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Customer Satisfaction Index of Singapore 2020: Q2 Results

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SMU

SINGAPORE MANAGEMENT
UNIVERSITY

INSTITUTE OF
SERVICE
EXCELLENCE

CUSTOMER SATISFACTION INDEX OF SINGAPORE 2020

Q2 RESULTS OVERVIEW

AIR TRANSPORT AND LAND TRANSPORT



LEE KONG CHIAN
SCHOOL OF
BUSINESS



2020 Q2 SCORES AIR TRANSPORT AND LAND TRANSPORT

78.4 Air Transport

81.7 Airport*

81.7 Changi Airport

77.0 Full Service Airlines

81.5 Singapore Airlines*

80.7 Emirates*

75.7 Other full service airlines

73.9 Budget Airlines

75.1 AirAsia

74.9 Lion Air

73.4 Jetstar Asia

72.3 Scoot

75.4 Other budget airlines

74.5 Land Transport

75.9 Point-to-Point Transport*

80.0 SMRT*

75.7 Gojek

75.0 ComfortDelGro

74.5 Grab

77.4 Other Taxi Companies

74.4 Public Buses

75.3 SBS Transit

72.7 SMRT

74.3 Other bus operators

73.4 Mass Rapid Transit System

75.3 SBS Transit*

72.5 SMRT

This chart summarises the results of the CSiSG 2020 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 at 90% confidence.

* Sub-sectors indicated with an asterisk(*) are sub-sectors that have performed significantly above their sector average at 90% confidence.

Entities shown in this scorecard have samples of $N \geq 100$.

CSISG 2020 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. 2020 marks the 14th year of measurement for the CSISG national study.

SECOND QUARTER RESULTS HIGHLIGHTS

The Air Transport sector, comprising of the Airport, Budget Airlines, and Full-Service Airlines sub-sectors, scored 78.4 points (on a 0 to 100 scale); the three constituent sub-sectors scored 81.7 points, 73.9 points, and 77.0 points, respectively.

However, these results were not comparable with the previous year's scores. This is due to two reasons: Firstly, only locals who had travelled overseas by air in the past 6 months were interviewed — most of them would have flown earlier in the year and prior to the start of the COVID-19 travel restrictions — with no valid tourist respondents. Secondly, the study's survey methodologies switched from face-to-face to online interviews, similarly prompted by the COVID-19 pandemic restrictions.

The Land Transport sector scored 74.5 points and is made up of three sub-sectors: Mass Rapid Transit (MRT) System, Public Buses, and Point-to-Point Transport, the latter being a new category introduced this year. It replaces the Taxi Services and Transport Booking Apps sub-sectors from previous years.

Similar to the Air Transport sector, the Land Transport sector's survey methodologies also switched from face-to-face to online interviews, with no tourist respondents surveyed. However, unlike the former, year-on-year comparisons were possible for the MRT System and Public Buses sub-sectors because a similar online survey was conducted in 2019 as part of a parallel pilot study.

The MRT System and Public Buses sub-sectors registered significant* increases in their commuter satisfaction scores: The MRT System sub-sector rose by 11.0% year-on-year to score 73.4 points while the Public Buses sub-sector saw an 8.1% rise to score 74.4 points. The Point-to-Point Transport sub-sector scored 75.9 points as an inaugural baseline.

It should be noted that the record performances for the MRT System and Public Buses sub-sectors may be influenced by the survey fieldwork period coinciding with Singapore's COVID-19 Circuit Breaker measures, where there were much fewer people taking both trains and buses, as well as the Phase One and Two reopening of the economy, where people gradually resumed commuting.

These CSISG Q2 sector and sub-sector scores are summarised in Figure 1.

	CSISG 2020
Air Transport	78.4
Changi Airport	81.7
Full Service Airlines	77.0
Budget Airlines	73.9
Land Transport	74.5
Mass Rapid Transit System	73.4 ▲
Public Buses	74.4 ▲
Point-to-Point Transport	75.9

Figure 1: CSISG 2020 Q2 Sector/Sub-sector performance. The ▲ indicates a significant* increase from a 2019 online pilot study. Year-on-year changes from the other sectors and sub-sectors were not comparable due to the exclusion of tourists and change in survey methodologies.

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

SECOND QUARTER KEY FINDINGS

Public Perception of COVID-19 Measures

The CSISG Q2 study had examined survey respondents' perceptions of the air and land transport operators' efforts to keep customers safe from COVID-19 infections. Respondents were asked if their respective transport operator was doing enough to keep them safe: Changi Airport had the highest rating at 8.08 points on a 1 to 10 scale, while train operators got the lowest rating, at 7.06 points. Each sub-sector's rating is illustrated in Figure 2.

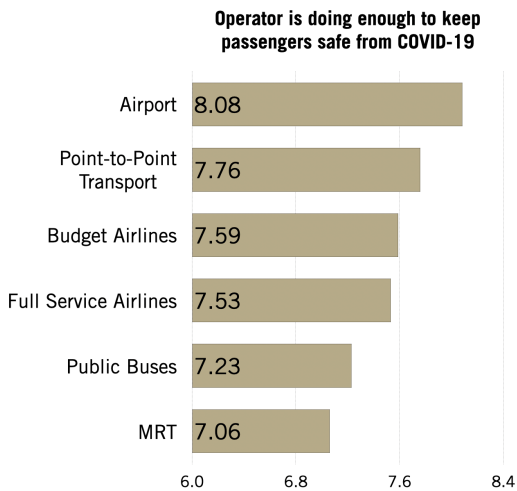


Figure 2: Respondents' perceptions of the Operator doing enough to keep them safe amid the COVID-19 pandemic, on a 1 to 10 scale.

Breaking down the ratings by fieldwork period, it was observed that for the public transport operators, the increase in commuter travel volumes and easing of some safe-distancing restrictions post-Circuit Breaker had a negative impact on commuters' perceptions of operators' COVID-19 safety efforts, i.e., perceptions of safety declined as COVID-19 restrictions were loosened. This was observed alongside negative impacts on commuters' trust in the Operator.

Analysis of verbatim comments suggests commuters were in favour of increased train and bus frequencies to allow for more safe distancing.

As there is a practical limit to how much further headway can be reduced and frequencies increased, Public Transport Operators should continue to reassure commuters and demonstrate their commitment to passenger safety amid the uncertainty.

COVID-19 Restrictions Key Driver of Improvement in Trains and Buses

The COVID-19 Circuit Breaker period saw a reduced number of trips taken on the public transport network and provided the study with macro-level observations of commuter perceptions and satisfaction levels during and after the Circuit Breaker.

The study's fieldwork period coincided with the Circuit Breaker period, where there were much fewer people taking both trains and buses, as well as the Phase One and Two reopening of the economy, where people gradually resumed commuting.

The observations in commuter satisfaction between the periods was palpable. For instance, satisfaction with the MRT was 78.5 points at the start of the study's fieldwork, which was during the Circuit Breaker period. Towards the end of fieldwork, and several weeks into the Phase Two reopening, satisfaction levels fell as low as 70.2 points. This is illustrated in Figure 3.

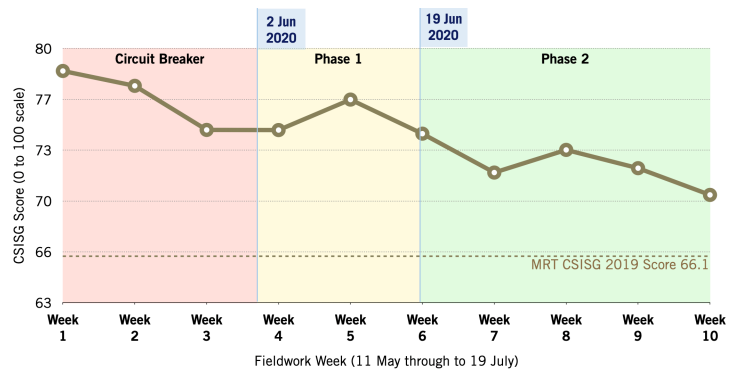


Figure 3: The decline in the MRT System sub-sectors' weekly CSISG performance during the fieldwork period. A similar trend was observed with public buses.

Indeed, all 16 MRT System specific attributes saw statistically significant improvements over 2019 during the Circuit Breaker period, only to swing back downwards post-Circuit Breaker; similar swings in attribute ratings were observed in the Public Buses sub-sector. These attributes measured commuters' perceptions in areas such as frequency, cleanliness, and safety.

Commuters Seemingly Enjoying Taxis More Than Private Hire Cars

Segmenting the Point-to-Point Transport sub-sector's respondents into two groups — those that rode in Taxis and those that got a Private Hire Car (PHC) — observation of the ride attributes' performance suggested that passengers that completed their trip in a taxi had a more enjoyable ride.

Of the eight ride-related attributes measured in the sub-sector, Taxis performed significantly better in three of them: *Safety of ride*, *Comfort of ride*, and *Interaction with driver*; all eight satisfaction attributes also recorded higher ratings for Taxi rides compared to PHC rides. This is illustrated in Figure 4.

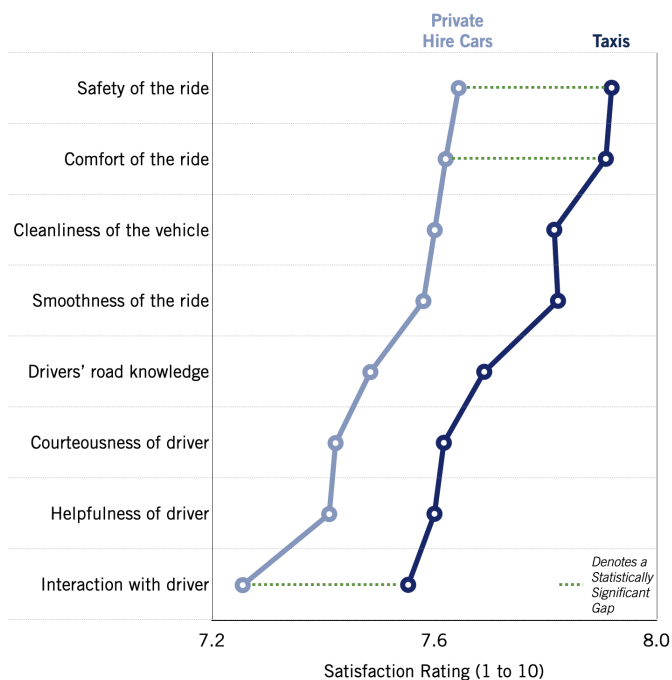


Figure 4: Taxis rated higher than Private Hires Cars for 3 Ride-related attributes. Attributes arranged in descending order of performance for Private Hire Cars.

To improve the ride experience, impact analysis suggests Taxi and PHC operators should focus on *Safety of the ride* and *Helpfulness of driver*; these two ride-related attributes have the largest impact on passengers' perceptions of quality.

Airlines' Brand-related Attribute Key Drivers of Loyalty

Analysis of the Full Service Airlines and Budget Airlines sub-sectors revealed that brand-related attributes were among the key drivers of customer loyalty.

For instance, the brand-related attribute 'Brand image complements lifestyle' was a more important lever of loyalty than other more intuitive flight experience related attributes, such as having a friendly and attentive cabin crew (for Full Service Airlines) or a comfortable journey (for Budget Airlines). Figure 5 illustrates the significant impact these attributes have in driving Customer Loyalty.



Figure 5: Brand-related attributes were a key driver of Customer Loyalty for both the Full Service and Budget Airlines sub-sectors. Attributes are listed in descending order of impact.

While passenger volumes were at record lows due to the COVID-19 pandemic, this impact analysis may provide some insights into the types of strategies to employ when air travel demand picks up. By focusing on key drivers of loyalty, be it the comfort of journey or further developing and refining their brand image, airlines that can most effectively address them in their value propositions will be best positioned for the future.

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; this quarter's sampling did not include any tourist respondents due to the COVID-19 travel restrictions. 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 in the fourth quarter. The national score for 2020 will then be computed using the data collected over these four quarters.

For this second quarter of 2020, the Air Transport sector comprised of the Full Service Airlines, Budget Airlines, and Airport sub-sectors. The Land Transport sector comprised of the MRT System, Public Buses, and Point-to-Point Transport sub-sectors; the latter shall replace the Taxi Services and Transport Booking Apps sub-sectors from previous years.

CSISG 2020 FIELDWORK PROCESS

Survey data was collected between April and July of 2020. Responses were collected via online survey panel interviews with Singapore residents that had recent consumption experiences with the respective entity they were being surveyed about.

The Q2 fieldwork garnered 7,448 unique responses in total, covering 59 companies and entities in the Air Transport and Land Transport sectors; 19 entities have published scores.

CONTACT US

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

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