

ISES INDUSTRY FORUM

CSISG 2014 Q1 RESULTS

RETAIL AND INFO-COMMUNICATIONS SECTORS



CSISG 2014 Q1

- CSISG 2014 Q1 Quick Facts & Sampling
- Results Overview
- Results and Highlights of Retail Sector
- Results and Highlights of Info-Communications Sector

The CSISG Score

Each CSISG score is a weighted average of customer ratings to three questions, summarised as:

- The customer's holistic satisfaction rating based on all experiences with the company
- How well the company has met the customer's expectations
- How similar the company is with the customer's imagined ideal company

These questions form part of the CSISG model that provides the cause-and-effect predictive capabilities employed in this national study.



Qn. Overall Satisfaction
Qn. Ability to Meet Expectations
Qn. Similarity to Ideal

Overview of the CSISG Main Fieldwork



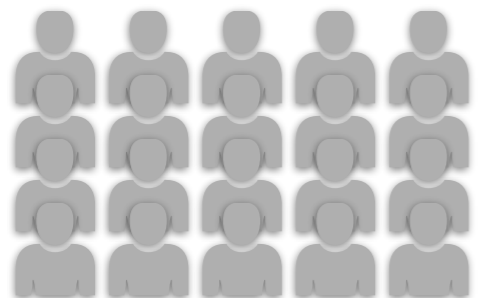
Singapore citizens and PRs are interviewed at their homes. Homes are selected from a random listing of 40,000 household addresses that match housing profile of Singapore resident population.



Departing tourists are interviewed at Changi Airport.



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



Typically 250 respondents per company would have answered the CSISG questionnaire.

CSISG 2014 Q1 Quick Facts

Sectors Covered	Retail & Info-Communications
Survey Period	Jan–Mar 2014
Total Questionnaires Completed	9,250
Face-to-face at residents' homes	8,040
Face-to-face at Changi Airport	1,210
Distinct entities measured	508
Entities with published scores	25

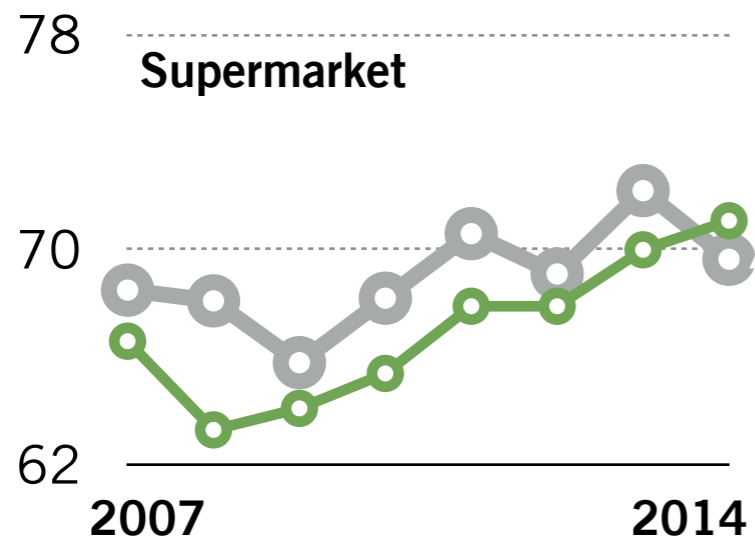
CSISG 2014 Q1 Updates

- PayTV added as a new sub-sector.
This includes *SingTel mio* and *StarHub CableTV*.
- Wireless@SG added as a new sub-sector.

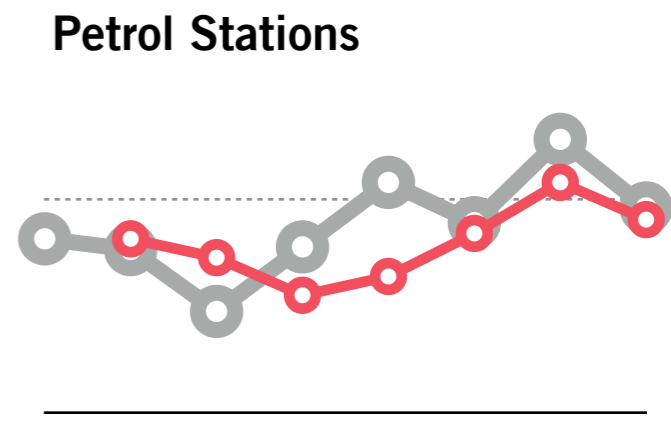
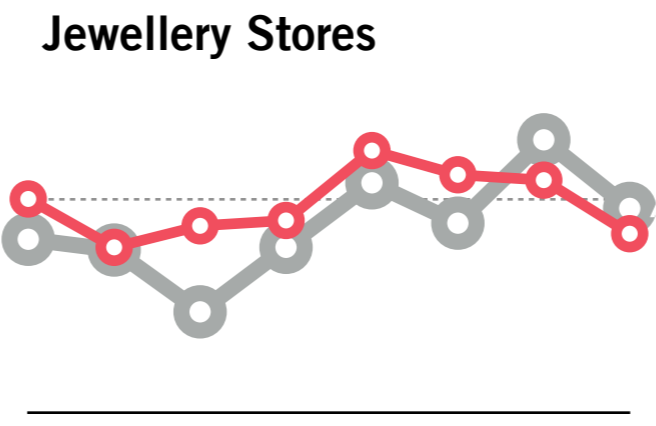
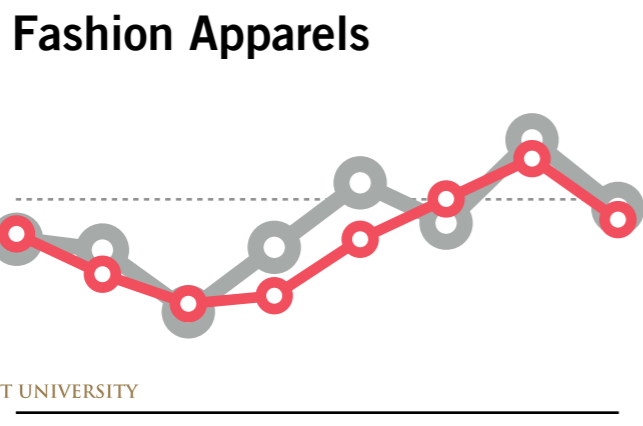
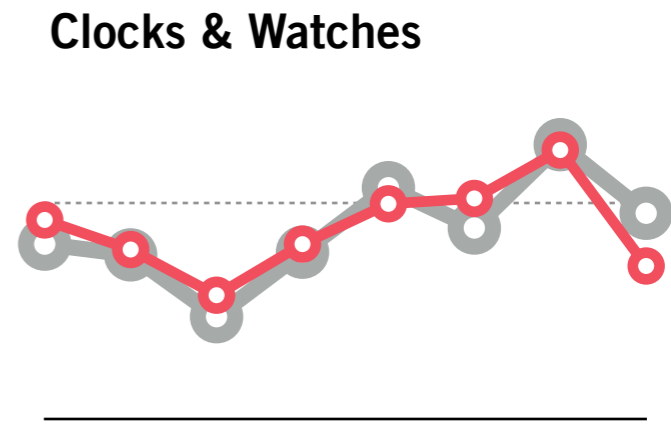
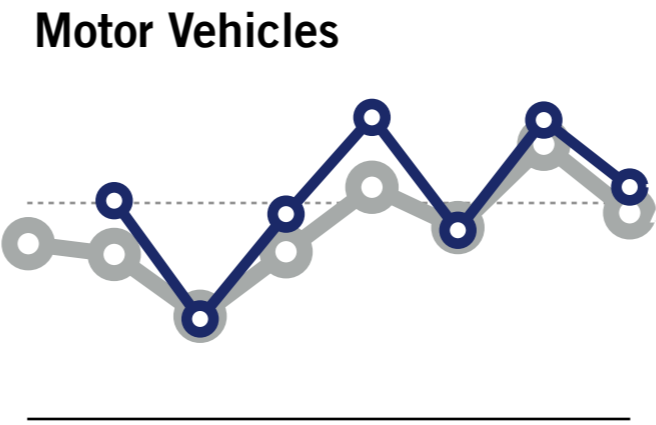
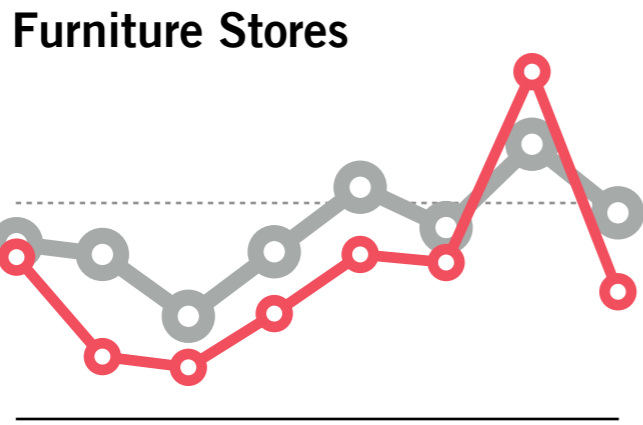
CSISG 2014 QUARTER 1 RESULTS OVERVIEW



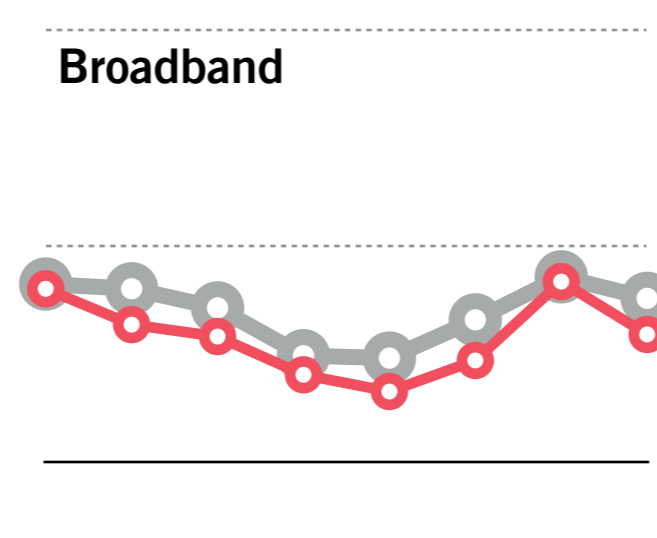
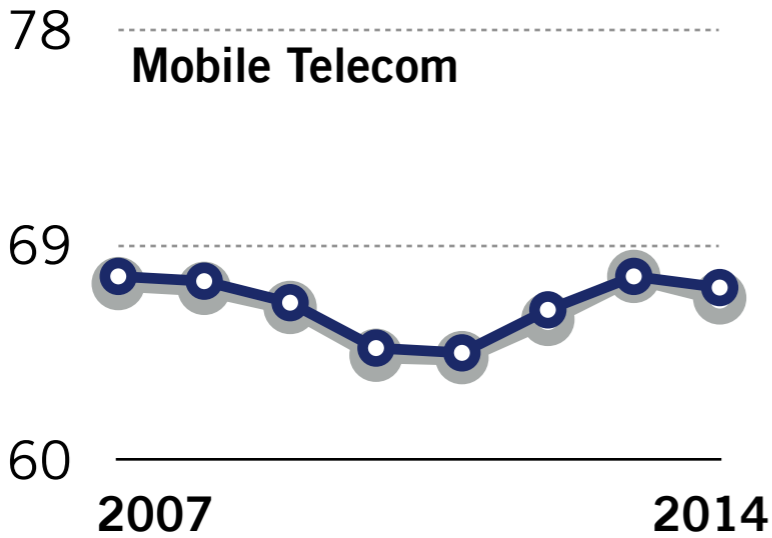
CSISG Retail Sector Trends



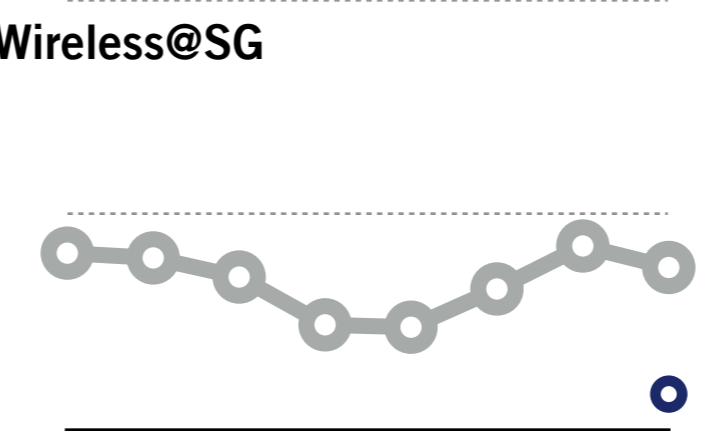
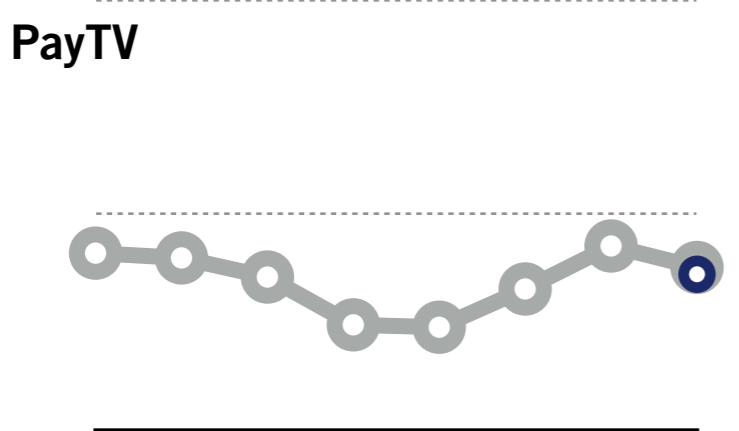
○ Retail Sector



CSISG Info-Comms Sector Trends

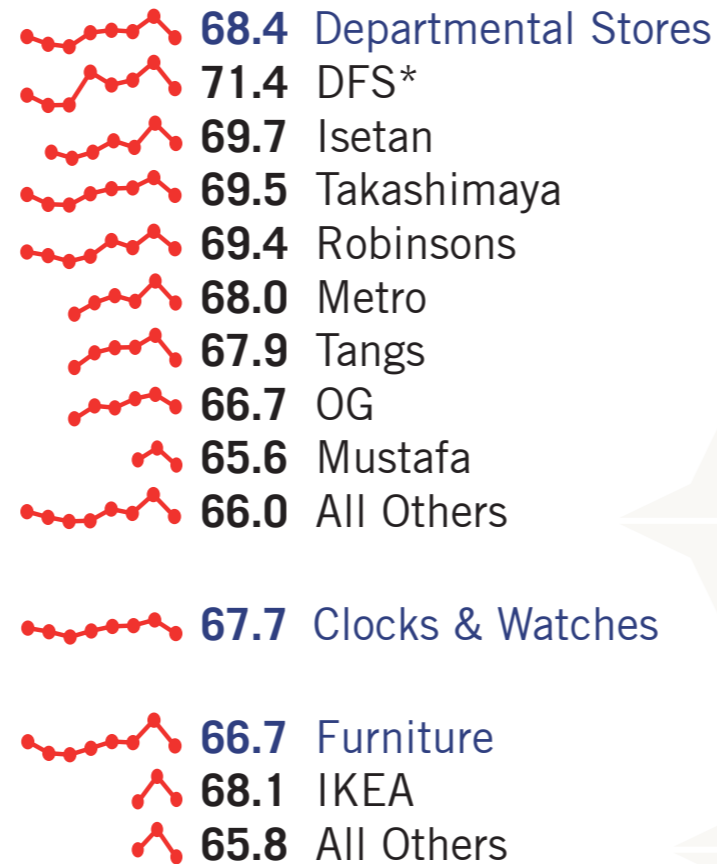
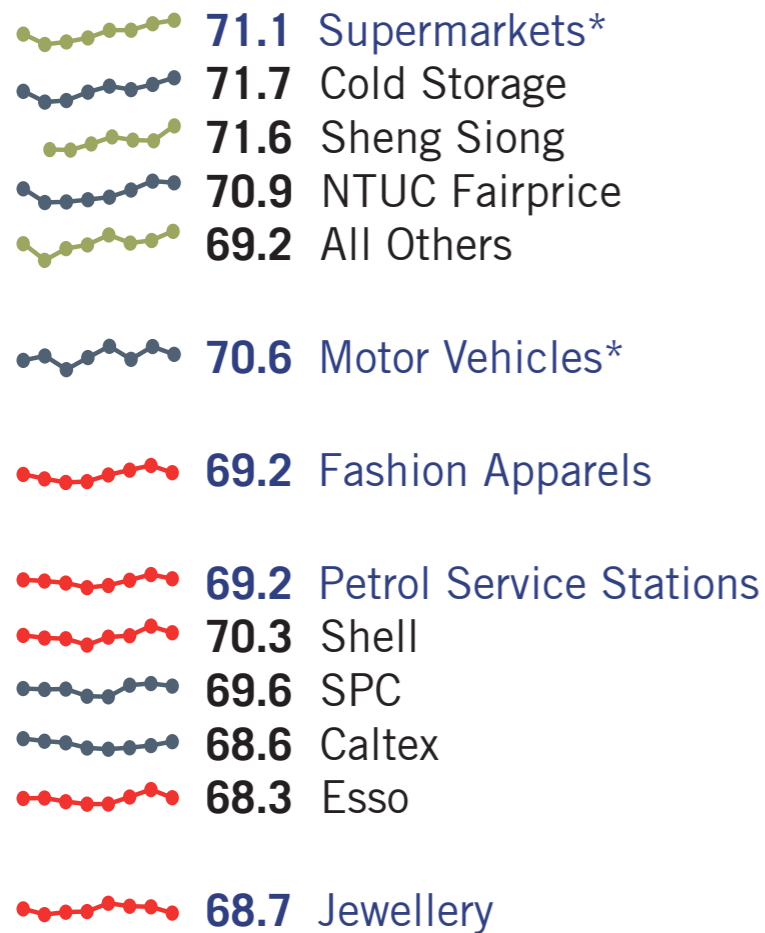


○ Info-Comms Sector

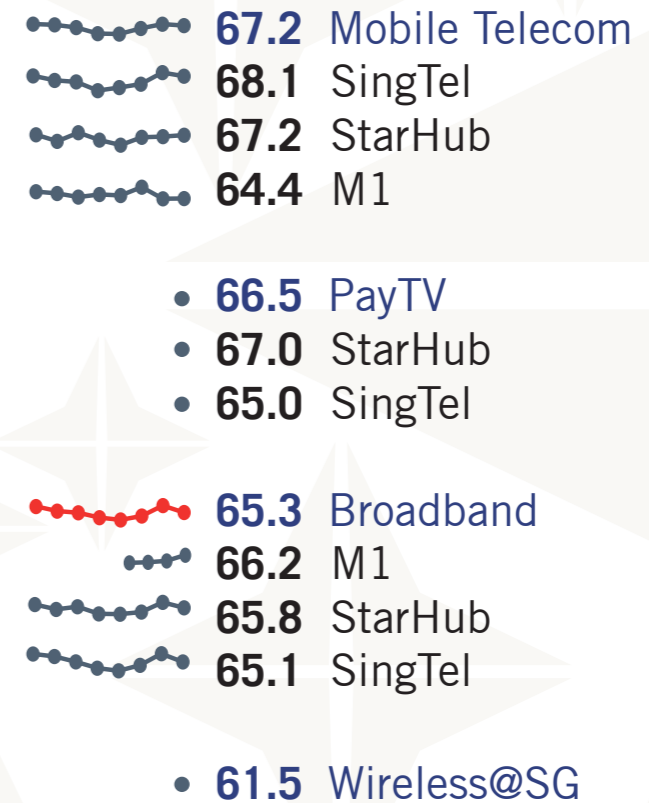


CSISG 2014 Q1 Results Overview

69.6 Retail



66.8 Info-Communications



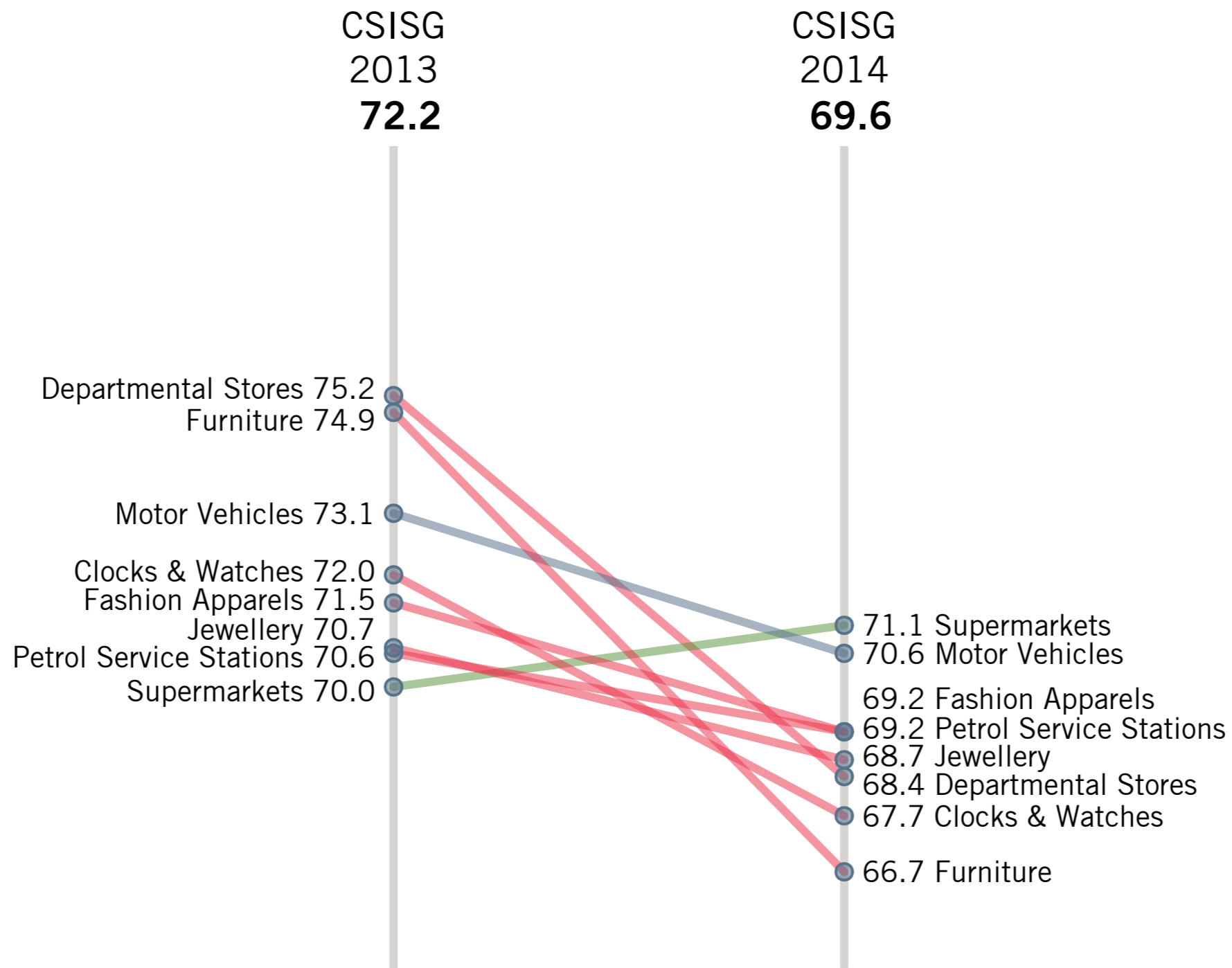
CSISG 2014 Q1 RESULTS

RETAIL



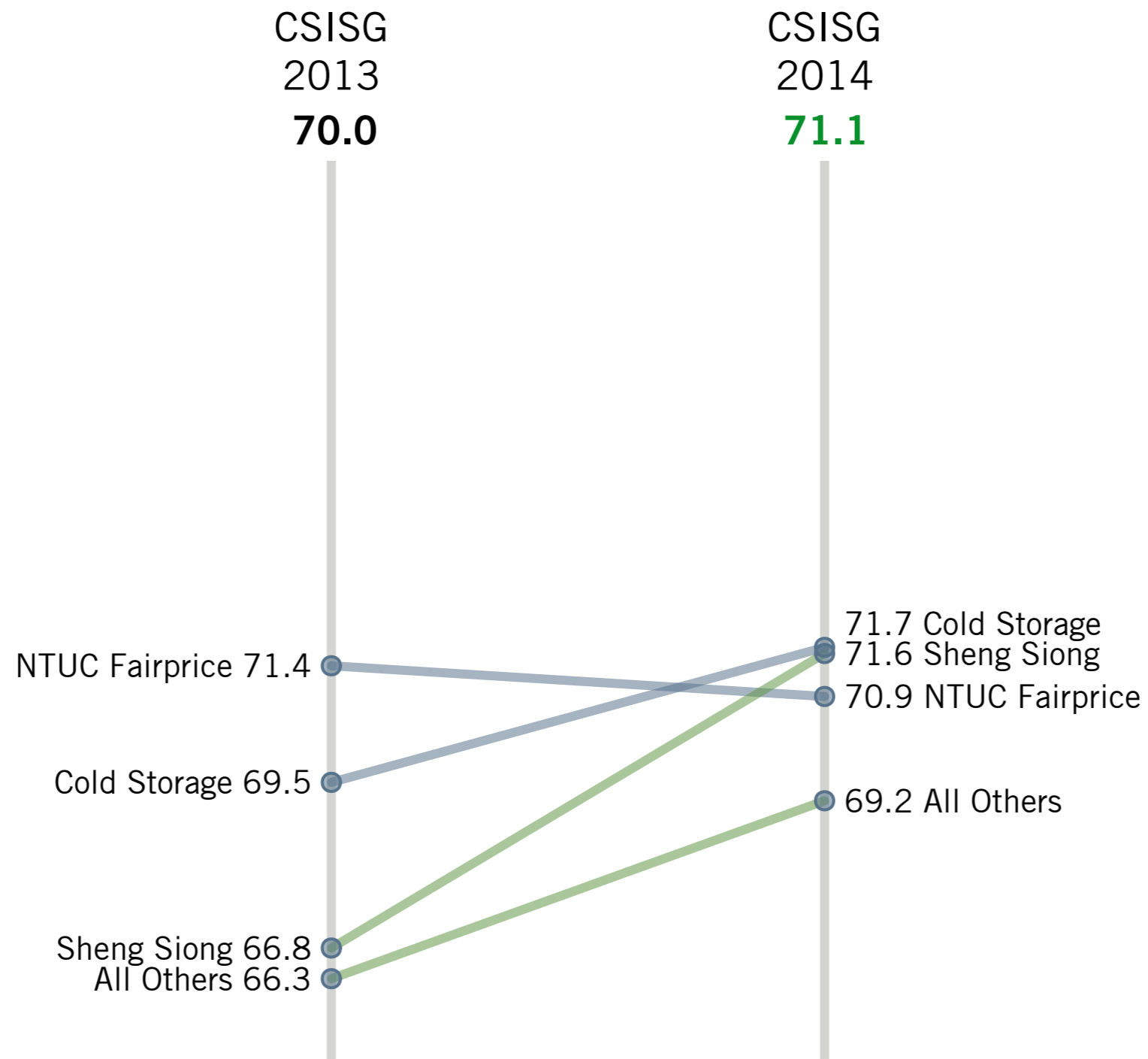
CSISG 2014 Q1 Retail

Year-on-Year Changes



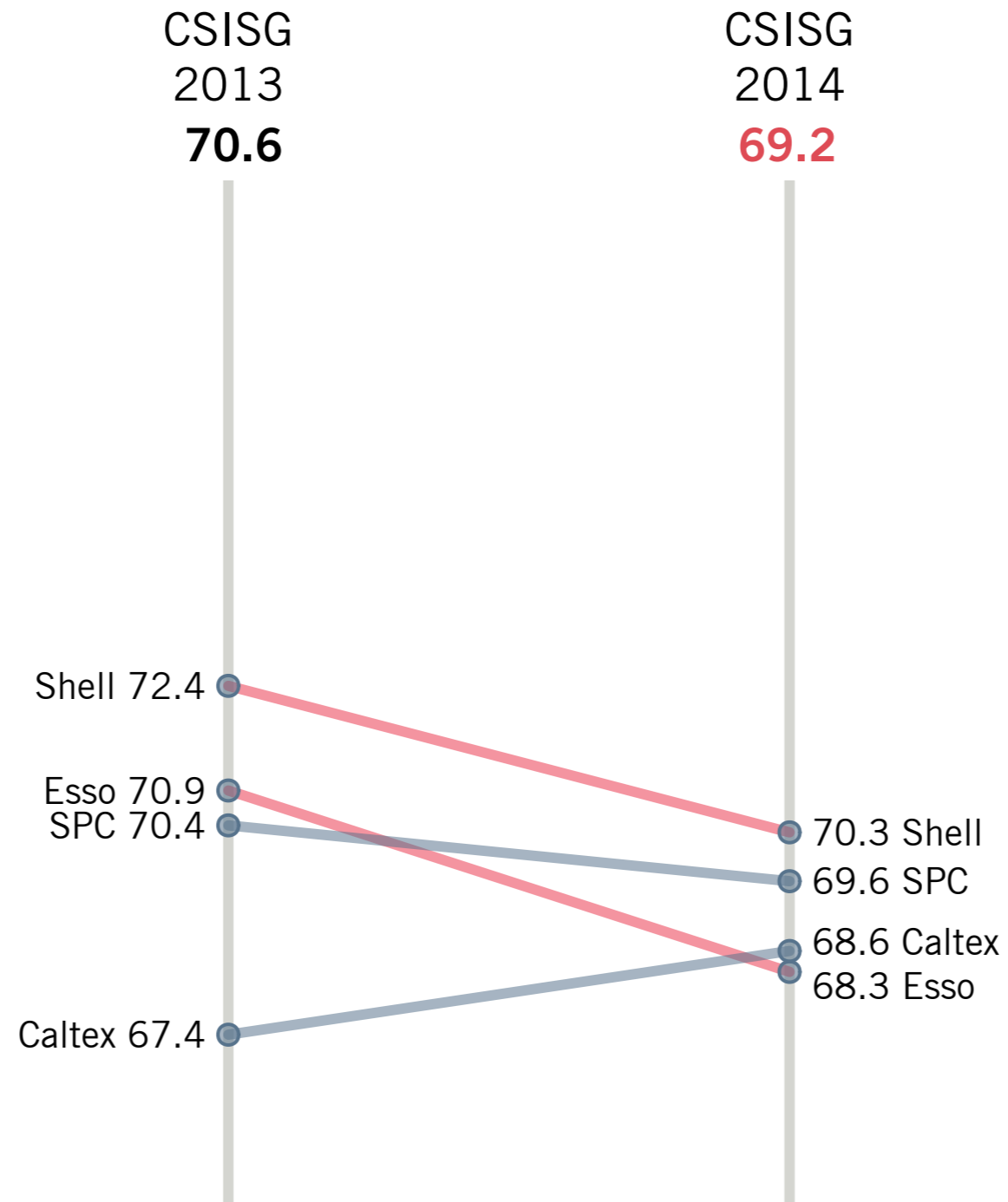
CSISG 2014 Q1 Retail

Supermarkets



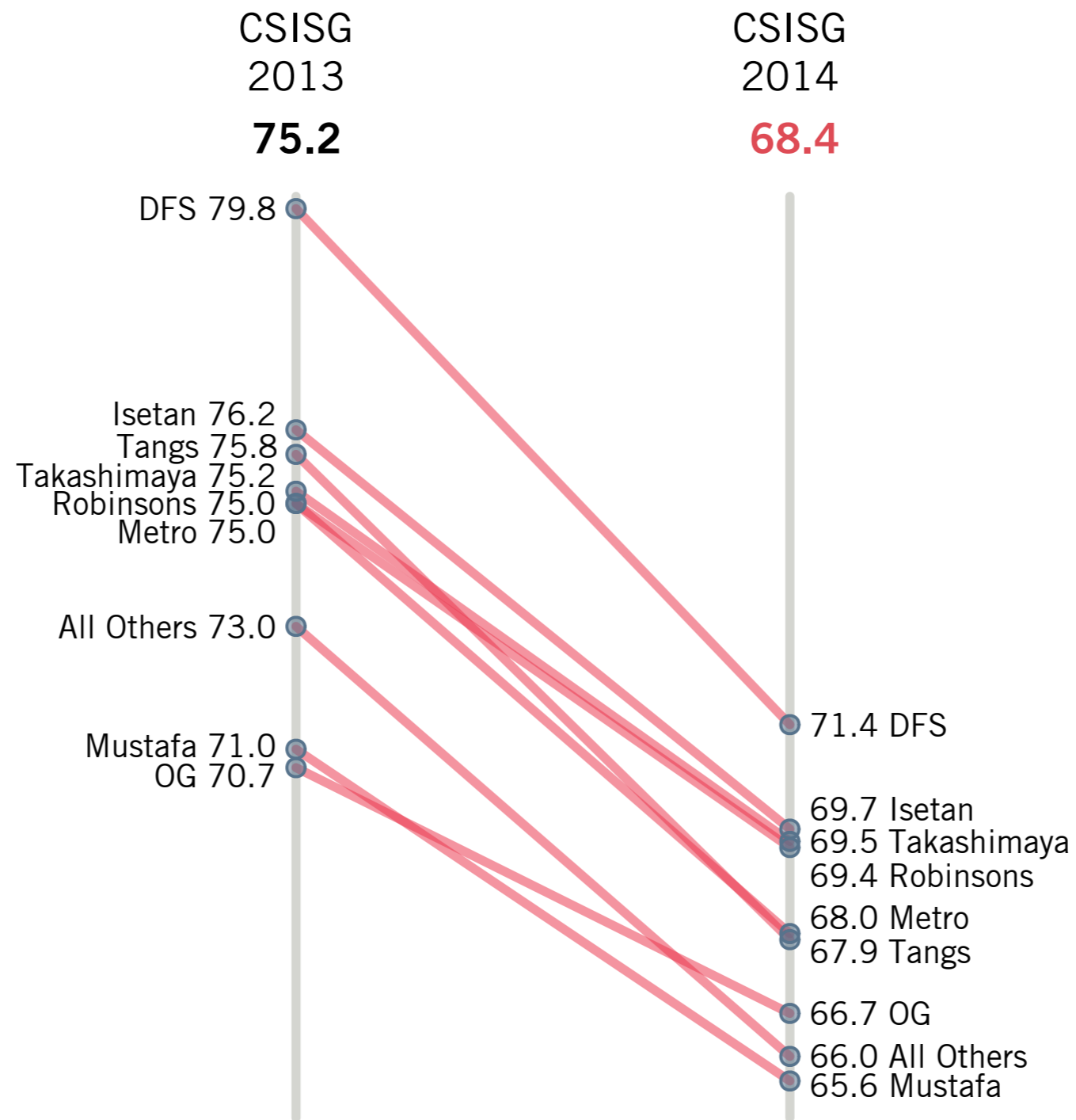
CSISG 2014 Q1 Retail

Petrol Service Stations



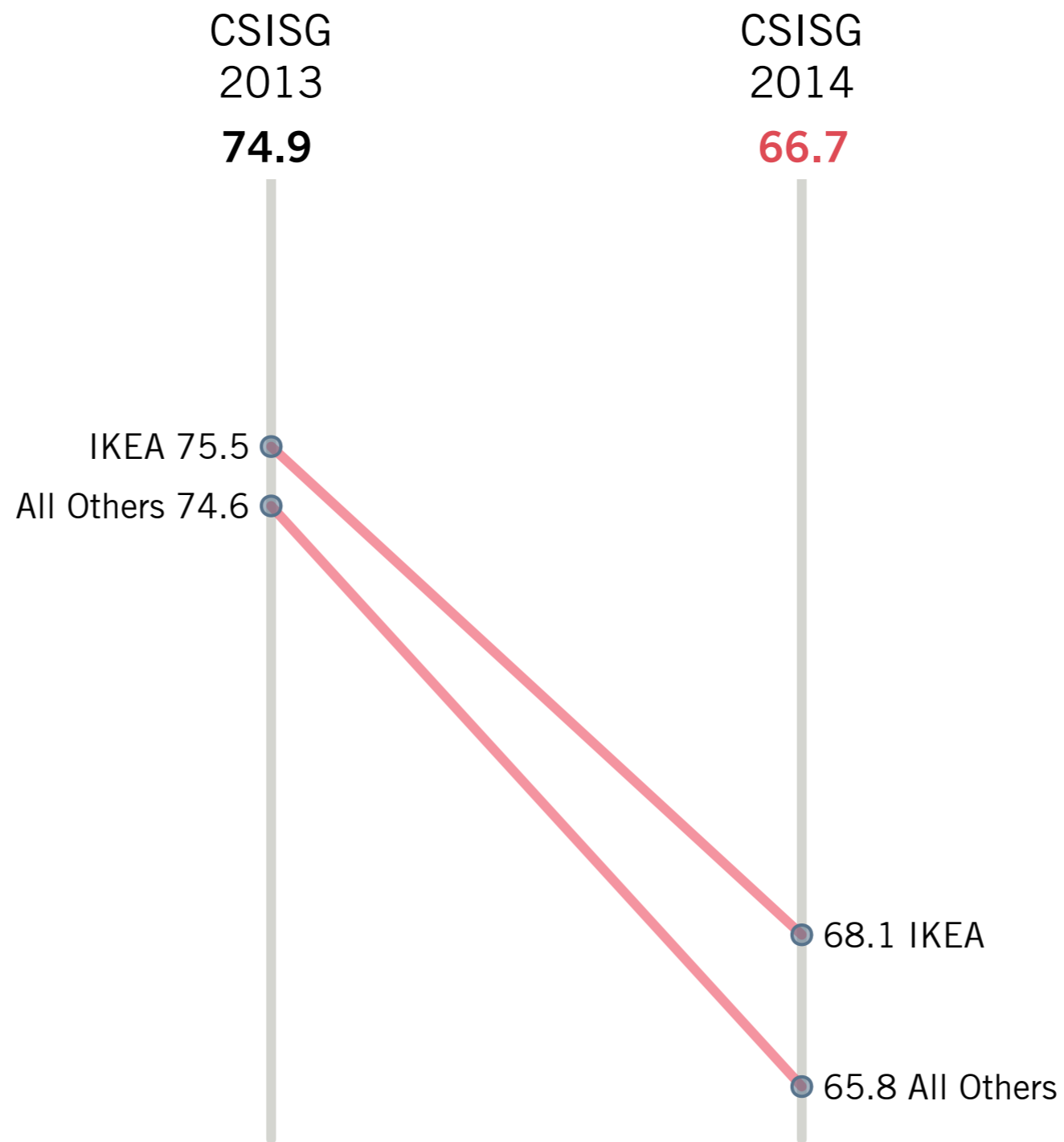
CSISG 2014 Q1 Retail

Departmental Stores



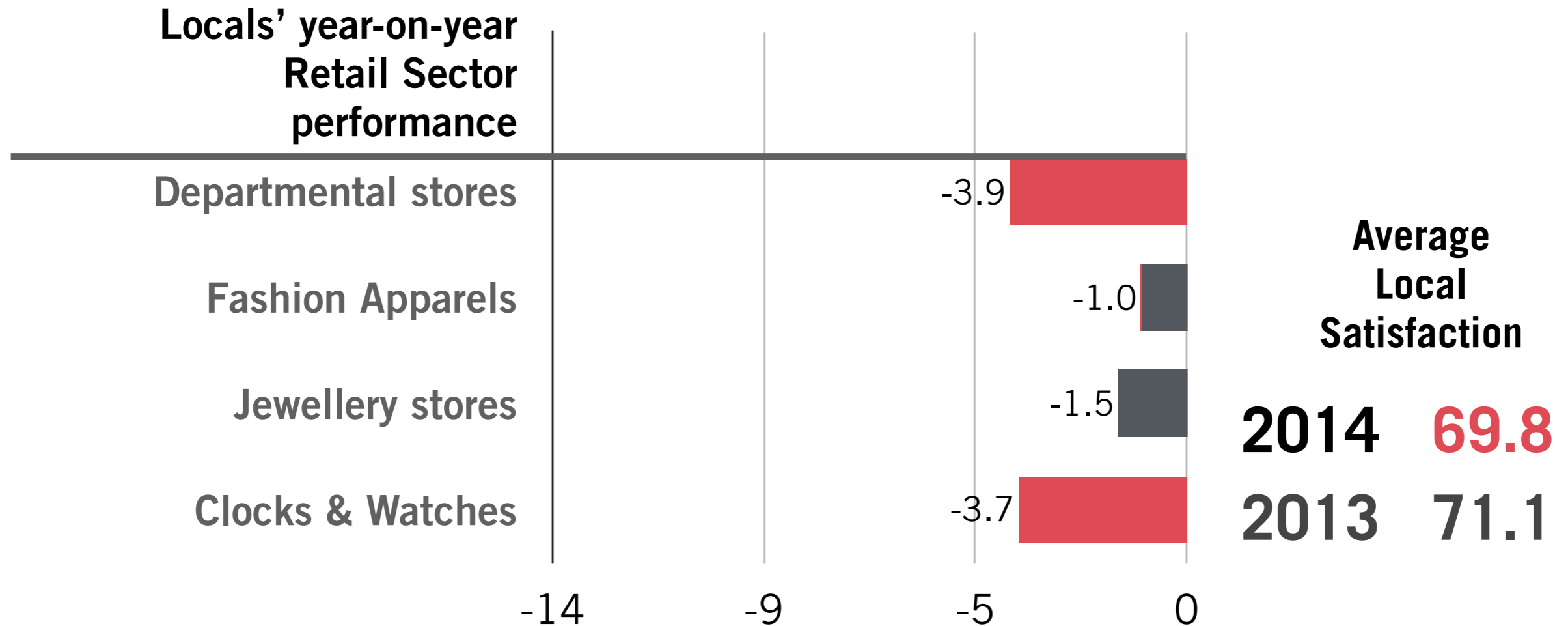
CSISG 2014 Q1 Retail

Furniture



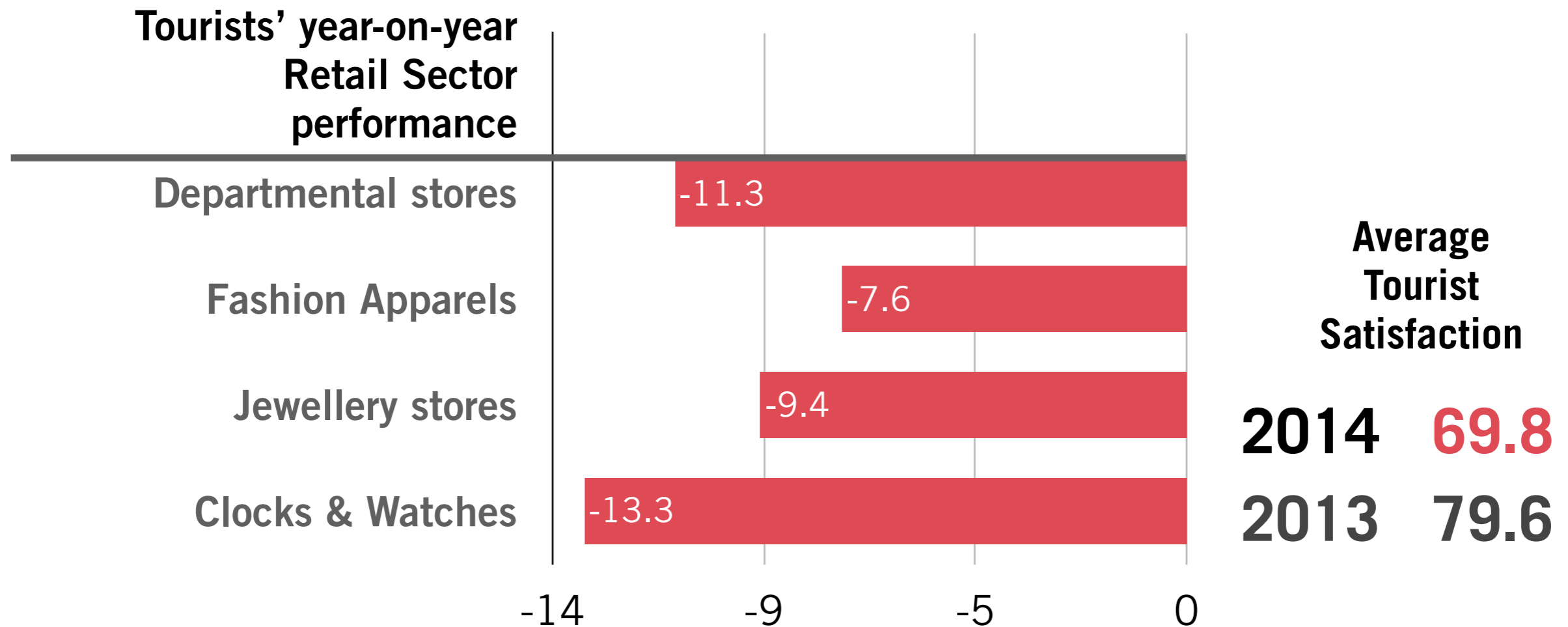
CSISG 2014 Q1 Retail

Year-on-Year Changes in Local Respondents' Satisfaction

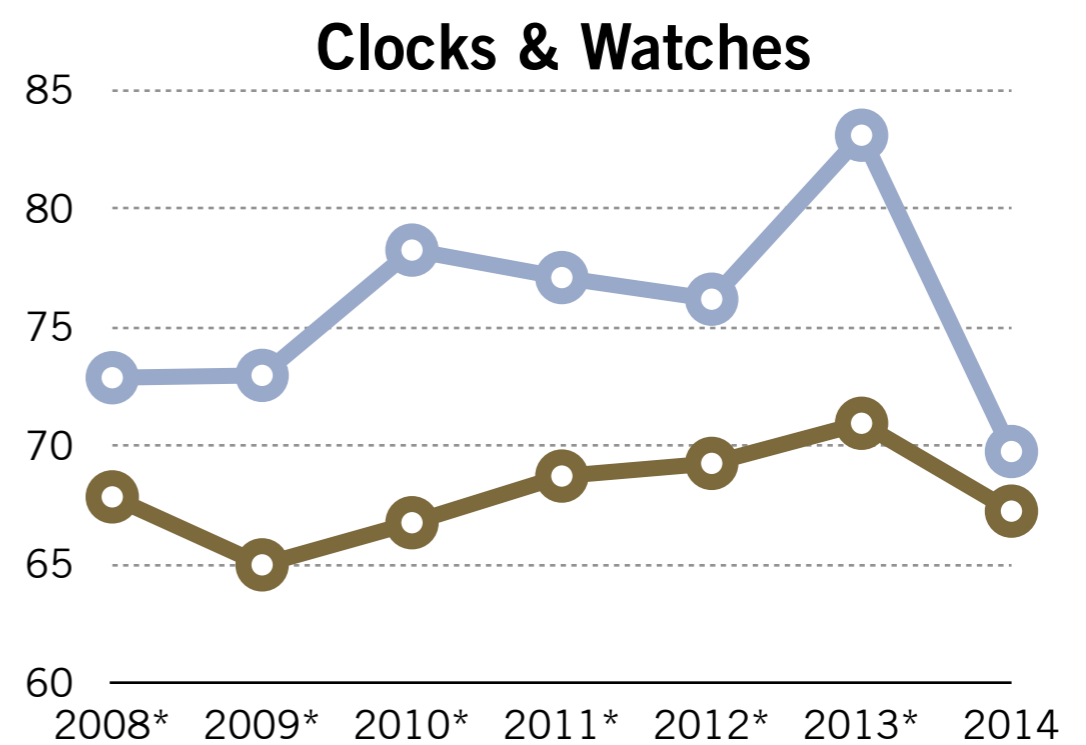
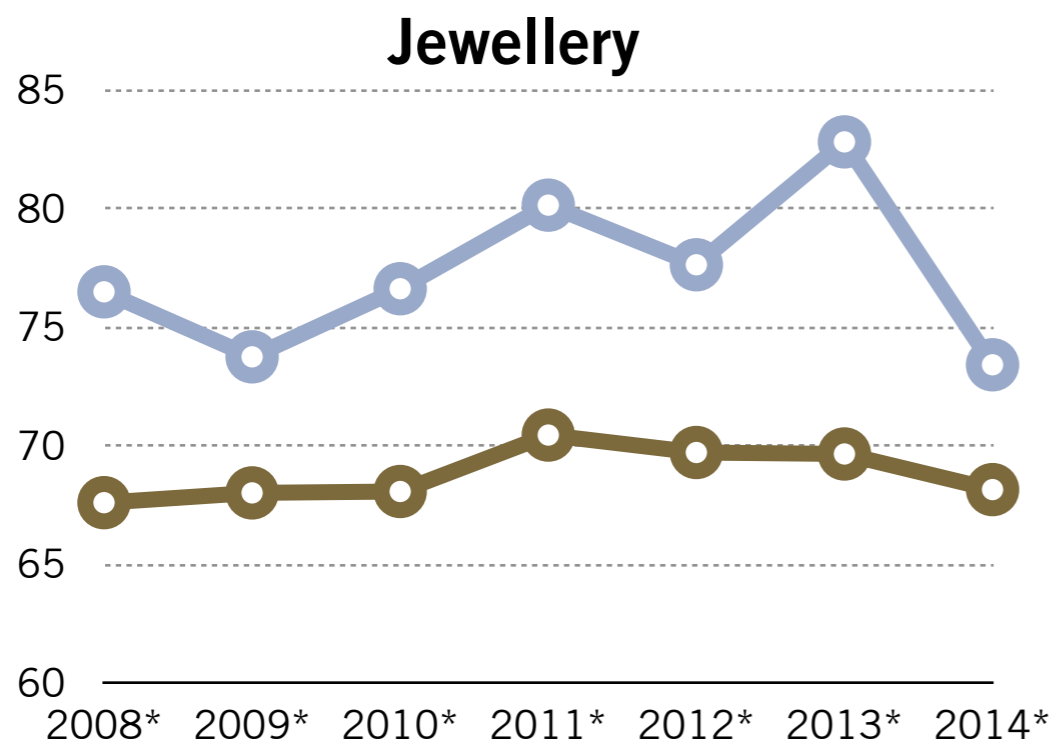
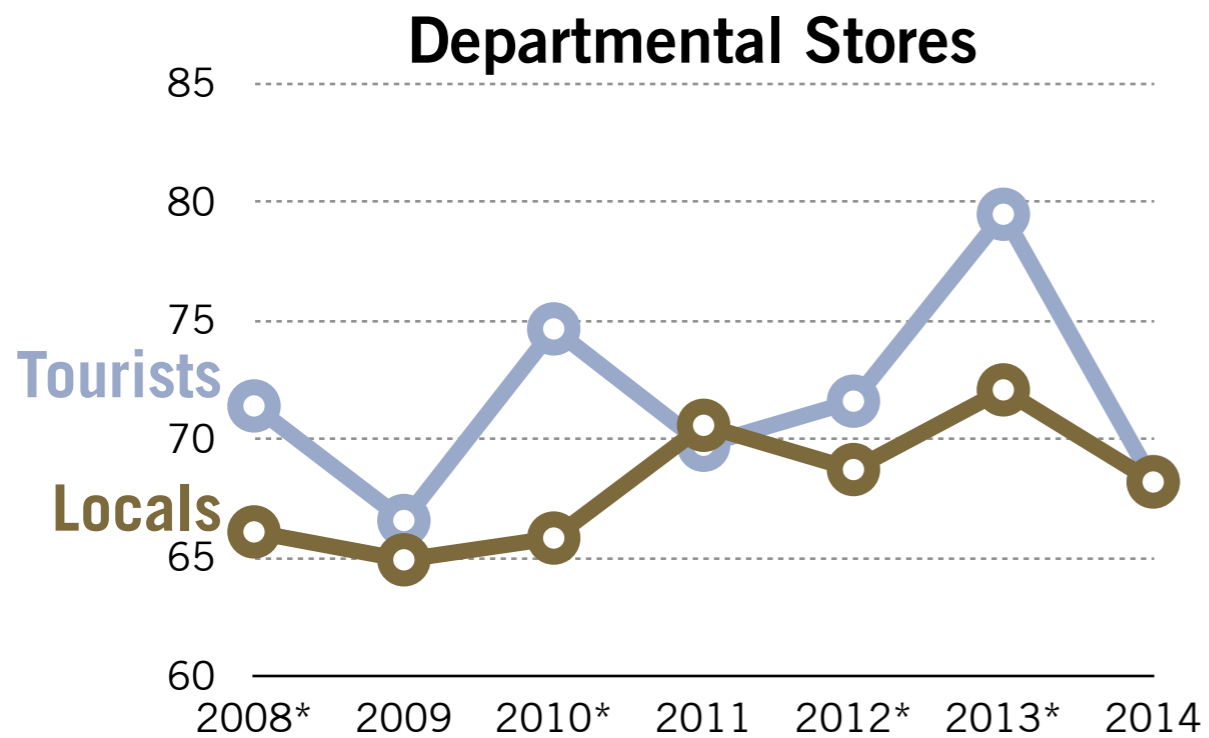


CSISG 2014 Q1 Retail

Year-on-Year Changes in Tourist Respondents' Satisfaction



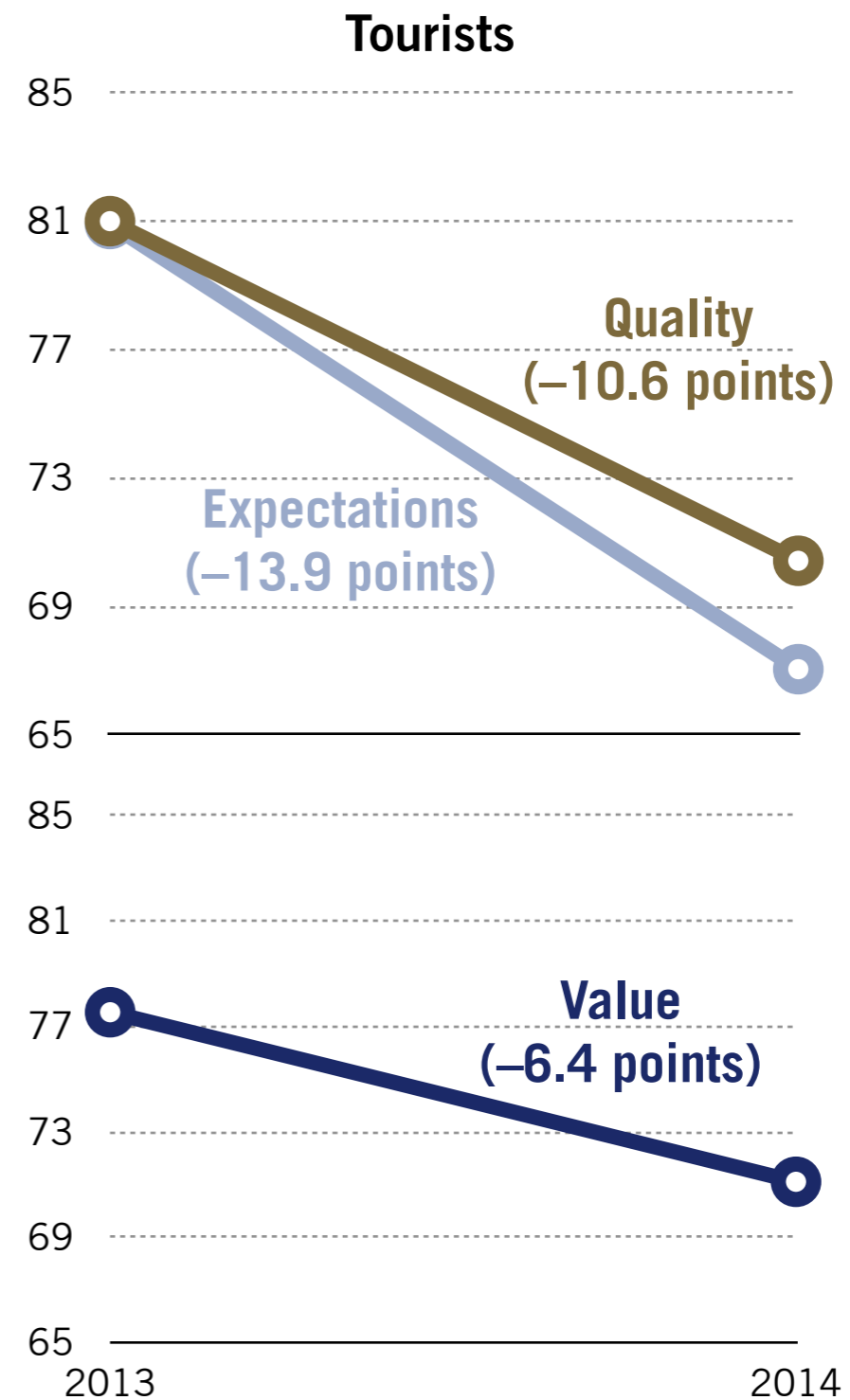
CSISG 2014 Q1 Locals vs Tourists



* Years where CSISG scores of locals and tourists are significantly different

CSISG 2014 Q1 Retail

Year-on-Year Local-Tourist Differences



CSISG 2014 Q1 Retail Local-Tourist Differences

For the Retail sector, 2014 is the first time Tourist satisfaction is on par with Local satisfaction since 2008.

Decrease in Retail sector CSISG performance led primarily by decreased satisfaction with Tourist customers.

All drivers of satisfaction fell significantly, however, compared to Locals, Tourists perception of value fell while Locals improved.

Why is satisfaction important?



Repurchase Intent

Average number of times visited
in the past 3 months

Average spend during each visit
in the past 3 months

Average spend a year

	bottom quartile	top quartile
Repurchase Intent	6.7	8.6
Average number of times visited in the past 3 months	2.6	2.6
Average spend during each visit in the past 3 months	\$103	\$126
Average spend a year	\$1,049	\$1,294

Why is satisfaction important?



	bottom quartile	top quartile
Repurchase Intent	7.3	8.5
Average number of times visited in the past 3 months	13.1	13.0
Average spend during each visit in the past 3 months	\$63	\$69
Average spend a year	\$3,314	\$3,558

Why is satisfaction important?

For both the departmental stores and supermarkets sub-sectors, although the average number of times visited in the past 3 months is very similar for customers with high or low CSISG scores, the average amount spent per visit for customers with high CSISG scores is higher than that of customers with low CSISG scores.

Customers with high CSISG scores have significantly higher repurchase intention ratings, Customer Loyalty scores, and spend more per visit as compared to customers with low CSISG scores.

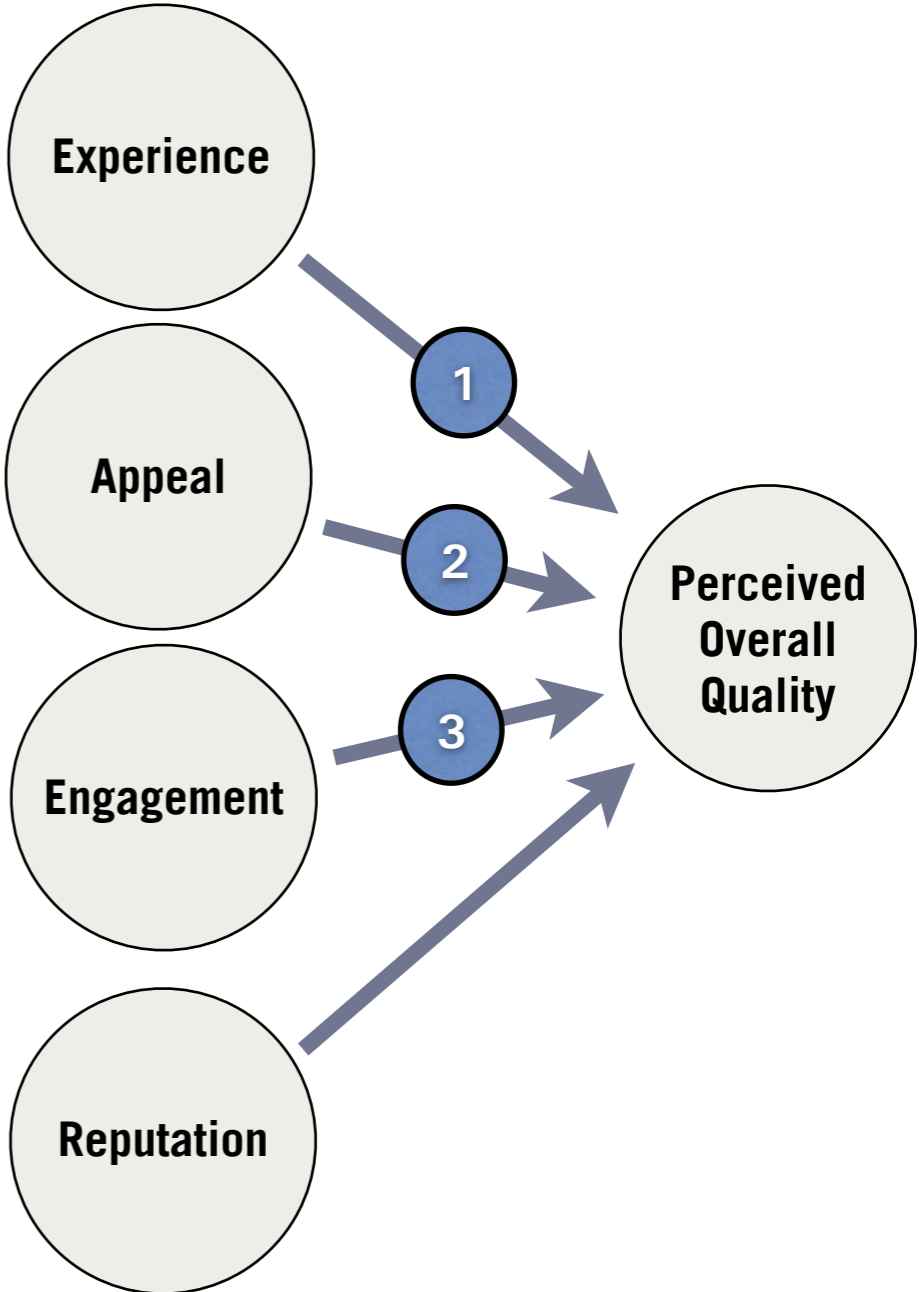
Touchpoint Impact Analysis

To most efficiently boost customer satisfaction, companies should work on dimensions that provide the greatest impact on their customers' perceptions of quality.

For the sub-sectors of Departmental Stores and Supermarkets, further analysis suggests attributes found within:

Experience
Appeal, and
Engagement

have the most significant impacts on perceived quality (in decreasing order of importance). The Reputation dimension did not have a statistically significant impact.



Increasing Departmental Stores CSISG Score

Dimensions	Experience		Appeal	Engagement		Reputation
Attributes Attributes are arranged in order of importance	1 Customer satisfaction with professionalism & product knowledge of staff	5 Customer satisfaction with variety of products	1 Customer satisfaction with promotions	1 Customer's level of awareness and attention to media advertising	5 Customer's familiarity with procedures	1 Customer trust in company
	2 Customer satisfaction with courtesy & helpfulness of staff	6 Ease of getting items	2 Company fit with customer's personality	2 Customer's level of awareness and attention to information sent to customer	6 Benefits received from rewards programme	2 Company's level of ethical standards
	3 Customer satisfaction with return and exchange policies		3 Competitive prices	3 Importance of preferential treatment from rewards programme	7 Company's knowledge of customer	3 Company is a active sponsor of community events
	4 Customer satisfaction with layout and ambience			4 Company's recognition of customer as being special	8 Customer's sense of community with other customers	4 Company is a good corporate citizen

Increasing Supermarket CSISG

Dimensions	Experience		Appeal		Engagement		Reputation
Attributes Attributes are arranged in order of importance	1 Customer satisfaction with return and exchange policies	5 Customer satisfaction with courtesy & helpfulness of staff	1 Customer satisfaction with promotions	1 Customer's level of awareness and attention to media advertising	5 Company's knowledge of customer	1 Company's level of ethical standards	
	2 Customer satisfaction with layout and ambience	6 Ease of getting items	2 Customer satisfaction with house brands	2 Customer's familiarity with procedures	6 Customer's level of awareness and attention to information sent to customer	2 Customer trust in company	
	3 Customer satisfaction with variety of products	7 Customer satisfaction with checkout process	3 Company fit with customer's personality	3 Customer's sense of community with other customer	7 Company's recognition of customer as being special	3 Company is a good corporate citizen	
	4 Customer satisfaction with professionalism & product knowledge of staff	8 Customer satisfaction with communication ability of staff	4 Competitive prices	4 Importance of preferential treatment from rewards programme	8 Benefits received from rewards programme	4 Company is a active sponsor of community events	

Increasing Retail CSISG Score

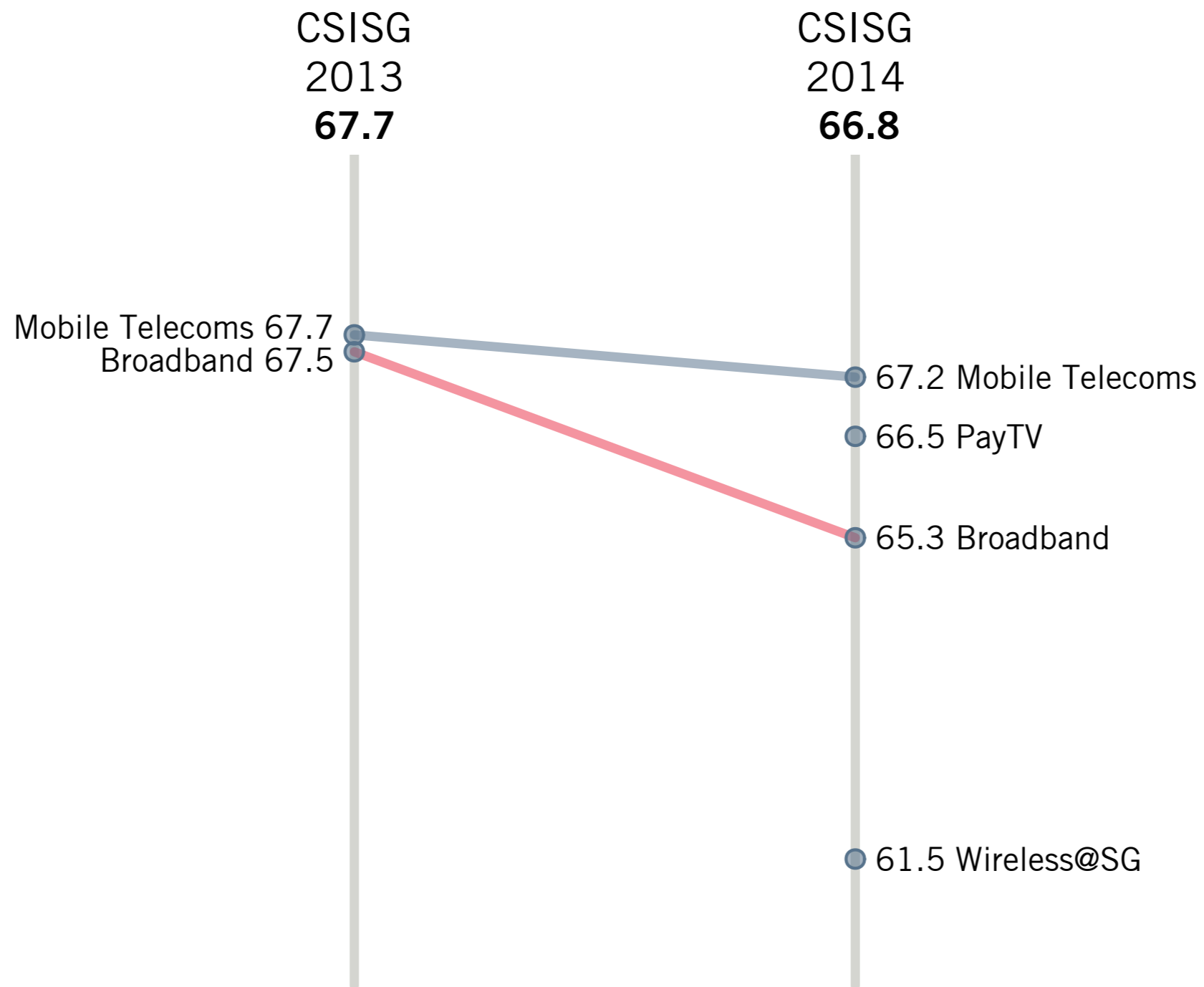
While we have identified the areas of customer experience which have a greater importance in influencing the scores of the customer experience, customer experience is still about the customer's end-to-end journey with the company.

As such, more focus may be paid to areas that are important but resources should not be taken away from other aspects in customer experience that may not be as important.

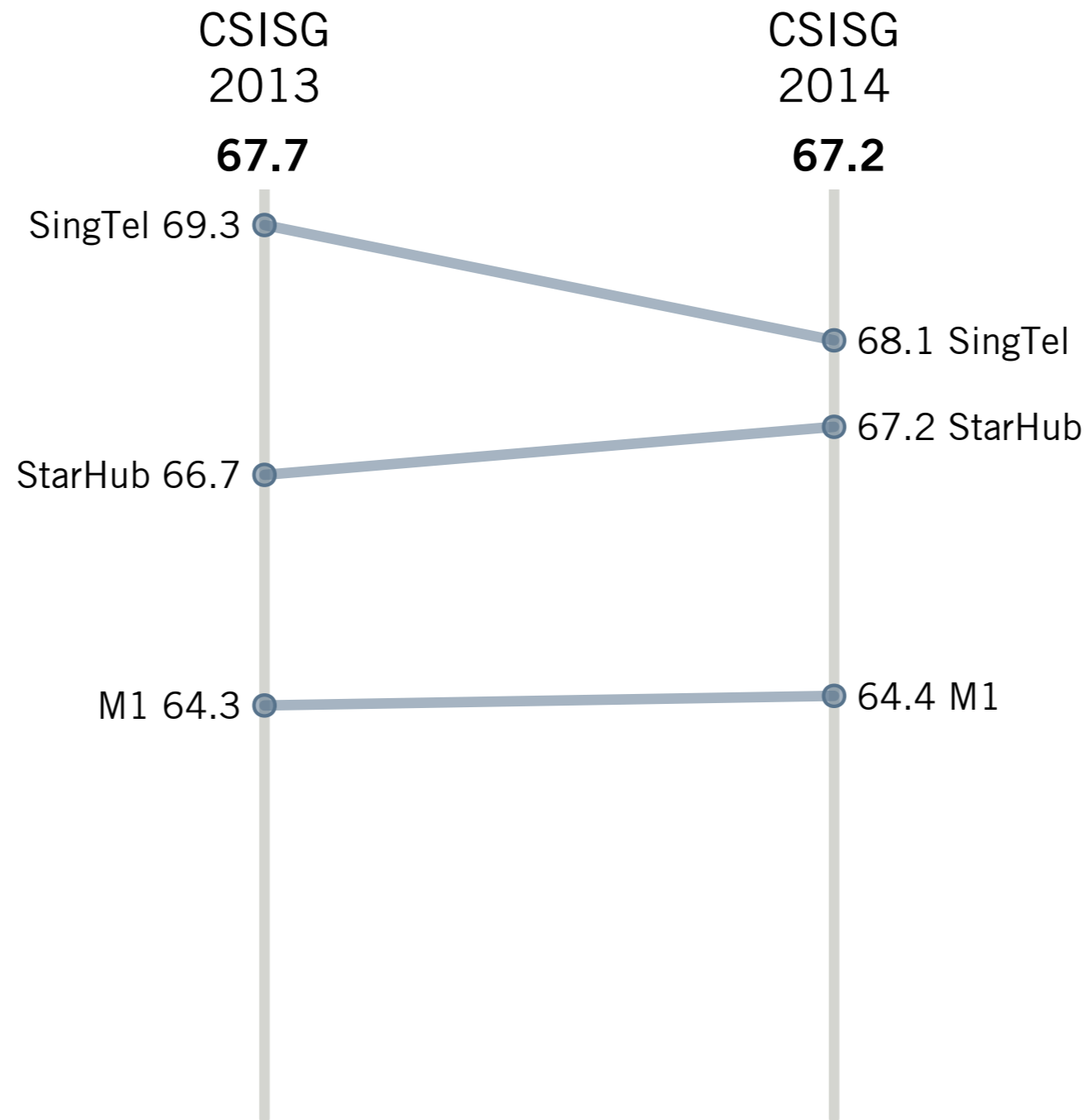
CSISG 2014 Q1 RESULTS INFO-COMMUNICATIONS



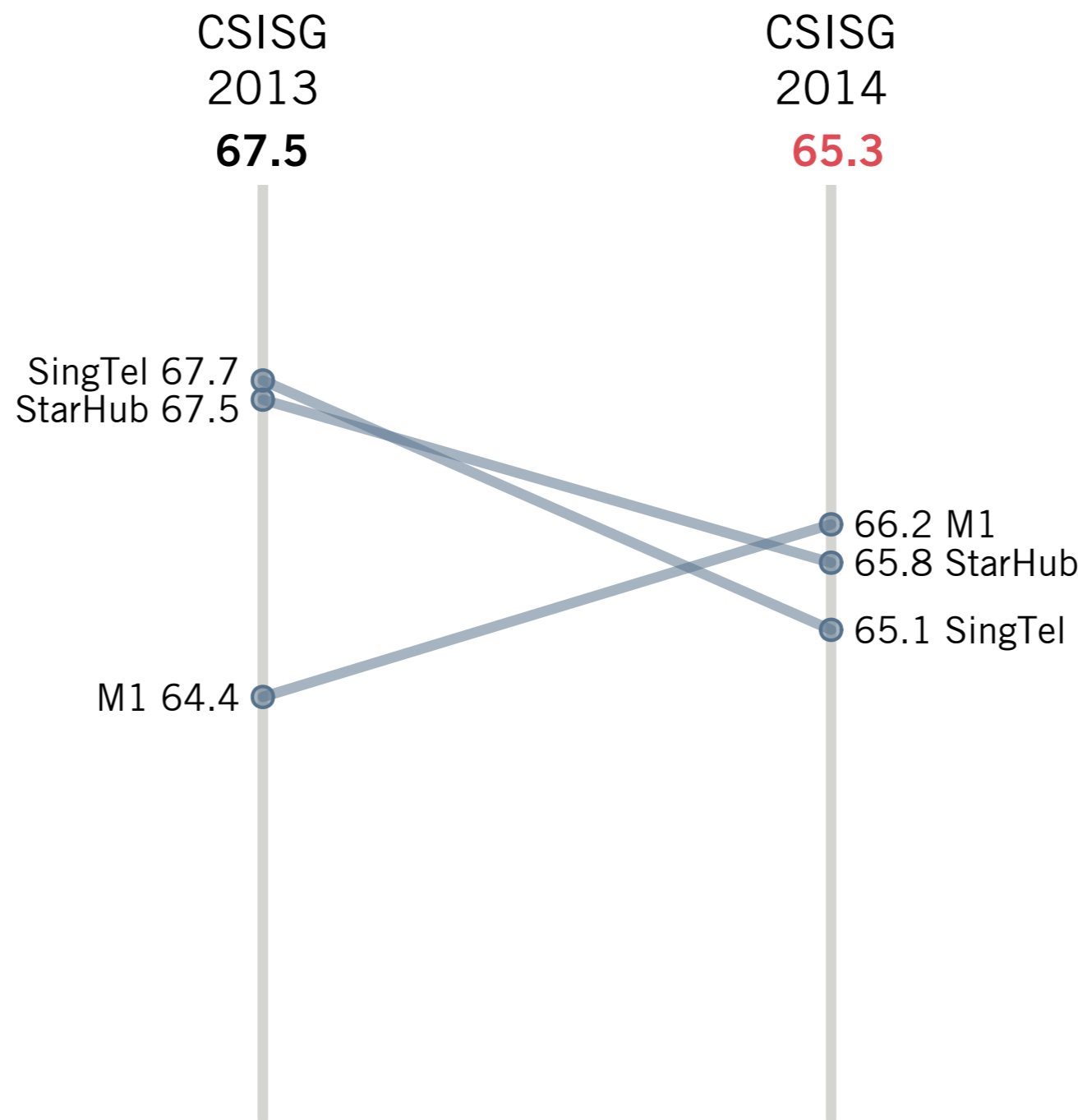
CSISG 2014 Q1 Info-communications Year-on-Year Change



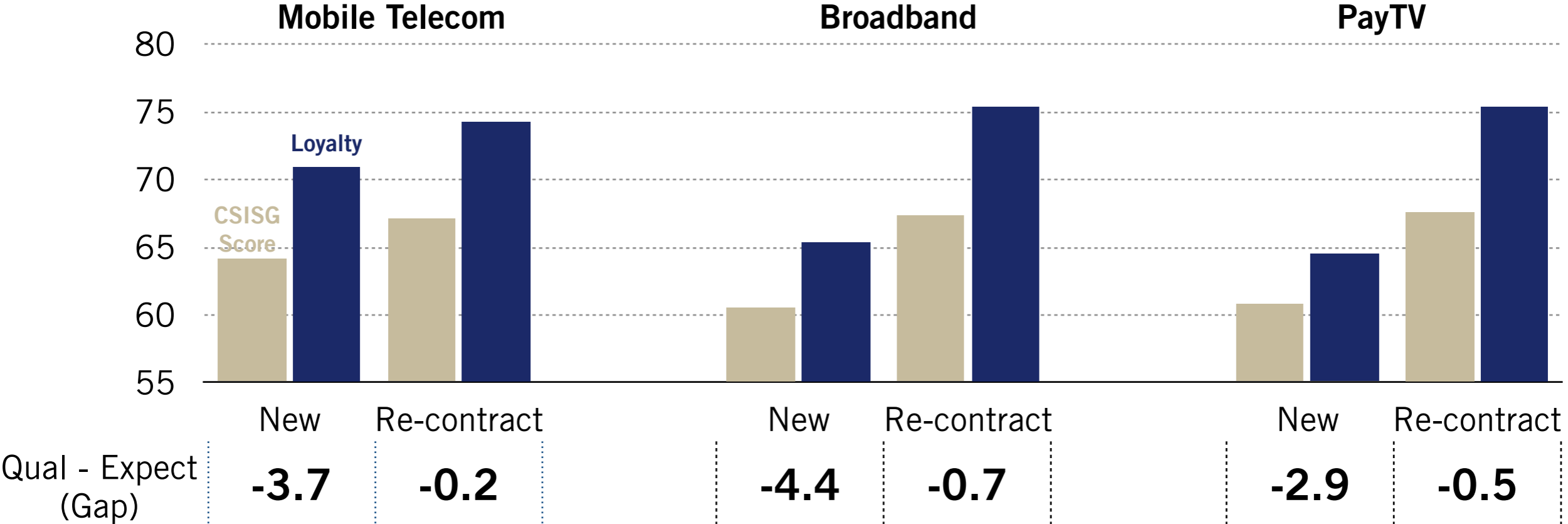
CSISG 2014 Q1 Info-communications Mobile Telecom



CSISG 2014 Q1 Info-communications Broadband



Customer Tenure, Satisfaction, & Loyalty

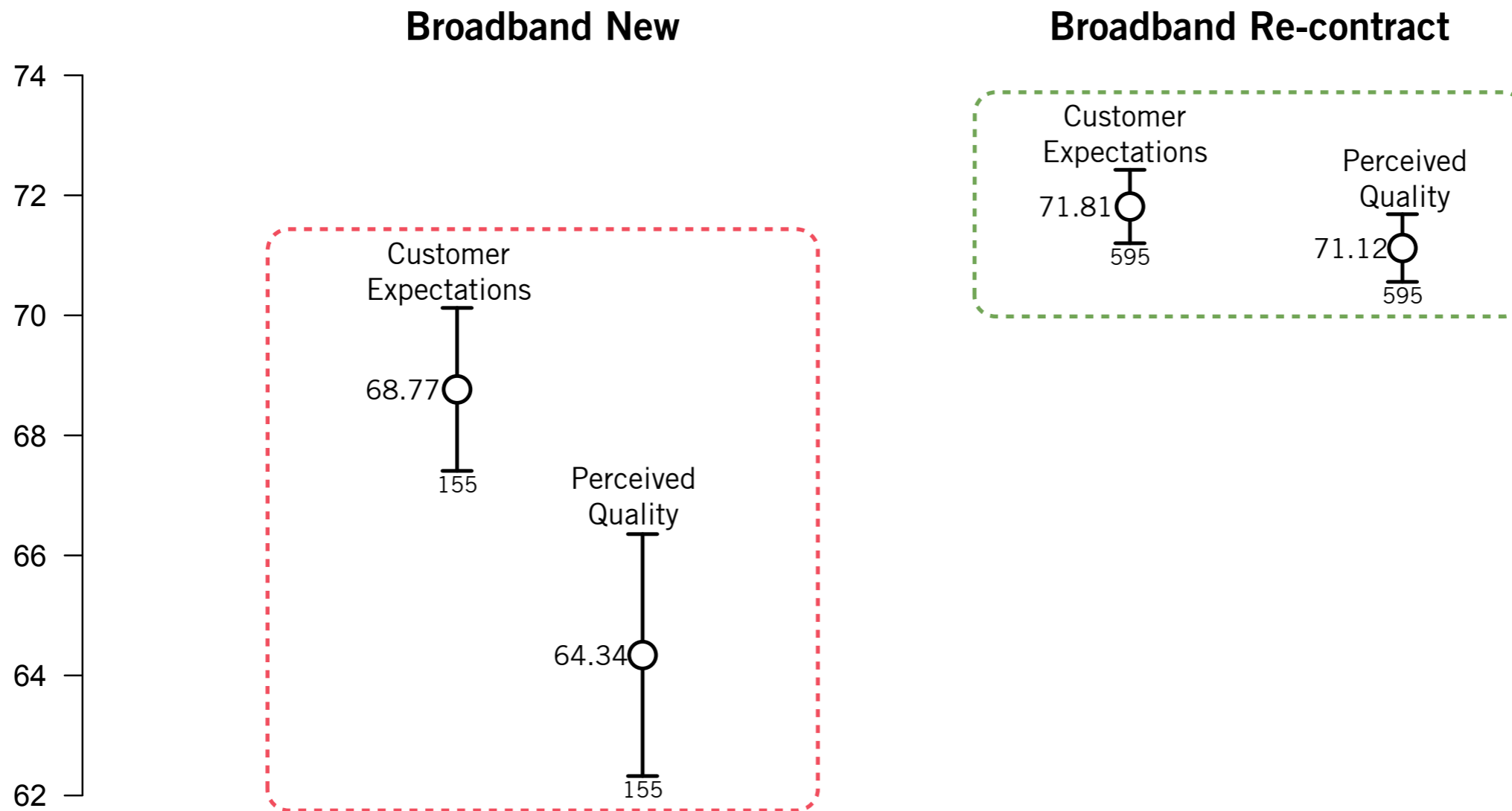


Re-contract customers refer to customers who have been with their service providers for two years or more.

The differences between the CSISG and Loyalty scores for all the customer segments across the three Info-Communications sub-sectors are significant.

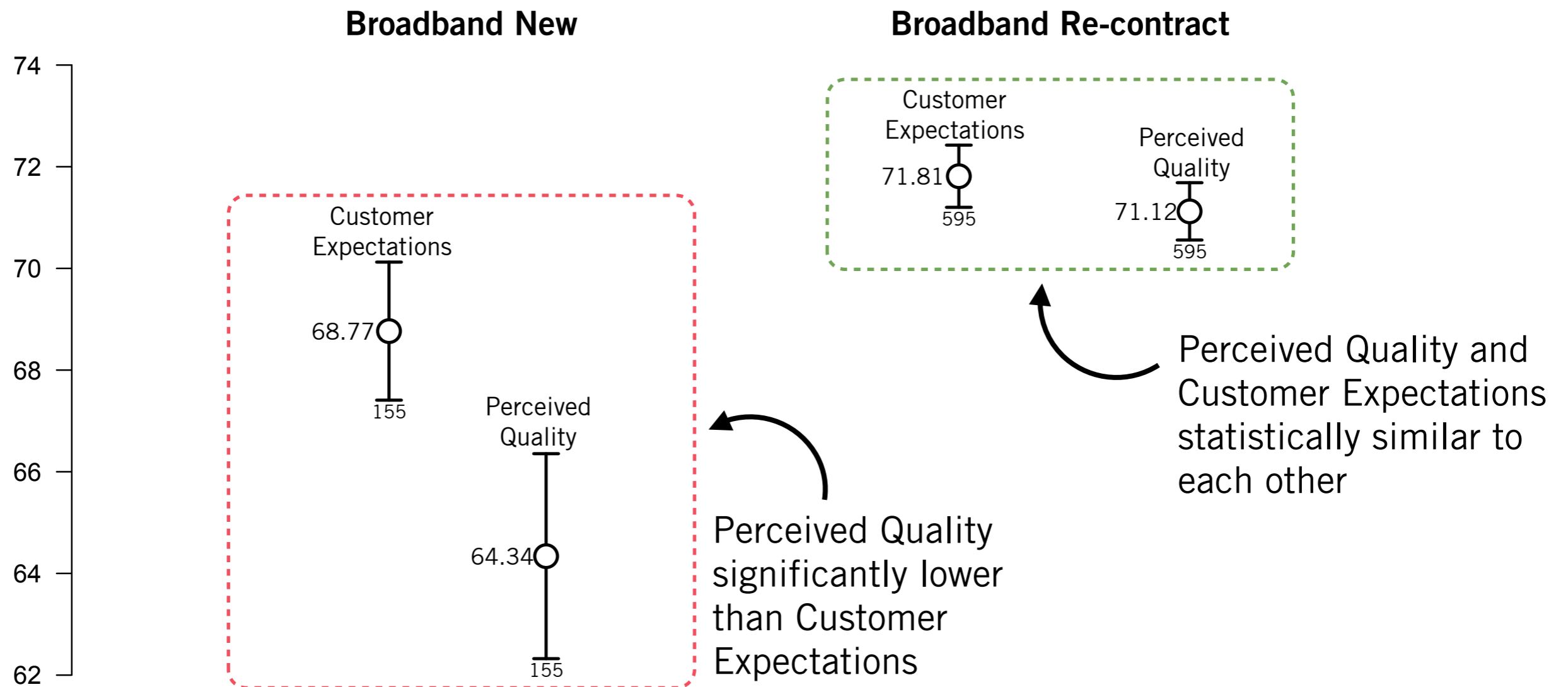
This suggests that Info-communication companies have been able to better manage expectations of re-contract customers and meet them, resulting in higher CSISG and loyalty scores.

Customer Tenure, Satisfaction, & Loyalty



For PayTV and Broadband sub-sectors, Customer Expectations and Perceived Quality scores for re-contract customers are significantly higher than that of new customers.

Customer Tenure, Satisfaction, & Loyalty



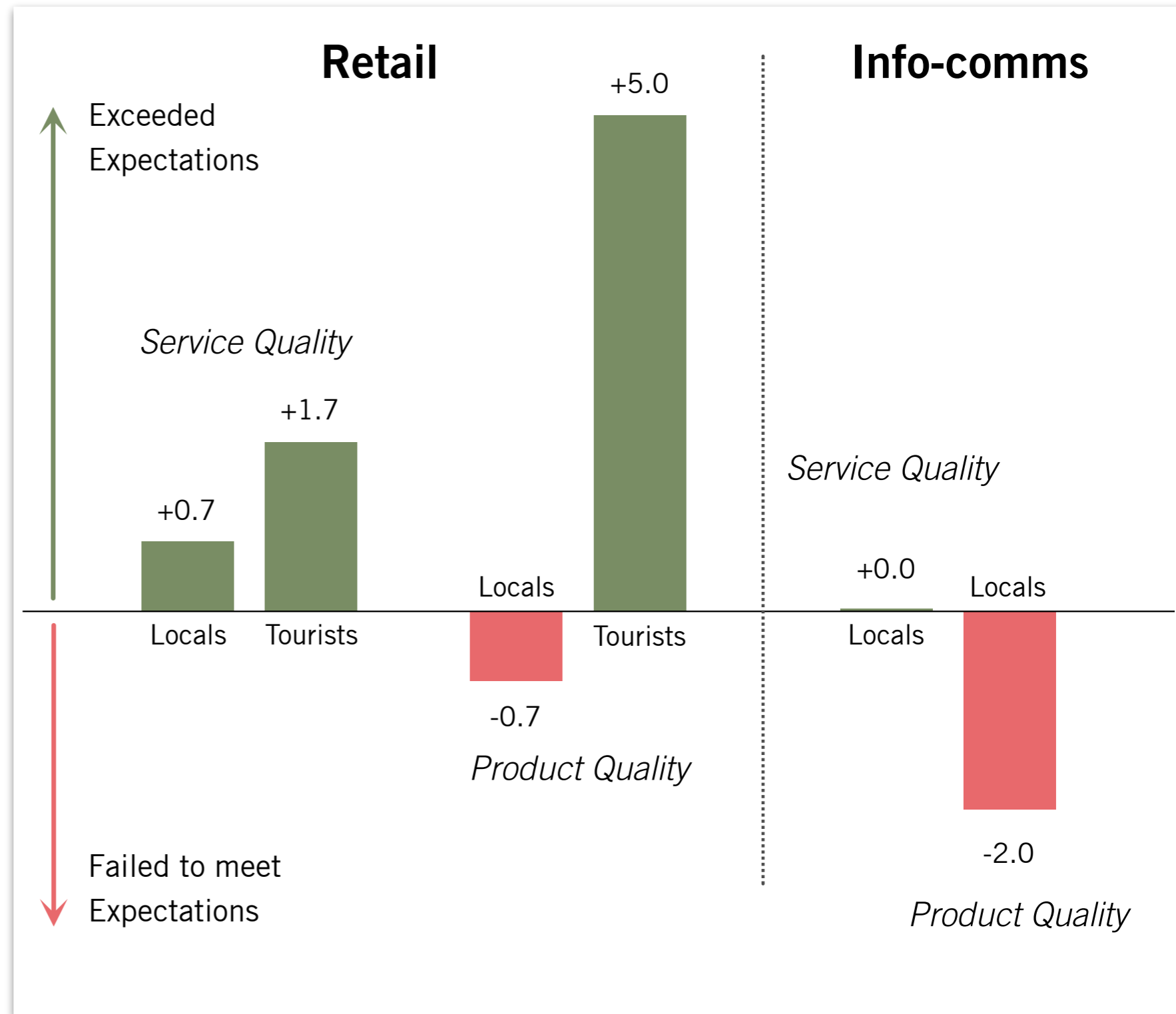
Across all 3 sub-sector in Info-Communications, companies were better able to meet Expectations of re-contract customers as opposed to new customers.

ADDITIONAL FINDINGS



Looking beyond Customer Service

- For locals, Service Quality met or exceeded Expectations for the Retail and Info-communications sectors.
- Conversely, Product Quality did not meet expectations of local respondents.
- This suggests that for locals, service quality is not the problem; it is the non-service aspects that are impacting customer satisfaction.



Looking beyond Customer Service

- Approach customer satisfaction holistically to look beyond customer service.
- Review the entire customer experience, e.g., service process and design, product mix, value proposition.
- Innovate new service experiences to maintain evolving customer expectations.



More information

CSISG 2014 Q1 Executive Summary is available at ises.smu.edu.sg

If you are from a CSISG-measured company, email ise@smu.edu.sg with your professional contact information for your complimentary company-specific CSISG score card

The ISES Membership Programme provides a comprehensive CSISG benchmarking report for your company along with a host of associated benefits. An application form is available in your Forum folder and also at ises.smu.edu.sg

