ISES INDUSTRY FORUM

CSISG 2015 Q2 RESULTS

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

- CSISG 2015 Q2 Quick Facts & Sampling
- Results Overview
- Results and Highlights of Air Transport, Land Transport, and Logistics Sector
- Results and Highlights of Education Sector
The CSISG Score

1. Overall Satisfaction
2. Ability to Meet Expectations
3. Similarity to Ideal
Overview of the CSISG Main Fieldwork

Singapore citizens and PRs are interviewed at their homes. Homes are selected from a random listing of 40,000 household addresses that match housing profile of Singapore resident population.

Departing tourists are interviewed at Changi Airport. All respondents answering for the airport were interviewed at the airport.

Each respondent answers up to 17 CSISG questions and 24 touchpoint questions about a company they had recent experiences with.

Typically 250 respondents per company would have answered the CSISG questionnaire.
CSISG 2015 Q2 Quick Facts

Sectors Covered

- Air Transport,
- Land Transport,
- Logistics,
- Private Education,
- Public Education

Survey Period

- April–June 2015

Total Questionnaires Completed

- 13,292

Face-to-face at residents’ homes

- 6,439

Face-to-face at Changi Airport

- 2,700

Online

- 4,153

Distinct entities measured

- 314

Entities with published scores

- 32
CSISG 2015 QUARTER 2
RESULTS OVERVIEW
CSISG 2015 Q2 Results Overview

- **74.1 Public Education**
  - 74.1 Public Education
  - 75.6 Universities*
    - 79.1 SMU*
    - 76.5 NUS
    - 73.3 NTU
  - 74.0 ITE
    - 69.8 Polytechnics
      - 74.4 Singapore*
      - 73.4 Temasek*
      - 70.5 Ngee Ann
      - 67.1 Republic
      - 63.6 Nanyang
  - 72.8 Air Transport
    - 73.2 Airlines
      - 76.1 Singapore Airlines*
      - 73.3 Emirates
      - 73.0 Cathay Pacific
      - 70.5 SilkAir
      - 69.4 Qantas
      - 69.3 Other airlines
    - 68.3 Budget Airlines
      - 68.0 AirAsia
      - 67.5 Jetstar Asia
      - 65.8 Tigerair
      - 70.3 Other budget airlines
  - 68.1 Private Education
    - 64.1 Private Education Institutions
  - 63.3 Land Transport
    - 65.9 Taxi Services*
      - 67.4 Transcab*
      - 66.9 Premier
      - 66.2 SMRT
      - 65.6 ComfortDelGro*
      - 62.3 Prime
    - 62.0 Mass Rapid Transit System
      - 63.9 SBS Transit
      - 61.5 SMRT
    - 60.9 Public Buses
      - 62.2 SMRT
      - 60.4 SBS Transit
CSISG Air Transport Sector Trends

Changi Airport

Budget Airlines

Airlines

Air Transport Sector

2007 2015
CSISG Land Transport Sector Trends

- **Taxi Services**
  - 90
  - 73
  - 55
  - 2007
  - 2015

- **MRT / LRT**
  - Land Transport Sector

- **Public Buses**
  - Land Transport Sector
CSISG Logistics Sector Trends

Postal Services

Courier Services

Logistics Sector

2007  2015
CSISG Private & Public Education Sector Trends

Private Education Institutions

Universities

ITE

Polytechnics

Private Education Sector

Public Education Sector
CSISG 2015 Q2 RESULTS
AIR TRANSPORT, LAND TRANSPORT, AND LOGISTICS
CSISG 2015 Q2 Air Transport, Land Transport, and Logistics

Year-on-Year Changes

<table>
<thead>
<tr>
<th>Service</th>
<th>CSISG 2014</th>
<th>CSISG 2015</th>
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<tbody>
<tr>
<td>Airport</td>
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<tr>
<td>Airlines</td>
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<td>73.2</td>
</tr>
<tr>
<td>Postal Services</td>
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<td>71.5</td>
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<td>Courier Services</td>
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<td>70.2</td>
</tr>
<tr>
<td>Budget Airlines</td>
<td>68.3</td>
<td>68.3</td>
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<tr>
<td>Taxi Services</td>
<td>63.2</td>
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<tr>
<td>Mass Rapid Transit System</td>
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<tr>
<td>Public Buses</td>
<td>58.5</td>
<td>60.9</td>
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13
CSISG 2015 Q2 Air Transport

Budget Airlines

<table>
<thead>
<tr>
<th>Airline</th>
<th>CSISG 2014</th>
<th>CSISG 2015</th>
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<tbody>
<tr>
<td>Tiger Airways</td>
<td>65.2</td>
<td>65.8</td>
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<tr>
<td>Jetstar Asia</td>
<td>68.0</td>
<td>67.5</td>
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<tr>
<td>AirAsia</td>
<td>66.9</td>
<td>68.0</td>
</tr>
<tr>
<td>Other budget airlines</td>
<td>71.5</td>
<td>70.3</td>
</tr>
</tbody>
</table>

Other budget airlines 71.5

70.3 Other budget airlines

68.0 AirAsia

67.5 Jetstar Asia

66.9 AirAsia
CSISG 2015 Q2 Logistics

Courier Services

<table>
<thead>
<tr>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>FedEx 72.6</td>
<td>73.2 FedEx</td>
</tr>
<tr>
<td>Speedpost 72.4</td>
<td>72.2 Speedpost</td>
</tr>
<tr>
<td>UPS 72.0</td>
<td>71.2 DHL</td>
</tr>
<tr>
<td>DHL 71.9</td>
<td>69.9 UPS</td>
</tr>
<tr>
<td>Other courier services 68.5</td>
<td>67.0 Other courier services</td>
</tr>
</tbody>
</table>
CSISG 2015 Q2 Land Transport

Taxi Services

<table>
<thead>
<tr>
<th>Company</th>
<th>CSISG 2014</th>
<th>CSISG 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>ComfortDelGro</td>
<td>62.9</td>
<td>65.6</td>
</tr>
<tr>
<td>SMRT</td>
<td>63.5</td>
<td>66.2</td>
</tr>
<tr>
<td>Transcab</td>
<td>64.3</td>
<td>67.4</td>
</tr>
<tr>
<td>Premier</td>
<td>65.1</td>
<td>66.9</td>
</tr>
<tr>
<td>Prime</td>
<td>59.5</td>
<td>62.3</td>
</tr>
<tr>
<td>ComfortDelGro</td>
<td></td>
<td>65.6</td>
</tr>
<tr>
<td>SMRT</td>
<td></td>
<td>66.2</td>
</tr>
<tr>
<td>Transcab</td>
<td></td>
<td>67.4</td>
</tr>
<tr>
<td>Premier</td>
<td></td>
<td>66.9</td>
</tr>
<tr>
<td>Prime</td>
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<td>62.3</td>
</tr>
</tbody>
</table>
CSISG 2015 Q2 Land Transport

Mass Rapid Transit System

<table>
<thead>
<tr>
<th>CSISG 2014</th>
<th>CSISG 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>SBS Trains 60.3</td>
<td>63.9 SBS Trains</td>
</tr>
<tr>
<td>SMRT Trains 59.6</td>
<td>61.5 SMRT Trains</td>
</tr>
</tbody>
</table>
CSISG 2015 Q2 Land Transport

Public Buses

SMRT 60.5
SBS Transit 57.7

SMRT 60.4
SBS Transit 62.2

CSISG 2014
CSISG 2015
## CSISG 2015 Q2 Air and Land Transport

### Year-on-Year Changes in Local Respondents’ Satisfaction

<table>
<thead>
<tr>
<th>Locals’ year-on-year Air and Land Transport Sectors performance</th>
<th>2015</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>MRT / LRT</td>
<td>3.0</td>
<td>-5.0</td>
</tr>
<tr>
<td>Public Buses</td>
<td>2.3</td>
<td>-2.5</td>
</tr>
<tr>
<td>Taxi Services</td>
<td>1.9</td>
<td>-1.1</td>
</tr>
<tr>
<td>Airlines</td>
<td>-1.1</td>
<td>-2.4</td>
</tr>
<tr>
<td>Budget Airlines</td>
<td>-2.4</td>
<td>-4.1</td>
</tr>
<tr>
<td>Changi Airport</td>
<td>-4.1</td>
<td>-5.0</td>
</tr>
</tbody>
</table>

**Average Local Satisfaction**

- **2015**: 68.8
- **2014**: 69.9
CSISG 2015 Q2 Air and Land Transport

Year-on-Year Changes in
Tourist Respondents’ Satisfaction

<table>
<thead>
<tr>
<th>Tourists’ year-on-year Air and Land Transport Sectors performance</th>
<th>MRT / LRT</th>
<th>Public Buses</th>
<th>Taxi Services</th>
<th>Airlines</th>
<th>Budget Airlines</th>
<th>Changi Airport</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1.6</td>
<td>2.0</td>
<td>4.0</td>
<td>0.3</td>
<td>2.5</td>
<td>0.2</td>
</tr>
</tbody>
</table>

Average Tourist Satisfaction

2015  72.9
2014  71.4
CSISG 2015 Q2 Land Transport
Public Transport

Customers were asked how much they trusted the company to be working in their best interest and if they were satisfied with the government’s intervention in the area of public transport.

<table>
<thead>
<tr>
<th>How satisfied are you with LTA’s intervention in the area of public train/bus systems?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Low Satisfaction</strong></td>
</tr>
<tr>
<td>High Trust</td>
</tr>
<tr>
<td>Low Trust</td>
</tr>
</tbody>
</table>

How much do you trust that SMRT/SBS Transit is working in your best interest?
• Customers with low trust of the company and low satisfaction with government intervention tend to have lower overall customer satisfaction scores.

• Further analysis shows satisfaction with government intervention has a significant and positive impact on overall customer satisfaction.

• A collaborative and integrated strategy to improve the commuting experience will be more efficient in driving customer satisfaction with the transport operators.
CSISG 2015 Q2 Air Transport
*Airlines sub-sector*

Importance of attributes to perceptions of quality

- Check-In Experience
- Cabin Comfort
- Cabin Maintenance
- Inflight Entertainment
- Food Quality
- F&B Choices
- Inflight Crew
- Ground Staff

Locals
Tourists
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.

In allocating resources at the margin to improve the customer experience, airlines may want to look towards these aspects.
CSISG 2015 Q2 Logistics

Courier sub-sector

Courier customers can be categorised into 4 segments:

- Local delivery for personal use
- Overseas delivery for personal use
- Local delivery for business use
- Overseas delivery for business use
## CSISG 2015 Q2 Logistics

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### Courier sub-sector

<table>
<thead>
<tr>
<th>Category</th>
<th>Customer Satisfaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal / Local</td>
<td>71.9</td>
</tr>
<tr>
<td>Personal / Overseas</td>
<td>73.3</td>
</tr>
<tr>
<td>Business / Overseas</td>
<td>72.1</td>
</tr>
<tr>
<td>Business / Local</td>
<td>68.3</td>
</tr>
</tbody>
</table>

*Proportions are ranked in increasing order*
The largest proportion of customers are those who use courier services for business deliveries locally. They are also the least satisfied customer segment.

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 the potentially differing needs and requirements.
CSISG 2015 Q2 Land Transport

*Taxi sub-sector*

![Chart showing age distribution and booking frequency among taxi users.](attachment:image.png)

- **Age of Respondent**
  - 18 to 24: 63.1
  - 25 to 39: 65.0
  - 40 to 54: 63.9
  - 55 to 84: 61.6

- **Number of Respondents**
  - Total: 29

- **Booking Frequency**
  - Booked recently:
    - 18 to 24: 65.3
    - 25 to 39: 66.8
    - 40 to 54: 62.0
    - 55 to 84: 64.0
  - Did not book recently:
    - 18 to 24: 34.7
    - 25 to 39: 33.2
    - 40 to 54: 37.9
    - 55 to 84: 36.0
People from the age group of 25 to 39 have the highest satisfaction.

They also make up 52.6% of the customer segment that booked recently, i.e., Booking is an important, and the biggest, driver of satisfaction.

People tend to have higher satisfaction with the taxi company if they had booked recently.

As booking drives Customer Satisfaction, taxi operators may want to redouble their efforts in moving commuters onto this mode of hiring taxis, i.e., instead of flag downs.
CSISG 2015 Q2 RESULTS
PUBLIC & PRIVATE EDUCATION
CSISG 2015 Q2 Public & Private Education

Year-on-Year Change

<table>
<thead>
<tr>
<th>Institution Type</th>
<th>CSISG 2014</th>
<th>CSISG 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Polytechnics</td>
<td>71.1</td>
<td>74.3</td>
</tr>
<tr>
<td>Universities</td>
<td>73.5</td>
<td>75.6</td>
</tr>
<tr>
<td>ITE</td>
<td>74.0</td>
<td>74.3</td>
</tr>
<tr>
<td>Private Education Institutions</td>
<td>65.8</td>
<td>64.1</td>
</tr>
<tr>
<td>Private Education Institutions</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
CSISG 2015 Q2 Public Education

Universities

<table>
<thead>
<tr>
<th></th>
<th>CSISG 2014</th>
<th></th>
<th>CSISG 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>NTU</td>
<td>70.6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SMU</td>
<td>79.2</td>
<td>79.1</td>
<td></td>
</tr>
<tr>
<td>NUS</td>
<td>74.3</td>
<td>76.5</td>
<td></td>
</tr>
<tr>
<td>NTU</td>
<td>70.6</td>
<td></td>
<td>73.3</td>
</tr>
</tbody>
</table>
CSISG 2015 Q2 Public Education

Polytechnics

<table>
<thead>
<tr>
<th>Institution</th>
<th>CSISG 2014</th>
<th>CSISG 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Singapore</td>
<td>76.5</td>
<td>74.8</td>
</tr>
<tr>
<td>Ngee Ann</td>
<td>70.1</td>
<td>70.5</td>
</tr>
<tr>
<td>Republic</td>
<td>69.4</td>
<td>67.1</td>
</tr>
<tr>
<td>Nanyang</td>
<td>66.5</td>
<td>63.6</td>
</tr>
<tr>
<td>Temasek</td>
<td>71.6</td>
<td>73.4</td>
</tr>
</tbody>
</table>
CSISG 2015 Q2 Education

Students from each Education sub-sector were also asked if cetera paribus, whether they were to choose their current school again.

- Yes: CSISG = 75.4%
- No: 53.5%
- Refused to Answer: 64.4%

Percentage of Respondents
Satisfaction of students who would choose their schools again is understandably higher than those who would not choose their schools again.

Satisfaction of students who did not answer is also significantly lower than that of students who would choose their schools again.

Schools may want to look at raising the satisfaction and willingness to re-enrol for the students who did not answer as they make up about a quarter of the total proportion.
CSISG 2015 Q2 Private Education

Students from the Private Education sector were asked:

- If they were attending part time or full time courses
- If they were enrolled in a vocational or non-vocational programme

**Programme Duration**

<table>
<thead>
<tr>
<th>Programme Duration</th>
<th>Vocational</th>
<th>Non-Vocational</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;1 year</td>
<td>75</td>
<td>70</td>
</tr>
<tr>
<td>1 to 3 years</td>
<td>70</td>
<td>70</td>
</tr>
<tr>
<td>&gt;3 years</td>
<td>65</td>
<td>65</td>
</tr>
</tbody>
</table>

**Vocational**

- Full Time
- Part Time

**Non-Vocational**

- Full Time
- Part Time
CSISG 2015 Q2 Private Education

• Full Time students doing vocational courses have significantly higher satisfaction as compared to Full Time students not doing vocational courses
• There is no significant difference between the satisfaction of Part Time students doing and not doing vocational courses
• Generally, shorter course durations also see higher satisfaction scores
• Full Time students not doing vocational courses are also the largest proportion of the students surveyed
In Conclusion

Perceptions of Quality is not only influenced by the provision of the core service or supplementary services that directly support the core service. External factors play a part in shaping the satisfaction.

Example:

- Satisfaction with ground staff at the airport is more important to passengers than the services passengers interact with onboard the plane

- Customer’s perception of the public transport company acting in their best interest and government intervention on public transport
More Information

CSISG 2015 Q2 Executive Summary is available at ises.smu.edu.sg

If you are from a CSISG-measured company, email ise@smu.edu.sg with your professional contact information for your complimentary company-specific CSISG score card.

The ISES Membership Programme provides a comprehensive CSISG benchmarking report for your company along with a host of associated benefits. An application form is available in your Forum folder and also at ises.smu.edu.sg.