EXECUTIVE SUMMARY
Current Customer Service Delivery in South Africa

tourism

Department:
Tourism
REPUBLIC OF SOUTH AFRICA

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one voice for tourism

TSEI
Tourism Service
Excellence Initiative

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EXECUTIVE SUMMARY

Purpose & Rationale

In response to dealing with the realities of South Africa's ranking in terms of competitiveness and also to transform the industry into a globally competitive service economy and a world destination of choice, the National Department of Tourism (NDT) in collaboration with the Tourism Business Council of South Africa (TBCSA) contracted the Disney Institute to conduct extensive customer service research in all nine provinces, in order to fully understand the levels and standards of service within tourism value chain.

Methodology & Approach

The research was conducted from September 28, to November 2, 2009 and following data was gathered and assessed for the final report:

- 28 Focus Groups with 203 participants
- 203 Focus Group Participant Surveys
- 564 Airport Intercept Surveys
- 75 Port of Entry Border Surveys
- 124 Observational Audits

Limitations of Research Process

Limitations to the study are related to the following issues:

1. Tardiness - Delays in starting sessions as scheduled.
2. RSVP confirmation - Delays in confirming participation in focus group meeting.

3. Hierachical mentality especially from the public sector.

Findings & Highlights

The research identified several critical elements currently having a negative impact on the consistent delivery of excellent customer service in South Africa, including: the legacy of apartheid, poor or indifferent attitudes of some employees, inadequate job training, deficient general education, poor recruitment and selection processes, a lack of urgency, a tendency towards autocratic management rather than participative leadership, and an imbalanced focus on technical job skills opposed to interpersonal "customer and people" skills development.

Also expressed in the findings was the inability of most South Africans to provide constructive feedback in the workplace, which has enabled the continuance of poor service and the acceptance of poor service as the norm. We also discovered that often front-line employees have never experienced excellent customer service or "being served" in the type of establishments in which they are employed. Thus, there is a disconnect that prevents employees from consistently providing a level of excellent service to customers that addresses the wants and needs of individuals and groups, without having had their own personal experiences.

The research also identified a significant conviction that, while private sector organizations try to deliver acceptable

levels of customer service, the public sector was seen with contempt, due to ineffective deployment practices, attitudes of entitlement, non-existent customer service and customers being viewed as nuisances. In fact, most expressed a degree of hopelessness that the public sector cannot change its current paradigm. Finally, it was expressed that a strong national customer service "rallying cry" was critical to excite, mobilize and unify the country towards service excellence in 2010 and beyond!

Recommendations:

Short-term Interventions
Phase Two - Immediate Recommendations.

In preparation for South Africa to host a successful 2010 Soccer World Cup, an undertaking of a rapid deployment of leadership and customer service programs, in a collaborative public and private sector effort, to a targeted segment of people in tourism and the public sector, with the goal to positively impact on the tourism experience was recommended.

The undertaking is daunting, but achievable, as this "quick boost" could jump-start the country to a more focused service excellence mindset beyond 2010, and have a positive influence on the country's current competitiveness ranking of 111 out of 124 countries.

A six-phased approach to the pre-World Cup deployment of programs was recommended. These phases were proposed to commence early January 2010 and conclude at end of March 2010. In this aggressive implementation National Department of Tourism (NDT) would work with representatives from the industry to train public and private sector; senior executives, leaders, middle managers, front-line supervisors and front-line staff. During the initial phases, it is suggested that training of 80 senior leaders, 7,500 mid-level and front-line leaders, as well as 12,000 front-line employees who will be directly providing customer service during FIFA 2010 be conducted. In this collaborative effort, key partners would participate in the selection of 50 Service Excellence Training Ambassadors, who would be empowered, equipped and provided the tools to assist in the implementation of this service excellence initiative. These training ambassadors would provide an ongoing connection to the "Service Excellence Approach".

They would also be trained to conduct customer service audits, and to observe ongoing service delivery levels for purposes of developing a continuous improvement mindset and encouraging the practice of constructive feedback. These new abilities will help to ensure service excellence in 2010 and beyond. In the proposed leadership excellence programs, leaders would learn proven, critical strategies and tactics used to consistently deliver world-class guest experiences, while respecting differences in local cultures. The tailored customer service program for front-line employees would focus on critical behavioral skills designed to deliver excellent customer service, in conjunction with a supportive toolkit for immediate and future reference.

Long-term Interventions

Phase Three – Recommendations for South Africa Beyond 2010

In order for South Africa to fully benefit from the short-term recommendations a holistic approach should be considered that optimizes synergy in South Africa beyond World Cup. After these short-term solutions are implemented, South Africa has the extraordinary opportunity to undertake a cultural/organizational alignment that will focus and mobilize the entire country for the future. The keys to alignment are a shared common purpose, commitment and distributive leadership. Components of the alignment process could entail, but are not limited to:

• Aligning Leaders: Senior Leadership Workshops.
• The Creation of an In-house Alignment Website.
• Initial Alignment Measurement.
• Debrief and Feedback to Senior Management.
• Creation of Action Teams.
• Second Assessment and Debrief.

The optimal state of alignment is when "strategy, people, customers and key processes work in concert to drive growth and bottom-line results."When organizations are aligned and providing excellence, they have high-level capabilities throughout the organization to rapidly adjust to ever-changing demands and the ability to build and maintain excellent superior infrastructures that repeatedly deliver intended results. However, it must be understood that attaining alignment is a never-ending process of identifying and doggedly correcting misalignments that push an organization away from its core ideology or impede progress''.

Conclusion

Having outlined the research recommenda-tions, there is a tremendous amount of work to be done to accomplish and meet stated goals and satisfy potentially millions of visitors to the country. Thus, the urgency to begin the transformation of South Africa's customer ser-vice culture is critical, as it begins the exciting journey towards service excellence.

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BACKGROUND

BACKGROUND

Currently, Tourism is one significant contributor to the South African economy. Below is the breakdown of the contribution in 2009:

• Tourism contributes about 189.4 billion to the GDP.
• 919 800 jobs are created directly and indirectly from tourism.
• We receive about 9,9 million visitors.
• South Africa is a value for money destination.
• We have a great all year round weather.
• Infrastructure in par with the best in the world.
• The country is well marketed internationally.
• The country has diverse product offering.
• Our currency is doing well under current global financial constraints.

Currently South Africa does not have an integrated approach to service excellence. There is a myriad of initiatives that are not integrated into one strategy for the country. Therefore, there is a need to consolidate all efforts and come out with a unified strategy that will guide service excellence in the sector for 2010 and beyond.

In seeking to improve overall customer service delivery, the National Department of Tourism (NDT) crafted the Strategic Plan of 2008, "Taking Service Excellence in the Tourism Service Value Chain to Greater Heights." The short-term focus of the plan is to "deliver a memorable, unforgettable service experience to visitors during 2010 and beyond." And its ambitious long-term goal is to "transform South Africa into a globally competitive service economy and the world's destination of choice!"

In order to fully understand the current state of customer service delivery in South Africa, in both the private and public sectors, Disney Institute (DI) was contracted to conduct extensive customer service research in all nine provinces.

The research was conducted from September 28, to November 02, 2009 with two DI cast members in the field working in concert with the Tourism Business Council of South Africa (TBCSA). The research took a multi-level methodological approach; to ensure all unique touch points in the tourism experience were audited, as well as leaders from the public and private sectors and recent guests to South Africa were solicited to provide critical and candid input. To kick start the research phase of the project, a project familiarization workshop was held in Centurion, South Africa September 25, 2009 with key stakeholders of the project and the DI team.

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METHODOLOGY

In order to assess the current levels of customer service in South Africa, data from the following was used:

- Focus Groups
- Focus Group Surveys
- Airport Intercept Surveys
- Port of Entry Border Surveys
- Observational Audits

Below is an explanation of each methodology:

FOCUS GROUPS

A total of 28 focus groups were conducted with 203 participants from the public and private sectors in order to:

- Understand the current state of customer service delivery (public and private) in specified service sectors throughout South Africa.
- Collect diversified insights and local perspectives.
- Gather actual statements.
- Gain non-verbal feedback to add insights to the meanings of their words.

Each focus group session was attended ± 10 participants. In most cases, separate sessions were held for the public and private sector.

Selection criteria
- Attendees nominated by their respective associations.
- Age limit and gender were prescribed.
- Contact with customer service providers (e.g. dined out, taken a taxi, airplane trip, and/ or visited a tourist attraction).

FOCUS GROUPS SURVEYS

All of the focus group participants (203) completed a one-page South Africa Customer Service survey prior to the focus group discussions in order to quantify and assess:

- Participants' overall satisfaction with customer service in South Africa.
- Key touch points (for example, restaurants, hotels, taxis, car rentals, etc.).
- Other comments and insights.

AIRPORT INTERCEPTS

A total of 767 surveys were collected among travelers in the departure and shopping areas at airports in CapeTown and OR Tambo in order to:

- Gain assessments of South Africa's customer service delivery from a broader audience (i.e. residents of South Africa, Africa, and international travelers).
- Collect real time and fresh information of travelers' perceptions as they depart the country.
- Quantify results for greater statistical precision.
- Supplement qualitative efforts.
- Gather additional feedback in a timely and cost-effective manner (i.e. all adult travelers qualified, and it was a captive environment).

With airport approval and knowledge, surveys were collected during peak travel times to be most efficient. To reduce bias, the travelers were asked to complete the surveys themselves.

PORT OF ENTRY - BORDER SURVEYS – SWAZILAND

A total of 75 surveys were completed with visitors entering South African either on foot or via vehicles at the Swaziland border in Oshoek in order to:

- Assess customer service delivery of passport and customs control at the border.
- Understand the purpose of their visit to South Africa.
- Quantify results for greater statistical precision.
- Supplement qualitative and other quantitative research efforts.

OBSERVATIONAL AUDITS

A total of 126 observational audits were completed by the DI team when they were engaged in planned tourism experiences, day-to-day activities and as they experienced or observed interactions in South Africa. Twenty-two establishments and attractions were visited across the country.

LIMITATIONS OF THE RESEARCH PROCESS

The following were challenges that might have negatively impacted some of the scheduled focus groups:

- Tardiness – on most average the focus groups stated later than scheduled.
- RSVP Confirmation – non-response from participants invited to the focus groups.
- Lack of municipality support and urgency – contributed to last minute invitations being sent which impacted on attendance.
- Impact of telemarketing – perception of participants of telemarketing, researchers experienced challenges when using the recruiting screeners to qualify nominated participants.
- Hierarchical mentality – some participants would only speak to a certain level of a person and not the researchers base on their occupational level.
- Public sector – there were barriers to most focus groups with the public sector.
- Creating a Magic Book – delivery of the incentive gift was late.

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DETAILED FINDINGS

The following is the detailed findings obtained from the interviews conducted:

Customer Service in General

Definition – What is customer service

Customer service was defined, when participants were asked to define customer service, without using the words "customer" or "service" in their definition.

Different interpretations were provided by participants. The following examples of definitions provided were:

- Attending to the needs of the consumer of your products and seeking feedback in order to maintain service of high quality. (Eastern Cape).
- Putting an effort to make sure the person on the receiving end is happy. Working with a smile delivering quality work with a good attitude and respect (KwaZulu Natal).
- Being warm, talking with the guest with interest, smile and valuing their presence. (Mpumalanga).

Customer – focused

The following are some of the interpretations provided by participants:
- Attending to the needs of the consumer of your products and seeking feedback in order to keep the standards of high quality service.
- The efficient and professional delivery of services to clients.

- The manner in which you treat people and conduct your business - making it easier for customers to recommend it to others, knowing the quality of your establishment's offerings.

Product Focused
The description provided by the participants with regards to product focused were the following:
- A system of ongoing quality management that enhances the consistent delivery of guest care.
- The enjoyable delivery of a product.
- Passionate and knowledgeable interactions in the delivery of a product or service - is what you provide and the way you provide it to the client.

Service Focused
The views shared by participants with regards to service focused were the following:
- Putting an effort to make sure that the person on the receiving end is happy.
- Working with a smile and delivering quality work with a good attitude and respect.
- Being warm, talking with the guest with interest, smile and valuing their presence.
- Excellent reaction, experience, courtesy, warmth, value for money spent, quality investment in satisfaction and the ability to capture the tourists' soul from the experience.

Where is Customer Service Important?
The following information was shared:
- The general consensus is that customer service is important in all sectors and not just to one particular industry.

- Every existing organization needs to be attentive to customer service.
- Happy customers are repeat customers and unhappy customers spread the news.
- Every enterprise has customers, therefore customer care is everybody's business.
- Customer service is important in both public and private sectors.

What is World Class Customer Service?

These were some of the areas outlined as reflecting World-Class Customer Service:

- World-Class Customer Service was defined as the total seamless experience of great quality.
- Personalized attention were the key themes of excellent customer service participants experienced and remembered (A hotel wishes me happy birthday when it's my birthday, you go to a facility with a welcome note with your name, reception greets you by name, you feel you belong, everyone was enthusiastic from the cleaner and up, on a visit to a hotel my name was on all of the amenities in the room).

What is Good Customer Service?

These were some of the areas outlined as reflecting Good Customer Service:

- Delivering on the implied promise or meeting expectations; however it was universally agreed, that good customer service is not good enough!
- When you have been attended to, nothing to complain about.
- Service is good, not offended, everything is technically correct, but not beyond.

What is Mediocre Customer Service?

The following are elements that describe Mediocre Customer Service:

- Mediocre service was seen as service with minimally acceptable levels of service and emotions.
- Service that usually little evokes response from customers.

What is Poor Customer Service?

The following are elements that describe Poor Customer Service:

- Poor service was viewed as unacceptable and emotionally detached, customers would not return to an establishment, and they will tell others of their bad experience.
- Ignoring the customer, with I don't care attitude.
- Something going wrong is not poor service… the response to the poor service makes the difference between great and poor service (not responding to complaints, not replacing the offered service as per customer's request – customer will never visit the place again).
- No product knowledge, no desire to help and it goes beyond poor attitude.
- Poor service makes you feel angry, cross and feeling cheated.
- Employees that argue with customers.
- Demeaning the customer… telling them they do not understand.
- Employees that ignore and talk badly to and about customers.
- Customers not being greeted.
- Long queues at banks during lunch and tellers leaving for breaks.

- In the public hospitals people dying due to poor service and neglectful service.
- Taxis loud, rude and dirty.
- Spending two hours at Home Affairs to make a payment while the staff members are on their phones chatting to their colleagues/friends and others are eating (unprofessional behavior and unacceptable image).
- South Africans as a society in general accept mediocre to bad service without complaining. This is laughed off as - it's just South Africa.

Actions Taken as a Result of Poor Service and Outcomes:

- Participants vary in their reactions in providing feedback for poor service they receive.
- Some participants think that complaining will not help, it might cause someone to lose their job, or the person will get even worse service.
- Others realize the value of providing feedback to the manager or via an online customer complaint site.
- Most of the participants do not give feedback because of the "humanness" of the South African culture, not to complain.

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CUSTOMER SERVICE IN SOUTH AFRICA

Overall Impressions

The following participants' descriptors provides a window into their perceptions of customer service, when asked to use only one or two adjectives to describe overall customer service in South Africa. More negative descriptors were attributed to customer service than positive ones, and with more intensity, which reflected the participants' frustrations and experiences with customer service throughout South Africa. Some of the postitive descriptors are adequate, friendly, hospitable and satisfactory and some negative descriptors are appalling, arrogant, hostile and non-existent.

General Impression of South African Culture

The following general information was shared:
- The inconsistent service provided.
- Participants question the motives of employees when they received good service because they are accustomed to low levels of service.
- Participants were appalled with poor service that was attributed to race or class bias.
- Poor training and the impact of apartheid system.
- South Africans are not capable of delivering excellent service; because they do not believe in themselves and that "our history encourages apathy".
- Different cultures in South Africa have different standards of customer care service.
- The level of service is in direct proportion to your group size, the smaller the group the poorer the service because this has a direct impact on the size of the tip.
- Lack of confidence that the front line staff have the capacity to deliver excellent customer service.
- If you engage South African people, you will get a much more warm, friendly and helpful interaction than in Germany, France, UK or Japan.
- The level of service also depends on social and racial standings, as well as, stereotypes.

Public Sector
The following general information was shared:
- There is very little respect of the public sector, employees are viewed as arrogant and disrespectful.
- Misguided sense of entitlement, and work to collect a paycheck.
- Annoyed by employees' tea breaks, conversations with co-workers or talking on the phone.
- Public servants act like they are doing consumers a favor and consumers are viewed as nuisance.
- They ignore the fact that they are serving their community and country.
- Poor service is caused by the fact that unqualified people are employed in the public sector.
- Government has created the impression that tourism is booming and anyone can work in tourism. This situation caused an influx of unqualified employees in the industry.

Overall South Africa Customer Service Rating

Participants were asked to rate their overall impression of customer service in South Africa and then share with each other their reasons for their rating of excellent, good or mediocre. The following general information was shared:

Excellent Impressions

- Those who had excellent impressions were based on emotions and personal connections felt during interactions and transactions.
- Customers experience South African people/service providers to be much more friendly and helpful compared to other countries like Germany, France and Japan.

Mediocre Impressions

- The basis of the mediocre impressions centered on service inconsistency, lack of empowerment, exposure, the effects of apartheid with its non-inclusive environment and policies to all people.
- South Africans are warm people, but they lack the push to professionalize that warmth.
- Lack of provision of space for staff to use their own creativity and discretions where necessary.
- Staff never experienced customer service and therefore they do not have an understanding of what they should aspire to (exposure and experience).
- Service based on race; better service for whites due to the belief that they can afford to provide better tips.
- No motivation beyond putting food on the table.
- Lack of effective training.

Poor/Less Favorable Impressions

- Poor/less favorable service was attributed predominantly to the non-existent positive service culture in the public sector.
- Batho-pele principles not being adhered to.
- Poor service attributed to overall bad attitudes, indifference and a general lack of understanding the negative impact of their behaviors on the business.

Public Sector

- Immigration is viewed as pathetic, customers sent from pillar to post get immigration documents.
- No service consistency and passion.
- Employees do not understand the big picture and the impact of their actions on the economy.
- Service structures and institutions like post offices, hospitals, taxis and police lack skilled resources.
- Subcultures in our culture are very hierarchical; therefore South African society is very autocratic.
- A customer is not seen as a guest and therefore not efficiently and effectively served.

Challenges and Barriers

Participants were asked to explain what they felt were the challenges and barriers confronting South Africa in its ability to provide consistent customer service. Challenges were identified as being emotional, psychological and cultural in nature.

Emotional & Psychological Barriers

- Since democracy the service industry is seen as an industry of subservience and not of service.

- It is also seen as a stepping-stone to something better, so the wrong people are in the right positions for the wrong reason with their poor and indifferent attitudes.
- An attitude of indifference is our biggest barrier, people are not committed.
- There is often an attitude of confrontation in service delivery and recovery.
- A mentality that service jobs are low class, respected profession included medicine, architect commerce etc.
- Lack of urgency and time consciousness created challenges.

Cultural Barriers
- The many languages in South Africa. Guilt over our past. We have been a very autocratic society, whites, and blacks and colored alike. We are a very passive society.
- We are conflicted society and we interpret situations differently and the country is not quite ready to accept. The black culture has a strong authoritarian structure, black children were taught not to question authority.

Other Barriers and Challenges:

Big Picture
- Other barriers and challenges identified were a general lack of employees understanding of the big picture.
- Understanding who is a customer, discrimination, hiring practices and training issues.
- Employees are only told a fraction of what they need to know, thus do not feel an ownership or connection to their employers or organizations.

Tourists are customers
- Lack of understanding that tourists are customers and that business and the country benefit from their contribution.

Labour Brokers
- The influence of labor brokers in the industry creates disloyalty in employees with its transitory processes along with employees already being disconnected and disenchanted in the world of work.

Discrimination
- Discrimination either overtly or covertly colors customer service interactions.
- Black on black discrimination is a real problem.
- The influence of our trade unions has a negative impact on our employees. People want the maximum pay for the minimum work.
- Discrimination based on politics, class, color and gender is a big problem in South Africa.

Hiring & Training Issue
- Another challenge articulated was hiring the right people and providing them with consistent customer service training for their service jobs.
- Participants felt screening processes are poor and the wrong types of people are being hired and poorly trained and they lacked adequate knowledge to do their job efficiently.

Roles of different players were outlined as follows:

Employee Focused
• Staff training.
• Employees be part of the business and be informed on the products and processes.
• Employees need to know and feel that they are being appreciated.
• Do not fire people who make mistakes, teach them how to perform correctly.
• Inspire staff to do well and provide incentives for excellence.

Leader Focused
• Lead by example.
• Be inspirational.

Processes
• Being on top of service recovery.
• Continuous training and updating on processes.

Employees' Role
• Feedback systems in place to reward or discipline employees.
• Train and provide tools and positive environment.

Front-line Staff
Most of the current front line staff have bad attitudes, lack of awareness of customer service ethics and racial undertones of discrimination which encouraged discriminatory treatment.

Reasons for their unacceptable behavior are attributed to the following:

The challenging living conditions of employees, low pay, lack of training,

survival mode, victimized by their peers for exceeding expectations, lack of confidence to approach guests, lack of knowledge on cultural difference resulting in interpersonal problems with customers, low salaries, like other individuals at the lower levels they see themselves as just numbers.

Public Sector
• Participants explained that the demoralizing culture within the public sector has a negative effect on the service.
• Passionate employees leave and those remaining are more concerned about their rights, rather than the customers.
• The overall environment within most of the public sector is not customer service focused.
• Public employees see customers as annoyance.
• Great service is not delivered because there is no culture or standards of excellence in organizations. If you have passion when you get a job in the public sector you will loose it quickly.
• There is no consequence for excellent and poor service.
• Government does not see people/public as customers.

Service Industry
- Participants expressed concern of the stigma in the service industry, it is seen as a subservient industry. Thus, getting a limited pool of quality employees passionate about the industry.
- Too many people see the service industry as demeaning or beneath them or their children. There may be some resentment, because workers see people spending more on a meal than they earn in a day or more; especially a black person to another black person. How did you get to the front of the pay line, while I'm at the back of it?
- Apartheid would not allow you to challenge the ideas of superiors, people were expected to comply.

Cultural
- The strength of the influence of the country's past on people's current behavior is deeply rooted.
- Black children were taught not to question authority; so black employees have a difficulty in taking initiative.
- If I am black, people don't expect me to be their boss.
- It seems that foreign workers have a stronger work ethic than our own local workers and that is creating challenges.

Employee's Role:

Deal with PreferentialTreatment
- Preferential treatment is provided to white customers and to customers that the front-line assumes will tip big.
- Black on black discrimination is rampant and stereotypes of other cultures existed

too when employees decide to provide service or not.
- Race plays a role in the level of service you get. If you are clean and dressed well, you get better and quicker service.
- Regular customers get better service.
- Indian, Israeli and Russian tourists are unpopular with employees.
- They treat others as they are treated.

Provide Feedback Systems
- Effective Performance appraisals to be introduced and applied.
- Element of fear to be removed from feedback.

Manager's Treatment of Employees
- Managers should be warm with employees and customers alike.
- Managers to lead, inspire people, approachable and earn their respect.
- Mistakes to be taken as learning opportunities.
- Management is transactional and leadership is transformational, we have many more managers than leaders in South Africa. Leaders must be accessible to their employees. The CEO needs training just as much as the manager and the subordinate do.
- Managers are badly trained and they do not know how to lead people.
- The management is drawn largely from the white population and the pattern must be appropriately addressed.
- The way you manage the staff is vital, if they do not feel respected, there is no way they can treat the customer with respect.

Organization's Role:

Processes
- Some organizations have internal and /or external processes in place for customer feedback and to clarify employee service delivery expectations.
- In the banks, the consequences of poor service are severe. Ombudsman services are used for complaints.

No Processes
- No effective systems for screening of staff.
- No career path, more often people get appointed to positions that internal candidates are much more qualified for without them being considered.

Recruitment, Selection & Retention
- Private sector is serious about customer service and it is fully aware that the sector is profiting from it.
- Public sector is not paying attention to it, it focuses on politics.
- The private sector does not take substandard staff.
- Hospitality is a very low paying industry... If you are sharp, even if you like the work, you will leave and go into a career that gives you an opportunity to grow . . . and be paid more.

Training and Development
- SA Host has been around since 1998. An improvement on the "Welcome Campaign" and building block for "Ubuntu".
- 90% of the tourism industry is run by SMMEs and only 1% of them have leadership skills. Therefore the most important industry is run

by unqualified people, there is little critical thinking and innovation, the focus is on following the rules.
- Managers lack self-confidence due to limited training hence they are from time to time deployed.

Conflict/Complaint Resolutions Process
- Service recovery processes take too long, and so you rarely see a change in the company.

- There is a need to have processes and mechanism in place to provide service recovery in government.
- External complaint service is available, customers call the main operator directly and internally there are suggestion boxes.

Understanding Customer Needs and Wants
- It is important for staff to know their job and to understand the role they play in the big picture.
- Being taught about cultural differences will result in improving interpersonal relations.
- Public sector customer service is an exception; they do not have to compete in the market.
- Satisfaction surveys to be done annually.

Touch Points
The following areas were identified as key touch points:
Restaurants (table service and fast food), hotels, taxis, shuttles, car rentals, tourism attractions, events and information, retail, banks, government and airports.

*A detailed customers' expectations and realities are reflected in the comprehensive report.

*Table Service Restaurants

- Most of the participants have first-hand experience using table service restaurants, tend to have good to-excellent impressions of these restaurants.
- They get most frustrated with incorrect orders.
- Long waiting periods to be served and turnover of service staff.

Customers' Expectations

- Greeted and escorted to seat quickly.
- Individual attention.
- Clean table with cutlery on table.
- Receive menu.
- Receive food timely (<20 min).

Reality (Impressions)

- Tend to be good to excellent.
- Expect "tip-centric" service.
- Black on black discrimination.
- Whites tend to get better service than others.

*Fast Food Restaurants

When visiting a fast food restaurant, speed of service is very important to customers, but "quality should not be compromised".

Customers' Expectations

- Fast food.
- Clean.
- Friendly people.
- Meets standards of brands.

Reality (Impressions)

- Inconsistency.
- Long lines.
- High employee turnover.

*Hotels

- Participants feel that hotels are a good place to demonstrate Ubuntu.
- South Africans have genuine pride in their own country, they are more sincere, warm and truly caring.

Customers' Expectations

- Warm and friendly reception.
- Personalized attention to needs/wants (especially from B&Bs).
- Professional - treats everyone equally and with respect.
- Clean / hygienic, Good bedding, Quiet sleeping conditions; tranquility, value for money, consistent star rating.

Reality (Impressions)

- Service often much better than other countries.
- Five-star rating system is inconsistently applied (e.g., "hotels in South Africa give better service than their benchmark UK hotels").
- Using the star system as a crutch: "we are actually providing higher service than you were paying for, so I don't know why you are complaining" attitude.

*Car Rentals

They explained that the most important thing is receiving a reliable car in a quick and friendly manner. Service are perceived to be positive in this area.

Customers' Expectations

- Reliable car.
- Welcoming and friendly.
- Fast service at reception/processing counter.

*A detailed customers' expectations and realities are reflected in the comprehensive report.

Reality (Impressions)

- Customers spend too much time in office / at counter.
- Distracted employees.
- Unfriendly.

*Taxis

The taxis fight over customers and customers may be negatively affected in the process

Drivers are very unprofessional, play music way too loud and will take you off the taxi if you complain.

In most cases their appearance is not pleasing and cars are dilapidated and dirty. They have excellent driving skills which are more relevant for racecar drivers.

Customers' Expectations

- Respectful and professional.
- Good communication skills.
- Ability to read the customer.
- Cleanliness, road worthy and licensed car

Reality (Impressions)

- Unreliable; inconsistent; unethical.
- Not friendly; abusive or inappropriate language / discussions (i.e., "talks about communal issues).
- Unhygienic; dirty; dilapidated.
- Loud music.

*Shuttle Services

Those familiar with shuttle services tend to have favorable impressions of shuttle services and feel the organization is good. They prefer to take a shuttle over taxis when it is possible.

They feel the most important aspect is riding on a clean, reliable shuttle with a focused knowledgeable driver.

Customers' Expectations

- Well maintained, clean and reliable car.
- Punctual, knowledgeable and friendly driver.

Reality (Impressions)

- On time.
- Shuttle organization is a good organization.
- Multi-tasking (eating and speeding).

*Tourism Attractions/Events/Information

Participants who have visited tourist attractions and/or events have mixed reviews. As a tourist, they feel that some attractions are well run, while others are inferior, unclean, and "illegal". There was a general perception that private attractions are better operated than government. Individuals working in non-tourist businesses (e.g.petrol stations) need to be more tourist-focused and better trained to be helpful when asked for information. Overall, respondents value tour guides and staff that are innovative, proactive, knowledgeable, accurate, and courteous.

Customers' Expectations

- User-friendly information.
- All staff knowledgeable and prepared to answer customer questions about attractions, culture, natural environment and area.
- Correct information.
- Safe and comfortable transportation.
- Consistency in cleanliness and excellent service delivery.

*A detailed customers' expectations and realities are reflected in the comprehensive report.

Reality (Impressions)
- Private attractions are better operated than government.
- Inconsistency in cleanliness, legitimacy and service delivery.
- Need a five-star rating system for attractions and tours.

*Retail
Participants tend to be unsatisfied with the customer service in retail establishments. They indicated that they had no expectation of positive customer service from retails. The participants also feel that there is a lack of respect and discrimination. Participants would like to have a customer-focused experience, where the staff is interested in experiencing "above and beyond "service.

Customers' Expectations
- Clean and organized environment and staff.
- Fast service / short queues; sufficient registers open.
- Knowledgeable staff about products.
- Follow through with complaints.

Reality (Impressions)
- Unskilled, untrained, cheap labor.
- Lack of interactions between employees and customers.
- Factory environment.
- Long lines; slow service.

*Banks
Most of the customer service discussions about banks were not positive. Participants do not feel valued or treated with respect.

At times they feel like they treated like bank robbers and not like customers. It was however, mentioned that service varies by banks.

Customers' Expectations
- Quick service.
- Visible signage or a bank guide.
- Treat everyone as a potential customer.
- Responding accurately to all queries.

Reality (Impressions)
- Not enough locations; few choices (especially in rural areas).
- Lack of managers helping tellers.
- Long lines especially at peak periods.
- Racial discrimination.

*Government
General impression is that service delivery is poor, slow and non- professional. Arrogance, bad attitude and inconsideration were highlighted as the main challenges.

Customers' Expectations
- Respect for time and people.
- Clean and inviting environment.
- Accurate execution of procedures.
- Capacitated staff to deal with queries.

Reality (Impressions)
- Poor service - customers seen as nuisance, rude, unpleasant, hostile.
- Lack of empathy.
- Poor skills and knowledge.
- Misinformation.

*A detailed customers' expectations and realities are reflected in the comprehensive report.

*Airports

Overall, most participants are not satisfied with their airport experiences. Airports are viewed as disorganized, signage poor and not easy to navigate. If you have a problem, there is no back up system.

Customers' Expectations

- Professional, sensitive and trained flight staff who are capacitated to deal with difficult customers.
- Informed of flight status / changes.
- Proper signage.
- Easy access in and out.
- Safety and security.

Reality (Impressions)

- Facilities are improving.
- Poor employee attitudes in immigrations and customs.
- Disorganized check in.
- Luggage is pilfered, lost or stolen.

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*A detailed customers' expectations and realities are reflected in the comprehensive report.

06
CONCLUSION

The research identified several critical elements currently having a negative impact on the consistent delivery of excellent customer service in South Africa, including: the legacy of apartheid, poor or indifferent attitudes of some employees, inadequate job training, deficient general education, poor recruitment and selection processes, a lack of urgency, a tendency towards autocratic management rather than participative leadership, and an imbalanced focus on technical job skills opposed to interpersonal "customer and people" skills development.

The inability of most South Africans to provide constructive feedback in the workplace, which has enabled the continuance of poor service and the acceptance of poor service as the norm. It was discovered that often front-line employees have never experienced excellent customer service or "being served" in the type of establishments in which they are employed. Thus, there is a disconnection. The research also identified a significant conviction that, while private sector organizations try to deliver acceptable levels of customer service, the public sector was seen with contempt, due to ineffective deployment practices, attitudes of entitlement, non-existent customer service and customers being viewed as nuisances. In fact, most expressed a degree of hopelessness that the public sector cannot change its current paradigm.

The following recommendations were made:
- The enormous undertaking of a rapid deployment that prevents employees from consistently providing a level of excellent service to customers that addresses the wants and needs of individuals and groups, without having had their own personal experiences.
- A collaborative public and private sector effort, to a targeted segment of people in tourism and the public sector, with the goal to positively impact the World Cup tourism experience.
- Disney Institute suggests a phased approach to the pre-World Cup deployment of programs. These phases would need to begin early January 2010 and conclude at the end of March 2010.
- In this aggressive implementation Disney Institute would work with key representatives from South Africa to train public and private sector; senior executives, leaders, middle managers, front-line supervisors and front-line staff. The target was suggested as follows:
  - *80 senior leaders,*
  - *7,500 mid-level and front-line leaders, as well as*
  - *12,000 front-line employees who will be directly involved and/or provide customer service during FIFA 2010.*
  - *50 Service Excellence Training Ambassadors, who would be empowered, equipped and provided the tools to assist in the implementation of recommendations .*
- It was concluded that a strong national customer service "rallying cry" was critical to excite, mobilize and unify the country towards service excellence in 2010 and beyond!

Overall participant felt strongly that if South Africa wants to improve customer service delivery, it must focus on key areas to address current issues:

- Improve the educational system and set South Africa up for the future.
- Update customer service training programs; include accountability, sustainability and refresher programs.
- Paradigm shift of leadership vs. autocratic management.
- Improved working/living conditions for employees.
- Focus on the people side of businesses and employees; attitude, commitment, passion and pride (Understanding that customers pay their salaries).
- Awareness of the impact of customer service on their economy.
- Communicate the tourism vision to all South Africa, to get buy in from all South Africans, in order to begin the attitudinal and behavioral changes.
- Right fit talent- passion over just anyone.
- Create a service culture in South Africa; friendly, consistent and timely service.
- Establish and sustain a strong customer service rallying cry for all of South Africa.

Education and Skills Development
- The industry to organize a service training program and refresher courses which should include issues of accountability and sustaining positive behavior.
- The training curriculum should include both core/technical skills and soft skills should counter care training.

- Organize coaching training programme for staff.
- Application and utilization of modern technology (e-learning).

Leadership Style
- Focus should be made on provision of leadership instead of being autocratic.

Norms and Standards
- Development of norms and standards for provision of excellent service.
- Development of a self assessment tool to measure compliance against set of norms and standards.

Awareness Creation
- Frequent, recognition and awards to reinforce quality service standards.
- Shared common vision and purpose.
- Impact of customer service to the economic.
- Communicate vision of curriculum to NTSS.
- Create service culture within and outside the tourism sector.

Quick Boost
- Training of front line staff on customer service.
- Training of service leaders on customer service.
- Training of middle managers on customer service.
- Training of Trainers programmes.
- More forums where different businesses share about customer service.

Customer Service Audits
- Conduct service delivery audits.
- Monitor service delivery levels.
- Encourage constructive feedback.

Feedback Mechanism
- Encourage and promote a culture of providing comments of any type of service received.

Award System
- Development of an integrated service excellence award system.

Based on these recommendations an implementation plan will be developed, outlining roles and responsibilities of various players.

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