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Institute of Service Excellence, SMU. Customer Satisfaction Index of Singapore 2014: Q2 Results. (2014). 1-8.

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CUSTOMER SATISFACTION INDEX OF SINGAPORE 2014

Q2 SCORES
TRANSPORT & LOGISTICS, PUBLIC EDUCATION,
AND PRIVATE EDUCATION

RESULTS OVERVIEW

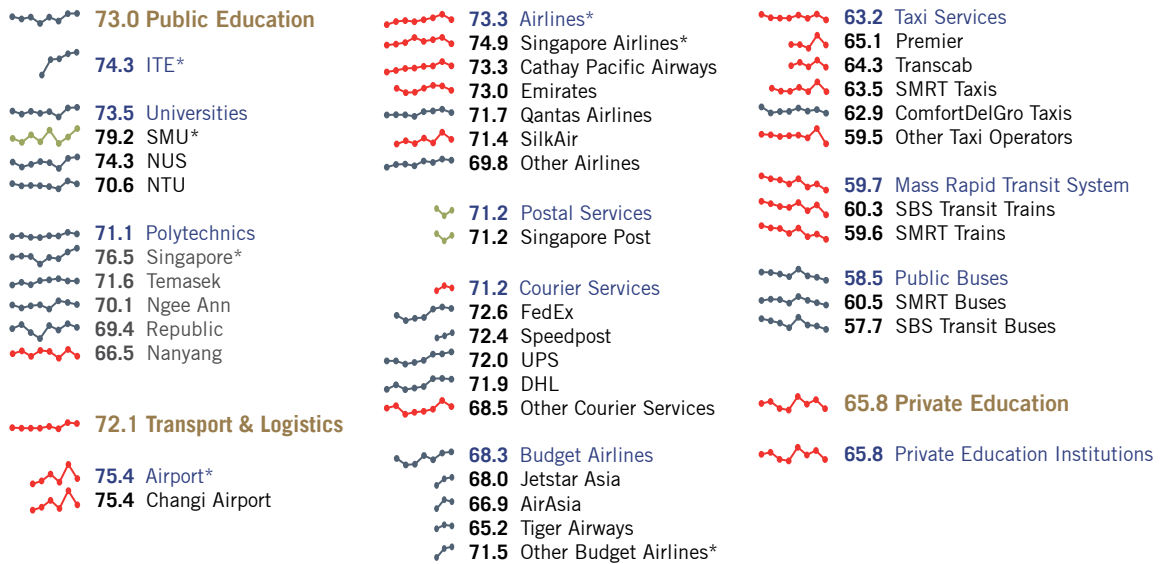


INSTITUTE OF
SERVICE EXCELLENCE
SINGAPORE MANAGEMENT UNIVERSITY





2014 Q2 SCORES EDUCATION AND TRANSPORT & LOGISTICS



This chart summarises the results of the CSISG 2014 satisfaction scores in the Education and Transport & Logistics sectors at the sector, sub-sector and company levels.

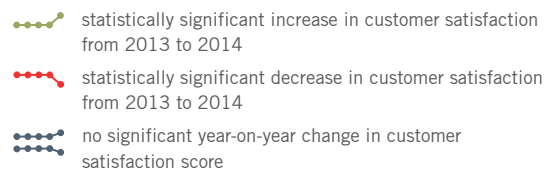
The sector scores (in gold) represents a weighted average of their respective sub-sector scores (in blue). Satisfaction scores for sub-sectors with individual company scores are weighted averages of these individual company scores.

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.

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

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



Note: The Public Education sector, the Private Education sector, and the Private Education Institutions sub-sector scores were updated on 9 March 2015. These scores supersede any previously published scores.

CSISG 2014 SECOND QUARTER RESULTS 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 eighth year of measurement.

SECOND QUARTER RESULTS HIGHLIGHTS

Between 2013 and 2014, customer satisfaction for the Transport and Logistics sector fell a significant 0.59-points (-0.8%) to 72.1-points (on a 0 to 100 scale), while the Public Education sector's score remained largely unchanged from last year, edging up 0.1-points (+0.1%) to 73.0-points. For Private Education, its 2014 score of 65.8-points is 6.43-points (-8.9%) lower than its 2013 performance, although it should be noted the CSISG 2014 study switched to an online survey methodology for this group of private education respondents, compared to the face-to-face surveys of previous years, possibly affecting its comparability.

Of the eight measured sub-sectors that make up the Transport & Logistics sector, six recorded declining year-on-year scores: Airlines, Changi Airport, Courier Services, MRT System, Public Buses, and Taxi Services.

The public transport sub-sectors of MRT (59.7-points), Public Buses (58.5-points), and Taxis (63.2-points), fell by 4.35-points (-6.8%), 2.17-points (-3.6%), and 4.10-points (-6.1%), respectively, although the change for Public Buses was not significant.

While the Airlines sub-sector fell a significant 3.82-points (-5.0%) year-on-year to 73.3-points, the Budget Airlines sub-sector inched up 0.79-points (+1.2%) to reach a historical high for the sub-sector of 68.3-points since measurement began in 2008. On the other hand, the Changi Airport sub-sector score declined a significant 10.13-points (-11.8%) year-on-year to 75.4-points.

In Logistics, the Courier Services sub-sector posted a significantly lower score of 71.2-points, a 1.66-point (-2.3%) decrease from 2013. However, the Postal Services sub-sector, essentially SingPost, marked the only significant improvement in the Transport & Logistics sector, increasing 3.83-points (+5.7%) from last year to also score 71.2-points.

The overall CSISG score for the Public Education sector was statistically unchanged from last year's.

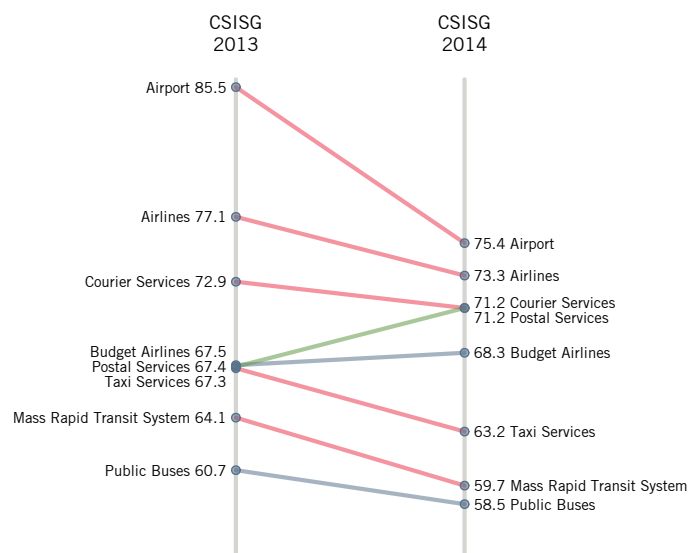


Figure 1a: Transport & Logistics sub-sectors year-on-year performance

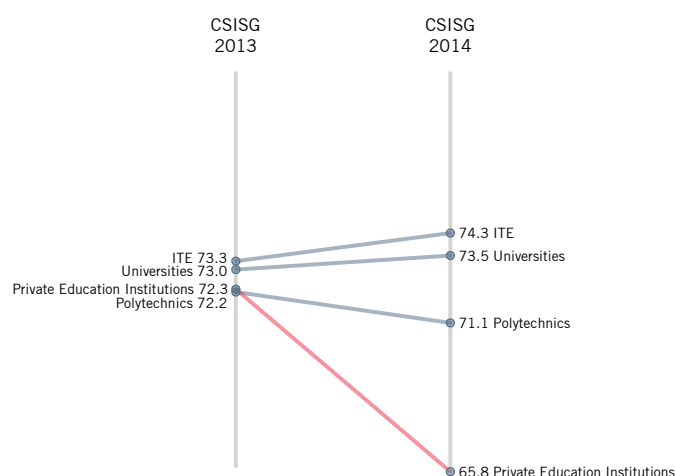


Figure 1b: Education sub-sectors year-on-year performance

All three constituent sub-sectors also did not register statistically significant changes in student satisfaction from year to year. The ITE sub-sector scored 74.3-points, an increase of 1.05-points (+1.4%) from 2013, Universities inched up 0.46-points (+0.6%) to 73.5-points, while Polytechnics made a marginal dip of 1.08-points (-1.5%) to 71.1-points.

SECOND QUARTER KEY FINDINGS

Severity of decline in satisfaction due to tourist respondents

For the Transport & Logistics sector, six of the eight sub-sectors take into account tourist respondents in determining its CSISG score: Airlines, Budget Airlines, Changi Airport, MRT, Public Buses, and Taxi Services.

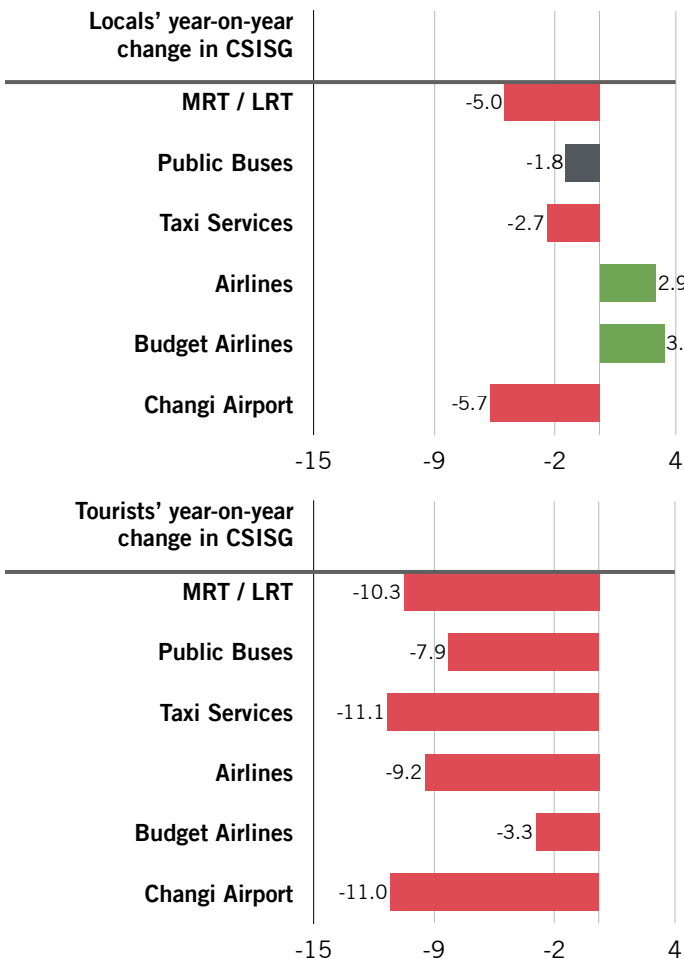


Figure 2: Locals' and Tourists' year-on-year change in customer satisfaction in Q2 sub-sectors

In all six sub-sectors, the decline in satisfaction year-on-year for tourists was greater than that of local respondents. In fact, as illustrated in Figure 2, locals were more satisfied with Airlines and Budget Airlines in 2014 compared to 2013.

Nonetheless, it should be noted that despite the larger decline in tourist satisfaction in these sub-sectors, overall, tourists respondents continue to be more satisfied than local respondents.

Significant proportion of public transport commuters indicate there was no point complaining

The CSISG survey asks public transport commuters, i.e., MRT, Public Buses, and Taxis, if they had complained to the transport operator they were responding about. If they stated they had not complained, the survey probes further for the reason.

Only 2.1% of those surveyed actually made a complaint. Of the 97.9% of respondents who indicated they did not complain, 16.8% said they had not lodged the complaint because they felt there was no point in doing so.

Further analysis shows that this group of commuters who said there was no point in complaining have a significantly lower satisfaction score than the average commuter, as illustrated in Figure 3. This may suggest that they have given up hope of their feedback to the transport operator having an appreciable improvement to their commuting experience.

It may be useful for stakeholders to track this metric for sentiment analysis and guide engagement with customers.

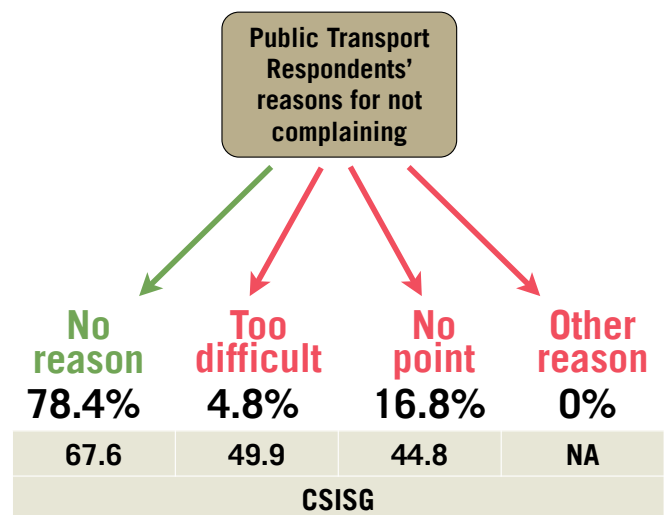


Figure 3: Public Transport respondents' reasons for not complaining to the operator

MRT users that used more than one mode to transport in their work commutes significantly less satisfied

Analysis has revealed that MRT users who need to take more than one mode of transport to work are significantly less satisfied with their transport operator than those who use the MRT network exclusively for their commutes.

In fact, inter-modal commuters scored significantly lower in all three drivers of satisfaction as well, i.e., Customer Expectations, Perceived Quality, and Perceived Value.

This relationship between satisfaction for the MRT and the number of transport modes a commuter needs to complete his or her journey is significant because when it comes to commuting, customers will invariably design their own solutions; how service providers interact with one another then affects the customers' satisfaction with each of them.

Thus, companies should be cognisant that customer experiences can overlap with the service provisions of external stakeholders. A holistic service design will integrate these other stakeholders to provide consumers with innovative solutions.

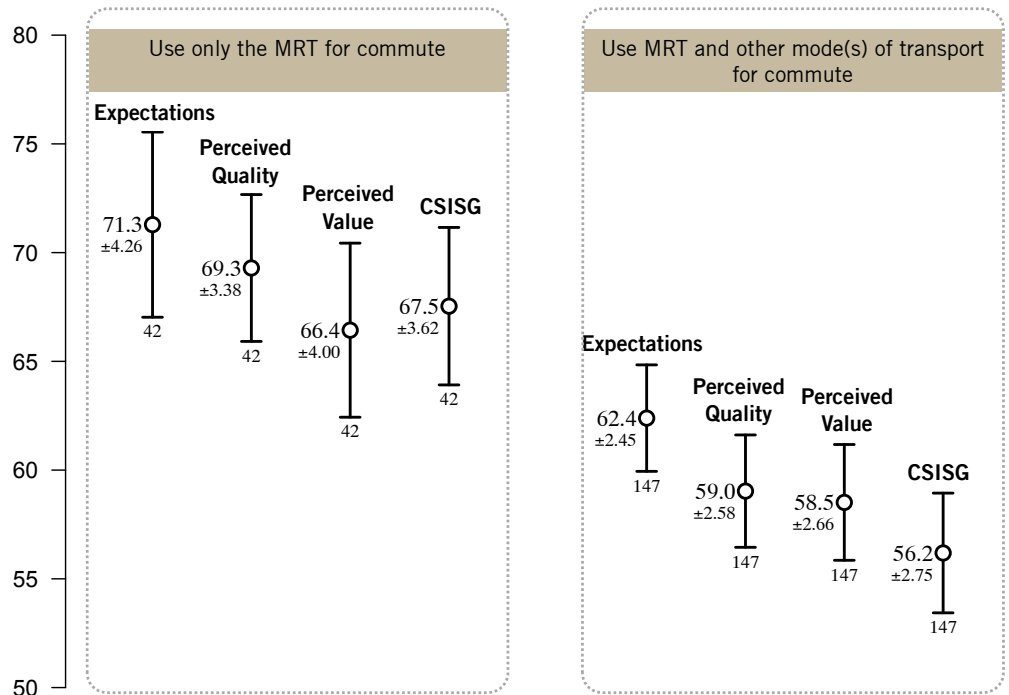


Figure 4: Difference in drivers of satisfaction and CSISG scores between uni- and inter-modal MRT commuters

Student support services most important driver of quality at Education Institutions

Analysis of the Public Education sector data revealed that students at the ITE, the Polytechnics, and Universities, as well as those of Private Education Institutions, felt their institution's student support services as having a significant, if not the most significant, impact on their perceptions of quality and satisfaction.

Student support in the CSISG refers to financial, career, and emotional support services provided for students.

This finding will allow education administrators to focus their efforts on improving aspects of these

services on campus, but also hopefully spur partnerships with industry to provide scholarships and relevant work attachment opportunities.

Adopting a collaborative approach to raise service standards

In both the transport and education sectors, the findings point to opportunities for service providers to engage with external stakeholders to develop a holistic customer experience and raise service standards.

By collaborating with external stakeholders, and incorporating customer feedback, organisations can develop innovative new service solutions that can raise the service bar for their industry.

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 the first quarter, Transportation & Logistics, Public, and Private Education in this 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 2014 will then be computed using the data collected over these four quarters.

For this second quarter of 2014, results for Public Education, Private Education, and Transport & Logistics sectors were collected and analysed.

The Public Education sector is made up of the ITE, Polytechnics, and Universities sub-sectors, while Private Education Institutions (PEIs) make up the Private Education sector.

This quarter also entailed two changes for the Private Education Institutions sub-sector. It was renamed from "Commercial Schools". The entire sub-sector's surveying methodology also changed, from door-to-door interviews at residences to an online survey platform. This surveying methodology is similar to the one deployed for the ITE sub-sector.

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

CSISG 2014 FIELDWORK PROCESS

Survey data for the Public Education, Private Education, and Transport & Logistics sectors was collected between April and June of 2014. 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 and PEI students about their institutions was collected via an online survey.

The Q2 fieldwork garnered 6,787 face-to-face interviews with locals at their residences and 2,366 with tourists and transit passengers at the airport. Online surveys for the ITE and PEIs garnered 3,849 responses.

In total, there were 13,002 unique responses covering 333 companies and entities in the Public Education, Private Education, and Transport & Logistics sectors; 31 entities have published scores.



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