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### Customer Satisfaction Index of Singapore 2013: Q2 Results

Institute of Service Excellence, SMU

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# CUSTOMER SATISFACTION INDEX OF SINGAPORE 2013

Q2 SCORES  
EDUCATION AND TRANSPORTATION & LOGISTICS

RESULTS OVERVIEW

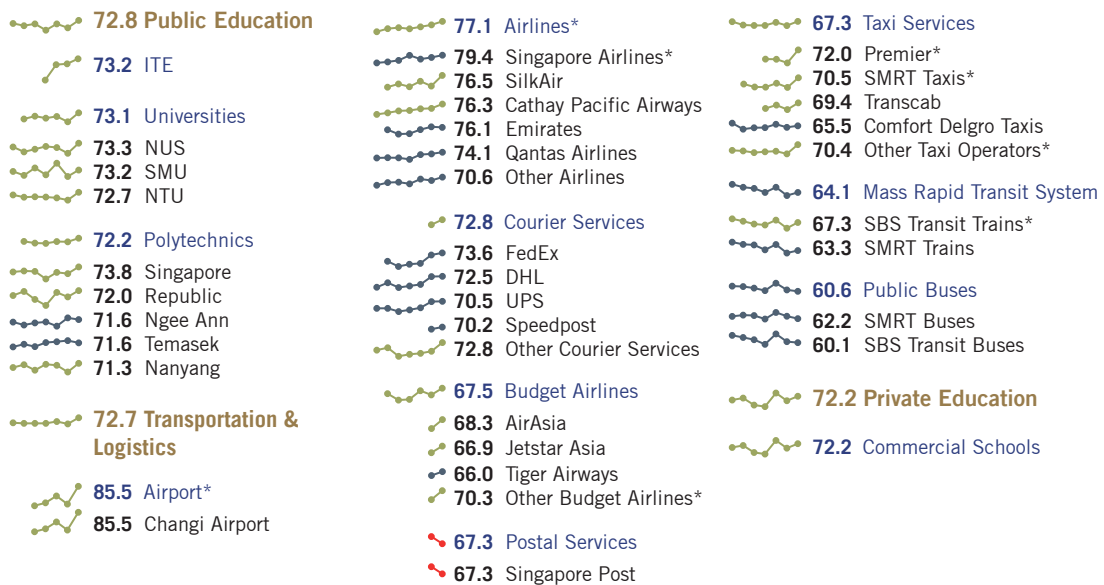


INSTITUTE OF  
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SINGAPORE MANAGEMENT UNIVERSITY





## 2013 Q2 SCORES EDUCATION AND TRANSPORTATION & LOGISTICS




This chart summarises the results of the CSISG 2013 satisfaction scores in the Education and Transportation & Logistics 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.


All scores displayed are accurate to one-decimal place. Entities are presented in decreasing levels of satisfaction.

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

The sparklines indicate the satisfaction score of their respective sectors, sub-sectors and companies over the past few years.

 statistically significant increase in customer satisfaction from 2012 to 2013

 statistically significant decrease in customer satisfaction from 2012 to 2013

 no significant year-on-year change in customer satisfaction score

## OVERVIEW

The Customer Satisfaction Index of Singapore (CSISG) computes customer satisfaction scores at the national, sector, sub-sector, and company levels. The CSISG serves as a quantitative benchmark of the quality of goods and services produced by the Singapore economy over time and across countries. This is the CSISG's seventh year of measurement.

## HIGHLIGHTS

Between 2012 and 2013, customer satisfaction for the Transportation and Logistics sector rose 4.37-points to 72.7-points (on a 0 to 100 scale). This is a significant 6.4% year-on-year improvement and is also the highest score the sector has recorded since tracking began in 2007.

The Public and Private Educations sectors also saw year-on-year improvements. The Public Education sector saw its satisfaction score improve 5.34-points (+7.9%) to 72.8-points. Similarly, commercial schools of the Private Education sector improved by 3.18-points (+4.6%) to 72.2-points.

In the Transportation and Logistics sector, five of the eight sub-sectors made statistically significant year-on-year improvements.

The MRT and Public Buses sub-sectors saw their CSISG scores move marginally from 2012, although the changes were not statistically significant. Customer satisfaction scores increased at the MRT sub-sector, rising 2.21-points or 3.6%

year-on-year to 64.1-points. The Public Buses sub-sector score fell 1.00-point or 1.6% to 60.6-points. Improving significantly was the Taxi sub-sector, with a 3.00-point or 4.7% improvement to score 67.3-points.

Changi Airport posted a considerable 12.71-point (+17.4%) year-on-year increase to 85.5-points. This score is not only the highest recorded score for Changi Airport, but also for the CSISG as an index since its inception in 2007.

The Full-service Airlines sub-sector improved by 2.49-points (+3.3%) to 77.1-points. The Budget Airlines sub-sector made an even larger improvement, gaining 4.88-points (+7.8%) to 67.5-points.

The Courier Services sub-sector also raised their customer satisfaction scores, by 3.58-points (+5.2%) year-on-year to 72.8-points.

The Postal Services sub-sector registered a significant 5.01-point (-6.9%) decline to 67.3-points.

Within the Public Education sector, both the Universities and Polytechnics sub-sectors made significant improvements from 2012. Universities scored 73.1-points, a 6.37-point (+9.5%) improvement, while Polytechnics scored 72.2-points, a 2.53-point (+3.6%) improvement. The ITE continued its third year of uninterrupted improvement to its student satisfaction, scoring 73.2-points. This is a significant 3.64-point (+5.2%) increase over its previous year's score.

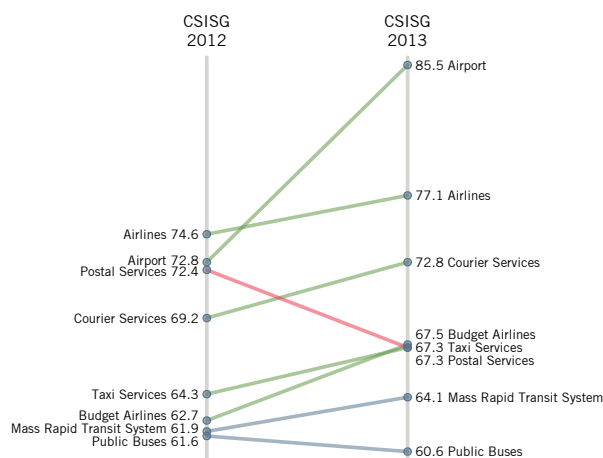


Figure 1: Transportation & Logistics sub-sector scores

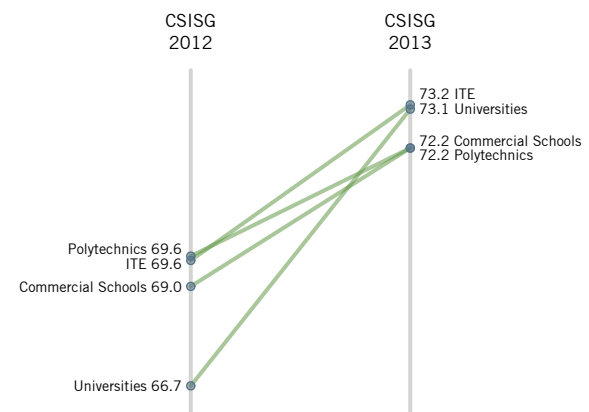


Figure 2: Education sub-sector scores

## SECOND QUARTER KEY FINDINGS

### POSITIVE MOVEMENTS IN PERCEIVED QUALITY AT THE MRT SUB-SECTOR SUGGEST SERVICE IMPROVEMENTS TAKING HOLD

The MRT sub-sector saw no significant changes to its 2013 score. Nonetheless, there was significant improvement to their commuters' perceptions of quality.

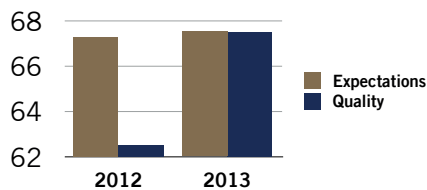


Figure 3 : MRT sub-sector quality expectations gap

Further analysis revealed the touchpoints of Ride Comfort, Train Frequency, and Train Punctuality as the three most important factors in affecting MRT sub-sector respondents' perceptions of quality. These three touchpoints also recorded higher ratings amongst the commuters interviewed.

MRT System touchpoints (ranked by importance)	Rating (1-10)	Year-on-Year Change
Ride comfort	7.3	0.2
Frequency	7.2	0.2
Punctuality	7.4	0.2
Safety & Security	7.6	0.2
Station comfort	7.5	0.3*
Cleanliness	8.0	0.3*
Operating hours	7.3	0.1
Information services	7.5	0.3*
Customer service	7.3	0.2*

An asterisk (\*) indicates a statistically significant change.

Figure 4 : MRT System sub-sector touchpoint performance

This suggests that the improvement initiatives being rolled out by the MRT operators and authorities are having a perceptible impact in commuter sentiment towards the MRT system. In time, this should result in stronger Perceived Quality and Customer Satisfaction levels.

### BUDGET AIRLINES' PASSENGERS WITH LOW REPURCHASE INTENTIONS MORE EASILY ENTICED WITH PRICE

The Budget Airlines sub-sector made greater improvements, increasing by 4.88-points year-on-year, as compared to

the Full-service Airlines sub-sector, which also made a significant, albeit more modest increase of 2.49-points.

A notable outcome of the Budget Airlines' stronger CSISG performance is improved customer loyalty. Specifically, compared to 2012, Budget Airline sub-sector respondents had, on average, higher repurchase intentions this year. And when it came to just the group of customers with lower repurchase intentions, it was significantly easier for the Budget Airlines to win them back this year as compared with the previous year. In 2012, Budget Airlines had to drop prices an average of 17.1% to get these disgruntled customer back on board. In 2013, prices had to only come down 11.9%.

### DIFFERENT ASPECTS OF EDUCATION AT THE VARIOUS EDUCATION INSTITUTIONS DRIVE STUDENTS' PERCEPTIONS OF QUALITY

The Universities, Polytechnics, and Commercial Schools sub-sectors made significant improvements to their students' satisfaction in 2013.

In analysing the various aspects of education that drive these students' perceptions of a high quality education, the data shows students at different education institutions care about, and are motivated by, different aspects of their learning journey.

Regardless of the Education sub-sector, Campus Experience was found to be of consistently high importance to students. Polytechnic students' perceptions of quality were most affected by the alignment of their polytechnic activities to their future careers. Both university and commercial school students' perceived quality and satisfaction levels were most affected by what and how they learn.

Universities	Polytechnics	Commercial Schools
Course-Fit	Relevance	Course-Fit
Support	Campus	Teaching
Campus	Support	Campus
Teaching	Course-Fit	Relevance
Computing	Computing	Support
Relevance	Teaching	Computing

The importance ranking of these dimensions are accurate at the sub-sector level and will differ when computed for individual institutions.

Figure 5 : Relative importance of Education dimensions on perceived quality

At each of the different educational institutions, students care about different things and administrators should consider paying attention to aspects of the student experience that most strongly impact their students' perceptions of quality.

## CSISG BACKGROUND

CSISG scores are generated based on the econometric modelling of survey data collected from end-users after the consumption of 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. Finally, the national score is weighted according to each sector's contribution to GDP. CSISG scores customer satisfaction on a scale of 0 to 100 with higher scores representing better performance.

Under a quarterly measure-and-release system, up to three sectors are measured each quarter with their results released the following quarter. Companies in the Retail and Info-Communications sectors were measured in this first quarter, Transportation & Logistics, Public, and Private Education in the second quarter, Food & Beverage and Tourism sectors in the third quarter, and finally the companies of Finance & Insurance and Healthcare sectors, in the fourth quarter. The national score for 2013 will then be computed using the data collected over these four quarters.

For this second quarter of 2013, results for Public Education, Private Education, and Transportation & Logistics sectors were collected and analysed.

The Public Education sector is made up of the ITE, Polytechnics, and Universities sub-sectors, while Commercial Schools make up the Private Education sector.

The Polytechnics, Universities, and Commercial Schools sub-sectors in this 2013 study also began using an education-specific CSISG model. This model adds six education-

specific variables that allow for more granular insights into students' perceptions of quality and their satisfaction at the respective education sub-sectors. The ITE sub-sector has been employing a similar model since 2011.

The Transportation & Logistics sector comprises of Airlines, Budget Airlines, Changi Airport, Public Buses, MRT, Taxis, Courier Services and Postal Services sub-sectors.

## CSISG 2013 FIELDWORK PROCESS

Survey data for the Public Education, Private Education, and Transportation & Logistics sectors was collected between May and July of 2013. Responses were primarily collected via face-to-face interviews with Singapore residents at their homes and departing tourists and transit passengers at Changi Airport. Responses from ITE students about their institution was collected via an online survey.

The Q2 fieldwork garnered 6,758 interviews with locals and 1,989 with tourists. In addition, 999 local, tourist, and transit passengers were interviewed at Changi Airport regarding their experiences there. A further 1,377 students responded via online surveys about their experiences with ITE.

In total, there were 11,123 unique responses covering 191 companies and entities in the Public Education, Private Education, and Transportation & Logistics sectors; 31 entities have published scores.

*\*Statistical significance for the CSISG study is measured at a confidence interval of 90%.*

## CONTACT US

Please contact us for more details of our CSISG Corporate Subscription and Custom Research.

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