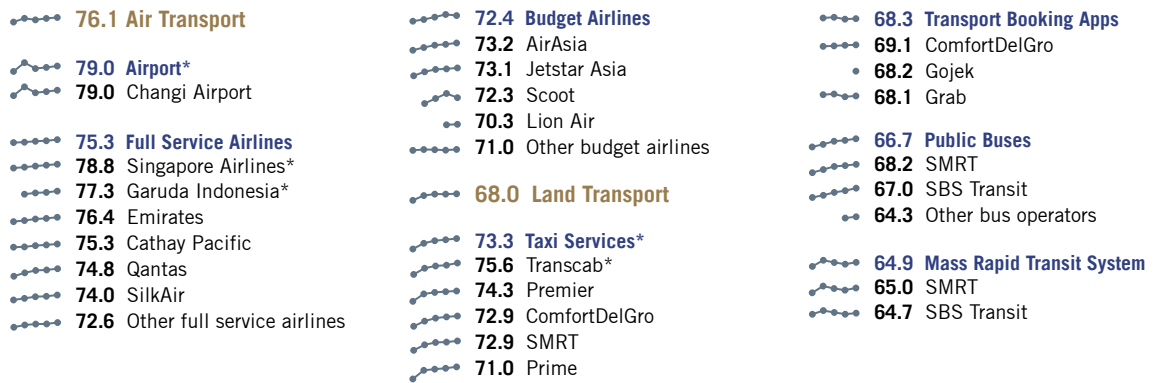


CUSTOMER SATISFACTION INDEX OF SINGAPORE 2019

Q2 RESULTS OVERVIEW AIR TRANSPORT AND LAND TRANSPORT



2019 Q2 SCORES AIR TRANSPORT AND LAND TRANSPORT



This chart summarises the results of the CSiSG 2019 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 2018 to 2019

 statistically significant decrease in customer satisfaction from 2018 to 2019

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

CSISG 2019 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 13th year of measurement.

SECOND QUARTER RESULTS HIGHLIGHTS

The Air Transport sector scored 76.1 points on a 0 to 100 scale. This was a 0.9% improvement over last year. The Land Transport sector scored 68.0 points, a 0.3% improvement over the previous year. However, both improvements were not considered to be statistically significant*.

The Land Transport sector is made up of four sub-sectors, namely Mass Rapid Transit (MRT) System, Public Buses, Taxi Services, and Transport Booking Apps: All four recorded marginal improvements year-on-year, although the increases were not significant.

Leading the improvements were the MRT System and Public Buses sub-sectors. The MRT System sub-sector scored 64.9 points, a year-on-year increase of 2.0% while the Public Buses sub-sector scored 66.7 points, a 1.8% increase. Notably, this was the Public Buses sub-sector's best performance since CSISG tracking began in 2007.

The Taxi Services and Transport Booking Apps sub-sectors also recorded higher scores year-on-year, scoring 73.3 points and 68.3 points, improvements of 1.2% and 0.5%, respectively.

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

The Airport and Full Service Airlines sub-sectors saw an uptick in their customer satisfaction score: Full Service Airlines recorded 75.3 points while the Airport, essentially Changi Airport, recorded 79.0 points, increases of 1.1% and 1.3% respectively, compared to the previous year. On the other hand, the Budget Airlines sub-sector dipped by 1.0% year-on-year to score 72.4 points. The changes were not significant.

These movements are illustrated in Figure 1.

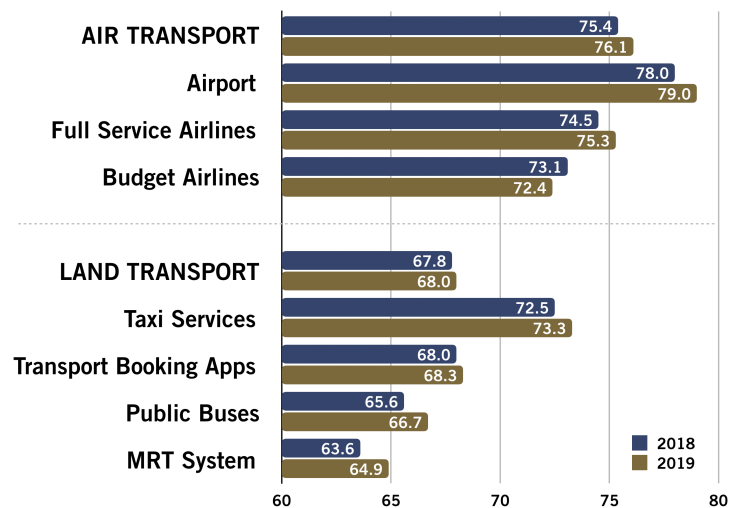


Figure 1: Air Transport and Land Transport sector/sub-sector CSISG performance for 2018 and 2019. Sub-sectors were listed by descending order of their 2019 CSISG performance.

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

SECOND QUARTER KEY FINDINGS

Service Staff Were Key Drivers of Perceived Quality for Airlines

Analysis showed that airline staff — both on the ground and in the air — stood out as common drivers of quality for both Full Service and Budget Airlines. For short-haul flights, analysis revealed that friendly cabin crew and staff empathy were among the top five quality drivers. For medium-haul flights, the data suggested staff empathy and professionalism were the key drivers. Analysis was not conducted for budget long-haul flights due to a lack of respondents.

As shown in Figure 2, depending on whether the passenger was on a budget or full service carrier, and how long the flight was, different aspects of the flying experience mattered. By creating differentiated experiences based on passenger types, airlines may better serve their customers.

Top 5 Attributes with Impact On Perceived Quality			
Short-Haul Flights (Less than 3 Hours)		Medium-Haul Flights (Between 3 & 6 Hours)	
Full Service Airlines	Budget Airlines	Full Service Airlines	Budget Airlines
Cabin crew friendly & attentive in meeting my needs	Airline able to accommodate my needs	Airline able to accommodate my needs	Brand image complements my lifestyle
Airline staff has my best interest at heart	Airline staff has my best interest at heart	Airline staff has my best interest at heart	Professionalism of cabin crew
Range of in-flight entertainment options	Brand image complements my lifestyle	Condition of the cabin	Professionalism of ground staff
Ease of getting information	Comfort of the journey	Airline has a good reputation	Ease of getting information
Quality of food & beverage	Cabin crew friendly & attentive in meeting my needs	Brand image complements my lifestyle	Efficiency with check-in process

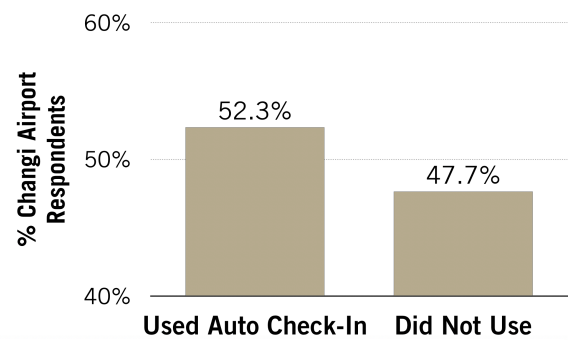
Figure 2: Top five attributes with the biggest impact on Perceived Quality for different airline segments, in descending order of impact.

Automated Check-In Systems At Changi Airport Have No Impact on Overall Satisfaction

With the roll-out of Automated Check-in Machines across all four of Singapore Changi Airport's terminals, a majority of passengers have had experience with the new machines.

Segmenting passengers by those who had used the machines against those who had not, the data, as illustrated in Figure 3, indicated that levels of customer satisfaction and perceived service quality were practically the same: Passengers who used the machines had an average satisfaction score of 79.0 points (on a 0 to 100 scale) while those who did not averaged 78.8 points. Similarly, Perceived Service Quality averaged 80.8 points for those who used Automated Check-in, compared to 81.2 points for those who did not.

It would appear that consumers seem to be willing to accept these technologies, with no observable impact to customer satisfaction levels. Companies deploying such self-serve systems should take advantage of these productivity gains and use the opportunity to up-skill their manpower so that they can provide higher value-added services.



Customer Satisfaction	79.0	78.8
Perceived Service Quality	80.8	81.2

Figure 3: Average scores for Changi Airport respondents, segmented by those who used and did not use the Automated Check-in systems at the airport.

Local Train Commuters' Quality-Expectations Gap Narrowing

The MRT System sub-sector's higher scores were driven by significant improvements in perceptions of quality.

Notably, the difference between local MRT commuters' perceived quality and their expectations has been narrowing over the past three years: In 2019, local MRT commuters had an average Perceived Quality score of 65.3 points compared to an average Customer Expectations score of 68.0 points, a negative gap of 2.7 points; this gap was 4.0 points last year and 5.0 points the year before. This is illustrated in Figure 4.

While MRT commuters' levels of Perceived Quality still fell short of the quality they were expecting to receive, the observed narrowing of the gap between these two metrics suggests that the commuting public is gradually recognising the tangible improvements to the MRT network.

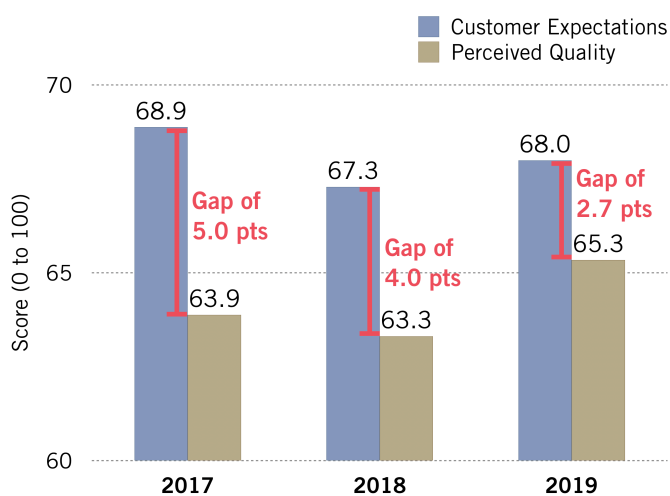


Figure 4: Gap between Quality and Expectations, for local MRT commuters, 2017-2019.

Local Bus Commuters More Satisfied Across All Measured Quality Attributes

On the other hand, the Public Buses sub-sector, which benefited more quickly from the government's Bus Service Enhancement Programme, saw local commuters' level of Perceived Quality steadily rise over the past three years.

This year, the improvement in the Public Buses sub-sector's Perceived Quality score was supported by substantially higher locals' satisfaction ratings across all measured public bus quality attributes, such as "Safety of the Ride", "Comfort of the Ride, and "Bus Frequency". The five most important attributes to local bus commuters' perceptions of quality, and their respective performance, is shown in Figure 5.

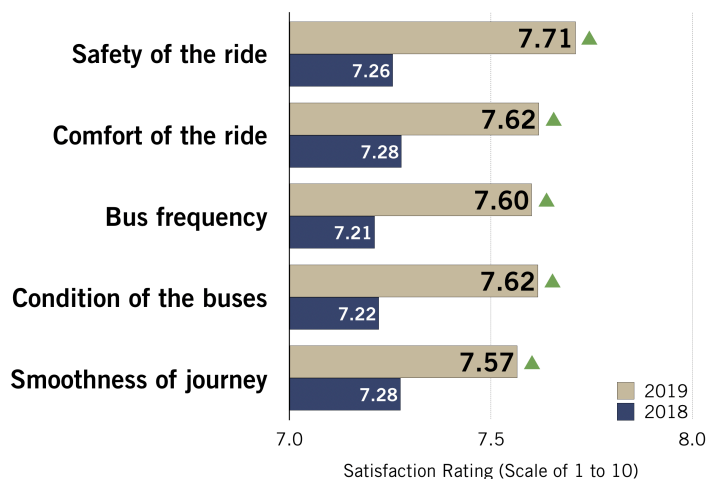


Figure 5: Top five attributes with the biggest impact on Perceived Quality for local bus commuters, in descending order of impact, and their respective satisfaction ratings. The GREEN arrowhead indicates a statistically significant improvement over the previous year.

Local Riders' Taxis Attribute Ratings Mostly Outperformed Private Hire Cars

Observations of local respondents highlighted taxis had outperformed private hire cars in eight of the nine satisfaction attributes they shared in common. In particular, the "Helpfulness of Driver" and "Drivers' Road Knowledge" attributes were significantly better for taxis, compared to private hire cars. This is illustrated in Figure 6.

Both incumbent operators and new entrants alike should look to differentiators to enhance the rider experience. This can be in the form of improving existing elements, such as service training for drivers, or introducing innovations to the experience, such as app-based payment options for taxi street hails.

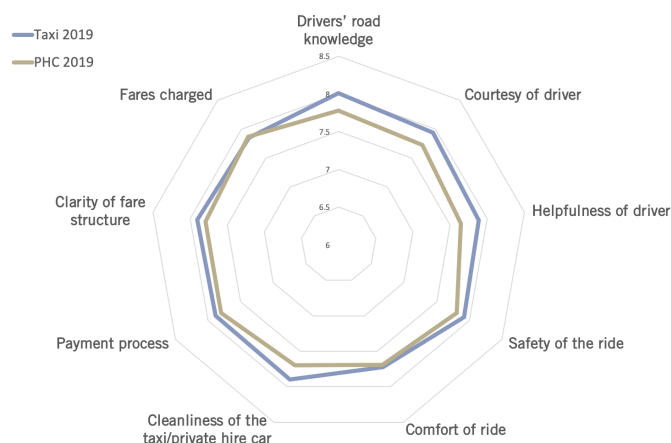


Figure 6: Comparison of attribute ratings between local Taxi and Private Hire Car respondents.

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 2019 will then be computed using the data collected over these four quarters.

For this second quarter of 2019, 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. This year, the Gojek app was added to the Index as an entity within the Transport Booking Apps sub-sector.

CSISG 2019 FIELDWORK PROCESS

Survey data was collected between April and July of 2019. 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 3,690 face-to-face interviews with locals and 2,710 with tourists and transit passengers at the airport.

In total, there were 6,400 unique responses covering 59 companies and entities in the Air Transport and Land Transport sectors; 26 entities have published scores.

CONTACT US

For more details on the CSISG, the ISE Corporate Membership programme, and customised research, please reach us at

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