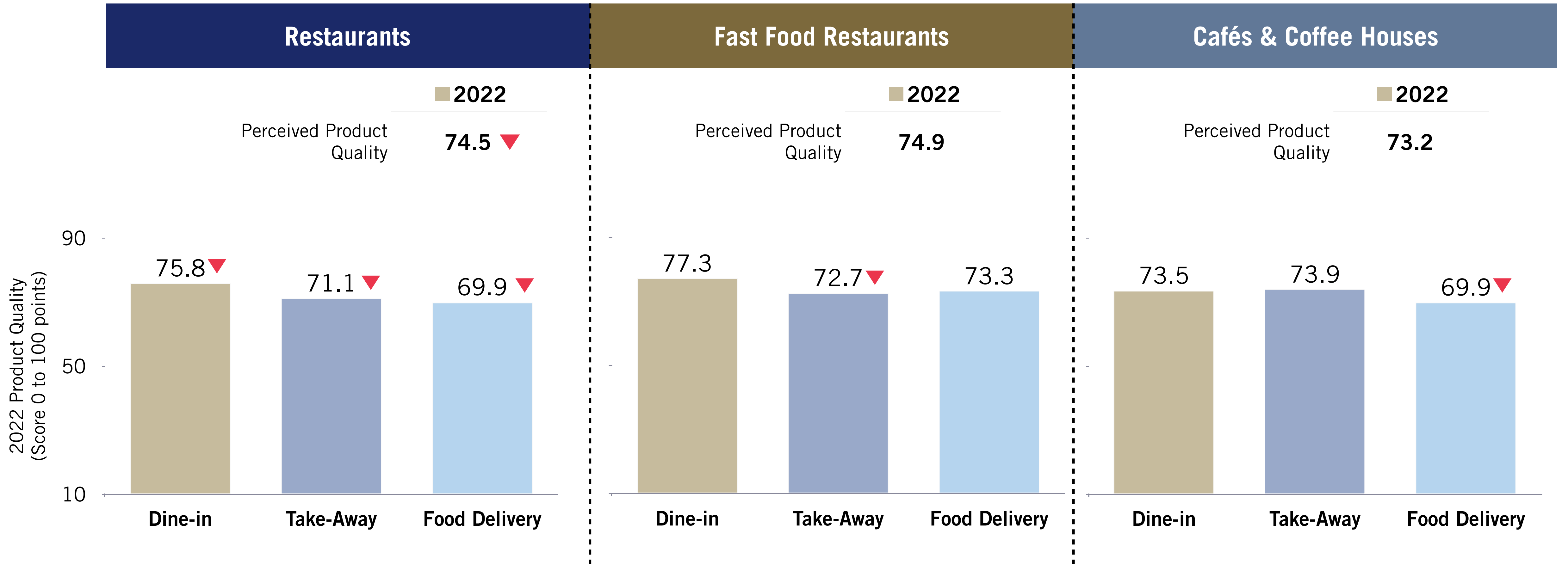


	Customer Expectations (Predicted Quality Before Recent Experience)	Perceived Product Quality (After Recent Experience)	Perceived Service Quality (After Recent Experience)	Perceived Value	CSISG	Customer Loyalty
Fast Food Restaurants Sub-Sector	73.1 ■ (-2.8%)	74.9 ■ (-2.4%)	73.7 ▼ (-3.1%)	68.8 ■ (-3.3%)	71.9 ■ (-2.8%)	70.0 ■ (-1.5%)
Restaurants Sub-Sector	74.4 ■ (-1.4%)	74.5 ▼ (-3.9%)	74.3 ▼ (-2.7%)	70.7 ■ (+0.3%)	71.6 ■ (-1.9%)	68.0 ▼ (-4.1%)
Cafés & Coffee Houses Sub-Sector	74.0 ■ (-0.1%)	73.2 ■ (-3.5%)	72.6 ■ (-2.5%)	68.1 ■ (+1.4%)	70.6 ■ (+1.5%)	68.8 ■ (+3.4%)

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

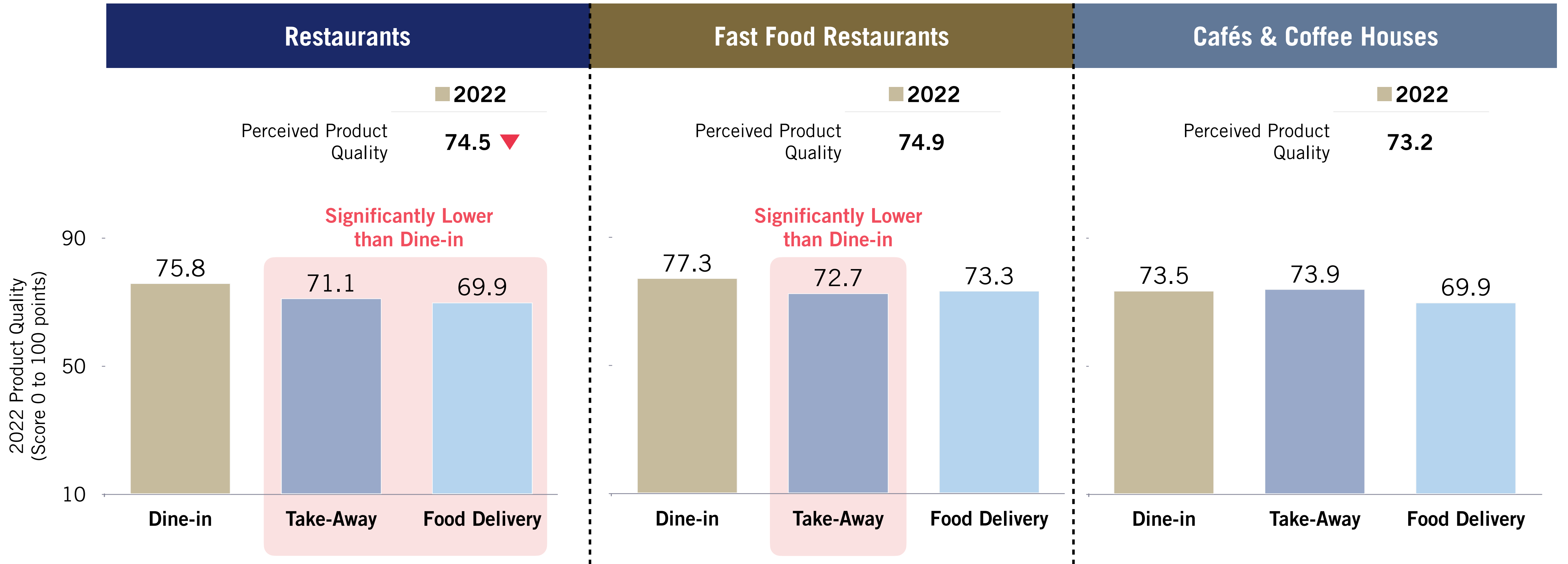
**Respondents:** Locals Who Patronised F&B in The Past 3 Months

# Product Quality: Year-on-Year Movements By Segment



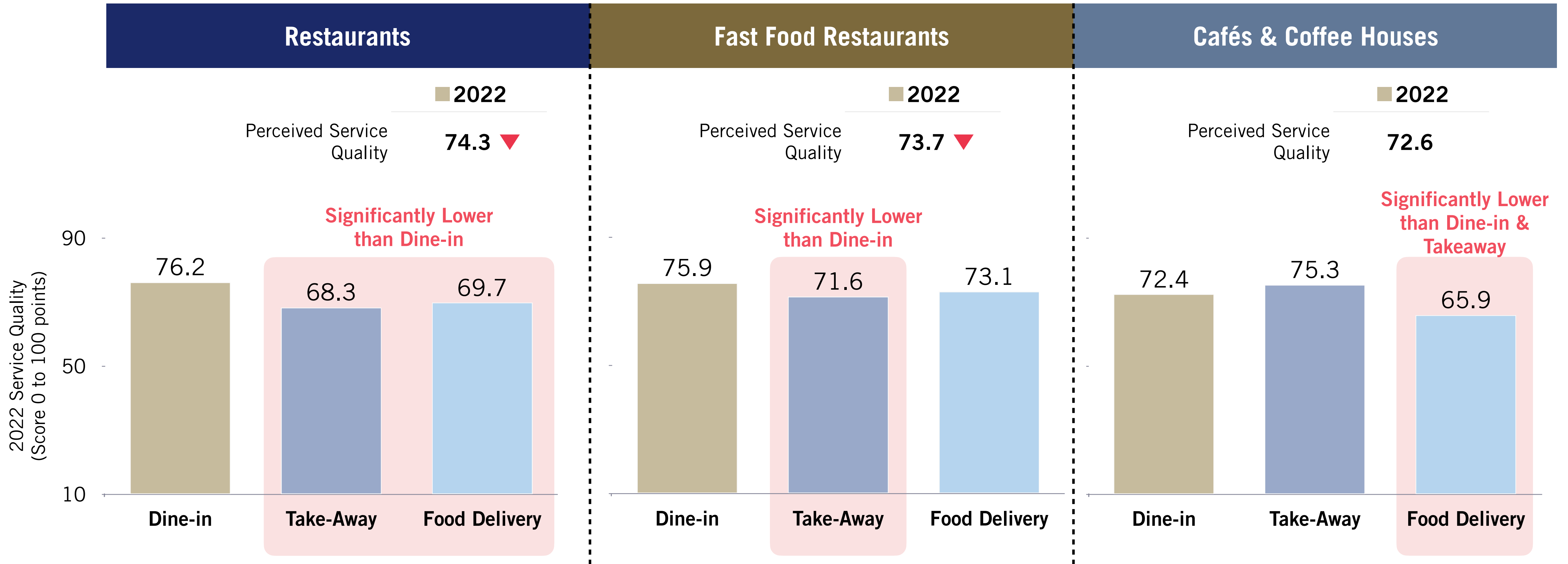
▲ ▼ Statistically significant year-on-year increase/decrease at 90% confidence

# Product Quality: Take-Away And Food Delivery Segments Under-Performed Dine-In



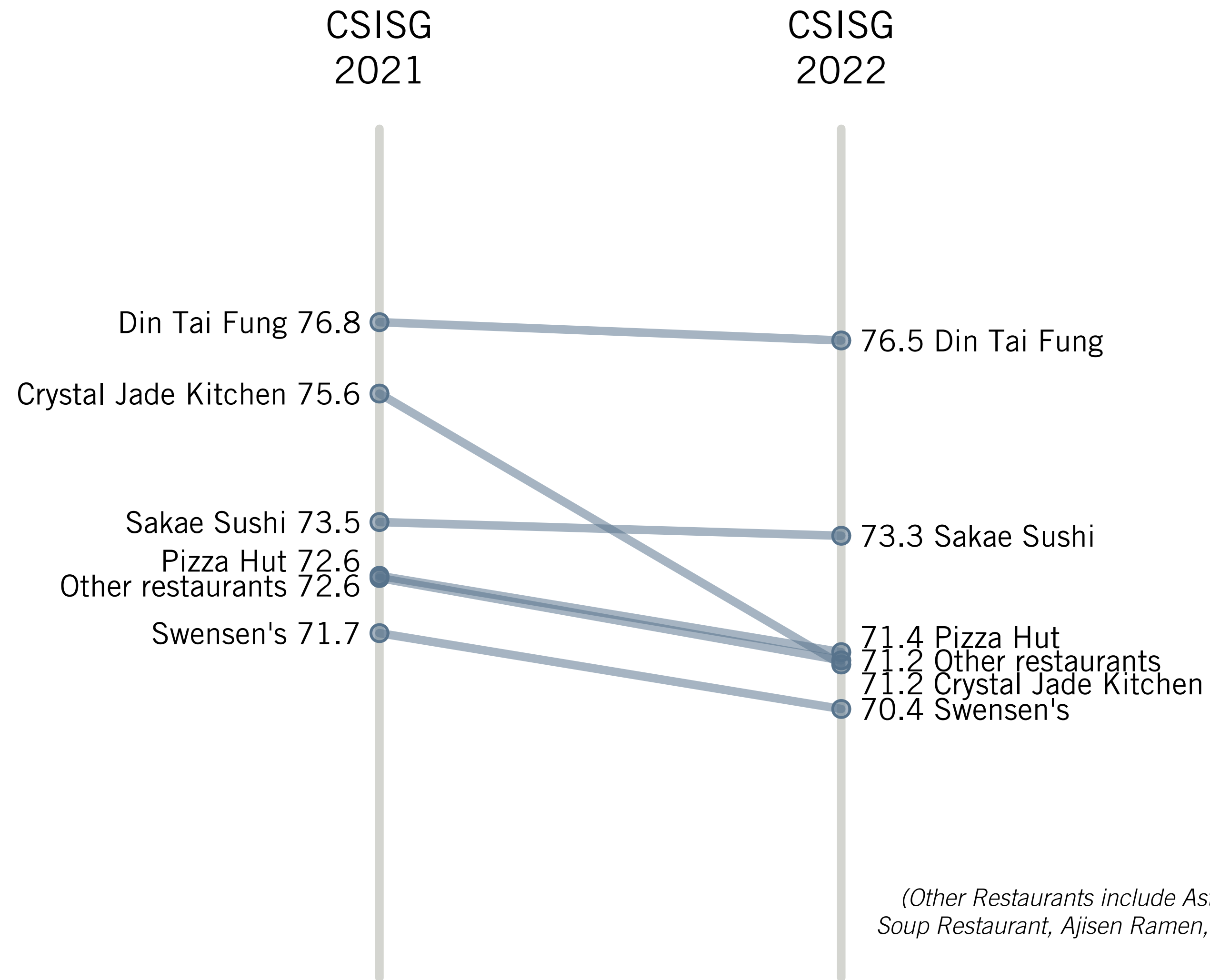
▲ ▼ Statistically significant year-on-year increase/decrease at 90% confidence

# Service Quality: Take-Away And Food Delivery Segments Under-Performed Dine-In



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

# Restaurants: Marginal Decline in CSISG Scores

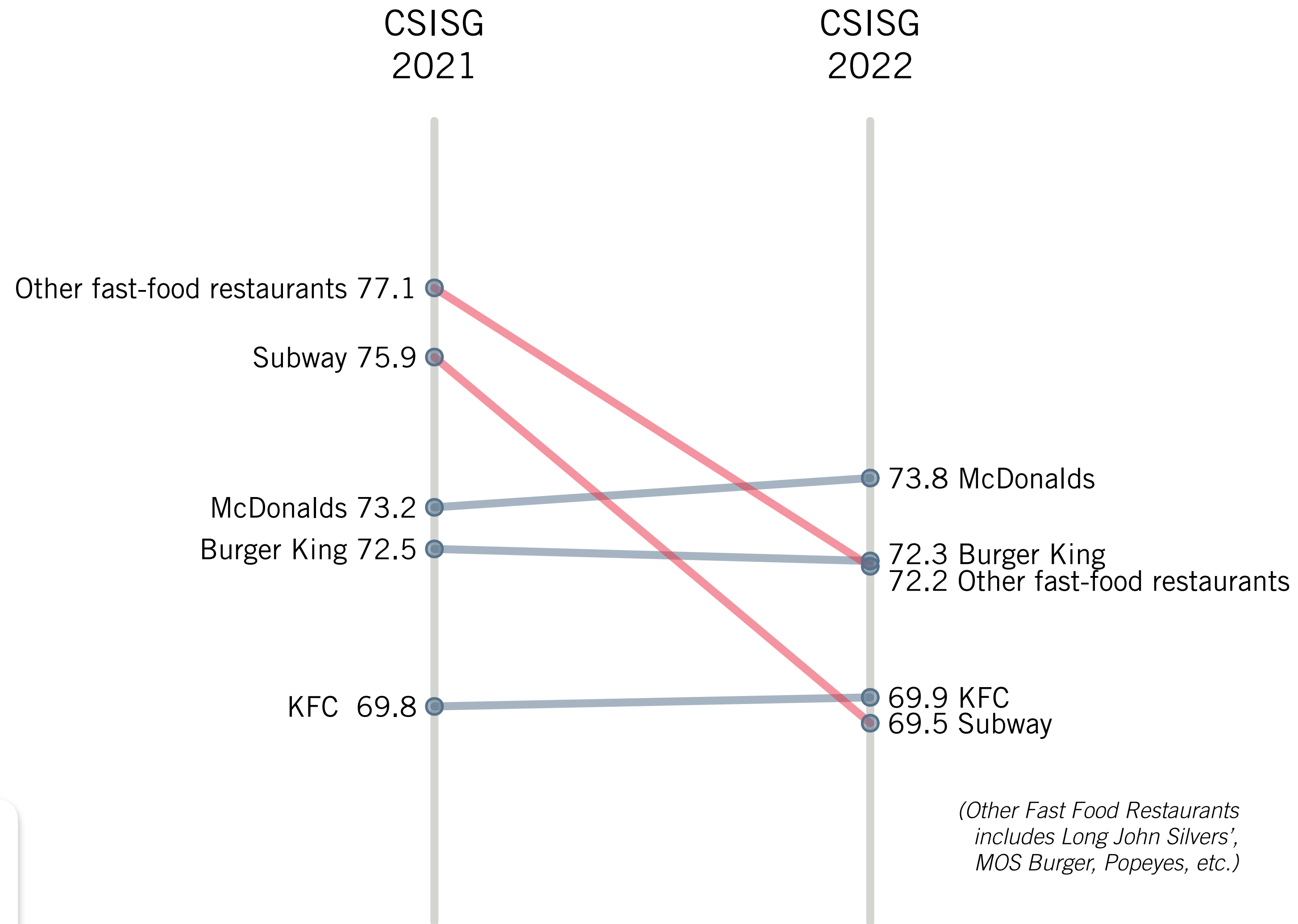


*(Other Restaurants include Aston's, Soup Restaurant, Ajisen Ramen, etc.)*

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

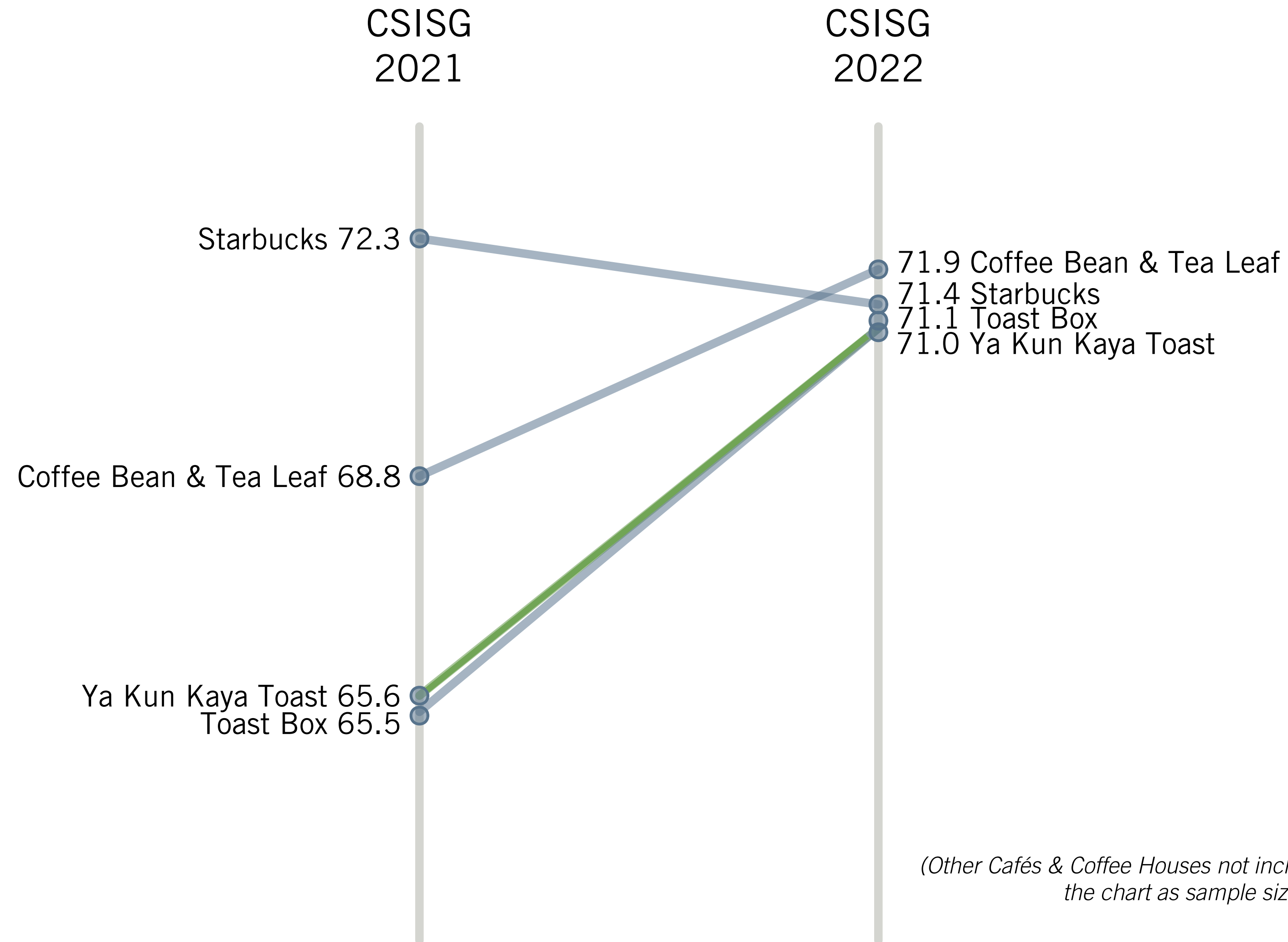


# Fast Food Restaurants: Significant Decline In CSISG For Subway And Others



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

# Cafés & Coffee Houses: Significant Increase In CSISG For Ya Kun Kaya Toast



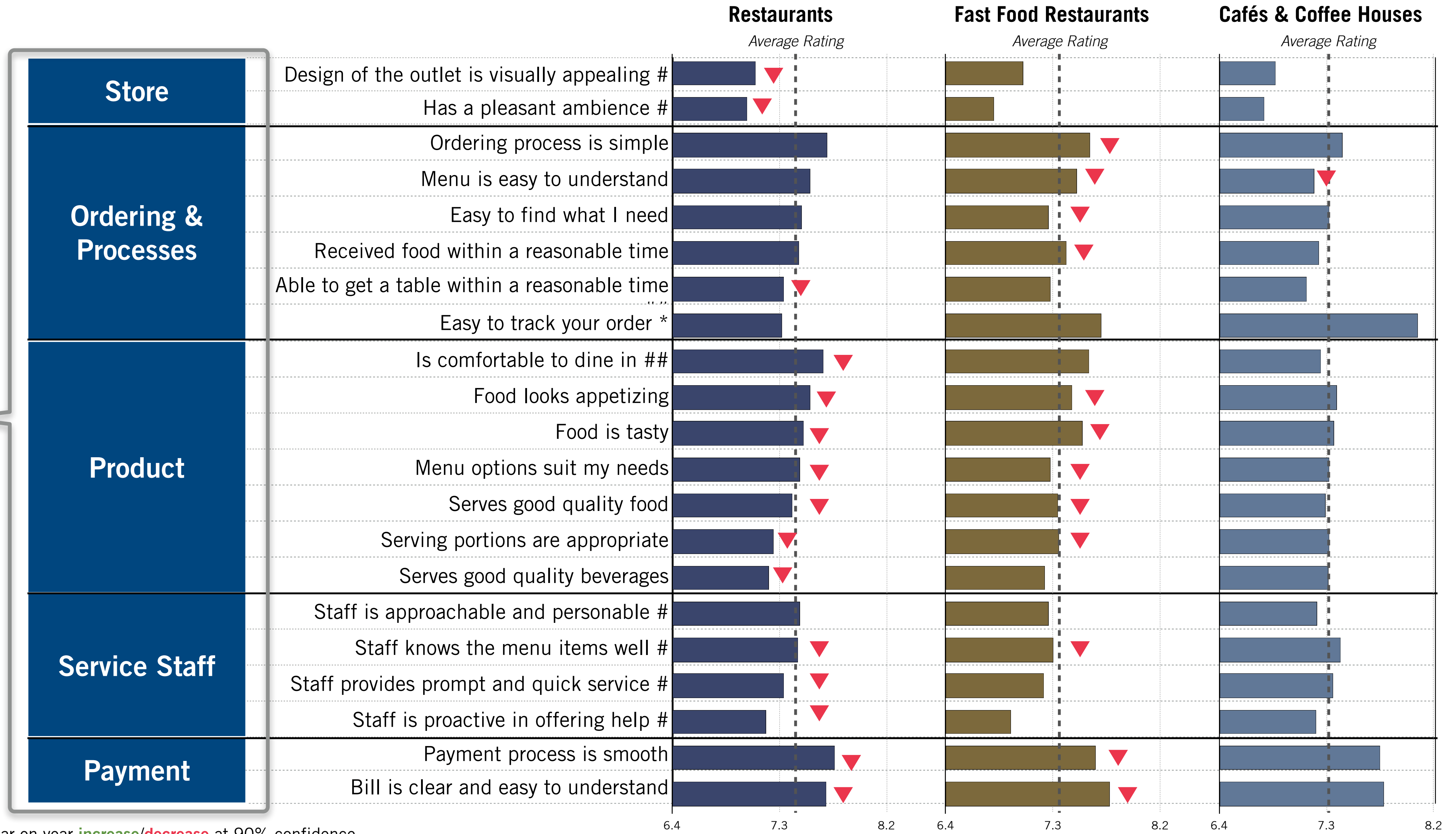
**Respondents:** Locals Who Patronised F&B in The Past 3 Months

*(Other Cafés & Coffee Houses not included in the chart as sample sizes < 50)*

# ATTRIBUTE PERFORMANCE

# Significant Decline Year-on-Year For Most Restaurant And Fast Food Attributes

Customer Journey



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

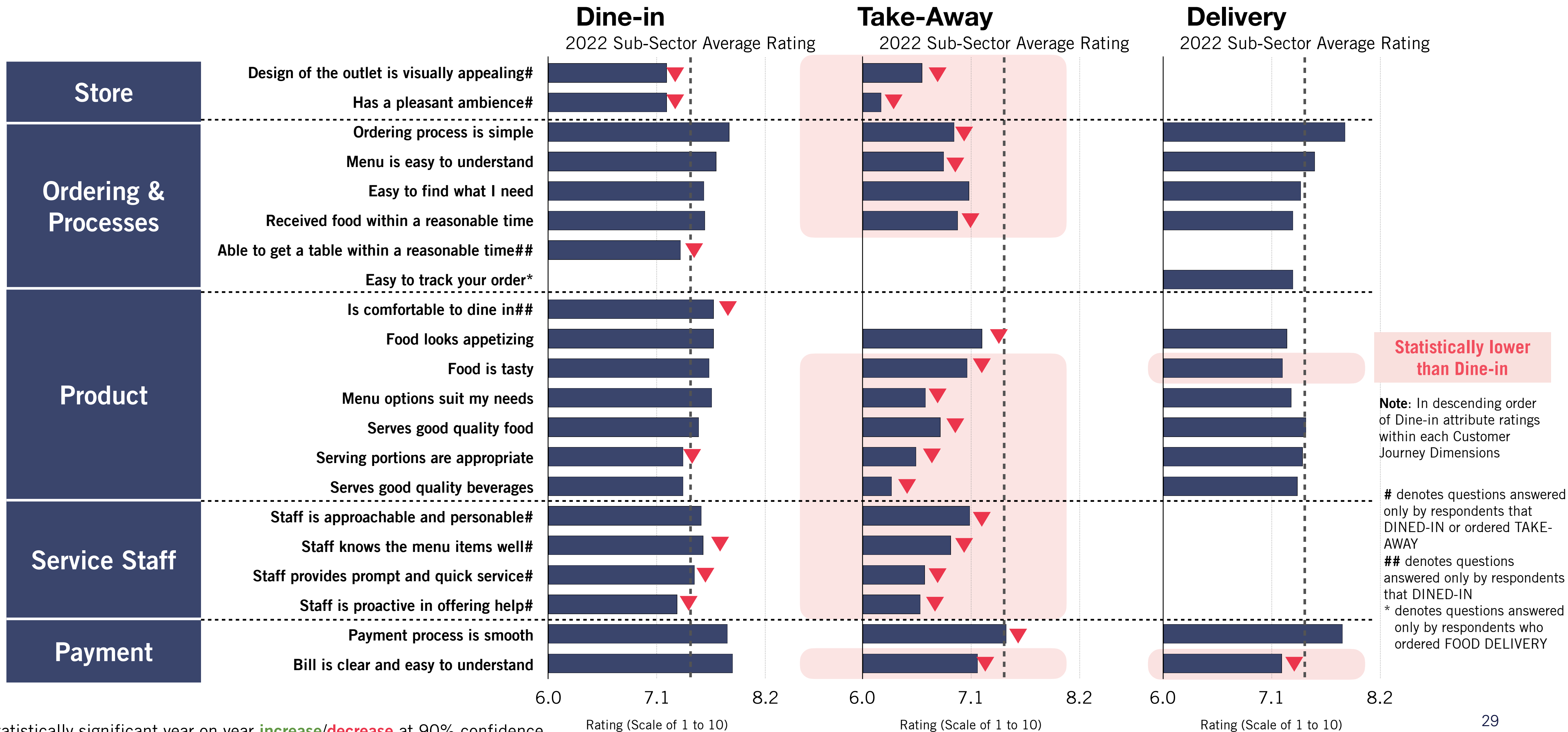
# denotes questions answered only by respondents that DINED-IN or ordered TAKE-AWAY

## denotes questions answered only by respondents that DINED-IN

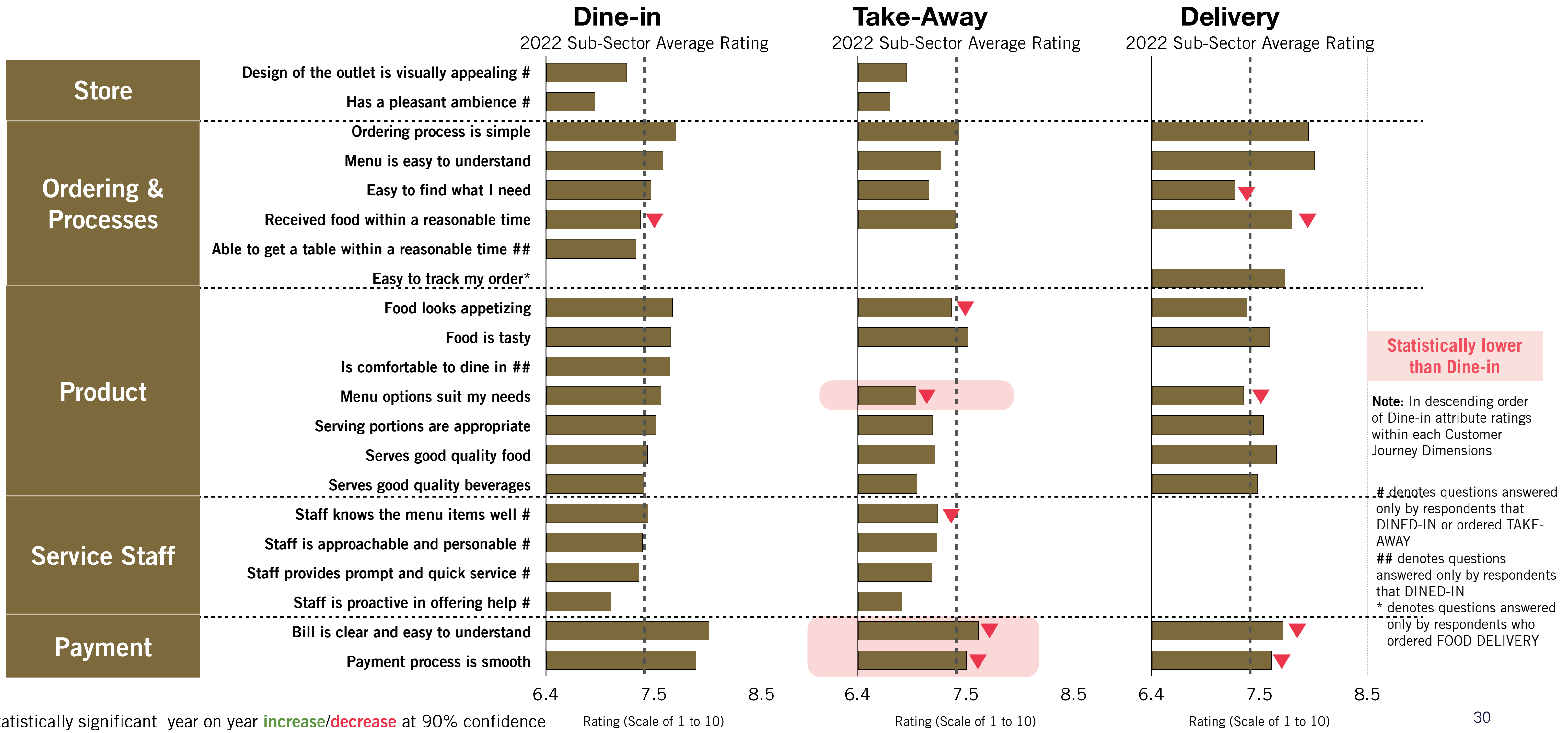
\* denotes questions answered only by respondents who ordered FOOD DELIVERY

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

# Restaurants: Take-Away Segment Underperforms Dine-In For Most Attributes



# Fast Food Restaurants: Take-Away Under-Performs Both Dine-In And Food Delivery



**Statistically lower than Dine-in**

**Note:** In descending order of Dine-in 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

# Cafés & Coffee Houses: Decline In Various Attributes for Delivery



**Note:** In descending order of Dine-in 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

# Restaurants and Fast Food: Selected Verbatim From Take-Away Customers

## Restaurants

### Selected Take-Away Verbatim

The **food quality was not satisfactory**, ... as the items were displayed appetizingly and seems larger, but the **actual size is disappointing**.

Management level is not very good, **staff service** is not careful enough.

It is **difficult to make reservations**. The **online booking process is too complex**, and the **menu is not easy to understand**.

**Improve the online booking order process** and provide **multi-channel payment methods**.

**Poor customer service**, seem like “force to work” kind of attitude

## Fast Food Restaurants

### Selected Take-Away Verbatim

Poor **service from staff**, they often can't be bothered and gave a being annoyed response. **Orders when repeated still ends up wrong**. Always being rushed through orders.

**Food was cold, tasted not fresh.**

**Service is poor and staff unapproachable.**

**Very long waiting time to receive my order** after ordering.

The **portion was really small**, and they gave very little vegetables, the **service staff was not proactive**.

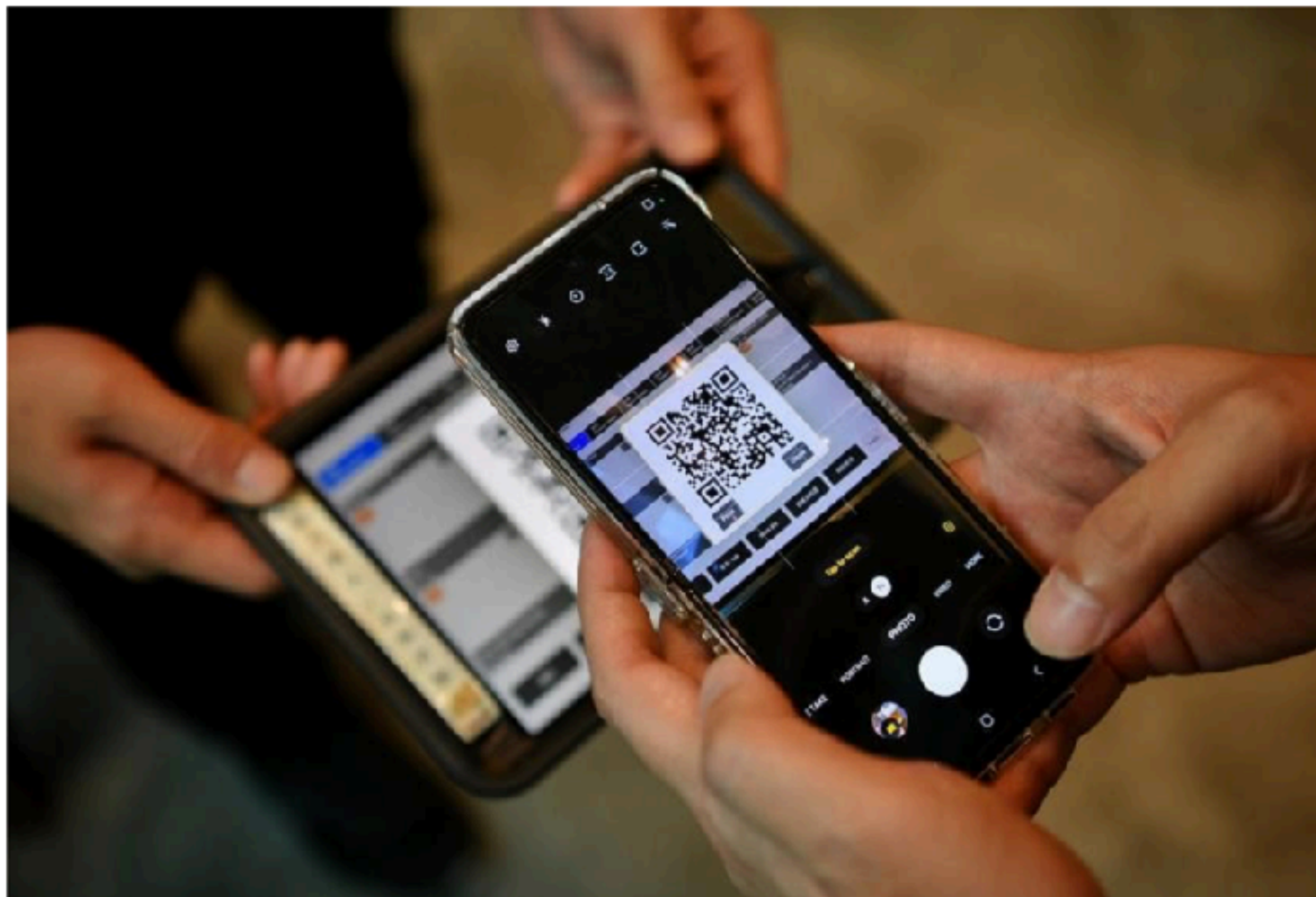


# **CHANGES IN F&B ORDERING PREFERENCES**

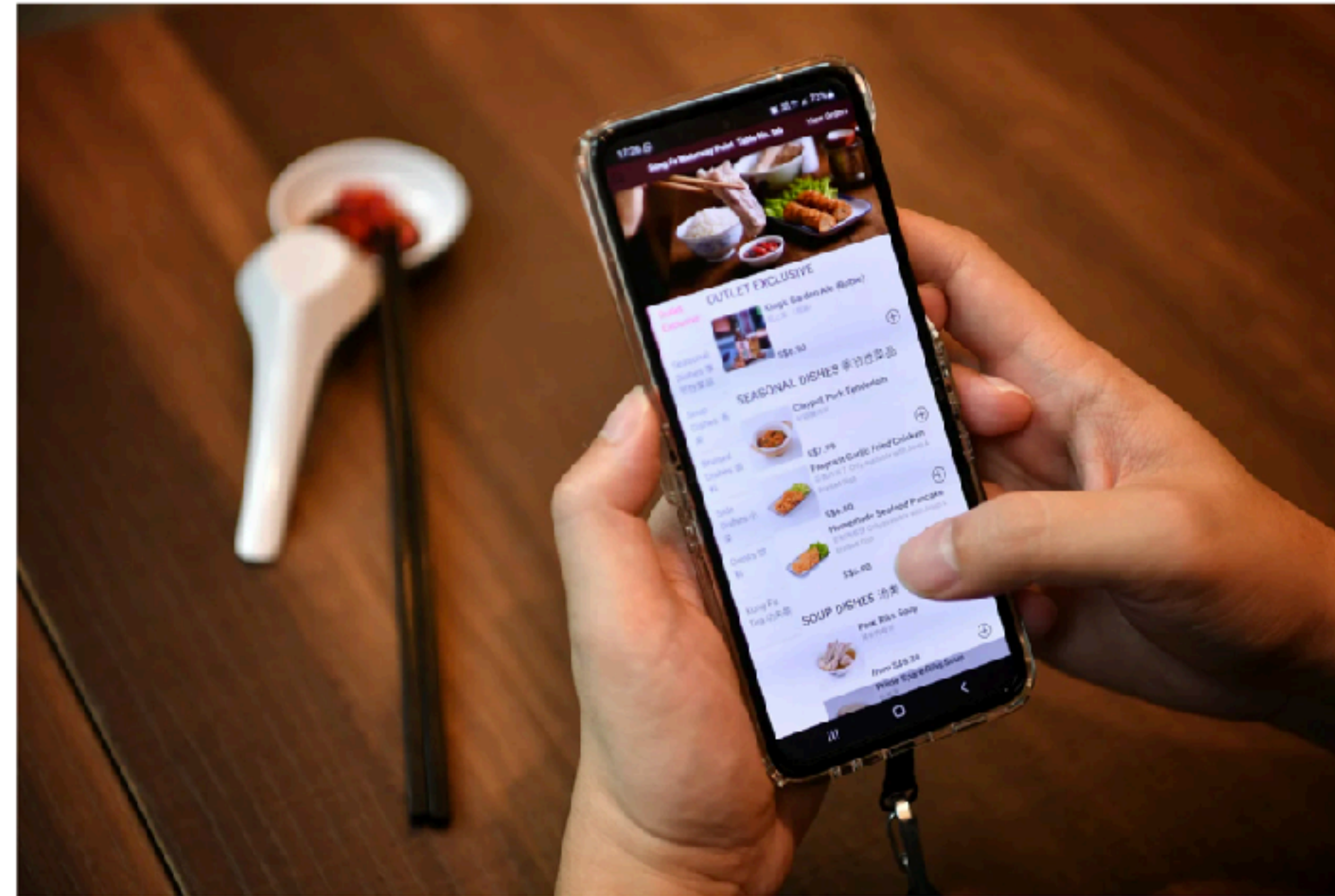
# Most F&B Operators Now Offer Self-Ordering Options To Customers

QR code menus here to stay post-Covid-19 as eateries say they improve operations.

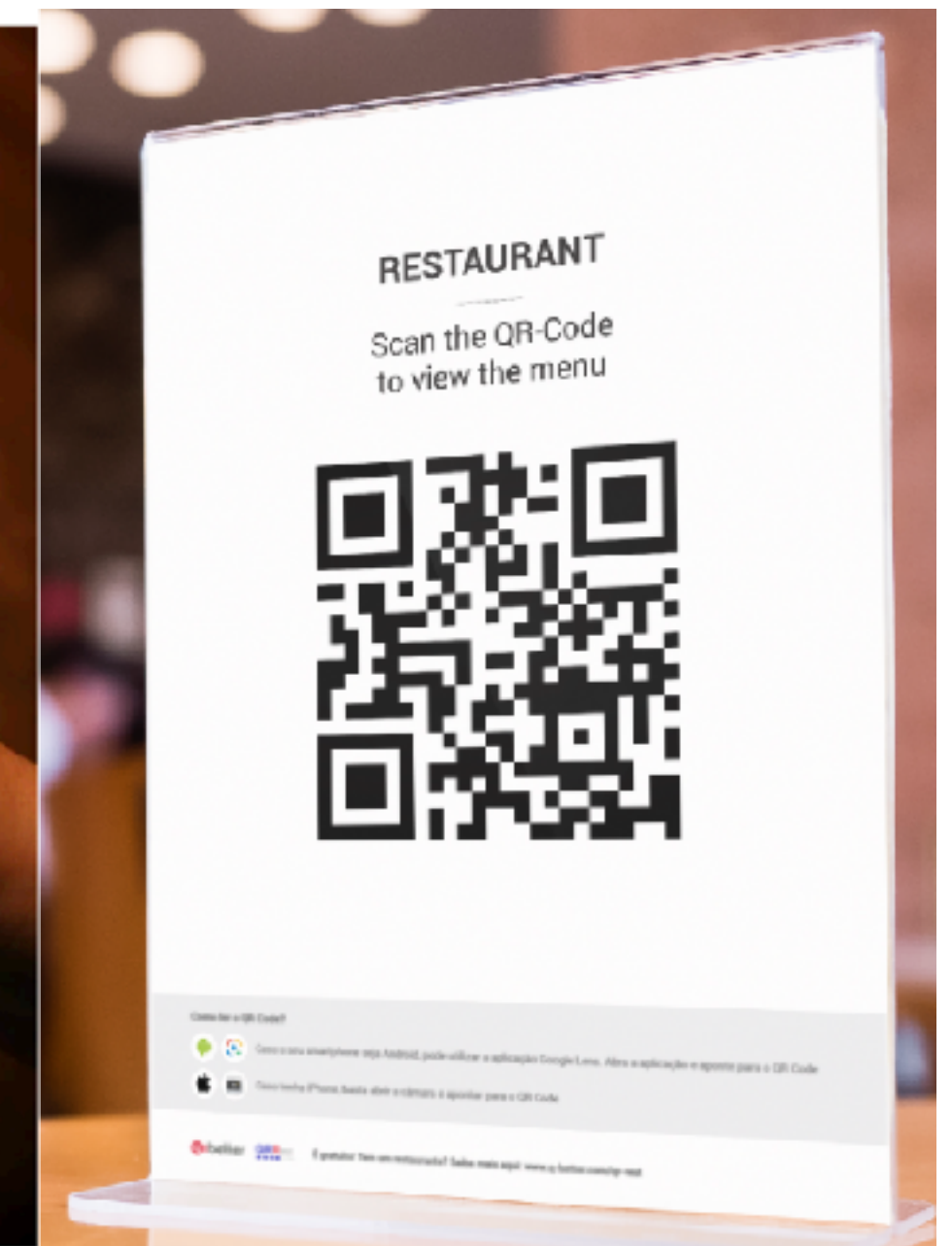
Besides better use of manpower, some eateries said patrons have grown accustomed to the digital menus.



Such menus will continue to be part of the dining experience in the post-Covid-19 world. ST PHOTO: CHONG JUN LIANG



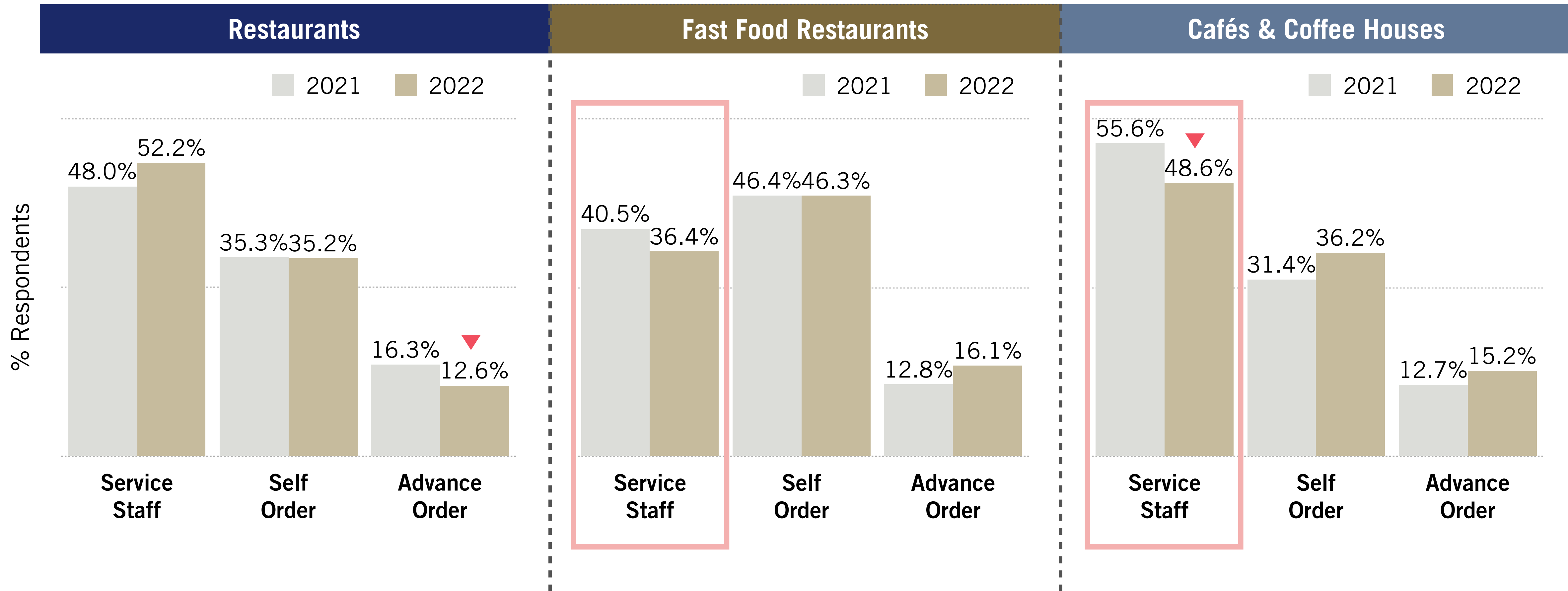
Besides better use of manpower, some eateries said patrons have grown accustomed to the digital menus. ST PHOTO: CHONG JUN LIANG



**Sources:**

- (1) <https://www.straitstimes.com/singapore/consumer/qr-code-menus-here-to-stay-post-covid-19-as-eateries-say-they-improve-operations>
- (2) <https://www.channelnewsasia.com/singapore/big-read-food-beverage-manpower-woes-eateries-robots-covid-19-2630486>

# Decrease In Preference For Ordering Through Service Staff For Fast Food And Cafés & Coffee Houses



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

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

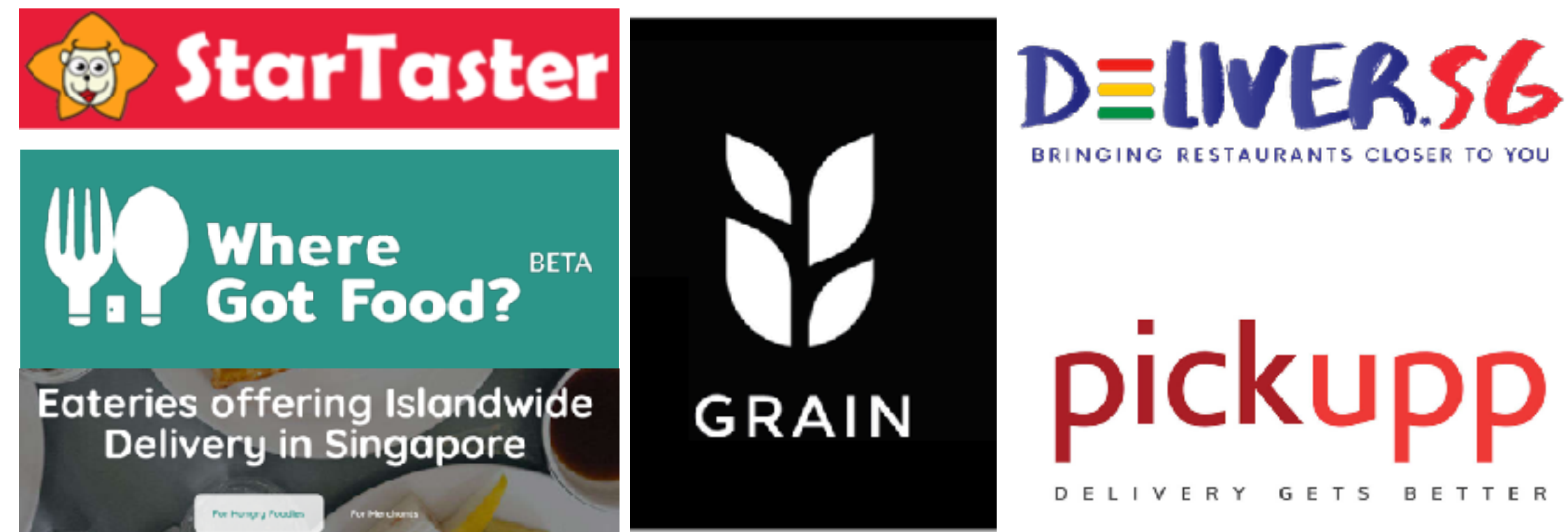
# FOOD DELIVERY PLATFORMS

# Online Food Ordering Providers in Singapore

Major Food  
Delivery  
Apps



Other Food  
Delivery  
Apps



**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>

# F&B Saw Demand For Food Deliveries Soften This Year

## Singapore-based Grab Says Food-Delivery Business Is Softening

It believes its customers may prefer to order groceries and cook at home.

August 29, 2022



“What we are seeing with some of the growth trends and consumer behavior is dining out has taken place,” Grab CEO Anthony Tan told analysts. “Customers want to save money ... they may actually show a preference to order groceries to cook for themselves.” Grab also offers grocery delivery.

## Deliveroo cuts 2022 forecast after sales slow in latest quarter

MON, JUL 18, 2022 - 02:57 PM



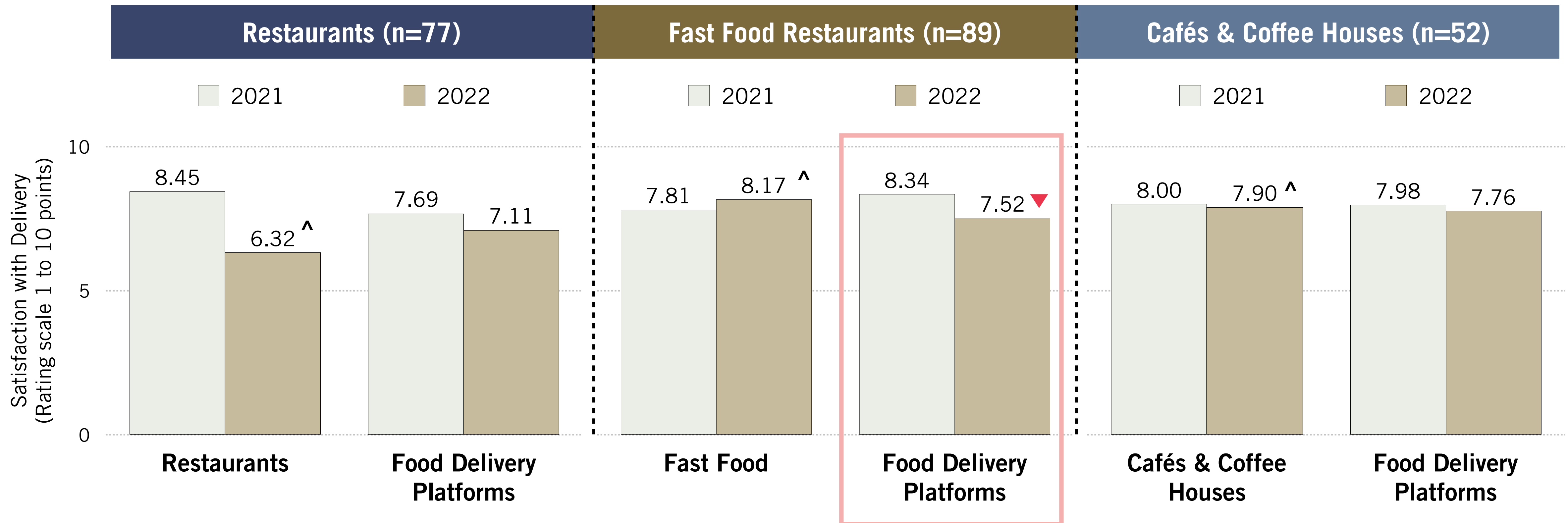
Shares in Deliveroo have plunged nearly 60 per cent this year as investors turn to favour profit-generating businesses rather than fast-growing and money-losing technology companies. PHOTO: REUTERS

**Sources:**

(1)<https://www.businesstimes.com.sg/startups-tech/startups/deliveroo-cuts-2022-forecast-after-sales-slow-latest-quarter>

(2)[https://www.convenience.org/Media/Daily/2022/Aug/29/3-Grab-Says-Food-Delivery-Softening\\_International](https://www.convenience.org/Media/Daily/2022/Aug/29/3-Grab-Says-Food-Delivery-Softening_International)

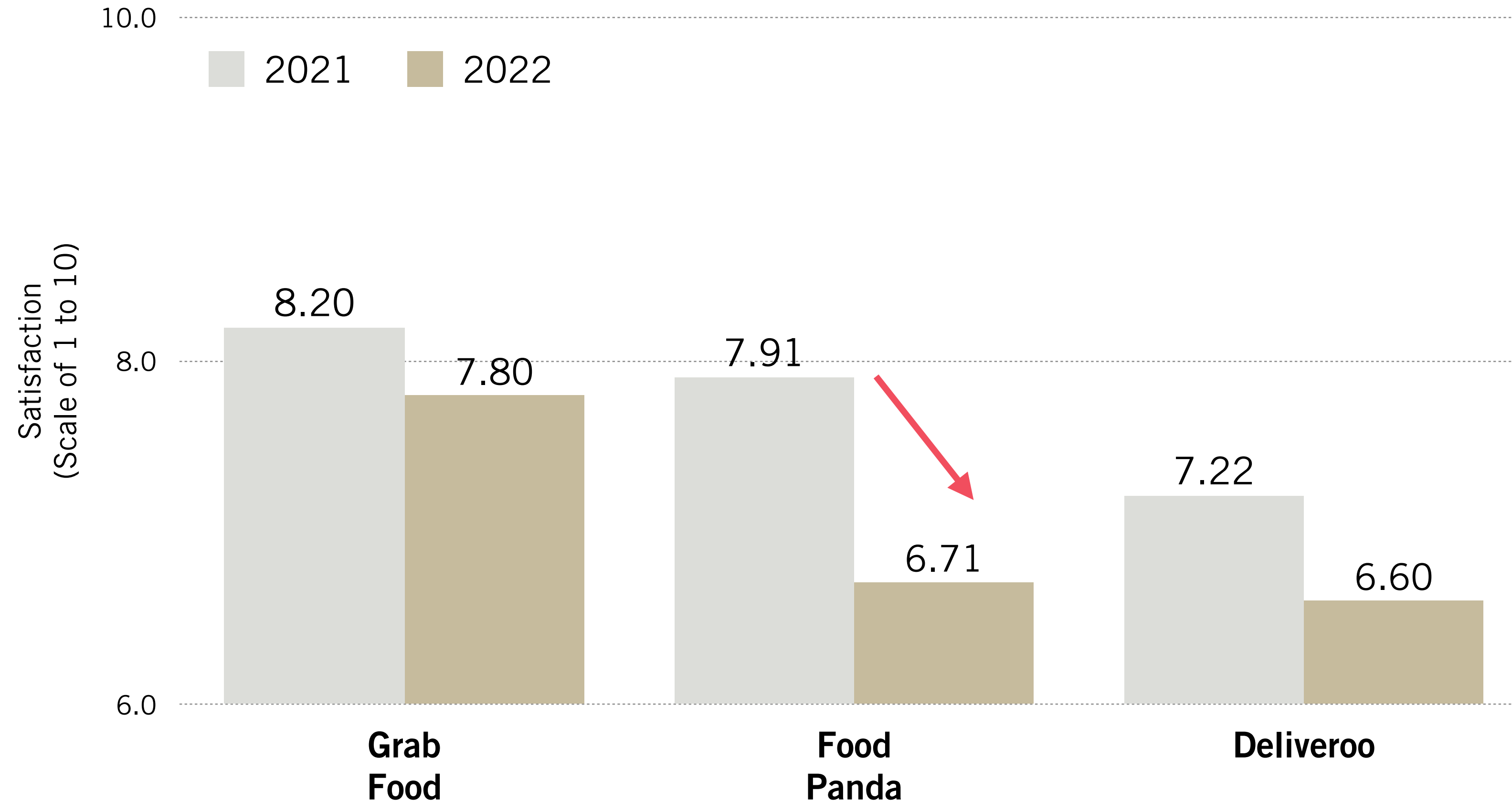
# Fast Food Saw Significant Decline In Satisfaction With Delivery Platforms



**Note:** Food Delivery Platforms include GrabFood, Food Panda, Deliveroo, etc.

▲▼ Statistically significant year-on-year increase/decrease at 90% confidence  
 Note: Data weighted by incidence . <sup>^</sup>Due to small sample size (<30), findings are only indicative.

# Satisfaction With All Delivery Platforms Lower Than In 2021



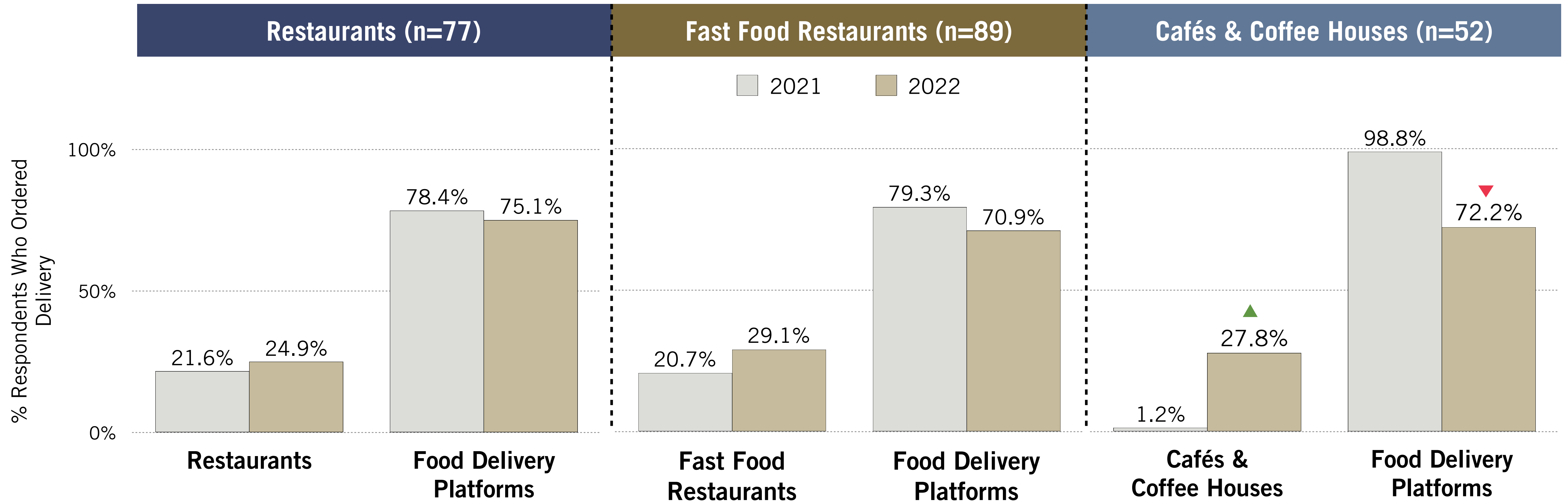
**7.35** ▼  
 Overall F&B Sector

Satisfaction with Delivery Platforms  
*(Rating Scale 1 to 10 points)*

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



# Decrease In Respondents Who Ordered Through Food Delivery Platforms



▲ ▼ Statistically significant year-on-year increase/decrease in proportions at 90% confidence  
**GREEN/RED** indicates that the rating is statistically **HIGHER/LOWER** than the other segment at 90% confidence.  
 Note: Data weighted by incidence . ^Due to small sample size (<30), findings are only indicative.

**Note:** Food Delivery Platforms include GrabFood, Food Panda, Deliveroo, etc. 41

# Selected Verbatim From Food Delivery Respondents

## Selected Verbatim: Areas For Improvement

More menu selection at cheaper price.

**Terrible online ordering service**, placed my order for a long time and didn't find my order.

Could **check orders more carefully, improve quality of cups** especially since they remove straws

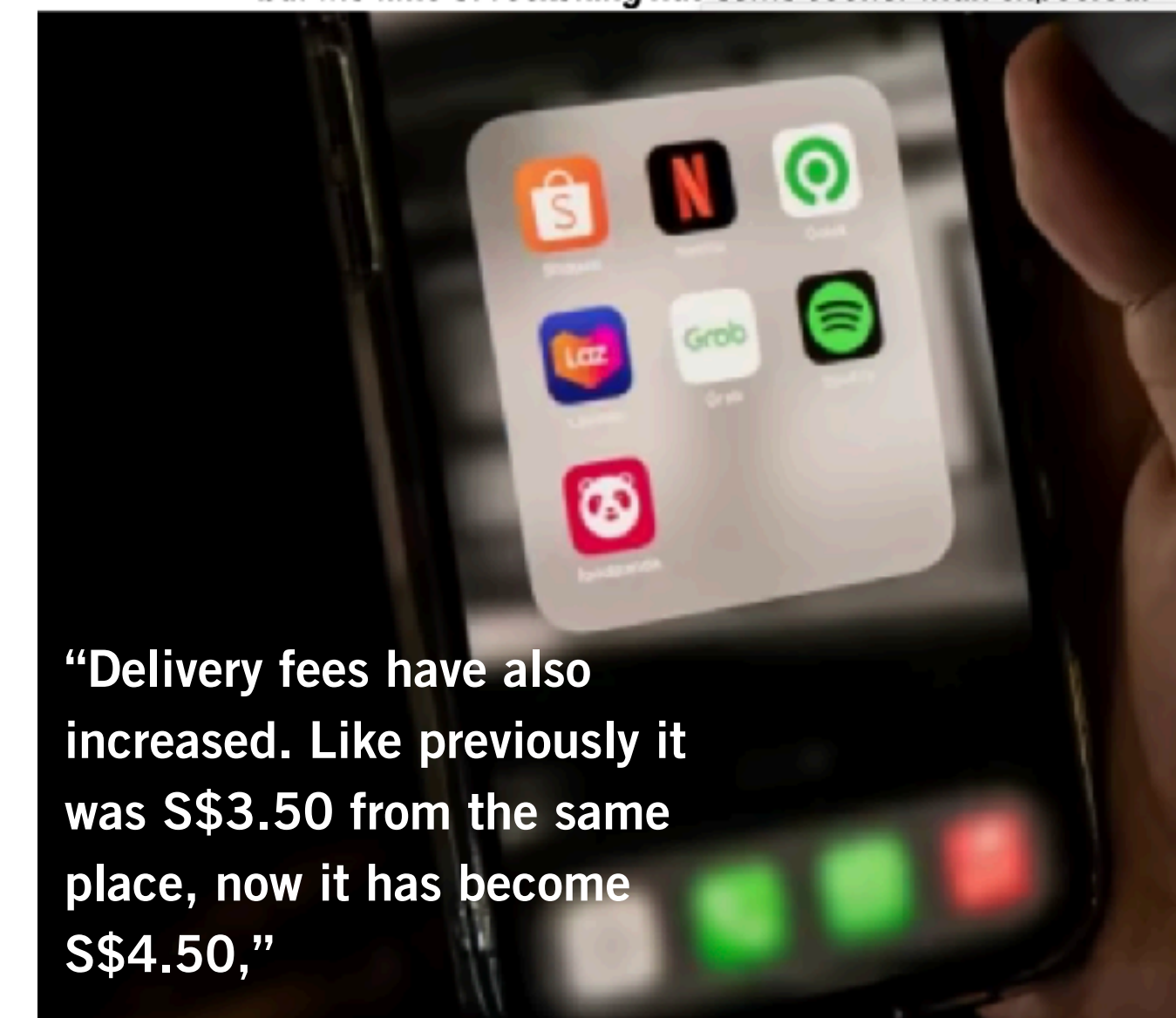
The **speed of food delivery** needs to be improved

The **price are increased and the portion are getting smaller** as I did ordered a fish burger and the portion of cheese was only half.

The **food was cold when I received** it and had missed the moment when the food tasted at its best.

## The Big Read: Consumers feeling the squeeze as industry disruptors come under pressure to deliver profits

Experts have long warned that it is inevitable for these industry disruptors – from food delivery and ride-hailing to e-commerce platforms – to shift towards seeking profitability, but the time of reckoning has come sooner than expected.

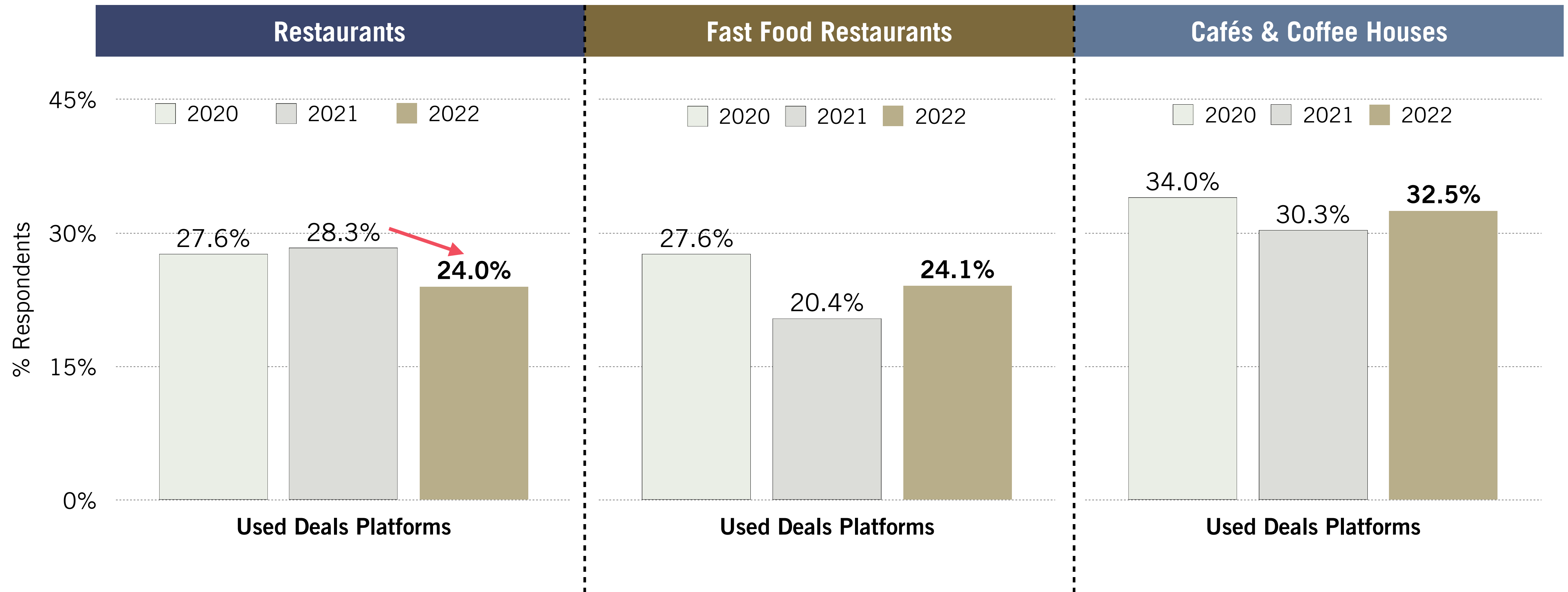


Sources:

(1) <https://www.channelnewsasia.com/singapore/industry-disruptors-food-delivery-private-hire-cars-grab-shopee-expensive-investor-profits-2831091>

# LEVERAGING ON DEALS

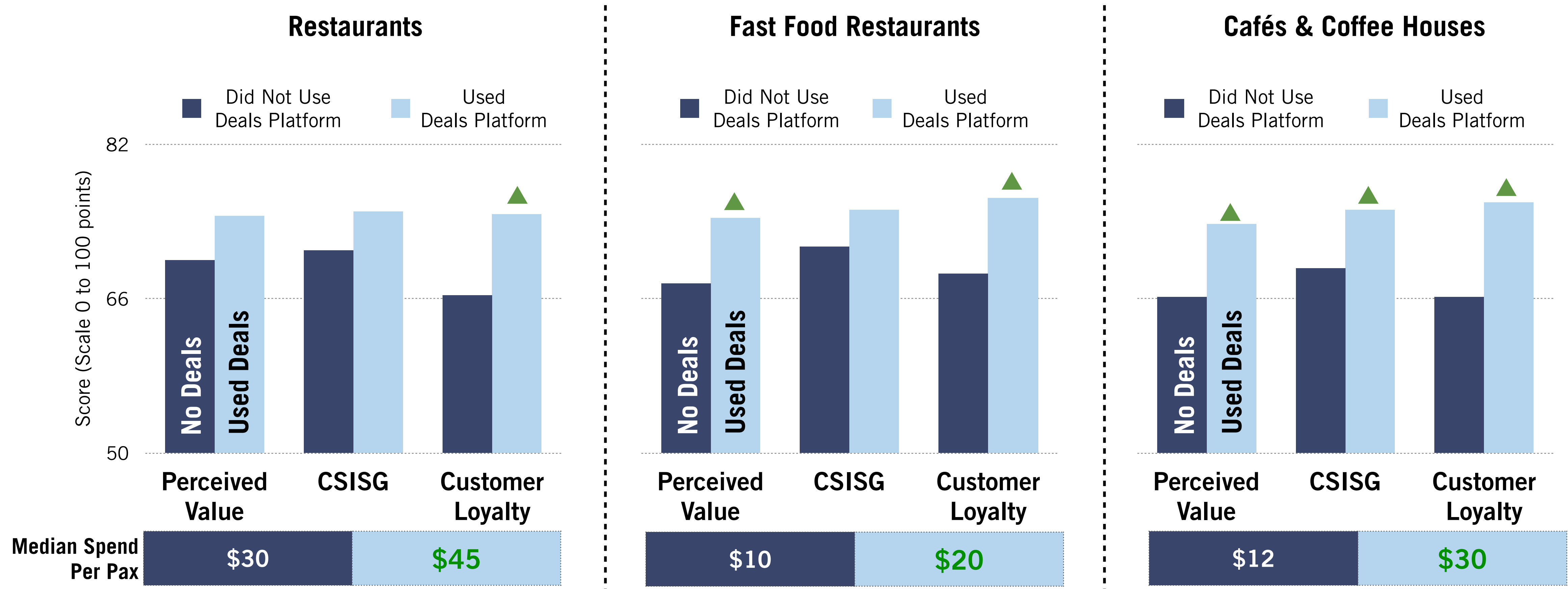
# Decline In Use Of Deals Platforms Among Restaurant Sub-Sector Respondents



↑ ↓ Statistically significant year-on-year **increase/decrease** in proportions at 90% confidence

**Note:** Deals Platforms Include "Fave Deals", "Burrple Beyond", "The Entertainer", etc.

# However, Deal Platform Users Scored Higher On Value, Satisfaction, Loyalty



GREEN/RED indicates statistically HIGHER/LOWER as compared to those who did not use deals platform at 90% confidence.

Note: Deals Platforms Include "Fave Deals", "Burrple Beyond", "The Entertainer", etc.

# KEY DRIVERS OF QUALITY

# Restaurants: Product, Staff And Ordering & Processes Key in 2022

Increasing Positive Impact on Quality

Key Attributes With Significant Impact on Quality		
Dine-in	Take-away	Food Delivery
Food is tasty	Design of the outlet is visually appealing	Received food within a reasonable time
Staff is approachable and personable	Food is tasty	Serves good quality food
Serves good quality food	Menu is easy to understand	Menu options suit my needs
Serving portions are appropriate	Serves good quality food	
	Ordering process is simple	

Legend:

Store	Processes	Product	Staff
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# Fast Food: Product, Staff & Processes Key in 2022

Increasing Positive Impact on Quality ↑

Key Attributes With Significant Impact on Quality		
Dine-in	Take-away	Food Delivery
Staff provides prompt and quick service	Staff knows the menu items well	Serves good quality beverages
Payment process is smooth	Ordering process is simple	Payment process is smooth
Staff is approachable and personable	Food looks appetizing	Received food within a reasonable time
Serves good quality beverages	Has a pleasant ambience	
Able to get a table within a reasonable time		

Legend:

Store

Processes

Product

Staff



# Cafés and Coffee Houses: Product, Staff & Processes Key in 2022

Increasing Positive Impact on Quality

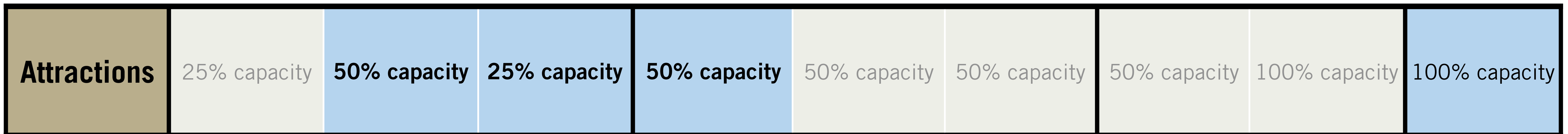
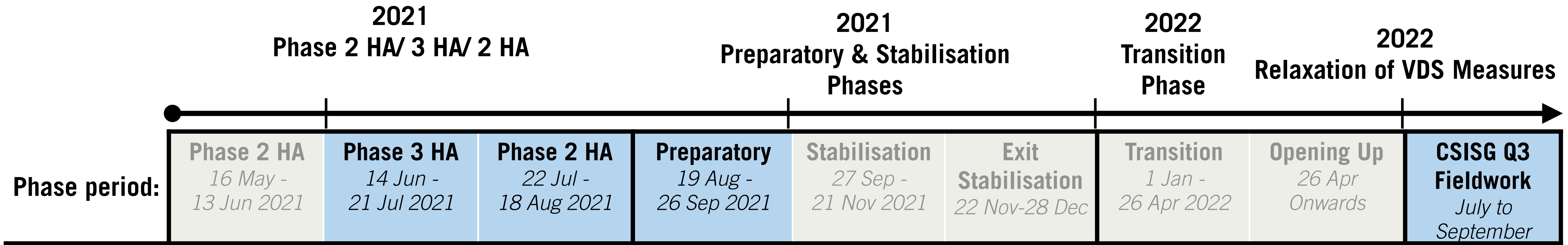
Key Attributes With Significant Impact on Quality		
Dine-in	Take-away	Food Delivery
Serves good quality food	Serves good quality beverages	Food looks appetizing
Staff is approachable and personable	Bill is clear and easy to understand	Menu options suit my needs
Serving portions are appropriate	Staff is approachable and personable	Payment process is smooth
	Design of the outlet is visually appealing	Easy to find what I need
		Menu is easy to understand

Legend:

Store	Processes	Product	Staff
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# **TOURISM SECTOR RESULTS**

# Major Changes In Capacity Allowed Since The Last Measurement

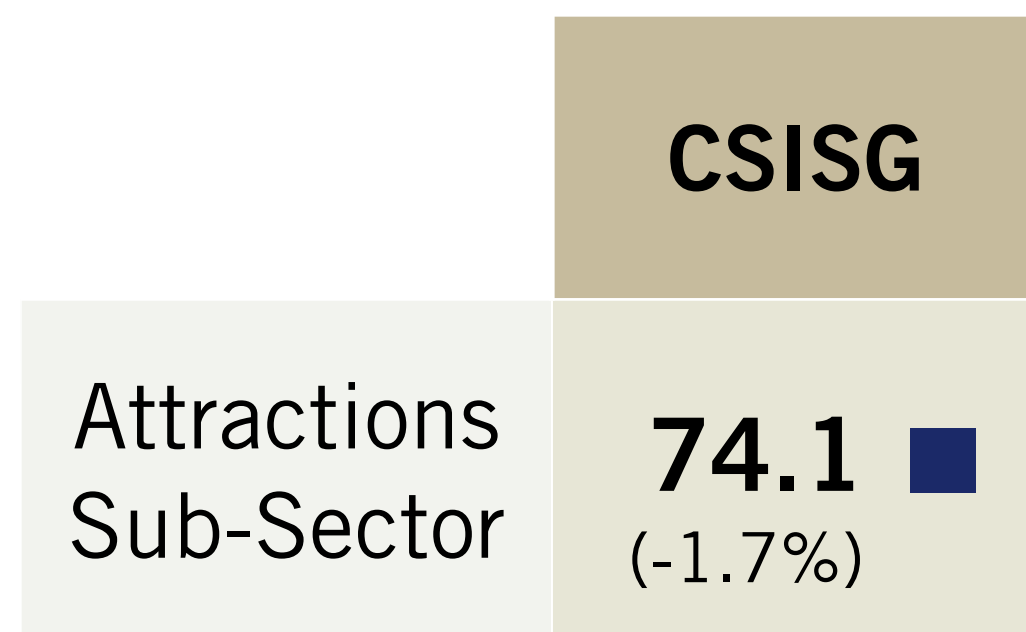


2021 Fieldwork

2022 Fieldwork

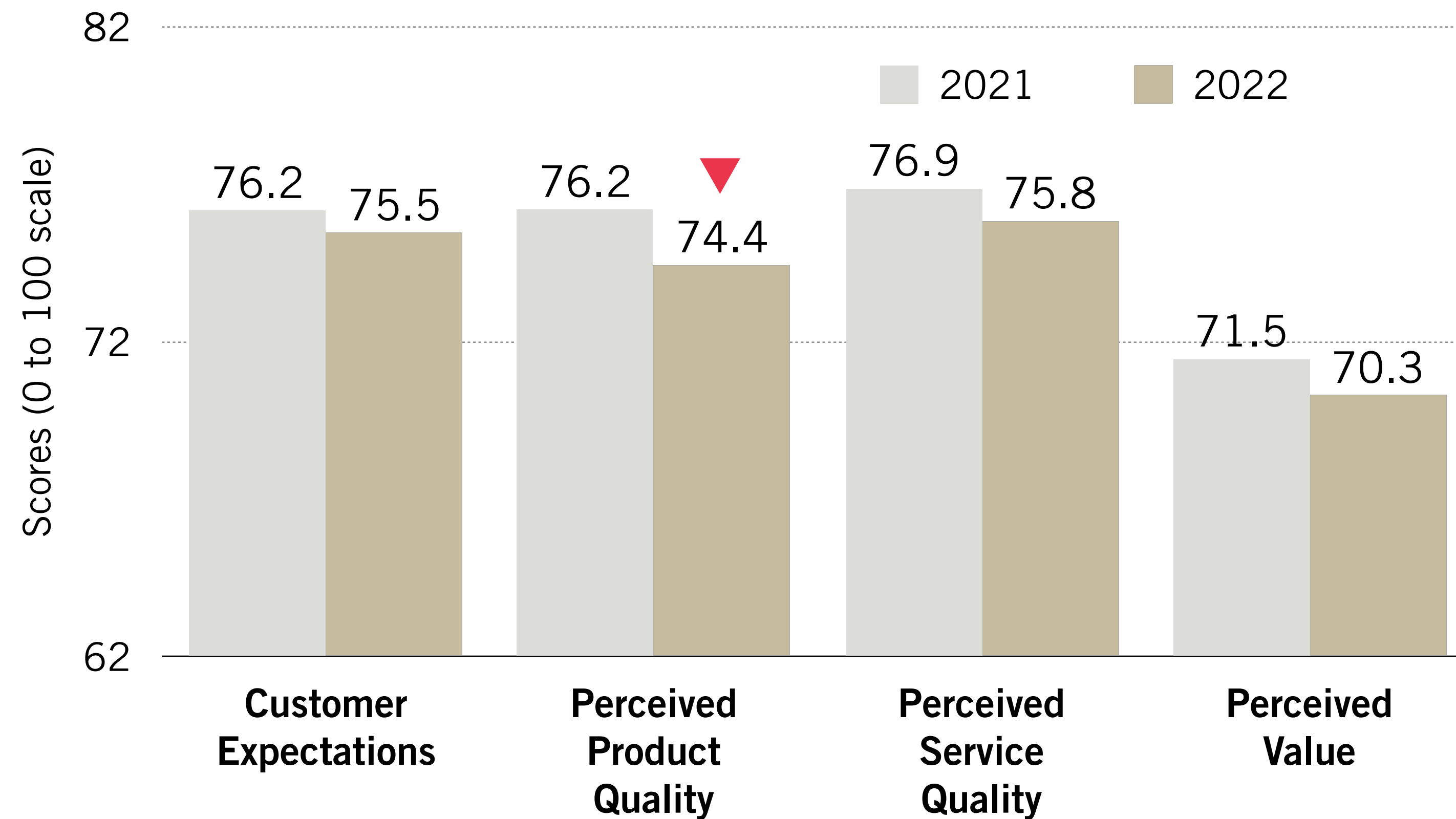
# CSISG Drivers: Statistically Significant Decline In Perceived Product Quality

## Customer Satisfaction



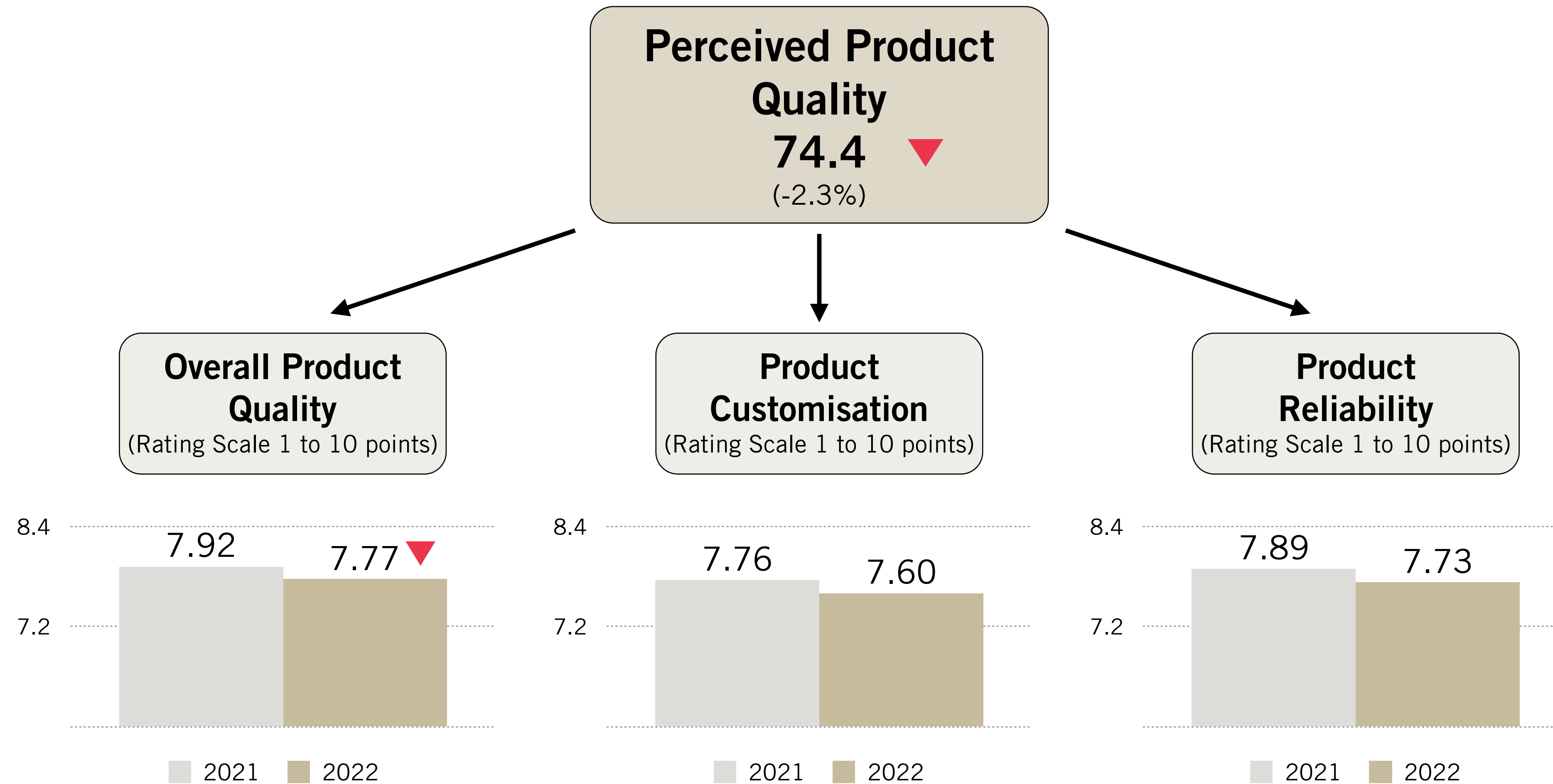
**Respondents:** Locals Who Visited Attractions in The Past 6 Months

## Drivers Of Satisfaction



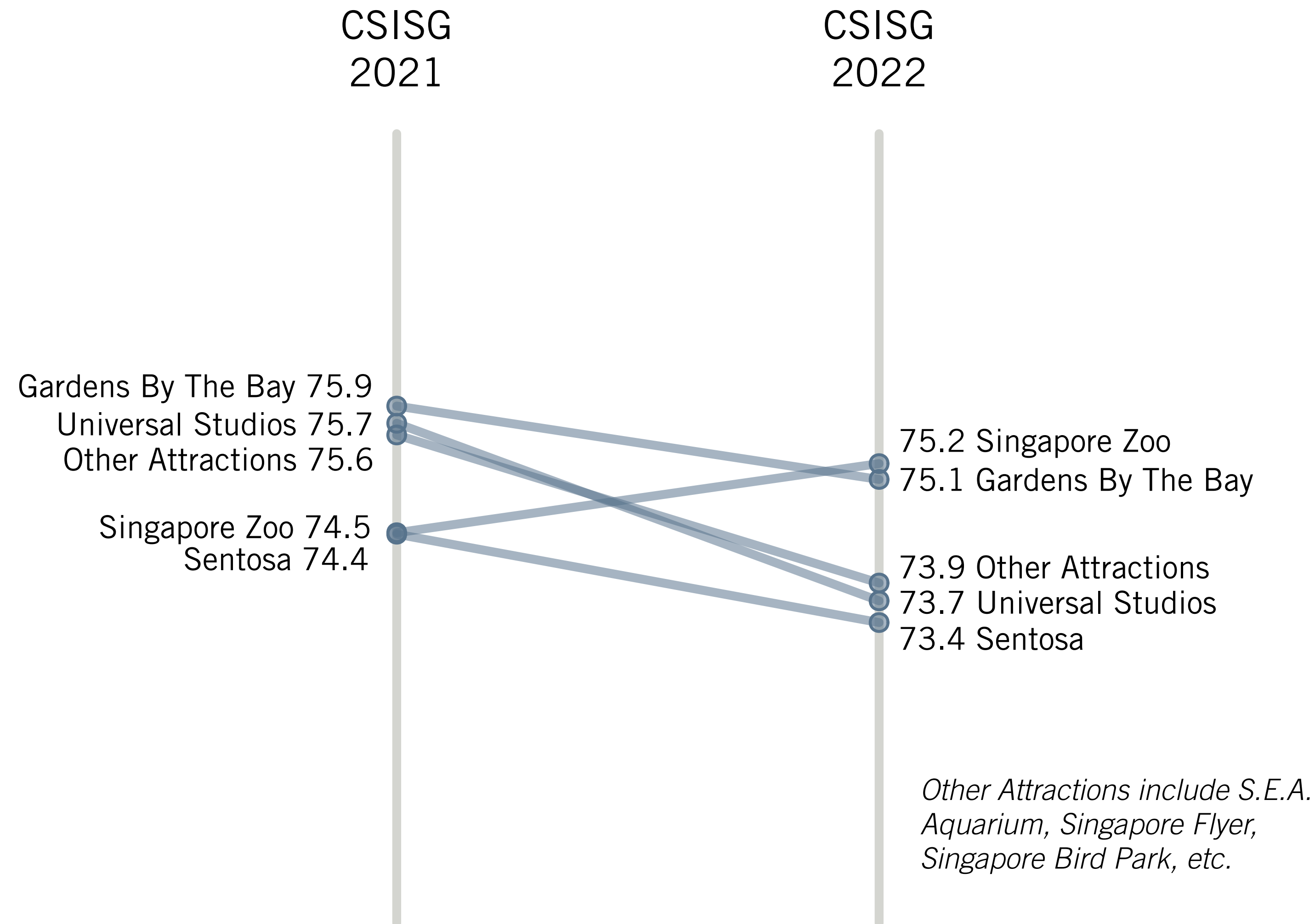
▲ ▼ Statistically significant year-on-year increase/decrease at 90% confidence

# Significant Decline In Overall Perception Of Product Quality



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

# Marginal Year-on-Year Movements In CSISG Scores For All Attractions

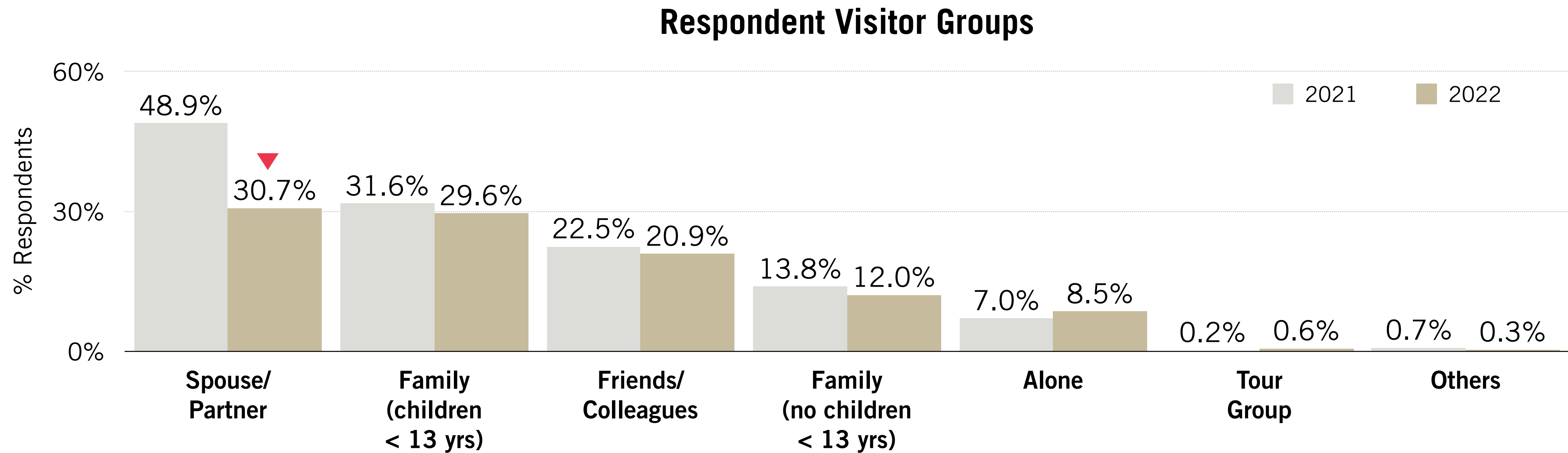


**Respondents:**  
Locals Who Visited Attractions in The Past 6 Months

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

# CHANGE IN VISITOR PROFILE

# Local Visitor Profile: Year On Year Comparison Of Visitor Groups



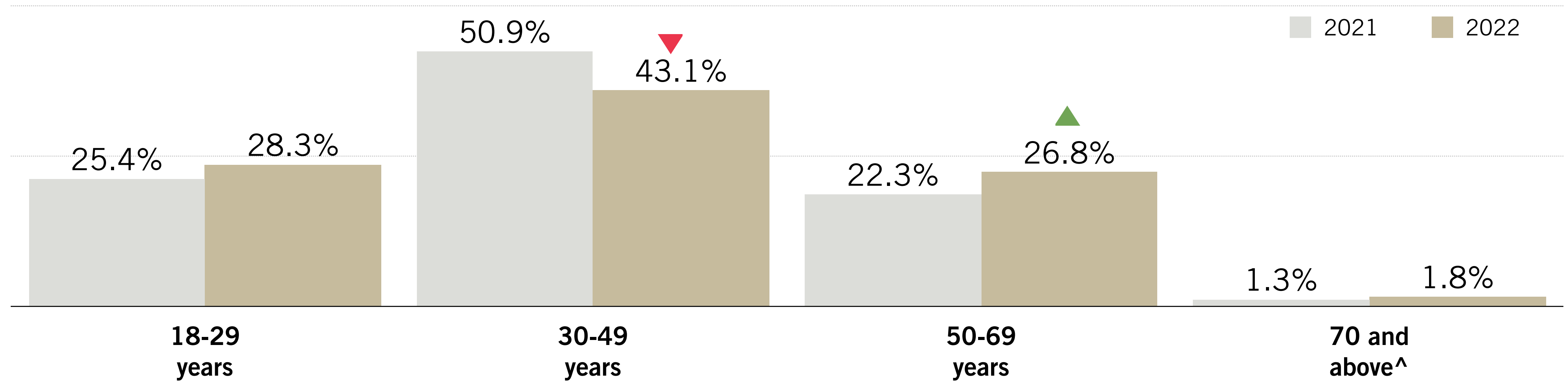
Decline in visits by couples

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



# Local Visitor Profile Includes More Visitors Aged 50 Years And Above

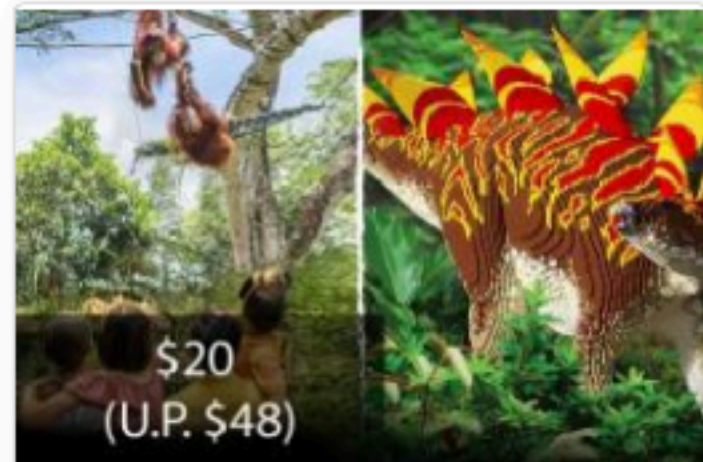
### Year-on-Year Visitor Comparison by Age



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

# Discounts For Seniors Offered By Attractions

## Mandai Wildlife Reserve



**Singapore Zoo Senior Discount for Singapore...**

**When**

08 Dec 2021      31 Dec 2022

**Where**

80 Mandai Lake Rd  
Singapore 729826



**Night Safari Senior Discount for Singapore...**

**When**

08 Dec 2021      31 Dec 2022

**Where**

80 Mandai Lake Rd  
Singapore 729826



**River Wonders Senior Discount for Singapore...**

**When**

08 Dec 2021      31 Dec 2022

**Where**

80 Mandai Lake Rd  
Singapore 729826

## Gardens by the Bay



## Passion Card Silver Promotions

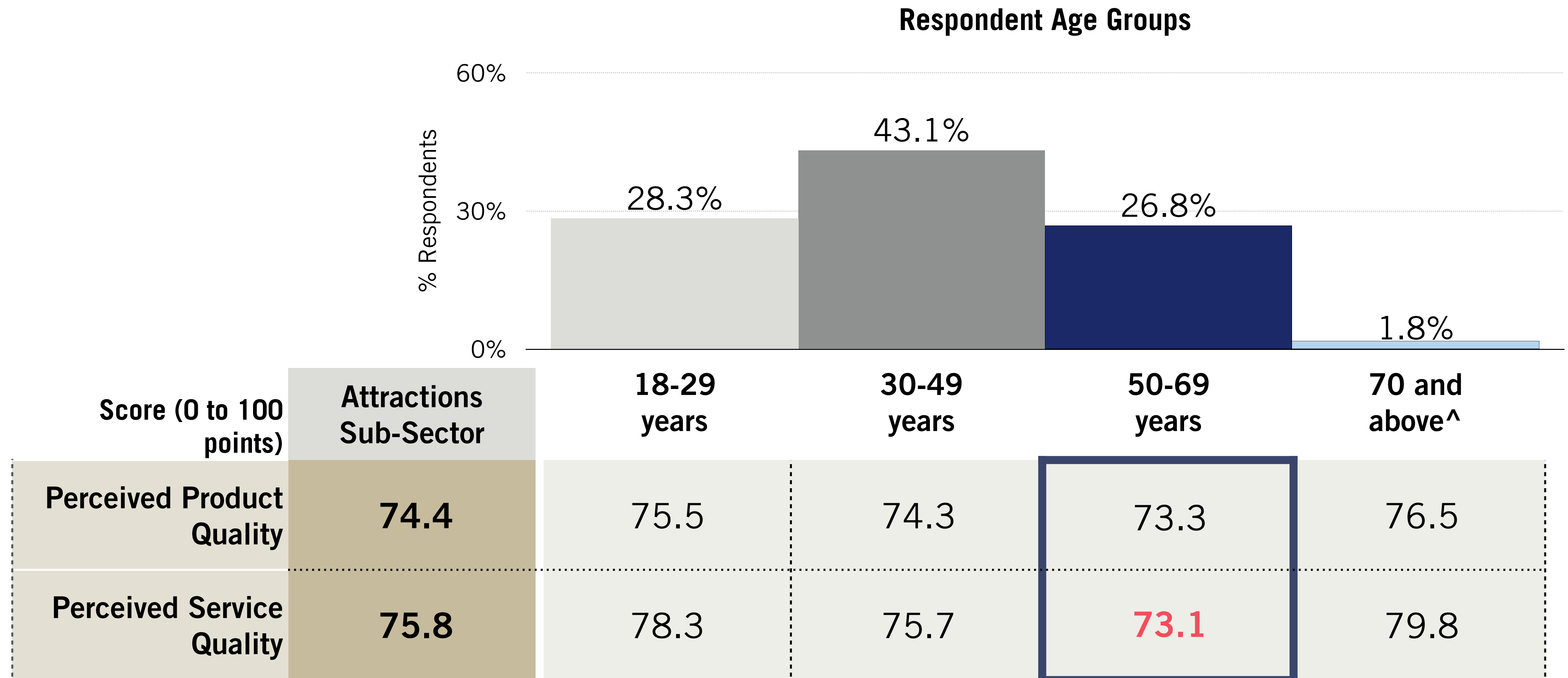
✓ [Silver Card]\*10% OFF Cable Car Sky Pass (Round Trip), SkyHelix Sentosa & Sentosa Island Bus Tour Senior Ticket Rates

**Seniors Discounts** are usually limited to local residents and tickets purchased are valid for same-park, same day admission.

**Sources:**

- (1) Sources: <https://stan.stb.gov.sg/public/sense/app/289a7ba7-52da-45af-bcc7-b8821a76c87f/sheet/d5c77bca-daec-40ae-8802-98af6a1ccddf/state/analysis>
- (2) <https://singpromos.com/places-of-interest/s20-gardens-by-the-bay-6-mth-unlimited-visits-membership-10th-anniversary-offer-till-2-may-2022-256278/> : Promotion from 9 April 2022 to 10 May 2022

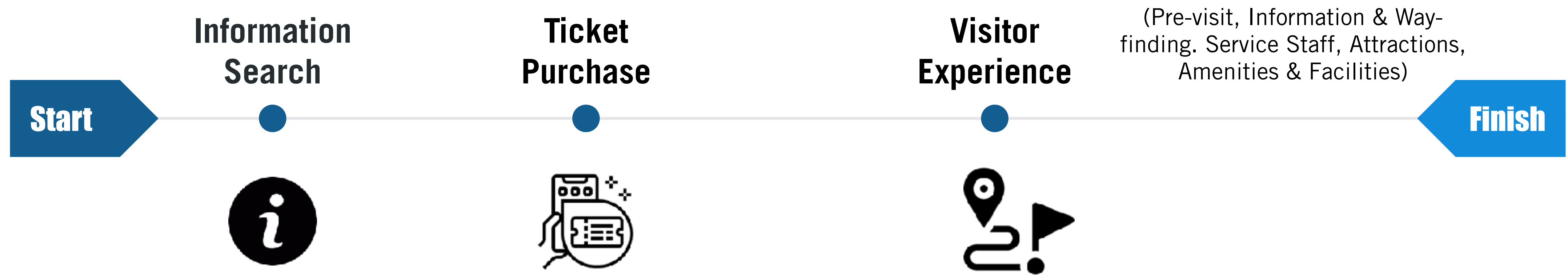
# Poorer Perception Of Product And Service Quality Among 50 to 69 Year Olds



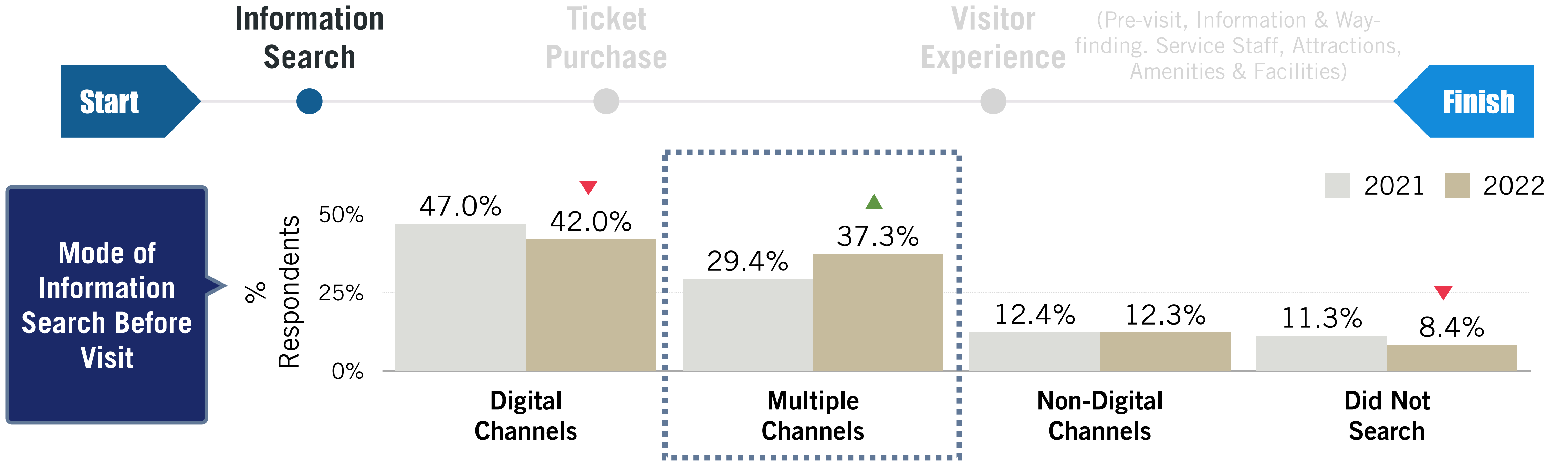
<sup>^</sup>Low samples for this group, hence findings are indicative only.

# **ATTRACTIONS VISITOR EXPERIENCE JOURNEY**

# Attractions Visitor Journey (Locals)



# More Respondents Using Multiple Channels To Search For Information

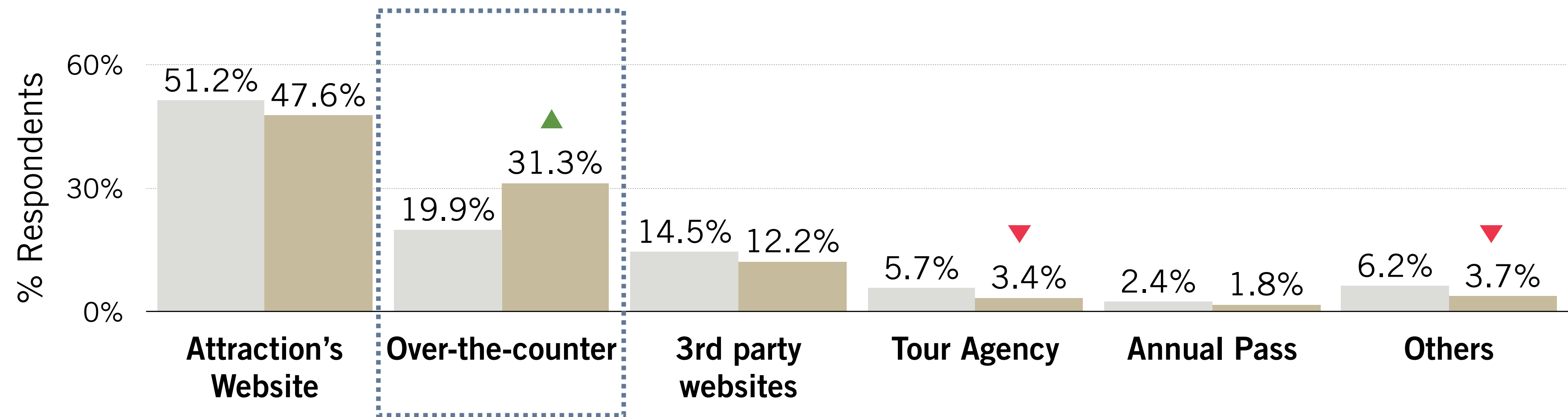


▲ ▼ Statistically significant year on year increase/decrease in proportions at 90% confidence

# Increase In Respondents Who Purchased Attractions' Tickets Over The Counter



**Mode Used For Recent Visit/Entry (Tickets/Passes)**



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

# Year-on-Year Changes In Modes Used For Recent Visits By Age Group



**Mode Used For Recent Visit/Entry (Tickets/Passes)**

	Attraction's Website		Over-the-counter		3rd party websites		Tour Agency, Annual Pass, Others	
	2021	2022	2021	2022	2021	2022	2021	2022
18 to 29 years	48.3%	55.7%	19.3%	24.6%	21.9%	<b>11.3%↓</b>	10.5%	8.5%
30 to 49 years	54.2%	<b>45.2%↓</b>	20.1%	<b>31.9%↑</b>	9.1%	<b>13.2%↑</b>	16.6%	<b>9.7%↓</b>
50 years and above	48.1%	43.4%	20.1%	<b>36.9%↑</b>	18.3%	<b>11.7%↓</b>	13.5%	<b>8.1%↓</b>

(Row percentage)

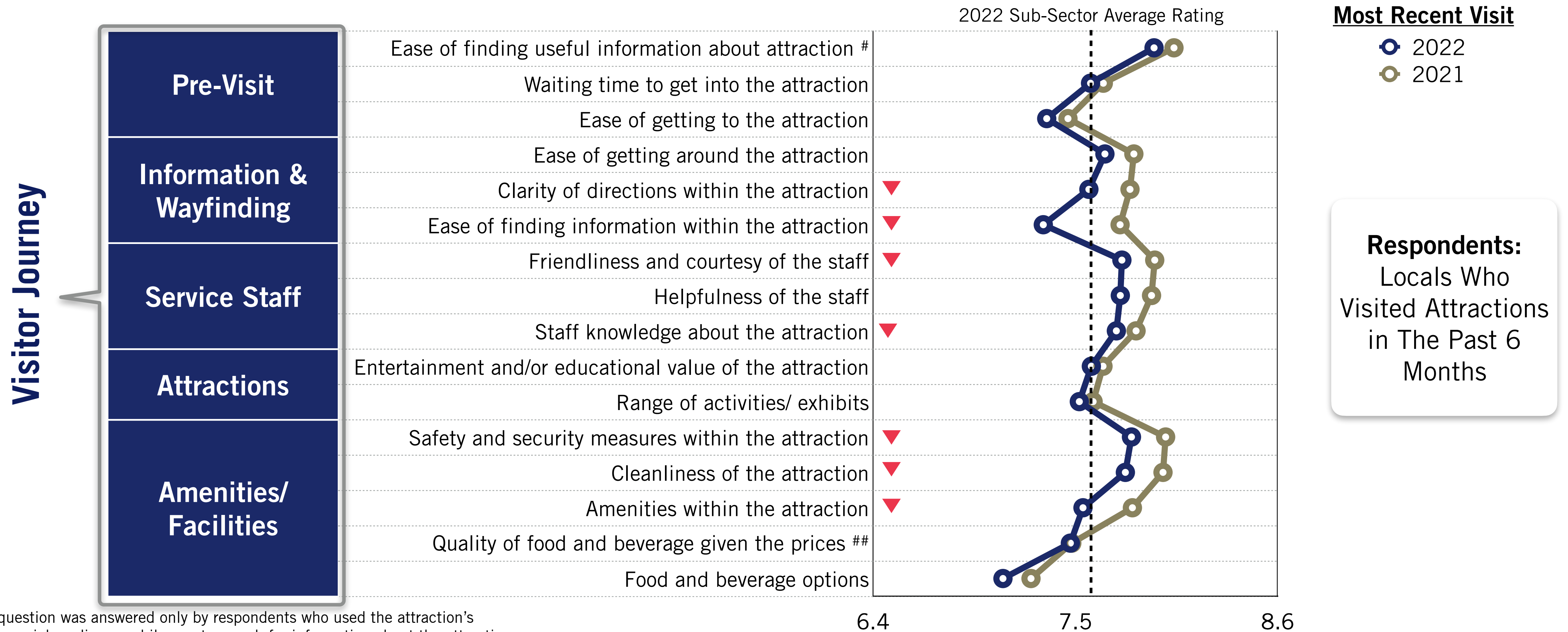
↑↓ Statistically significant year on year **increase/decrease** in proportions at 90% confidence



# VISITOR EXPERIENCE



# Significant Decline In Information, Service Staff, Amenities Related Attributes



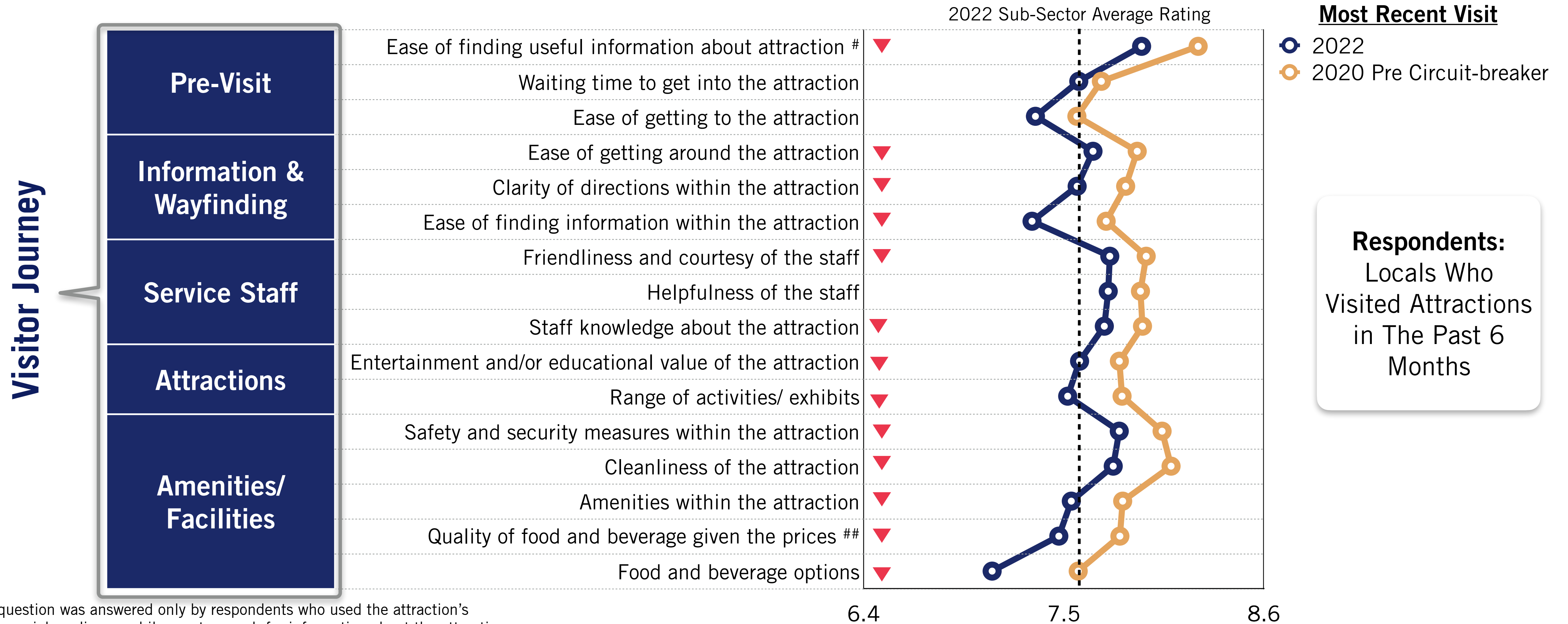
# This question was answered only by respondents who used the attraction's website, social media or mobile app to search for information about the attraction

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

Note: Attributes arranged in descending order of 2022 ratings within each dimension,

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

# Most Attribute Ratings Underperformed Compared To Pre-Circuit Breaker Period



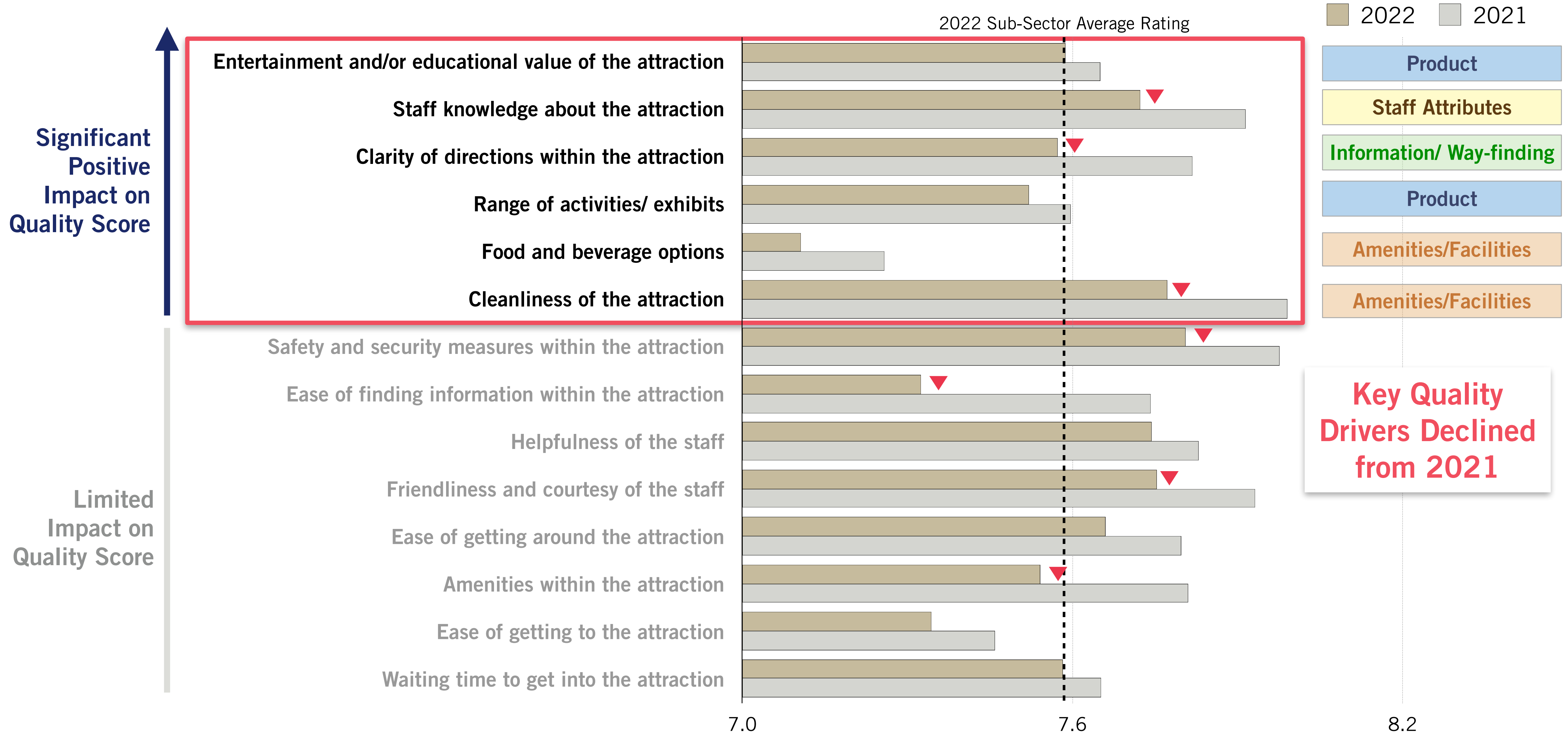
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# Attractions' Attributes - Impact on Quality



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

Satisfaction Rating (Scale of 1 to 10)

# Areas For Improvement: Selected Verbatim

## Product-related

### Selected Verbatim

**Terrible landscaping, messy and poorly maintained.**

We went to visit after ease of the lockdown, **the place looks unlively.**

The exhibits are a **little stagnant and not much changes...**

... [attraction] **only had one educational show.** And it was **not able to accommodate the number of guests there.**

**Very little rides open there, queue of rides super long.**

## Information and Wayfinding

### Selected Verbatim

Unfamiliar with the attractions, there is **no staff to guide the route.**

[Attraction] **was crowded and difficult to navigate around the routes to cover all attractions...**

**Information online is not sufficient** for free and easy.

Prices are always quite expensive, **bus timings could be a bit better (more informed).**

...the **directions can be a little confusing.** The mode of **transportation** to get to [attraction name] is **not so convenient.**

# Key Takeaways

## F&B

- **Performance:**

- Restaurants and Fast Food saw lower Quality Scores. Fast Food saw Service Quality decline too.
- The decline in Quality is driven by the takeaway segment.

- **Pain-Points:**

- Product & staff attributes continue to underperform.
- Take-away customers indicate poorer ordering and process experience, when compared to Dine-in and Delivery.
- Food Delivery respondents were less satisfied with food delivery platforms.
- **Focus Areas:** Think about (1) Improving takeaway experience, (2) Focus on food quality and service staff to retain customers, and (3) Focus on ensuring product quality and improving processes for the food delivery customers.

## Attractions

- **Performance:** Decline in (1) Product quality, (2) information and way-finding, and (3) amenities and facilities.
- **Focus Areas:** Think about how to improve (1) attractions' experience, information and accessibility, and amenities and facilities.

# QUESTIONS?



# ISE INDUSTRY FORUM

## CSISG 2022 Q3 RESULTS ANNOUNCEMENT

### F&B AND TOURISM