TOURISM AND F&B
CSISG 2013 Q3 RESULTS

INSTITUTE OF
SERVICE EXCELLENCE
SINGAPORE MANAGEMENT UNIVERSITY

CSISG 2013 Q3 Results

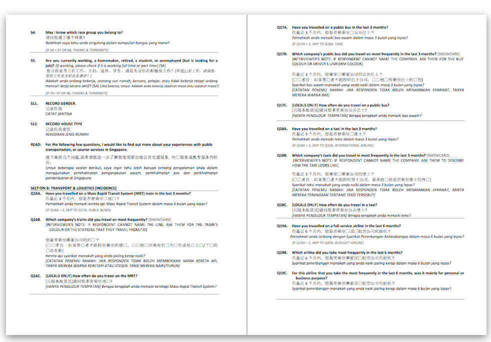
- CSISG 2013 Q3 results overview
- Tourism results and findings
- F&B results and findings

INSTITUTE OF
SERVICE EXCELLENCE
SINGAPORE MANAGEMENT UNIVERSITY

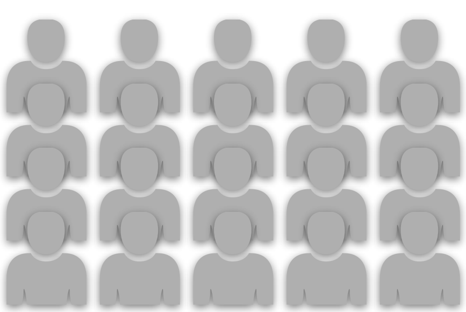
Overview of the CSISG Main Fieldwork

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

Departing tourists are interviewed at the departure level of Changi Airport.



Each respondent answers up to 17 CSISG questions and 15 touchpoint questions about a company they had recent experiences with.



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

CSISG 2013 Q3 Quick Facts

Sectors Covered	**Tourism** **F&B**
Survey Period	**Aug to Sep 2013**
Total Questionnaires Completed	**8,503**
Face-to-face at residents' homes	**4,943**
Face-to-face at Changi Airport	**3,560**
Distinct entities measured	**548**
Entities with published scores	**24**

INSTITUTE OF
SERVICE EXCELLENCE
SINGAPORE MANAGEMENT UNIVERSITY

CSISG 2013 Q3 — Tourism and F&B

74.5 Tourism

79.8 Attractions*
- **81.6** Universal Studios
- **78.7** Singapore Zoo
- **78.1** Sentosa Development
- **76.2** Jurong Bird Park
- **76.1** Night Safari
- **79.3** Other Attractions

77.5 Hotels*
- **84.4** Shangri-La Hotel*
- **84.1** MBS*
- **83.4** The Ritz Carlton*
- **81.5** Swisstotel the Stamford*
- **80.7** Mandarin Orchard*
- **80.5** Grand Hyatt*
- **78.4** RWS Hotels
- **74.8** Other Hotels

68.7 Travel & Tour Services

An asterisk indicates that the company/sub-sector is significantly higher than its sub-sector/sector score

70.3 Food & Beverage

71.7 Restaurants*
- **73.1** Tung Lok
- **71.3** Crystal Jade
- **70.9** RE&S
- **67.9** Sakae Holdings
- **71.8** Other Restaurants

71.1 Cafes & Snack Bars
- **73.4** Starbucks*
- **71.6** The Coffee Bean & Tea Leaf
- **70.9** Other Cafes & Snack Bars

70.6 Bars & Pubs

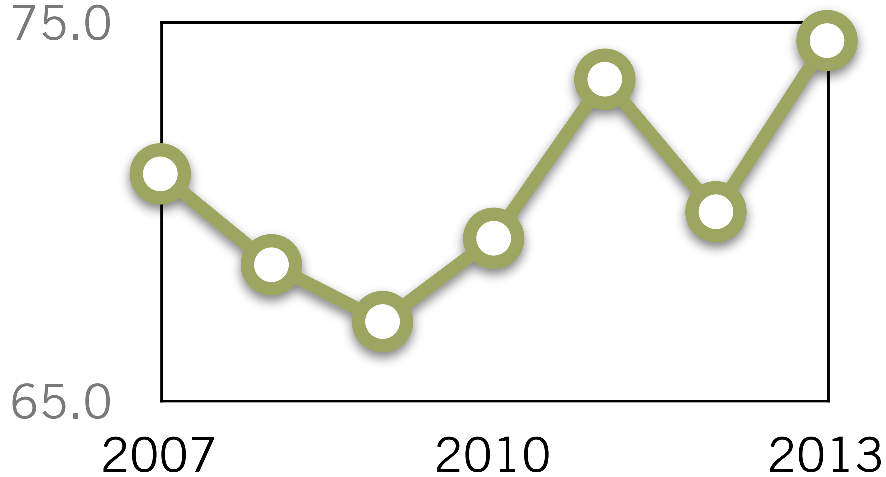
67.9 Fast Food Restaurants
- **68.9** Burger King
- **67.6** McDonalds
- **66.8** KFC
- **69.6** Other Fast Food Restaurants

65.5 Food Courts
- **65.9** Food Republic
- **65.1** Koufu
- **63.7** Kopitiam
- **66.0** Other Food Courts

INSTITUTE OF
SERVICE EXCELLENCE
SINGAPORE MANAGEMENT UNIVERSITY

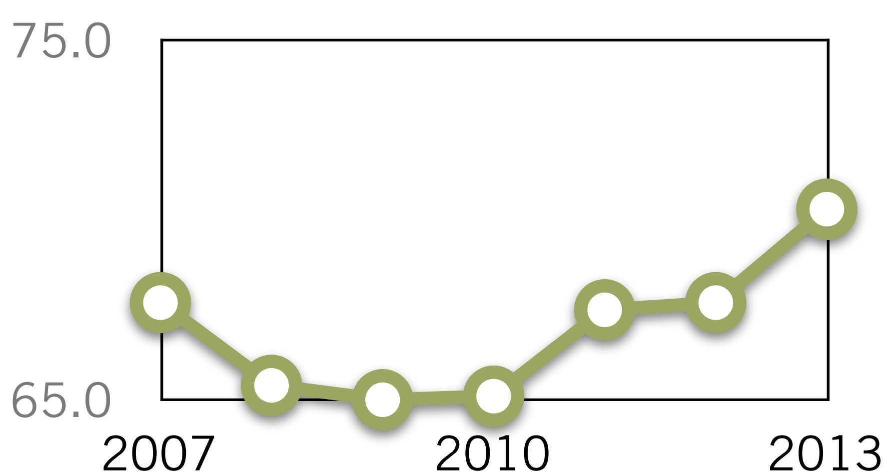
CSISG 2013 Q3 Sector Results

Both sectors improved significantly from 2012



74.5 Tourism

4.5 point increase from 2012



70.3 F&B

2.6 point increase from 2012

INSTITUTE OF
SERVICE EXCELLENCE
SINGAPORE MANAGEMENT UNIVERSITY

CSISG 2013 Q3 RESULTS TOURISM

INSTITUTE OF
SERVICE EXCELLENCE
SINGAPORE MANAGEMENT UNIVERSITY

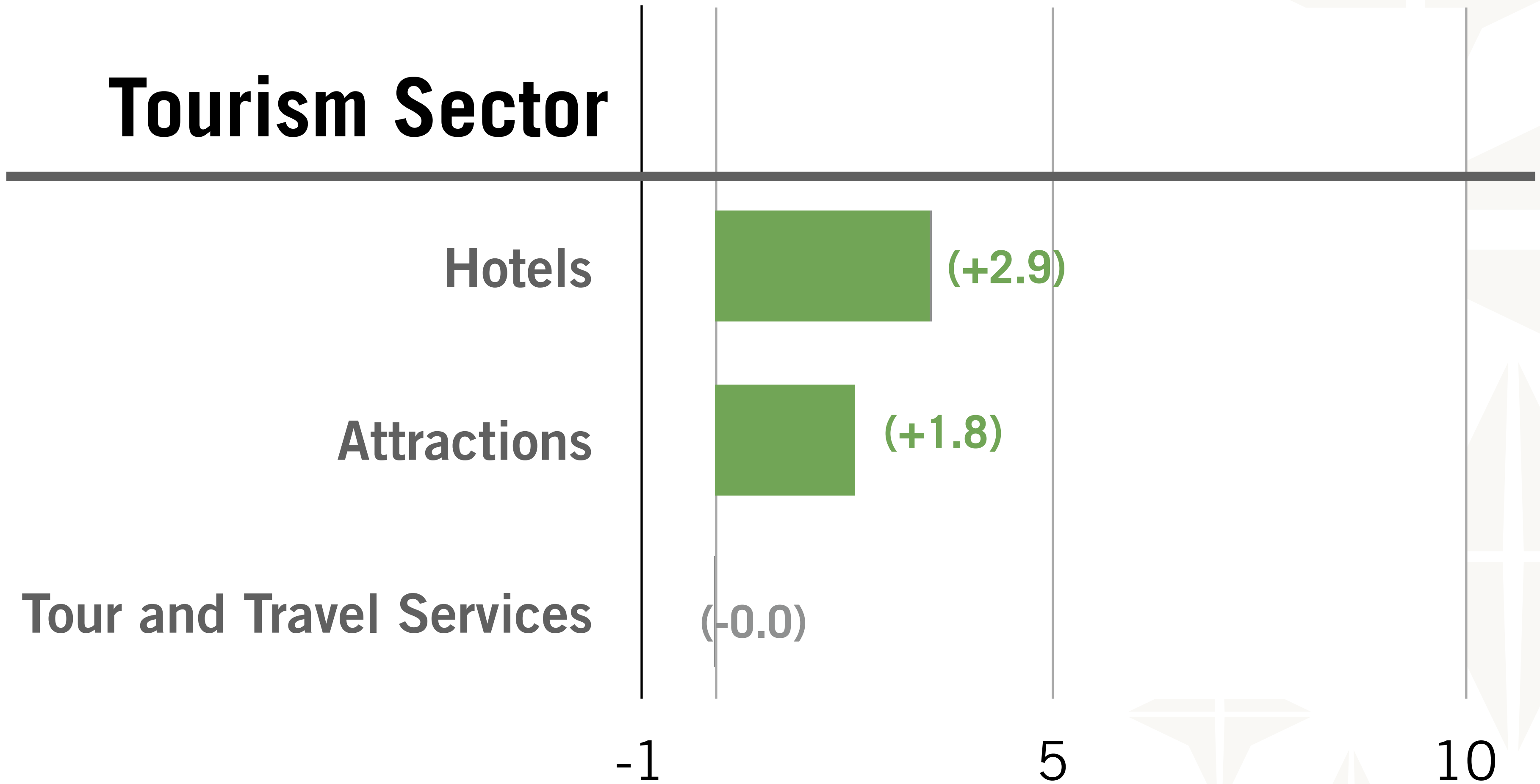
CSISG 2013 Q3 Tourism
Sub-sectors year-on-year change

Change	CSISG 2013	Sub-sector
+7.4	**77.5 ***	**Hotels**
+7.2	**79.8 ***	**Attractions**
+0.2	**68.7**	**Tour & Travel Services**

Notes: Significant year-on-year changes are represented in red/green
An asterisk indicates that the sub-sector is significantly higher than its sector average

INSTITUTE OF
SERVICE EXCELLENCE
SINGAPORE MANAGEMENT UNIVERSITY

Year-on-year changes in locals' satisfaction of Tourism sector and sub-sectors

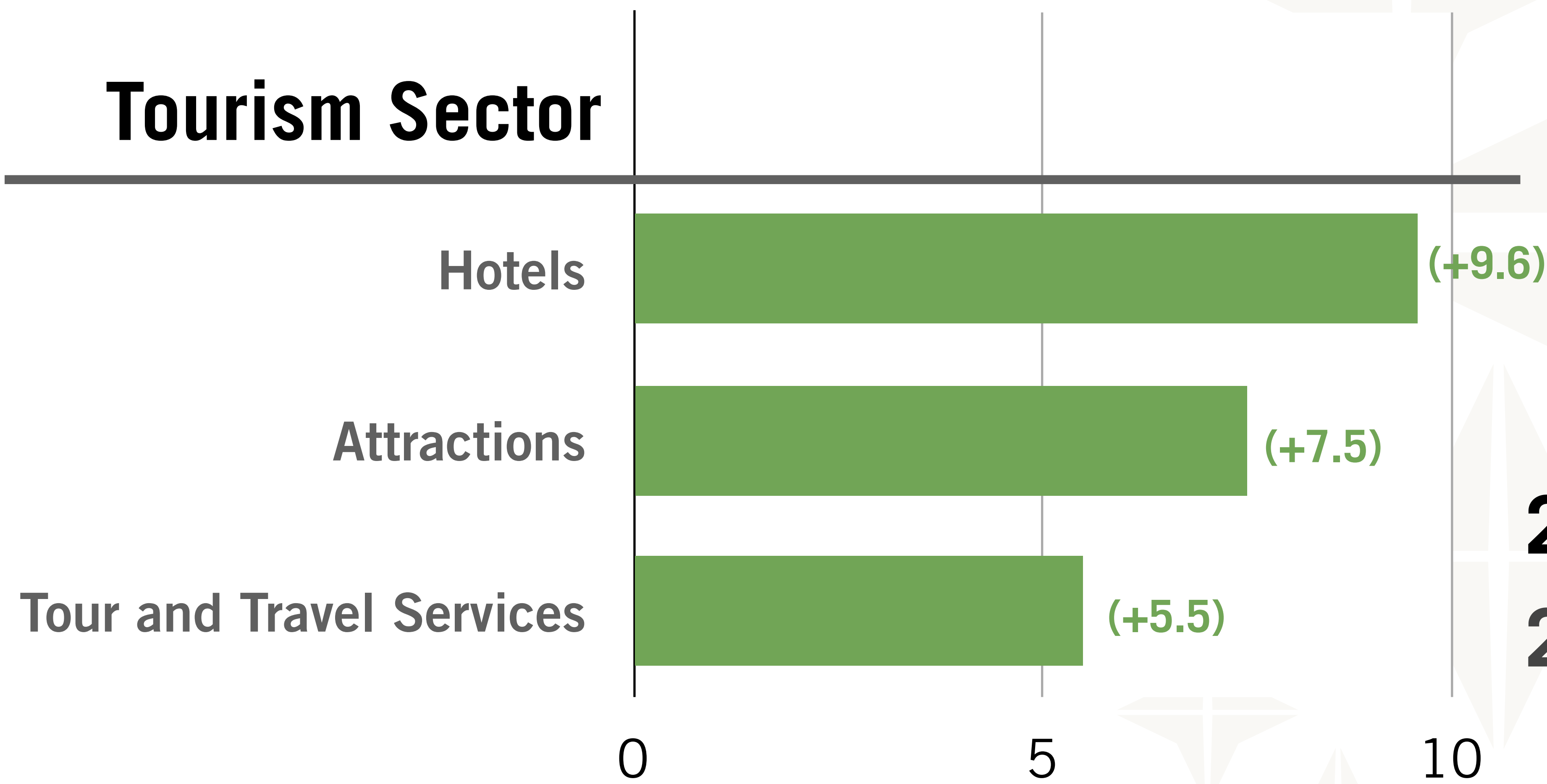


Tourism Average Local Satisfaction

2013	71.5
2012	70.2

INSTITUTE OF SERVICE EXCELLENCE
SINGAPORE MANAGEMENT UNIVERSITY

Year-on-year changes in tourists' satisfaction of Tourism sector and sub-sectors



Tourism Average Tourist Satisfaction

2013	80.1
2012	72.6

INSTITUTE OF SERVICE EXCELLENCE
SINGAPORE MANAGEMENT UNIVERSITY

CSISG 2013 Q2
Tourism sub-sectors

+7.4	**77.5**	Hotels
+10.7	**84.4** *	Shangri-La Hotel
+8.7	**81.5** *	Swissotel the Stamford
+8.6	**84.1** *	MBS
+8.0	**83.4** *	The Ritz Carlton
+7.7	**80.5** *	Grand Hyatt
+7.5	**80.7** *	Mandarin Orchard
NA	**78.4**	RWS Hotels
+6.3	**74.8**	*Other hotels*

Notes: Significant year-on-year changes are represented in red/green
An asterisk indicates that the company is significantly higher than its sub-sector average
This is the first year of measure for RWS Hotels

INSTITUTE OF SERVICE EXCELLENCE
SINGAPORE MANAGEMENT UNIVERSITY

CSISG 2013 Q2
Tourism sub-sectors

+7.2	**79.8**	Attractions
+7.9	**78.7**	Singapore Zoo
+6.7	**81.6**	Universal Studios
+6.1	**76.2**	Jurong BirdPark
+5.0	**78.1**	Sentosa Development
+4.4	**76.1**	Night Safari
+7.7	**79.3**	*Other attractions*

Notes: Significant year-on-year changes are represented in red/green
An asterisk indicates that the company is significantly higher than its sub-sector average

INSTITUTE OF
SERVICE EXCELLENCE
SINGAPORE MANAGEMENT UNIVERSITY

CSISG 2013 Q3 RESULTS
F&B

INSTITUTE OF
SERVICE EXCELLENCE
SINGAPORE MANAGEMENT UNIVERSITY

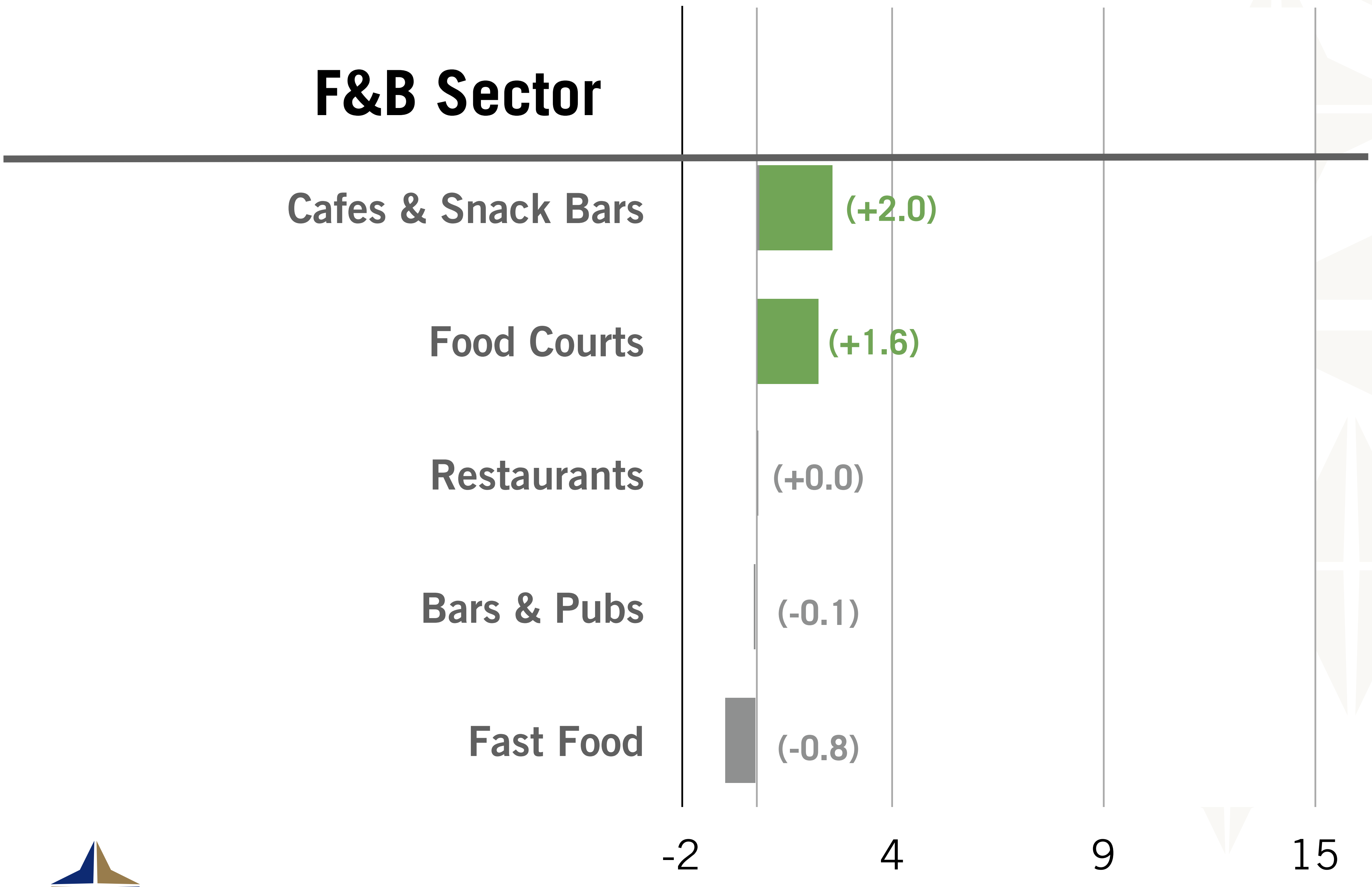
CSISG 2013 Q3 F&B
Sub-sectors year-on-year change

Change	CSISG 2013	Sub-sector
+3.9	**71.1**	**Cafes & Snack Bars**
+3.5	**71.7** *	**Restaurants**
+1.3	**70.6**	**Bars & Pubs**
+0.7	**65.5**	**Food Courts**
-0.3	**67.9**	**Fast Food**

Notes: Significant year-on-year changes are represented in red/green
An asterisk indicates that the sub-sector is significantly higher than its sector average

INSTITUTE OF SERVICE EXCELLENCE
SINGAPORE MANAGEMENT UNIVERSITY

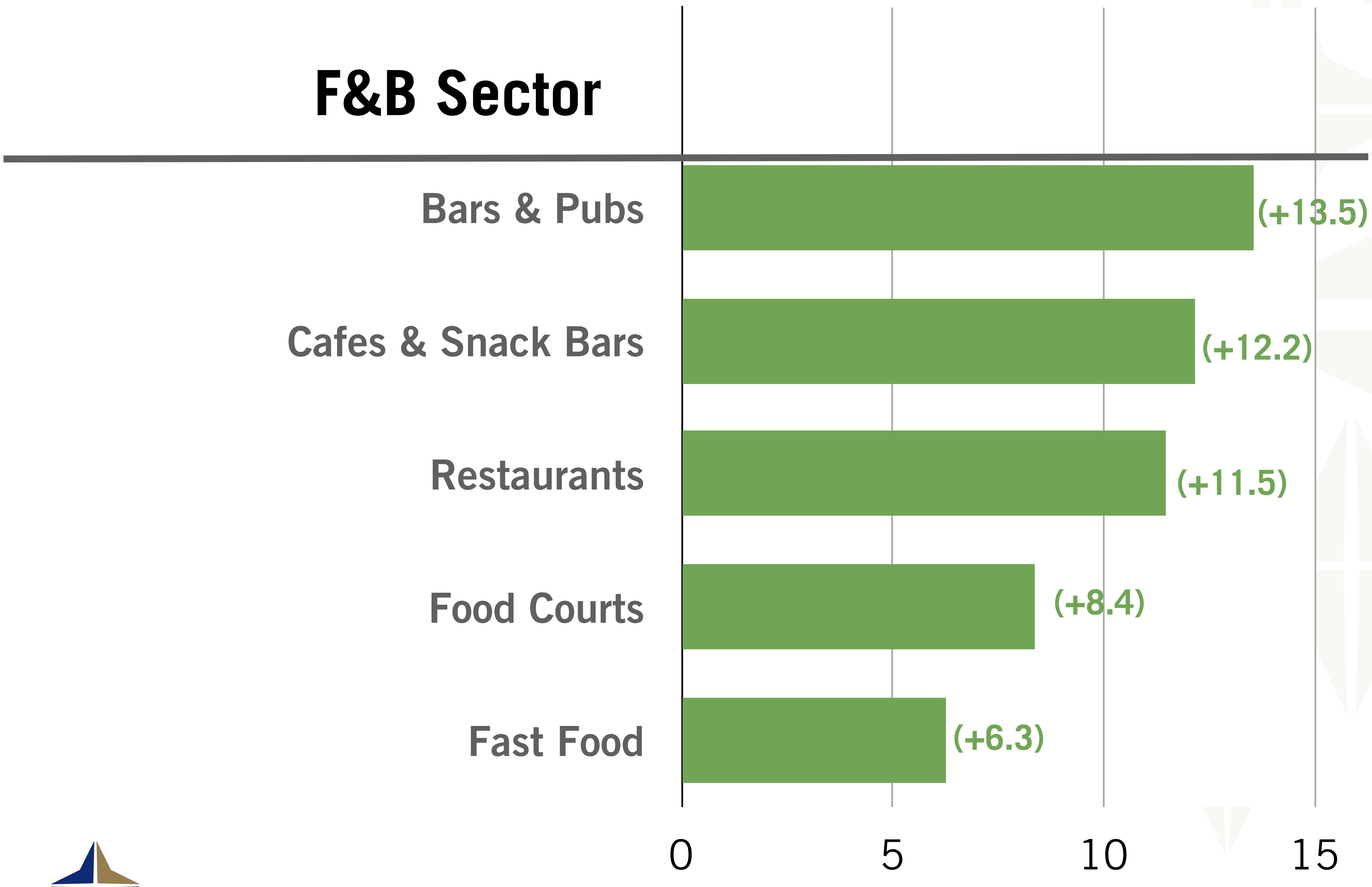
Year-on-year changes in locals' satisfaction of F&B sector and sub-sectors



F&B Average Local Satisfaction

2013	67.6
2012	67.1

Year-on-year changes in tourists' satisfaction of F&B sector and sub-sectors



F&B Average Tourist Satisfaction

2013	81.1
2012	70.5

INSTITUTE OF SERVICE EXCELLENCE
SINGAPORE MANAGEMENT UNIVERSITY

CSISG 2013 Q3
F&B sub-sectors

+3.5	**71.7**	**Restaurants**
+4.0	71.3	Crystal Jade
+2.7	70.9	RE&S
+1.5	73.1	Tung Lok
+0.0	67.9	Sakae Holdings
+3.8	71.8	*Other restaurants*
+3.9	**71.1**	**Cafes & Snack Bars**
+4.6	73.4 *	Starbucks
+4.2	71.6	Coffee Bean
+3.9	70.9	*Other cafes and snack bars*

Note: Significant year-on-year changes are represented in red/green
An asterisk indicates that the company is significantly higher than its sub-sector average

INSTITUTE OF SERVICE EXCELLENCE
SINGAPORE MANAGEMENT UNIVERSITY

CSISG 2013 Q3
F&B sub-sectors

-0.3	**67.9**	**Fast Food**
+1.3	**68.9**	Burger King
-1.3	**67.6**	McDonalds
-1.5	**66.8**	KFC
+3.4	**69.6**	*Other fast-food restaurants*
+0.7	**65.5**	**Food Courts**
+5.8	**65.9**	Food Republic
+3.0	**65.1**	Koufu
+0.1	**63.7**	Kopitiam
+1.0	**66.0**	*Other food courts*

Note: Significant year-on-year changes are represented in red/green
An asterisk indicates that the company is significantly higher than its sub-sector average

INSTITUTE OF SERVICE EXCELLENCE
SINGAPORE MANAGEMENT UNIVERSITY

CSISG 2013 Q3 Key Findings
Importance of F&B service touchpoints

- Touchpoint performance rank-ordered by decreasing levels of importance to customer satisfaction

Fast Food touchpoints	Rating (1-10)
Quality of food	7.3
Staff courtesy	7.2
Order process	7.1
Ease of finding a seat	7.1
Cleanliness	7.4
Queue time	6.9
Accuracy of change	8.0

Food Courts touchpoints	Rating (1-10)
Quality of food	7.0
Order process	6.9
Staff courtesy	6.8
Ease of finding a seat	6.7
Cleanliness	7.1
Accuracy of change	7.8
Queue time	6.8

Restaurants touchpoints	Rating (1-10)
Quality of food	7.6
Staff responsiveness	7.4
Ease of Reservation	7.4
Time taken to receive food	7.3
Time taken to receive menu	7.5
Order process	7.4
Bill timeliness and accuracy	7.9
Waiting to be seated	7.2
Cleanliness	7.7

CSISG 2013 Q3 Key Findings
Importance of F&B service touchpoints

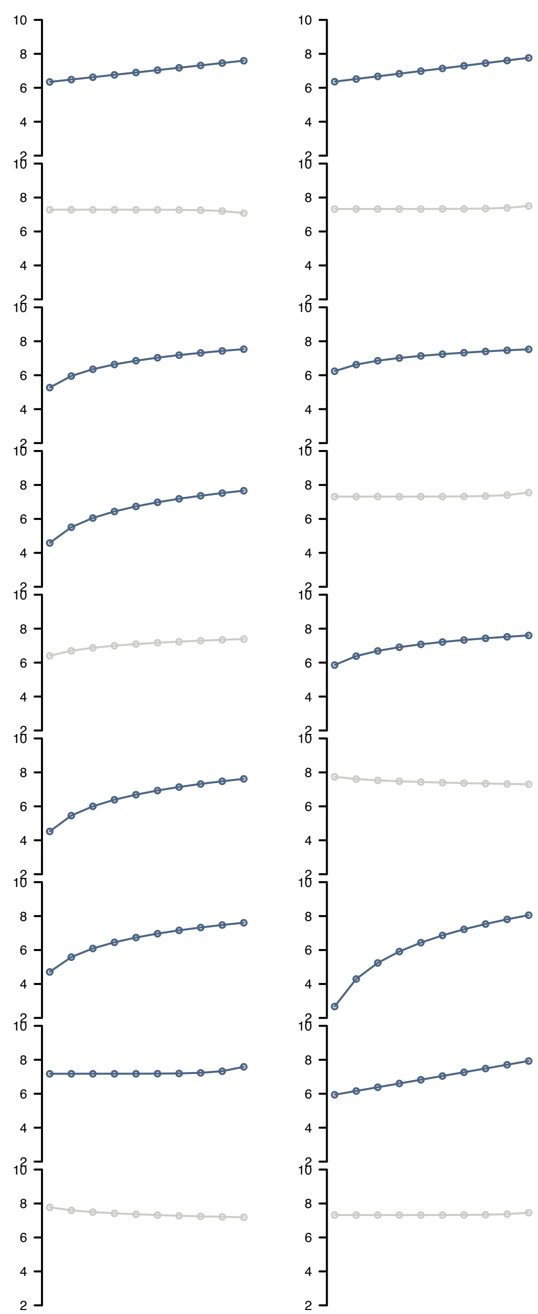
- *Touchpoints.* Service-aspects of F&B touchpoints play an important role in affecting diner satisfaction
- *Total experience.* Even as Quality of Food remains the most important aspect among the three F&B sub-sectors, taken together, the other service-aspects have greater leverage in affecting satisfaction

CSISG 2013 Q3 Key Findings
Differential impact of touchpoints

- *Basics.* When reviewing the relationship between F&B and Tourism touchpoints with customers' recent satisfaction with the establishment, certain touchpoints are revealed to be a basic need
- *At minimum.* These minimum standard touchpoints have a characteristic whereby if its delivery was not satisfactory, it will entail a significant penalty in satisfaction
- *Basic threshold.* However, high performance on these touchpoints do not necessarily provide a proportionate improvement in satisfaction

CSISG 2013 Q3 Key Findings
Evolving touchpoint impact on satisfaction

2012 **2013** **Restaurants Touchpoints**



- Ease of making reservations
- Waiting time to be seated
- Time taken to receive the menu
- Order-taking process
- Time taken to receive the food you ordered
- Cleanliness of the eating environment
- Quality of the food when it arrived
- Responsiveness of the service staff to additional requests
- Timeliness and accuracy of the bill

INSTITUTE OF SERVICE EXCELLENCE
SINGAPORE MANAGEMENT UNIVERSITY

Note: Significant impacts are represented in blue

CSISG 2013 Q3 Key Findings
Differential impact of touchpoints

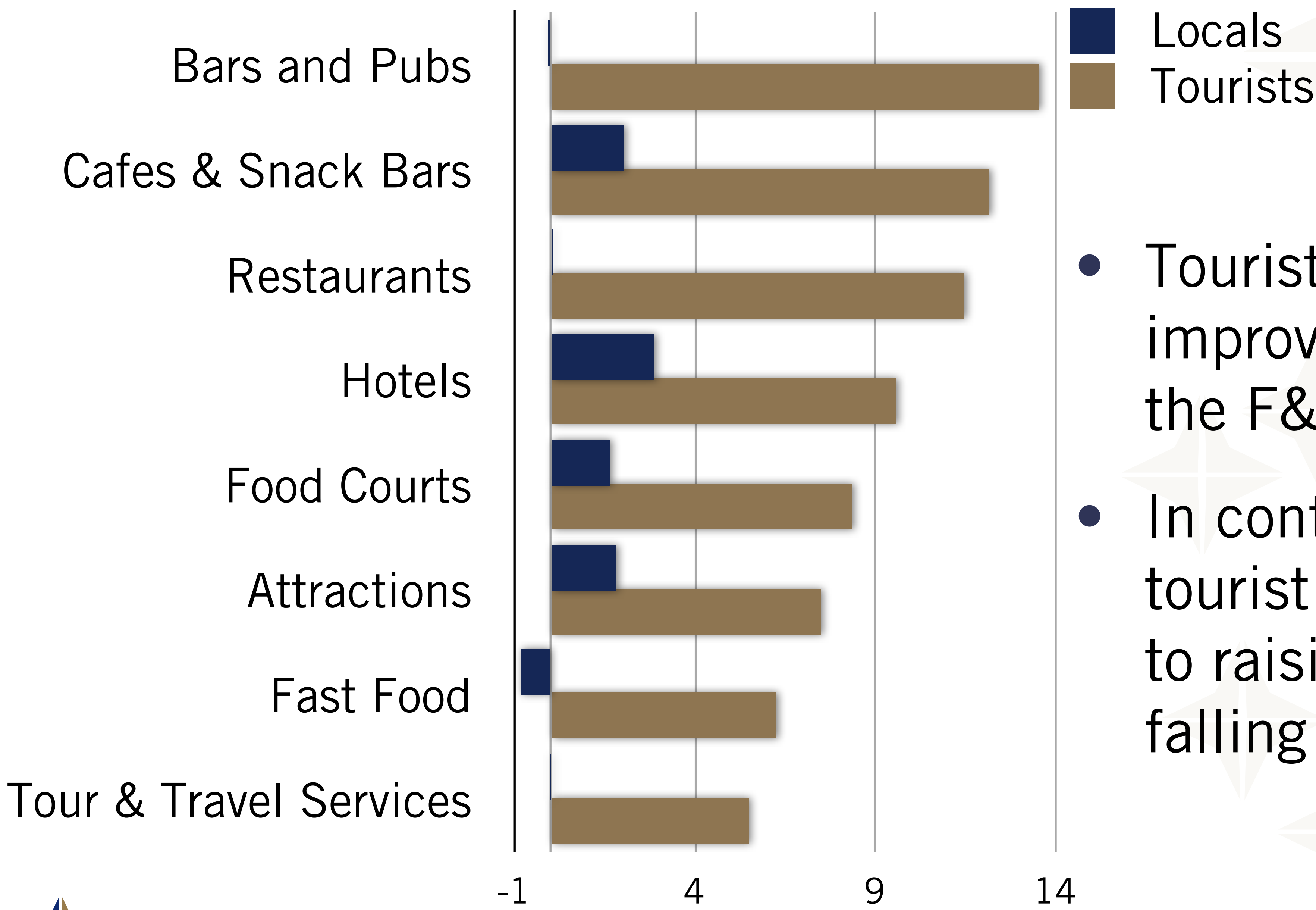
- CSISG analysis identified the following touchpoints as exhibiting hygiene characteristics

F&B sub-sectors		
Fast Food	Food Courts	Restaurants
Queue time	Ease of finding a seat	Time taken to receive menu
Cleanliness	Staff courtesy	Time taken to receive food
	Accuracy of change	Quality of food

Tourism sub-sectors	
Attractions	Hotels
Ease of getting to attraction	Ease of getting to hotel
Directions clarity	Check-in process
Staff courtesy	Staff courtesy
Amenities	Directions clarity
Cleanliness	Cleanliness

INSTITUTE OF SERVICE EXCELLENCE
SINGAPORE MANAGEMENT UNIVERSITY

CSISG 2013 Q3 Key Findings
Tourists driving improvements in Q3



- Tourist ratings are driving improvements across both the F&B and Tourism sectors
- In contrast to 2012, where tourist satisfaction fell due to raising expectations and falling perceptions of quality

INSTITUTE OF SERVICE EXCELLENCE
SINGAPORE MANAGEMENT UNIVERSITY

Conclusion

- *Determine attributes.* Different attributes of the service experience affect satisfaction
- *Customer expectations.* The importance of these aspects evolve over time, as customer expectations change and evolve
- *Evolving impacts.* What used to be an efficient lever to increase satisfaction may no longer be applicable
- *Consistent monitoring.* Continuous measurement is necessary to monitor expectations and ensure service provisioning meet these expectations

INSTITUTE OF
SERVICE EXCELLENCE
SINGAPORE MANAGEMENT UNIVERSITY