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CUSTOMER SATISFACTION INDEX OF SINGAPORE 2015

Q2 SCORES

AIR TRANSPORT, LAND TRANSPORT,
LOGISTICS, PRIVATE EDUCATION, AND
PUBLIC EDUCATION

RESULTS OVERVIEW

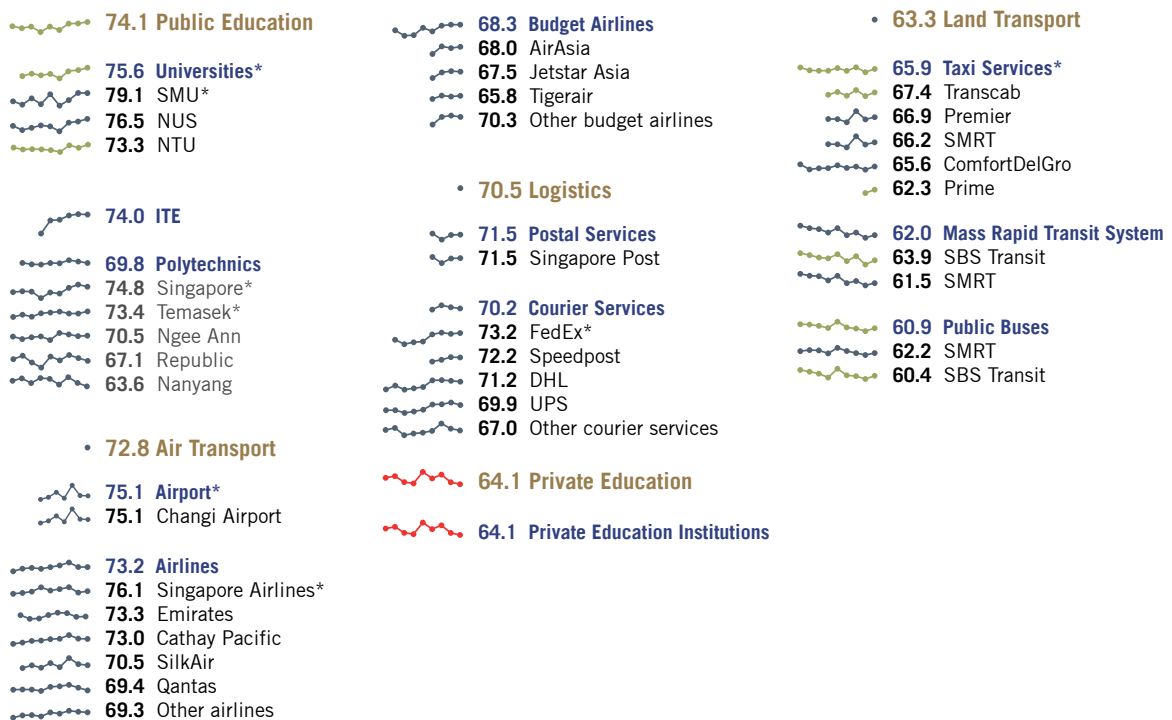


INSTITUTE OF
SERVICE EXCELLENCE
SINGAPORE MANAGEMENT UNIVERSITY





2015 Q2 SCORES
AIR TRANSPORT, LAND TRANSPORT, LOGISTICS,
PRIVATE EDUCATION, AND PUBLIC EDUCATION



This chart summarises the results of the CSISG 2015 satisfaction scores in the Air Transport, Land Transport, Logistics, Private Education, and Public Education sectors at the sector, sub-sector and company levels. 2015 is the first year of measure for the Air Transport, Land Transport, and Logistics sectors. Previously, they were measured as one sector (i.e., the Transport & Logistics sector).

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.

- statistically significant increase in customer satisfaction from 2014 to 2015
- statistically significant decrease in customer satisfaction from 2014 to 2015
- no significant year-on-year change in customer satisfaction score

CSISG 2015 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 ninth year of measurement.

SECOND QUARTER RESULTS HIGHLIGHTS

Starting with this year’s survey, Q2 introduced the Air Transport, Land Transport, and Logistics sectors. Previously, the CSISG grouped these three distinct sectors as the Transport & Logistics sector. By partitioning the Transport & Logistics sector into three, the CSISG intends to provide better resolution for industry insight and analysis.

Within the Air Transport sector, the three constituent sub-sectors performed similarly to the previous year. Changi Airport scored 75.1-points, a dip of 0.3-points (-0.4%), while Airlines scored 73.2-points (-0.1-points/-0.1%) and Budget Airlines scored 68.3-points (score unchanged from 2014).

The Land Transport sector fared better. The Taxi Services and Public Buses sub-sectors recorded significantly* improved scores from the previous year. Taxi Services scored 65.9-points, an annual improvement of 2.7-points (+4.3%) while Public Buses scored 60.9-points, an increase of 2.4-points (+4.1%). The MRT sub-sector also saw higher scores across both operators, scoring an overall 62.0-points, a 2.2-point (+3.7%) increase over 2014, although this movement was not significant. It is also important to note the survey period concluded prior to the 7 July 2015 disruption of the MRT network, which may have negatively impacted commuter satisfaction since.

There were small year-on-year movements for the two Logistics sub-sectors. Courier Services scored 70.2-points, a 1.0-point (-1.4%) fall, while the Postal Services sub-sector inched up 0.3-points (+0.4%) to 71.5-points. These movements were not significant.

The overall CSISG score for the Public Education sector improved significantly year-on-year, on the back of a record 75.6-points from the Universities sub-sector (+2.1-points/+2.8%). The Polytechnics sub-sector and ITE sub-sector dipped 1.3-points (-1.8%) and 0.3-points (-0.4%) to score 69.8-points and 74.0-points, respectively.

On the other hand, the Private Education sector, which comprises of Private Education Institutions (PEIs), recorded a significant 1.7-point (-2.5%) year-on-year decline to 64.1-points.

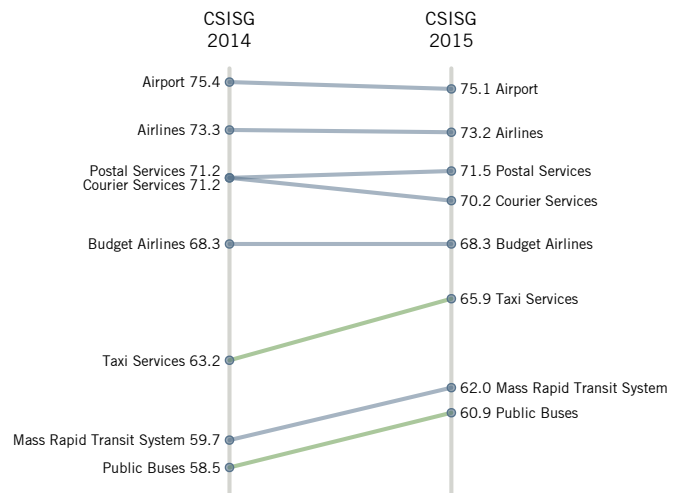


Figure 1a: Air Transport, Land Transport, and Logistics sub-sectors year-on-year performance

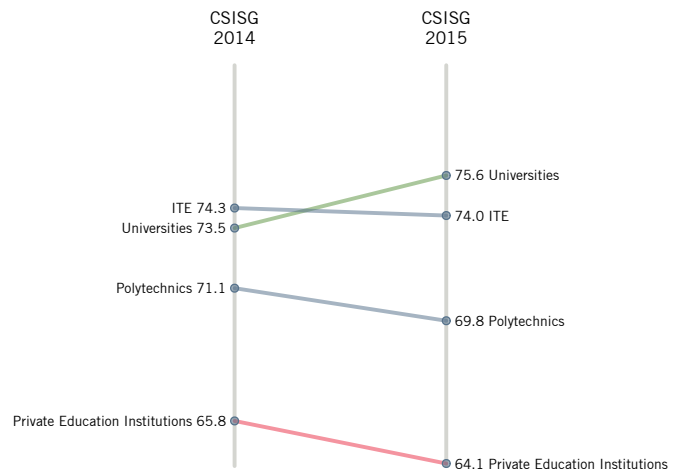


Figure 1b: Education sub-sectors year-on-year performance

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

SECOND QUARTER KEY FINDINGS

Commuter trust and satisfaction with government interventions linked to satisfaction with Public Transport

Analysis of the MRT and Public Buses sub-sectors revealed that commuters’ trust in the transport operator and commuters’ satisfaction with government intervention have a significant and positive association with the CSISG scores.

Specifically, the more commuters believe that the operator is working in their best interest, and the happier commuters are with the adequacy of government intervention in public transport, the more likely these same commuters will have high(er) satisfaction with the transport operator, as the matrix illustrates in Figure 2.

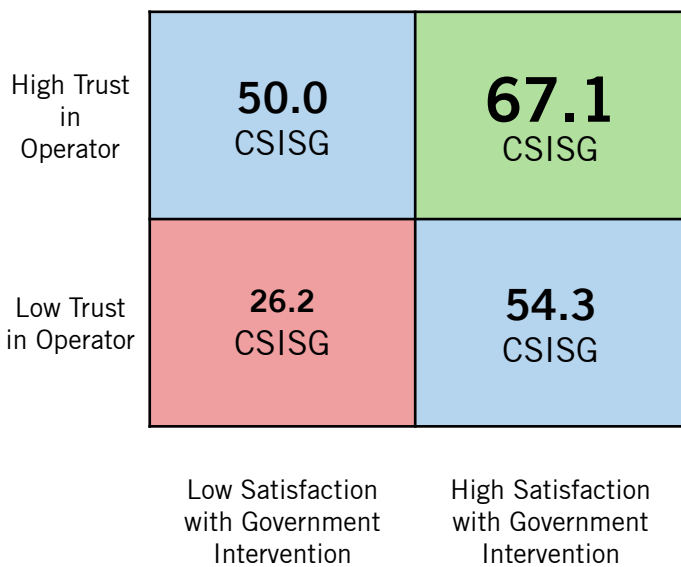


Figure 2: Public Transport commuters’ association of satisfaction with “Trust” and “Satisfaction with government interventions”.

This observation suggests that to efficiently drive satisfaction, operators will need a collaborative and integrated strategy to improve the commuting experience; trust and support has to be built with the commuting public while policies and procedures should be coordinated with government agencies.

Airline passengers perceptions of quality significantly influenced by pre-flight touchpoints

Perceptions of quality are also influenced by interactions with touchpoints prior to the delivery of the core service of the Airlines, i.e., transporting passengers to their destination.

Airlines’ ground staff and agents contribute significantly to perceived quality for both local and tourist passengers, and to a greater degree than the inflight crew. This is illustrated in Figure 3, where the magnitude of importance in driving quality is greater for Ground Staff than it is for Inflight Crew. Thus, in allocating resources at the margin to improve the customer experience, airlines may want to look towards these aspects.

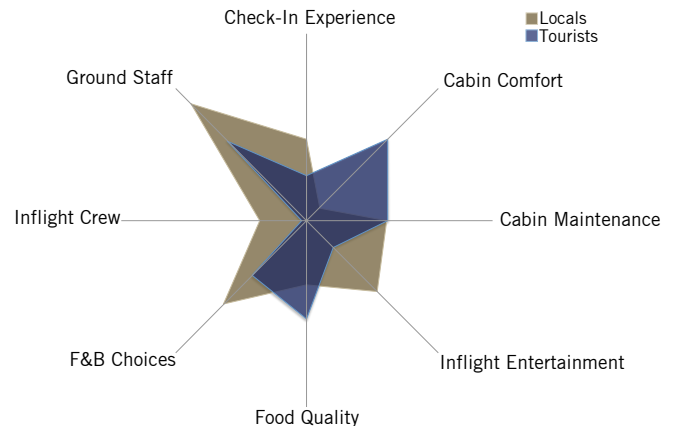


Figure 3: Importance of touchpoint attributes in driving Airline customers’ perceptions of quality

Courier services for overseas delivery fare better than local deliveries

As illustrated in Figure 4, the largest proportion of customers are those who use courier services for business deliveries locally (i.e., the dark gold segment). They are also the least satisfied customer segment, with a score of 68.3-points followed by personal local deliveries (i.e., the dark blue segment).

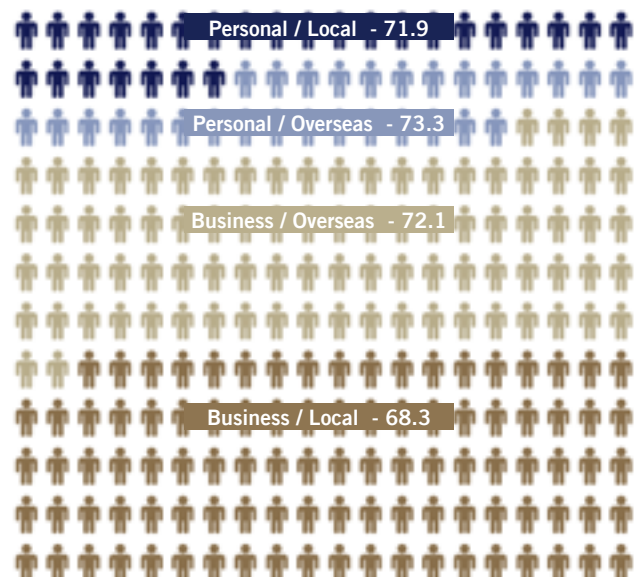


Figure 4: Average CSISG scores for different Courier services customer segments

In contrast, overseas deliveries by courier customers for business and personal purposes fared relatively better.

Thus, it may be prudent to review the delivery procedures at the customer segment level to identify any gaps in the service experience, keeping in mind potentially differing needs and requirements between customer types.

Vocational programmes contributed to lower Private Education score

Segmenting the PEI student respondents, it was revealed that the poorer year-on-year CSISG showing from PEIs can be attributed to vocational programmes, as opposed to non-vocational courses that actually made a small improvement in 2015. Segment analysis also indicated those enrolled in part-time programmes were relatively less satisfied than full-time students.

PEIs offering part-time or vocational programmes may use this observation to examine if it applies to their own student population and take necessary actions to improve the student experience where appropriate.

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, distinct industry sectors measured within each calendar quarter have their results released the following quarter. Companies in the Retail and Info-Communications sectors were measured in the first quarter, Air Transport, Land Transport, 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 2015 will then be computed using the data collected over these four quarters.

For this second quarter of 2015, the Air Transport sector comprises of the Airlines, Budget Airlines, and Changi Airport sub-sectors. The Land Transport sector comprises of the Public Buses, MRT, and Taxi Services sub-sector. The Logistics sector is made up of the Courier Services and Postal Services sub-sectors. 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.

Starting with this year's survey, Q2 introduced the Air Transport, Land Transport, and Logistics sectors. Previously, the CSISG grouped these three distinct sectors as the Transport & Logistics sector. By partitioning the Transport & Logistics sector into three, the CSISG intends to provide better resolution for industry insight and analysis. Prime Taxi was also introduced as a measured company in the Taxi Services sub-sector. With Prime Taxi's introduction, the CSISG now measures all registered taxi operators in Singapore.

CSISG 2015 FIELDWORK PROCESS

Survey data was collected between April and June of 2015. 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 6,439 face-to-face interviews with locals at their residences and 2,700 with tourists and transit passengers at the airport. Online surveys for the ITE and PEIs garnered 4,153 responses.

In total, there were 13,292 unique responses covering 314 companies and entities in the Air Transport, Land Transport, Logistics, Private Education, and Public Education sectors; 32 entities have published scores.

