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CUSTOMER SATISFACTION INDEX OF SINGAPORE 2017

Q2 RESULTS OVERVIEW AIR TRANSPORT AND LAND TRANSPORT

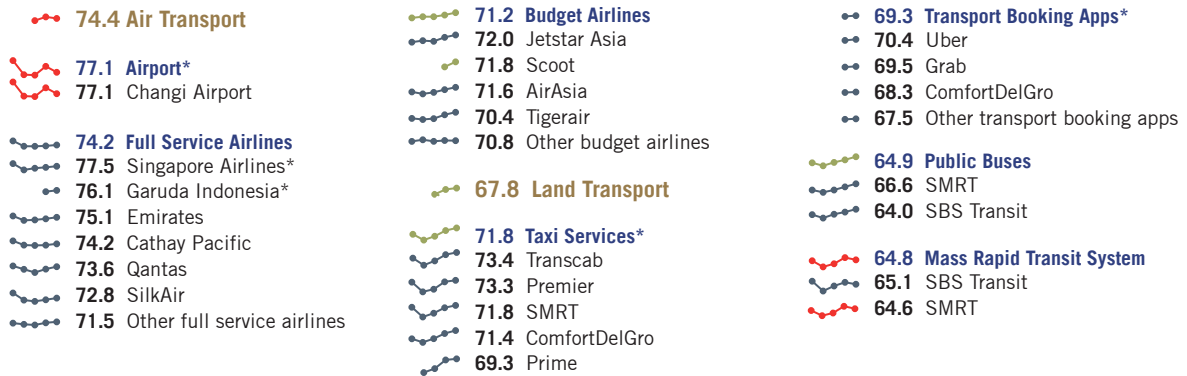


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2017 Q2 SCORES AIR TRANSPORT AND LAND TRANSPORT



This chart summarises the results of the CSiSG 2017 satisfaction scores in the Air Transport and Land Transport 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.

 statistically significant increase in customer satisfaction from 2016 to 2017

 statistically significant decrease in customer satisfaction from 2016 to 2017

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

CSISG 2017 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 eleventh year of measurement.

SECOND QUARTER RESULTS HIGHLIGHTS

The Land Transport sector scored 67.8 points (on a scale of 0 to 100), an increase of 0.99-points over the same period last year. Meanwhile, The Air Transport sector scored 74.4 points, a decrease of 1.10-points from the year before. These changes were considered statistically significant*.

The Land Transport sector is made up of the Taxi Services, Transport Booking Apps, Public Buses, and Mass Rapid Transit System (MRT) sub-sectors.

Of these, Taxi Services and Public Buses registered significant* year-on-year improvements. Taxi Services scored 71.8 points (+1.85-points year-on-year) and Public Buses scored 64.9 points (+2.23 points year-on-year).

The Transport Booking Apps sub-sector scored 69.3 points (+0.52-points year-on-year), maintaining its performance from the year before, as the change in scores was not statistically significant.

The MRT sub-sector saw a significant* fall in customer satisfaction levels from the year before, scoring 64.8 points (-1.60-points).

Within the Air Transport sector, three sub-sectors were measured: Airport, Full Service Airlines, and Budget Airlines.

Budget Airlines scored 71.2 points, a significant* improvement of 1.69-points year-on-year, while Full Service Airlines maintained its customer satisfaction performance at 74.2 points (+0.66-points year-on-year).

The Airport sub-sector saw a significant* decline in customer satisfaction levels with a score of 77.1 points, a decrease of 4.23-points year-on-year.

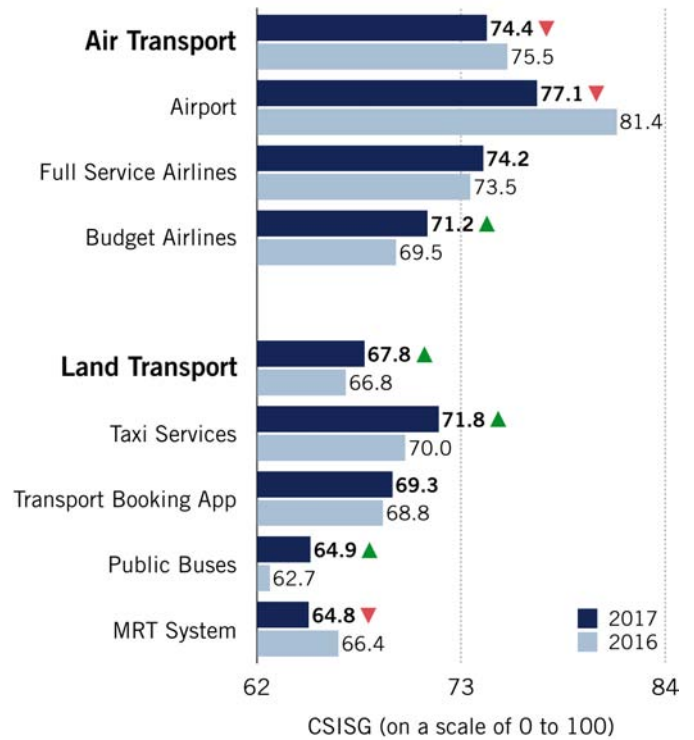


Figure 1: CSISG2017 Air Transport and Land Transport sector/sub-sector year-on-year performance. The green/red arrows denote a statistically significant increase/decrease in the CSISG score compared to the previous year.

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

SECOND QUARTER KEY FINDINGS

MRT commuters less satisfied year-on-year

The MRT sub-sector's CSISG performance declined significantly* from the previous year. This may be associated with the train faults and delays that arose following the train network's new signalling system tests on weekdays beginning 29 May 2017. The decline in satisfaction was observed in the fieldwork data collected after the start of the signalling test, as illustrated in Figure 2.



Figure 2: MRT Trains CSISG fell significantly* in July 2017.

Several of the MRT sub-sector's key drivers of quality improved

Despite the overall fall in satisfaction for the MRT sub-sector, several measured attributes improved year-on-year, i.e., *Sufficiency of train arrival information*, *Travel time to reach destination*, *Helpfulness of staff*, *Ease of moving within station*, and *Accuracy of information provided throughout the station*. Unsurprisingly, *Reliability of trains* performed worse, year-on-year. These observations are illustrated in Figure 3.

Notably, these attributes have a significant impact on commuters' perceptions of quality.

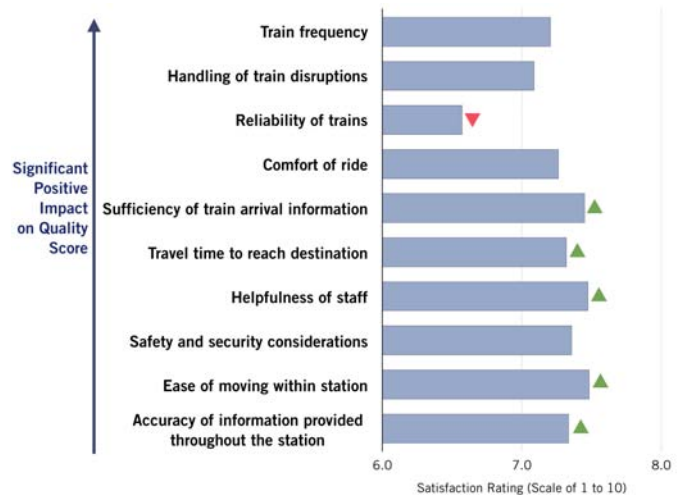


Figure 3: MRT sub-sector attributes that significantly impact perceived quality and were comparable year-on-year. The green/red arrows denote a statistically significant increase/decrease in Rating compared to the previous year.

Among users of Transport Booking Apps, Private Hire Car riders were more satisfied than Taxi riders

Although satisfaction with the Transport Booking Apps sub-sector did not shift substantially year-on-year, the CSISG scores varied significantly* when comparing satisfaction by service type, i.e., whether the app booking was for a private hire car or traditional taxi cab.

As illustrated in Figure 4, Transport Booking App users that rode with a Private Hire Car were more satisfied than those that rode on a Taxi. Also, Private Hire Car riders were observed to be more satisfied year-on-year.

This was in part driven by improved year-on-year attribute ratings to *Comfort of Ride*, *Cleanliness of Vehicle*, *Safety of Ride*, *Accuracy of Wait Time Estimation*, and *Driver's Road Knowledge*; these attributes have a significant* impact on Perceived Quality.

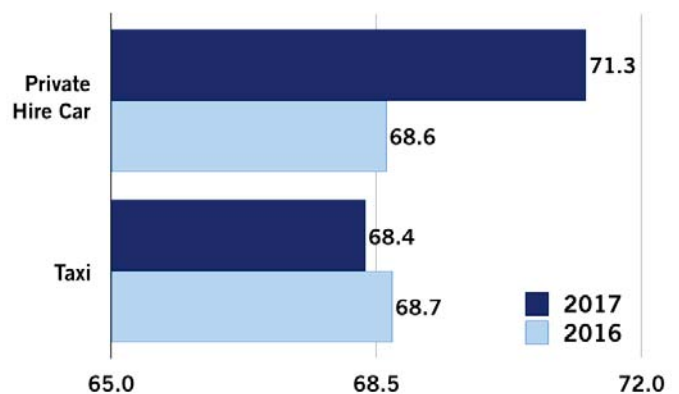


Figure 4: Transport Booking App CSISG scores, when segmented by users of Private Hire Cars and Taxis.

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

Budget Airlines' CSISG performance improved on back of local passengers higher satisfaction year-on-year

The Budget Airlines sub-sector's CSISG score improved from the previous year. Driving this improvement was local passengers' satisfaction ratings.

Nonetheless, it was observed that tourist passengers' satisfaction levels (73.7 points) continued to substantially outperform local passengers' (67.5 points).

Further analysis of these two segments of passengers revealed different attributes drive their perceptions of quality: Customer Service-based attributes were more important to tourist passengers, while Flight Experience-based attributes were key differentiators for local passengers. This is illustrated in Figure 5. A similar finding was also observed in the Full Service Airlines sub-sector.

Budget Airlines	
Locals	Tourists
Comfort of the journey	Efficiency with the overall check-in process
Ease of getting information	Professionalism of the ground staff
Brand image complements your lifestyle	Airline staff has your best interest at heart
Professionalism of the ground staff	The airline is able to accommodate to my needs
Cleanliness of the toilet	The cabin crew is friendly and attentive in meeting my needs

Legend: Customer Service Flight Experience

Figure 5: Budget Airlines' attributes with the highest impact on Perceived Quality, segmented by local and tourist passengers.

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.

Company scores are weighted based on a separate incidence study. This incidence study helps determine each company's sample profile and the local-tourist weights. Sub-sector scores are derived as a weighted average of company scores, in proportion to the local and tourist incidence interactions with the constituent companies. Sector scores are derived by 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 and Land Transport 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 2017 will then be computed using the data collected over these four quarters.

For this second quarter of 2017, the Air Transport sector comprised of the Full Service Airlines, Budget Airlines, and Airport sub-sectors. The Land Transport sector comprised of the Public Buses, MRT/LRT, Taxi Services, and Transport Booking Apps sub-sectors.

CSISG 2017 FIELDWORK PROCESS

Survey data was collected between April and July of 2017. Responses were collected via face-to-face interviews with Singapore residents at their homes and departing tourists and transit passengers at Changi Airport.

The Q2 fieldwork garnered 4,300 face-to-face interviews with locals and 2,450 with tourists and transit passengers at the airport.

In total, there were 6,750 unique responses covering 68 companies and entities in the Air Transport and Land Transport sectors; 26 entities have published scores.

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



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