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Customer Satisfaction Index of Singapore: Executive Summary 2008

Institute of Service Excellence, SMU

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EXECUTIVE SUMMARY 2008

CUSTOMER SATISFACTION INDEX OF SINGAPORE



INSTITUTE OF
SERVICE EXCELLENCE
SINGAPORE MANAGEMENT UNIVERSITY



BACKGROUND

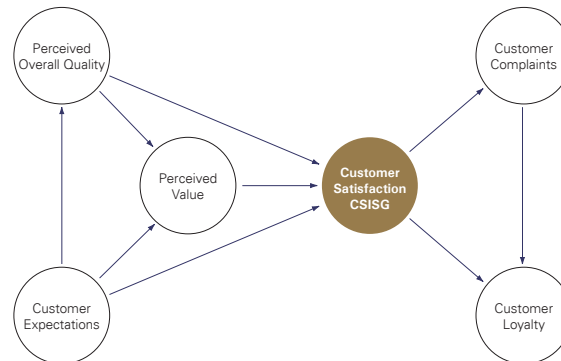
The Institute of Service Excellence at Singapore Management University (ISES) was appointed by the Singapore Workforce Development Agency (WDA) to implement and maintain an annual benchmark for the services sectors in Singapore. The Customer Satisfaction Index of Singapore (CSISG) was first launched in April 2008 based on data collected from a nationwide survey conducted in 2007. In this second year, the results of CSISG 2008 were derived from the survey data gathered between November 2008 and January 2009.

In this door-to-door survey, respondents from 15,328 households in Singapore filled out 27,698 questionnaires. Almost all respondents answered two questionnaires each, with each questionnaire asking about a business entity in one of 35 different sub-sectors across eight economic sectors. These questionnaires were designed to measure important aspects of the respondents' cumulative as well as most recent experiences with a business entity. Using the same questionnaire a separate survey at Changi Airport consisting of 4,008 tourists departing Singapore was conducted between 20 November 2008 and 6 January 2009. Each tourist filled out one questionnaire about a business entity in one of 18 sub-sectors.

The resulting dataset of respondents closely matches the resident Singapore population on all relevant socioeconomic and demographic dimensions. Similarly, the distribution of tourist respondents closely matches the 2007 Singapore tourist countries of residence for tourist arrivals.

THE CSISG SCOPE AND COVERAGE

The structural model on the right was used to generate the Singapore satisfaction scores, based on the survey data collected. Besides producing a customer satisfaction index at the national level, the CSISG presents separate indices for eight key economic sectors, 35 sub-sectors and 88 business entities. The services sectors that were measured account for approximately one third of the Singapore GDP. The CSISG scores customer satisfaction on a scale of 0 to 100 with higher scores representing better performance.



CUSTOMER SATISFACTION IS NOT CUSTOMER SERVICE

Customer service is only one of the many drivers impacting customer satisfaction. As illustrated in the CSISG structural model, customer satisfaction is first and foremost impacted by customer expectations of a company's performance. Customer expectations are influenced by factors such as past experience, advertising and word-of-mouth. Expectations in turn colour customers' perception of overall quality and value-for-money. In addition to customer satisfaction scores, the CSISG also produces scores for the three drivers of customer satisfaction (i) customer expectations, (ii) perceived overall quality, and (iii) perceived value of the products and services. Additionally, the CSISG also measures two outcomes of customer satisfaction namely, (i) customer loyalty and (ii) customer complaints.

CSISG CORPORATE SERVICES

Customer satisfaction is driven by a consistent business strategy. Companies can capitalise on the CSISG as a strategic business tool to gain valuable insights about customer satisfaction through the CSISG Corporate Subscription and CSISG Custom Research.

CSISG CORPORATE SUBSCRIPTION

By using a consistent methodology across all sectors, sub-sectors and companies measured, the annual CSISG provides companies with an objective, reliable and rigorous benchmark of customer satisfaction. The CSISG Corporate Subscription caters to companies that are measured in the CSISG annual national survey. It provides companies with in-depth information about the data obtained from the CSISG, and acts as a performance yardstick both against competitors and companies outside of their industries.

Using the cause-and-effect property of the CSISG methodology, the impact of customer satisfaction on revenue is systematically quantified. A CSISG Corporate Subscriber can further determine how a rise in performance of each dimension of satisfaction will affect the other variables, leading to insights on what drives satisfaction and the link between customer satisfaction, customer retention and loyalty. This allows for the development of a strategic framework to allocate resources effectively into areas of improvements that are most visible to customers.

To capitalise on the CSISG, the Corporate Subscription will offer:

- Overall performance of the subscriber's sector and sub-sector
- Benchmarking of measured companies in the subscriber's sub-sector / industry
- Cross industry benchmarking of three CSISG-measured companies, and
- Strategic framework to guide decision-making.

These insights will be presented in a report and delivered through in-house briefings to key stakeholders of CSISG Corporate Subscribers.

CSISG CUSTOM RESEARCH

The CSISG methodology can be engaged for use by companies not measured in the CSISG for benchmarking, to quantify brand equity, and to develop performance improvement initiatives.

Please contact us for more details about our corporate services.

CONTACT US

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2008 NATIONAL SCORE 67.8

Education (69.8)

Commercial Schools (71.0)

Polytechnics (69.9)

- Republic (71.4)
- Singapore (70.9)
- Temasek (70.6)
- Nanyang (70.3)
- Ngee Ann (67.7)

Universities (68.7)

- SMU (69.4)
- UniSIM (69.3)
- NTU (69.2)
- NUS (67.1)

Transportation and Logistics (68.7)

Airlines (71.9)

- Singapore Airlines (74.6)
- Emirates (74.4)
- Qantas (70.2)
- Cathay Pacific (70.0)
- SilkAir (68.1)
- All Others (66.7)

Mass Rapid Transit System (67.8)

- SBS Transit (68.2)
- SMRT (67.7)

Courier and Postal Services (66.9)

- DHL (67.9)
- FedEx (67.6)
- UPS (65.5)
- SingPost (64.5)
- All Others (69.1)

Water Transportation (66.8)

Taxi Services (64.7)

- SMRT (66.0)
- ComfortDelGro (63.1)
- All Others (65.9)

Public Buses (64.0)

- SMRT (64.7)
- SBS Transit (63.8)

Budget Airlines (63.6)

Tourism, Hotels and Accommodation Services (68.6)

Hotels (71.4)

- The Ritz-Carlton (76.9)
- Shangri-La (76.5)
- Swissotel The Stamford (74.6)
- Grand Hyatt (74.6)
- Meritus Mandarin (71.6)
- All Others (70.3)

Attractions (71.0)

- Wildlife Reserves (71.6)
- Underwater World (70.9)
- Sentosa (70.4)
- All Others (70.8)

Travel Agencies, Tour Operators, and Ticketing Agencies (64.7)

Retail (68.1)

Motor Vehicles (70.1)

- Tan Chong Motor (71.0)
- Borneo Motors (70.6)
- Cycle & Carriage (68.9)
- Kah Motor (68.6)
- All Others (70.2)

Petrol Service Stations (68.5)

- Caltex (68.8)
- Shell (68.6)
- SPC (68.5)
- ExxonMobil (68.2)

Clocks and Watches (68.3)

Jewellery (68.2)

Fashion Apparels (67.2)

Departmental Stores (66.3)

- Robinson & Co (67.2)
- Isetan (67.0)
- Takashimaya (66.6)
- DFS (66.0)
- All Others (65.7)

Furniture (64.3)

Supermarkets (63.3)

- Mustafa (66.6)
- NTUC Fairprice (64.6)
- Sheng Siong (64.0)
- Cold Storage (63.9)
- All Others (59.9)

Healthcare (67.6)

Private Hospitals (69.9)

- Raffles (71.3)
- Parkway Holdings (69.7)
- Thomson Medical Centre (69.4)
- Mount Alvernia (69.1)

Restructured Hospitals (68.4)

- KK Women's and Children's (70.2)
- Singapore General (69.4)
- Alexandra (68.4)
- National University (68.3)
- Changi General (68.3)
- Tan Tock Seng (67.0)

General Practitioners (67.9)

All Others (65.4)

Polyclinics (65.4)

- SingHealth (67.1)
- NHG (64.3)

Info-Communications (67.2)

Mobile Telecom (67.5)

- StarHub (69.1)
- SingTel (66.8)
- M1 (66.0)

Internet Service Providers (65.7)

- SingNet (66.1)
- StarHub (65.3)
- PacNet Internet (65.3)

Finance and Insurance (67.0)

Commercial Banks (67.6)

- HSBC (69.4)
- Citibank (69.0)
- DBS (67.3)
- OCBC (67.0)
- UOB (66.9)
- All Others (68.1)

Motor & Other Insurance (66.7)

- AXA (67.9)
- NTUC Income (67.8)
- American Home Assurance (66.2)
- All Others (66.2)

Life Insurance (65.7)

- American International Assurance (65.0)
- Great Eastern (64.7)
- Prudential (64.5)
- NTUC Income (64.3)
- All Others (68.3)

Food and Beverage (65.4)

Bars and Pubs (68.4)

Restaurants (67.4)

- Tung Lok (67.3)
- RE & S (66.3)
- Apex-Pal (65.1)
- Crystal Jade (65.0)
- All Others (67.9)

Fast Food Restaurants (64.4)

- Pizza Hut, KFC (65.3)
- Burger King (64.7)
- McDonald's (62.9)
- All Others (67.1)

Cafes, Coffee Houses, and Snack Bars (62.7)

- Starbucks (68.1)
- Coffee Bean & Tea Leaf (66.3)
- Delifrance (63.8)
- All Others (62.3)

This chart summarises the results of the CSiSG 2008 satisfaction scores at the national, sector, sub-sector and company levels. The national score of 67.8 represents a weighted average of the 8 sector scores (in gold), which themselves are weighted averages 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.

