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Customer Satisfaction Index of Singapore 2010: Q3 Results

Customer Satisfaction Index of Singapore 2010: Full Year Overview

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CUSTOMER SATISFACTION INDEX OF SINGAPORE 2010

Q3 SCORES
FOOD & BEVERAGE AND
TOURISM, HOTELS & ACCOMMODATION SERVICES

EXECUTIVE SUMMARY



INSTITUTE OF
SERVICE EXCELLENCE
SINGAPORE MANAGEMENT UNIVERSITY





2010 Q3 SCORES

FOOD & BEVERAGE AND TOURISM, HOTELS & ACCOMMODATION SERVICES

Tourism, Hotels & Accommodation Services **69.3**

Hotels **74.1**

- 83.6** The Ritz-Carlton*
- 79.2** Swissotel The Stamford*
- 78.2** Shangri-La*
- 78.0** Grand Hyatt*
- 77.7** Mandarin Orchard*
- 72.1** All Others

Attractions **70.3**

- 71.5** Underwater World
- 70.3** Sentosa
- 68.4** Wildlife Reserves
- 70.8** All Others

Travel Agencies, Tour Operators, & Ticketing Agencies **64.8**

Food & Beverage **65.1**

Restaurants **66.5**

- 66.0** Crystal Jade
- 65.5** Sakae Holdings
- 65.3** Tung Lok
- 63.6** RE & S
- 66.8** All Others

Bars and Pubs **64.8**

Cafes, Coffee Houses, & Snack Bars **63.9**

- 64.3** Starbucks
- 63.9** Delifrance
- 60.9** Coffee Bean & Tea Leaf
- 64.0** All Others

Fast Food Restaurants **62.4**

- 63.4** McDonald's
- 62.0** Burger King
- 61.1** KFC
- 61.1** All Others

Food Courts **59.2**

This chart summarises the results of the CSISG 2010 satisfaction scores in the Food & Beverage and Tourism, Hotels & Accommodation Services sectors at the sector, sub-sector and company levels.

The sector scores (in gold) represents a weighted average of their respective sub-sector scores (in blue). Satisfaction scores for sub-sectors with individual company scores are weighted averages of these individual company scores.

* Companies indicated with an asterisk(*) are companies that have performed significantly above their sub-sector average.

BACKGROUND

Following the release of CSISG results for the Retail, Info-Communications, Transportation & Logistics, and Education sectors in the first two quarters of 2010, the current third quarter release of results are of the Food & Beverage (F&B) and Tourism, Hotels & Accommodation Services (THAS) sectors. CSISG results of the final two economic sectors for 2010, the Finance and Healthcare sectors, is scheduled to be released in January 2011, together with the 2010 national score.

CSISG company scores are based on face-to-face interviews with end users of companies' products and services. Sub-sector scores are derived as a weighted average of company scores, in proportion to the revenue contributions of companies. Sector scores are derived in a similar fashion, aggregating the sub-sector scores proportionately to each sub-sector's revenue contributions.

FIELDWORK PROCESS

For both the F&B and THAS sectors, survey data was collected between July and August 2010.

4,621 questionnaires were completed by respondents from 2,323 households. Respondents were queried about their experiences with business entities (companies) from either sector.

To capture tourist experiences with both sectors, 2,777 questionnaires were completed by departing tourists at Changi Airport. Each tourist was asked about their experiences with a single business entity from one of the sub-sectors under either the F&B or THAS sectors.

A total of 7,398 questionnaires about consumers' experiences with 596 companies were completed. The questionnaires were designed to measure aspects of the respondent's cumulative as well as most recent experiences with the business entity.

RESULT HIGHLIGHTS

Strong gains were observed amongst the hotels. Satisfaction for The Ritz Carlton surged to an all-time high of 83.6, the highest recorded CSISG company score to date. Other measured hotels such as Shangri-La, Grand Hyatt, and Mandarin Orchard (previously Meritus Mandarin) also improved substantially.

The Attractions sub-sector also enjoyed significant improvement this year, jumping 2.4 points to score 70.3. Within the Attractions sub-sector, Underwater World and Sentosa improved significantly. A separate entity named "Other Attractions", representing the satisfaction of all other attractions in Singapore, also made a significant leap this year.

The collective effect of strong performances within the Hotels and Attractions sub-sector pushed the overall THAS score up from two consecutive years of decline.

The F&B sector observed a slight increase in score from 65.0 to 65.1 this year. Within the sector, Restaurants improved slightly but satisfaction with Fast Food Restaurants declined significantly. This year, CSISG 2010 also included for the first time, a new

Food Courts sub-sector which has achieved a baseline score of 59.2 for future benchmarking.

Figure 1 shows the trend in CSISG scores for both sectors since 2007. The THAS sector has managed to pull upwards from previous years' decline while F&B remains steady over the last 3 years.

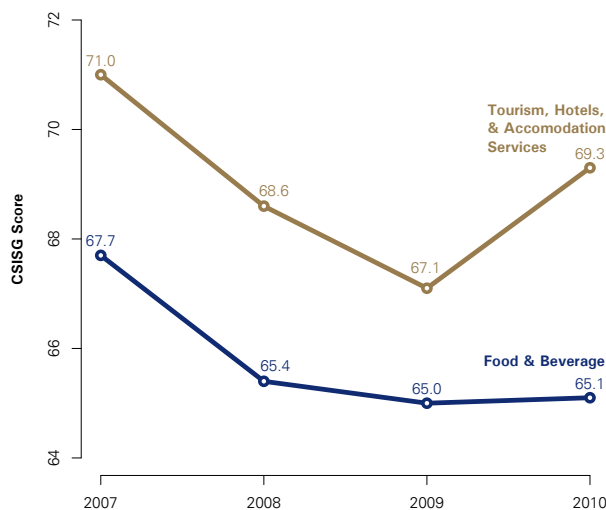


Figure 1: CSISG scores for the Tourism, Hotels & Accommodation Services and Food & Beverage sectors from 2007 to 2010

FINDINGS

FOOD & BEVERAGE

The CSISG 2010 data shows that customer expectations with the F&B sector has risen over the previous year. This could be because Singaporeans are becoming more well-travelled and exposed to diverse culinary experiences and world-class restaurants. However, based on the data, a worrying observation is that F&B outlets here are not meeting these rising expectations of consumers. This observation is consistent with the Restaurants, Fast Food and Cafes et al sub-sectors. Companies in these sub-sectors need to up the ante in their product and service offerings to meet the rising tide of customer expectations.

TOURISM, HOTELS & ACCOMMODATION SERVICES

A consistent finding from the CSISG is that a customer's positive prediction of quality (i.e., customer expectations) before consuming a service is associated with a positive experience during consumption as well as higher satisfaction, provided that the quality experienced does not fall too far below the customer's prediction. Customer expectations are influenced by previous experiences with the company as well as information that they encounter about the company. These sources of information can come from advertisements, recommendations from friends and family, or even internet forums. Therefore the main message for companies within the hotels and attractions sub-sectors is to continue strengthening their branding and positioning efforts in order to enjoy sustained customer satisfaction.

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