ISES INDUSTRY FORUM

CSISG 2014 Q2 RESULTS
TRANSPORT & LOGISTICS AND
PUBLIC & PRIVATE EDUCATION
CSISG 2014 Q2

• CSISG 2014 Q2 Quick Facts & Sampling
• Results Overview
• Results and Highlights of Transport & Logistics Sector
• Results and Highlights of Public & Private 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 14 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 2014 Q2 Quick Facts

<table>
<thead>
<tr>
<th>Sectors Covered</th>
<th>Transport &amp; Logistics</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Public &amp; Private Education</td>
</tr>
<tr>
<td>Survey Period</td>
<td>April–June 2014</td>
</tr>
<tr>
<td>Total Questionnaires Completed</td>
<td>13,002</td>
</tr>
<tr>
<td>Face-to-face at residents’ homes</td>
<td>6,453</td>
</tr>
<tr>
<td>Face-to-face at Changi Airport</td>
<td>2,700</td>
</tr>
<tr>
<td>Online</td>
<td>3,849</td>
</tr>
<tr>
<td>Distinct entities measured</td>
<td>333</td>
</tr>
<tr>
<td>Entities with published scores</td>
<td>31</td>
</tr>
</tbody>
</table>
Changes implemented this year:

Commercial schools were renamed to Private Education Institutions.

Respondents for Private Education Institutions were surveyed online.
CSISG 2014 QUARTER 2
RESULTS OVERVIEW
CSISG Transport & Logistics Sector Trends

- Changi Airport
- Airlines
- Postal Services
- Courier Services
- Budget Airlines
- Taxi Services
- MRT / LRT
- Public Buses

Year: 2007 to 2014
CSISG Public & Private Education Sector Trends

ITE

Universities

Polytechnics

PEIs

Public Education Sector

Private Education Sector
CSISG 2014 Q2 Results Overview

72.8 Public Education
- 72.8 Public Education
- 74.3 ITE*
- 73.5 Universities
- 79.2 SMU*
- 74.3 NUS
- 70.6 NTU
- 71.1 Polytechnics
- 76.5 Singapore*
- 71.6 Temasek
- 70.1 Ngee Ann
- 69.4 Republic
- 66.5 Nanyang

72.1 Transport & Logistics
- 75.4 Airport*
- 75.4 Changi Airport
- 73.3 Airlines*
- 74.9 Singapore Airlines*
- 73.3 Cathay Pacific Airways
- 73.0 Emirates
- 71.7 Qantas Airlines
- 71.4 SilkAir
- 69.8 Other Airlines
- 71.2 Postal Services
- 71.2 Singapore Post
- 71.2 Courier Services
- 72.6 FedEx
- 72.4 Speedpost
- 72.0 UPS
- 71.9 DHL
- 68.5 Other Courier Services
- 68.3 Budget Airlines
- 68.0 Jetstar Asia
- 66.9 AirAsia
- 65.2 Tiger Airways
- 71.5 Other Budget Airlines*
- 63.2 Taxi Services
- 65.1 Premier
- 64.3 Transcab
- 63.5 SMRT Taxis
- 62.9 ComfortDelGro Taxis
- 59.5 Other Taxi Operators
- 59.7 Mass Rapid Transit System
- 60.3 SBS Transit Trains
- 59.6 SMRT Trains
- 58.5 Public Buses
- 60.5 SMRT Buses
- 57.7 SBS Transit Buses

66.3 Private Education
- 66.3 Private Education Institutions
CSISG 2014 Q2 Transport & Logistics

Year-on-Year Changes

- Airport: 85.5 (2013) vs. 75.4 (2014)
- Airlines: 77.1 (2013) vs. 73.3 (2014)
- Courier Services: 72.9 (2013) vs. 71.2 (2014)
- Budget Airlines: 67.5 (2013) vs. 68.3 (2014)
- Mass Rapid Transit System: 64.1 (2013) vs. 59.7 (2014)
- Public Buses: 60.7 (2013) vs. 58.5 (2014)
CSISG 2014 Q2 Transport & Logistics

Courier Services

<table>
<thead>
<tr>
<th>Service</th>
<th>CSISG 2013</th>
<th>CSISG 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>FedEx</td>
<td>73.7</td>
<td>72.6</td>
</tr>
<tr>
<td>DHL</td>
<td>72.5</td>
<td>72.0</td>
</tr>
<tr>
<td>UPS</td>
<td>70.6</td>
<td>71.9</td>
</tr>
<tr>
<td>Speedpost</td>
<td>70.1</td>
<td>68.5</td>
</tr>
<tr>
<td>Other courier services</td>
<td>72.8</td>
<td>71.2</td>
</tr>
</tbody>
</table>
CSISG 2014 Q2 Transport & Logistics

Airlines

CSISG 2013 77.1
CSISG 2014 73.3

Singapore Airlines 79.5
SilkAir 76.5
Cathay Pacific 76.3
Emirates 76.1
Qantas Airlines 74.1

Other airlines 70.6

74.9 Singapore Airlines
73.3 Cathay Pacific
73.0 Emirates
71.7 Qantas Airlines
71.4 SilkAir
69.8 Other airlines
CSISG 2014 Q2 Transport & Logistics

Budget Airlines

Other budget airlines 70.4
AirAsia 68.3
Jetstar Asia 66.9
Tiger Airways 66.0
71.5 Other budget airlines
68.0 Jetstar Asia
66.9 AirAsia
65.2 Tiger Airways

CSISG 2013
67.5

CSISG 2014
68.3
CSISG 2014 Q2 Transport & Logistics

Taxi Services

- ComfortDelGro Taxis 65.7
- SMRT Taxis 70.5
- Transcab 69.4
- Premier 72.0
- Other taxi operators 70.4

Comparison:

<table>
<thead>
<tr>
<th>Year</th>
<th>Operator</th>
<th>CSISG 2013</th>
<th>CSISG 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>ComfortDelGro Taxis</td>
<td>65.7</td>
<td>66.1</td>
</tr>
<tr>
<td></td>
<td>SMRT Taxis</td>
<td>70.5</td>
<td>70.6</td>
</tr>
<tr>
<td></td>
<td>Transcab</td>
<td>69.4</td>
<td>70.2</td>
</tr>
<tr>
<td></td>
<td>Premier</td>
<td>72.0</td>
<td>72.8</td>
</tr>
<tr>
<td></td>
<td>Other taxi operators</td>
<td>70.4</td>
<td>70.7</td>
</tr>
</tbody>
</table>

Institute of Service Excellence
Singapore Management University
CSISG 2014 Q2 Transport & Logistics
Mass Rapid Transit System

CSISG 2013: 64.1
CSISG 2014: 59.7

SBS Trains 67.3
SMRT Trains 63.3

60.3 SBS Trains
59.6 SMRT Trains
CSISG 2014 Q2 Transport & Logistics

Public Buses
CSISG 2014 Q2 Transport & Logistics

Year-on-Year Changes in Local Respondents’ Satisfaction

<table>
<thead>
<tr>
<th>Locals’ year-on-year T&amp;L Sector performance</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>MRT / LRT</td>
<td>-5.0</td>
<td>-1.8</td>
</tr>
<tr>
<td>Public Buses</td>
<td>-2.7</td>
<td>2.9</td>
</tr>
<tr>
<td>Taxi Services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Airlines</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Budget Airlines</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Changi Airport</td>
<td>-5.7</td>
<td>3.4</td>
</tr>
</tbody>
</table>

Average Local Satisfaction

2014  69.5
2013  69.9

Year-on-Year Changes in Average Local Satisfaction
CSISG 2014 Q2 Transport & Logistics

Year-on-Year Changes in Tourist Respondents’ Satisfaction

<table>
<thead>
<tr>
<th>Tourists’ year-on-year T&amp;L Sector performance</th>
<th>Average Tourist Satisfaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>MRT / LRT</td>
<td>2014 71.4, 2013 80.1</td>
</tr>
<tr>
<td>Public Buses</td>
<td>-10.3, -7.9</td>
</tr>
<tr>
<td>Taxi Services</td>
<td>-11.1, -9.2</td>
</tr>
<tr>
<td>Airlines</td>
<td>-9.2, -3.3</td>
</tr>
<tr>
<td>Budget Airlines</td>
<td>-3.3</td>
</tr>
<tr>
<td>Changi Airport</td>
<td>-11.0, -11.1</td>
</tr>
</tbody>
</table>

Tourists' year-on-year T&L Sector performance
CSISG 2014 Q2 Transport & Logistics

Public Transport Respondents’ reasons for no complaints (97.9%)

- No reason: 78.4%
- Too difficult: 4.8%
- No point: 16.8%
- Other reason: 0%

| CSISG 67.6 | 49.9  | 44.8  |
| Positive Word-of-mouth / Loyalty 73.8 | 51.1  | 36.8  |
A similar pattern is noticed across all other sub-sectors where satisfaction levels of customers who did not complain because there was no need to were significantly higher than other customers who did not complain.

MRTs sub-sector has the highest number of customers who did not complain because it was too difficult or there was no point complaining. This is followed by Public Buses sub-sector (21.4%) and Taxi Services sub-sector (15.8%).

As such, these commuters have significantly lower scores for Positive Word-of-mouth.
CSISG 2014 Q2 Transport & Logistics

MRT sub-sector

Note: Data based on those that took Trains as transport to work and completed trains questionnaire. Only locals in dataset.
CSISG 2014 Q2 Transport & Logistics
MRT sub-sector

Note: Data based on those that took Trains as transport to work and completed trains questionnaire. Only locals in dataset.
Commuters who have more than 1 main mode of transport to work are less satisfied than those with only 1 main mode of transport to work.

This suggests that satisfaction for MRT Trains is dependent on the use of other modes of transports as well.

When it comes to commuting, customers design their own solutions; how service providers interact with one another affects the customers’ satisfaction with each of them.
CSISG 2014 Q2 RESULTS
PUBLIC & PRIVATE EDUCATION
CSISG 2014 Q2 Public & Private Education

Year-on-Year Change

CSISG 2013

ITE 73.3
Universities 73.0
Private Education Institutions 72.3
Polytechnics 72.2

CSISG 2014

74.3 ITE
73.5 Universities
71.1 Polytechnics
66.3 Private Education Institutions
CSISG 2014 Q2 Public Education

Universities

CSISG 2013 73.1
NTU 72.7
SMU 73.2
NUS 73.3

CSISG 2014 73.5
79.2 SMU
74.3 NUS
70.6 NTU
CSISG 2014 Q2 Public Education
Polytechnics

CSISG 2013
72.2

CSISG 2014
71.1

Singapore Poly 76.5
Republic Poly 72.0
Temasek Poly 71.6
Ngee Ann Poly 71.5
Nanyang Poly 71.4

76.5 Singapore Poly
71.6 Temasek Poly
71.5 Ngee Ann Poly
69.4 Republic Poly
66.5 Nanyang Poly
CSISG 2014 Q2 Education

Students from each Education sub-sector were asked about various aspects of their student life.

<table>
<thead>
<tr>
<th>Campus</th>
<th>Convenience, facilities, study spaces, learning resources, campus life</th>
</tr>
</thead>
<tbody>
<tr>
<td>Computing</td>
<td>IT infrastructure and support</td>
</tr>
<tr>
<td>Course-Fit</td>
<td>Suitability, interest, expectations in relation to the enrolled course</td>
</tr>
<tr>
<td>Relevance</td>
<td>Belief in the enrolled course to provide relevant experience and future opportunities</td>
</tr>
<tr>
<td>Support</td>
<td>Counselling, career, and financial assistance</td>
</tr>
<tr>
<td>Teaching</td>
<td>Quality, dedication, mutual respect exhibited by teaching staff</td>
</tr>
</tbody>
</table>
## CSISG 2014 Q2 Education

<table>
<thead>
<tr>
<th>ITE</th>
<th>Universities</th>
<th>Polytechnics</th>
<th>Private Education Institutions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relevance</td>
<td>Support</td>
<td>Support</td>
<td>Teaching</td>
</tr>
<tr>
<td>Support</td>
<td>Campus</td>
<td>Computing</td>
<td>Support</td>
</tr>
<tr>
<td>Course-Fit</td>
<td>Computing</td>
<td>Campus</td>
<td>Relevance</td>
</tr>
<tr>
<td>Teaching</td>
<td>Teaching</td>
<td>Teaching</td>
<td>Campus</td>
</tr>
<tr>
<td>Campus</td>
<td>Relevance</td>
<td>Relevance</td>
<td>Course-Fit</td>
</tr>
<tr>
<td>Computing</td>
<td>Course-Fit</td>
<td>Course-Fit</td>
<td>Computing</td>
</tr>
</tbody>
</table>

The importance ranking of these dimensions are accurate at the sub-sector level.
Regardless of the Education sub-sector, Student Support is consistently of high importance to students.

Student support refers to financial, career, and emotional support for students in the schools.

This is consistent also for the individual Polytechnics and Universities.
In conclusion

Adopt collaborative approach to raise service standards.

Example:

Transport operators working together with regulators

Education institutions working with industry for meaningful work placements and internships
More information

CSISG 2014 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