CUSTOMER SATISFACTION INDEX OF SINGAPORE 2010 - Q2 RELEASE
CSISG 2010 Q2 Quick Facts

5,233 face-to-face interviews with 9,096 questionnaires completed by Singapore residents at their homes.

1,703 face-to-face interviews with departing tourists at Changi airport (each tourist answered one questionnaire) pertaining to their experience with the MRT/LRT, Public Buses, Taxis, Airlines, Budget Airlines, and Commercial Schools sub-sectors.
1,004 face-to-face interviews with locals, tourists, and transit passengers to measure customer satisfaction with the Airport (includes Terminals 1, 2, 3, and Budget Terminal)

In all, 11,803 questionnaires about 229 companies were completed between April and July 2010 covering transport & logistics and education sectors
Satisfaction for the transport & logistics sector has remained at 68.7.

Within the transport & logistics sector, satisfaction scores of MRT/LRT and Public Buses sub-sectors have declined significantly.

However satisfaction scores of Changi Airport and Courier & Postal Services sub-sector have improved significantly.
The satisfaction score for the education sector observed a significant decrease of 2.9 points from 68.4 to 65.5 in 2010.

The universities sub-sector experienced a significant decline in satisfaction score from last year.

A new sub-sector, ITE has been added to the education sector in 2010.
Transport & Logistics and Education Results
Transport & Logistics Sector
Year-on-Year Changes
Year-on-year Changes For MRT/LRT

Customer Expectations
-1.1
68.4

Perceived Value
-3.0*
68.2

Perceived Overall Quality
-2.0*
69.1

Customer Satisfaction
-2.9*
64.1

Customer Complaints
+0.0
1.2%

Customer Loyalty
-2.3*
77.5

This year’s average score

Change in average score

*Explanatory note: An asterisk represents a significant year-on-year change

Wednesday, February 9, 2011
Year-on-year Changes For Public Buses

Perceived Overall Quality

-0.7
65.6

Customer Complaints

+0.7
2.7%

Customer Expectations

+0.4
67.0

Perceived Value

-2.2*
65.2

Customer Satisfaction

-1.8*
61.1

Customer Loyalty

+2.7*
77.5

*Explanatory note: An asterisk represents a significant year-on-year change

Change in average score

This year’s average score

Wednesday, February 9, 2011
INSTITUTE OF SERVICE EXCELLENCE
SINGAPORE MANAGEMENT UNIVERSITY

YEAR-ON-YEAR CHANGES FOR TAXIS

Customer Expectations: -1.9* (65.4)
Perceived Overall Quality: -0.1 (68.3)
Perceived Value: -0.6 (68.0)
Customer Satisfaction: 0.0 (64.4)
Customer Complaints: +1.6* (3.3%)
Customer Loyalty: +1.3 (72.2)

*Explanatory note: An asterisk represents a significant year-on-year change
Year-on-year Changes For Airlines

- **Perceived Overall Quality**
  - Previous Year: 74.1
  - Change: -2.3*

- **Perceived Value**
  - Previous Year: 73.9
  - Change: -0.7

- **Customer Expectations**
  - Previous Year: 69.2
  - Change: -5.2*

- **Customer Complaints**
  - Previous Year: 74.9
  - Change: +0.3

- **Customer Satisfaction**
  - Previous Year: 71.8
  - Change: -0.8

- **Customer Loyalty**
  - Previous Year: 73.9
  - Change: -1.6*

*Explanatory note: An asterisk represents a significant year-on-year change*
## CSISG 2010 Q2
### T&L sector Constant at 68.7

<table>
<thead>
<tr>
<th>Change</th>
<th>CSISG 2010</th>
<th>Sub-sector</th>
</tr>
</thead>
<tbody>
<tr>
<td>+2.1</td>
<td>73.7 *</td>
<td>Changi Airport</td>
</tr>
<tr>
<td>+1.6</td>
<td>65.7</td>
<td>Courier &amp; Postal Services</td>
</tr>
<tr>
<td>0.0</td>
<td>64.4</td>
<td>Taxi Services</td>
</tr>
<tr>
<td>+1.0</td>
<td>62.5</td>
<td>Water Transport</td>
</tr>
<tr>
<td>+0.5</td>
<td>59.5</td>
<td>Budget Airlines</td>
</tr>
<tr>
<td>−0.8</td>
<td>71.8 *</td>
<td>Airlines</td>
</tr>
<tr>
<td>−1.8</td>
<td>61.1</td>
<td>Public Buses</td>
</tr>
<tr>
<td>−2.9</td>
<td>64.1</td>
<td>MRT/LRT System</td>
</tr>
</tbody>
</table>

**Note:** Year-on-year changes in green/red are statistically significant

* Symbol indicates significantly higher than sector average
## CSISG 2010 Q2
### T&L sector Constant at 68.7

<table>
<thead>
<tr>
<th>Change</th>
<th>Score</th>
<th>Airlines</th>
</tr>
</thead>
<tbody>
<tr>
<td>-0.8</td>
<td>71.8</td>
<td><strong>Airlines</strong></td>
</tr>
<tr>
<td>+3.6</td>
<td><strong>79.3</strong> *</td>
<td>Singapore Airlines</td>
</tr>
<tr>
<td>+0.3</td>
<td>71.7</td>
<td>Cathay Pacific Airways</td>
</tr>
<tr>
<td>+0.3</td>
<td>71.6</td>
<td>Emirates</td>
</tr>
<tr>
<td>-1.1</td>
<td>69.0</td>
<td>Qantas Airlines</td>
</tr>
<tr>
<td>-1.2</td>
<td>65.8</td>
<td>Other airlines</td>
</tr>
<tr>
<td>-2.0</td>
<td>68.4</td>
<td>SilkAir</td>
</tr>
</tbody>
</table>

**Note:** Year-on-year changes in green/red are statistically significant. * symbol indicates significantly higher than sub-sector average.
CSISG 2010 Q2
T&L sector Constant at 68.7

<table>
<thead>
<tr>
<th></th>
<th>Change</th>
<th>Score</th>
<th>Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>Courier &amp; Postal Services</td>
<td>+1.6</td>
<td>65.7</td>
<td>FedEx</td>
</tr>
<tr>
<td></td>
<td>+1.6</td>
<td>65.5</td>
<td>FedEx</td>
</tr>
<tr>
<td></td>
<td>+1.4</td>
<td>67.0</td>
<td>SingPost</td>
</tr>
<tr>
<td>Other courier/postal services</td>
<td>+1.4</td>
<td>64.4</td>
<td>Other courier/postal services</td>
</tr>
<tr>
<td></td>
<td>+1.2</td>
<td>64.4</td>
<td>UPS</td>
</tr>
<tr>
<td></td>
<td>+1.1</td>
<td>65.6</td>
<td>DHL</td>
</tr>
<tr>
<td>MRT/LRT</td>
<td>-2.9</td>
<td>64.1</td>
<td>MRT/LRT</td>
</tr>
<tr>
<td></td>
<td>-0.8</td>
<td>65.5</td>
<td>SBS Transit Trains</td>
</tr>
<tr>
<td></td>
<td>-3.5</td>
<td>63.8</td>
<td>SMRT Trains</td>
</tr>
</tbody>
</table>

Note: Year-on-year changes in green/red are statistically significant
## CSISG 2010 Q2 T&L sector Constant at 68.7

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>0.0</td>
<td>64.4</td>
<td>Taxi Services</td>
</tr>
<tr>
<td>+0.1</td>
<td>64.2</td>
<td>ComfortDelGro Taxis</td>
</tr>
<tr>
<td></td>
<td>65.4</td>
<td>Transcab</td>
</tr>
<tr>
<td></td>
<td>65.4</td>
<td>Premier</td>
</tr>
<tr>
<td></td>
<td>65.3</td>
<td>All Others</td>
</tr>
<tr>
<td>-0.1</td>
<td>63.8</td>
<td>SMRT Taxis</td>
</tr>
<tr>
<td>-1.8</td>
<td>61.1</td>
<td>Public Buses</td>
</tr>
<tr>
<td>-2.5</td>
<td>61.9</td>
<td>SMRT Buses</td>
</tr>
<tr>
<td>-3.3</td>
<td>58.9</td>
<td>SBS Transit Buses</td>
</tr>
</tbody>
</table>

Note: Year-on-year changes in green/red are statistically significant. CSISG 2010 is the first year of measurement for Transcab and Premier.
Customer satisfaction scores for MRT/LRT and Public Buses sub-sectors fell significantly year-on-year.

Year-on-year performance on perceived value fell the most for MRT/LRT and Public Buses sub-sectors.
Locals Vs Tourists In Transport & Logistics Sector
Locals and Tourists Satisfaction with Transport & Logistics

At the sector level, locals’ satisfaction have dropped slightly compared to the previous year.

Both local and tourist satisfaction with MRT/LRT, Public Buses, and Airlines decreased, with locals’ satisfaction decreased by a larger extent.

Tourists’ satisfaction with the Taxis sub-sector has increased significantly from 2009.
Satisfaction Scores for T&L Sector (Locals Only)

T&L Average Local Satisfaction

2010 66.6 (–0.1)

2009 66.7

^ Sub-sectors with tourist respondents.
Satisfaction Scores for T&L Sector (Tourists Only)

T&L Average Tourist Satisfaction

2010 73.4 (+0.4)
2009 73.0

- Taxi Services:
  - 2009: 69.8
  - 2010: 74.2 (+4.4)

- Airlines:
  - 2009: 75.4
  - 2010: 75.2 (-0.2)

- Budget Airlines:
  - 2009: 62.6
  - 2010: 62.2 (-0.4)

- Trains:
  - 2009: 75.8
  - 2010: 74.1 (-1.7)

- Public Buses:
  - 2009: 67.3
  - 2010: 64.9 (-2.4)

Wednesday, February 9, 2011
Education Sector
Year-on-Year Changes
Year-on-year Changes For Education

Perceived Overall Quality

-4.8* 67.1

Perceived Value

-3.2* 67.5

Customer Expectations

-7.5* 64.0

Customer Satisfaction

-2.9* 65.5

Customer Complaints

-0.7 2.4%

Customer Loyalty

-5.2* 66.3

Change in average score

This year’s average score

*Explanatory note: An asterisk represents a significant year-on-year change

Wednesday, February 9, 2011
## CSISG 2010 Q2
### Education sector down 2.9 to 65.5

<table>
<thead>
<tr>
<th>Change</th>
<th>CSISG 2010</th>
<th>Sub-sector</th>
</tr>
</thead>
<tbody>
<tr>
<td>–0.2</td>
<td>68.5 *</td>
<td>Polytechnics</td>
</tr>
<tr>
<td>–1.0</td>
<td>65.0</td>
<td>Commercial Schools</td>
</tr>
<tr>
<td>–1.4</td>
<td>69.3 *</td>
<td>Universities</td>
</tr>
</tbody>
</table>

Note: Year-on-year changes in green/red are statistically significant. * symbol indicates significantly higher than sector average. CSISG 2010 is the first year of measurement for ITE.
### CSISG 2010 Q2

**Education sector down 2.9 to 65.5**

<table>
<thead>
<tr>
<th>Change</th>
<th>Score</th>
<th>Universities</th>
</tr>
</thead>
<tbody>
<tr>
<td>-1.4</td>
<td>69.3</td>
<td></td>
</tr>
<tr>
<td>+2.0</td>
<td>71.0</td>
<td>NUS</td>
</tr>
<tr>
<td>-0.2</td>
<td>69.3</td>
<td>NTU</td>
</tr>
<tr>
<td>-4.9</td>
<td>69.8</td>
<td>SMU</td>
</tr>
<tr>
<td>-4.9</td>
<td>60.8</td>
<td>UniSIM</td>
</tr>
</tbody>
</table>

Note: Year-on-year changes in green/red are statistically significant
## CSISG 2010 Q2
### Education sector down 2.9 to 65.5

<table>
<thead>
<tr>
<th>Change</th>
<th>Score</th>
<th>School</th>
</tr>
</thead>
<tbody>
<tr>
<td>-0.2</td>
<td>68.5</td>
<td>Polytechnics</td>
</tr>
<tr>
<td>+4.2</td>
<td>70.6</td>
<td>Nanyang</td>
</tr>
<tr>
<td>+2.9</td>
<td>71.8</td>
<td>Temasek</td>
</tr>
<tr>
<td>+0.7</td>
<td>69.9</td>
<td>Ngee Ann</td>
</tr>
<tr>
<td>-4.3</td>
<td>61.4</td>
<td>Republic</td>
</tr>
<tr>
<td>-5.4</td>
<td>65.2</td>
<td>Singapore</td>
</tr>
</tbody>
</table>

Note: * symbol indicates significantly higher than sub-sector
Year-on-year performances of perceived quality and perceived value for universities dropped significantly.

For the Polytechnics, Universities and Commercial School sub-sectors, the year-on-year decline in CSISG scores can be mainly attributed to a decrease in perceived value.
Key Takeaway 1
Willingness to give back linked to satisfaction with Tertiary institutions

After your graduation, if asked, how willing would you be to donate either time or money to [insert polytechnic or university name]?

Please use a scale of 1 to 10 where 1 means “not willing at all” and 10 means “very willing”.

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Willingness to give back linked to satisfaction with tertiary institutions

Least Satisfied Quartile

Most Satisfied Quartile

Polytechnics

Universities

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Willingness to give back linked to satisfaction with tertiary institutions

There is a strong positive relationship between student satisfaction and their willingness to donate either time or money to their respective institutions after graduation.

It is in the long term interests of tertiary institutions to ensure that students have satisfying experiences during their tenure with the institution.

Wednesday, February 9, 2011
Key Takeaway 2
IMPORTANCE OF FOLLOWING UP WITH COMPLAINTS
IMPORTANCE OF FOLLOWING UP WITH COMPLAINTS

Customer Satisfaction

<table>
<thead>
<tr>
<th>40</th>
<th>45</th>
<th>50</th>
<th>55</th>
<th>60</th>
</tr>
</thead>
</table>
| No follow-up from company after complaint
Importance of Following up with Complaints

No follow-up from company after complaint

With follow-up from company after complaint

Customer Satisfaction
Importance of Following up with Complaints

No follow-up from company after complaint

With follow-up from company after complaint

 Expecting Follow-up

 Expecting Follow-up

Customer Satisfaction

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Importance of Following up with Complaints

No follow-up from company after complaint

With follow-up from company after complaint

Customer Satisfaction

Expecting Follow-up

Not Expecting Follow-up

Expecting Follow-up

Not Expecting Follow-up

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Importance of Following up with Complaints

Expecting Follow-up | Not Expecting Follow-up
---|---
No follow-up from company after complaint | With follow-up from company after complaint

Customer Satisfaction

T&L 2009 | CSISG 2009
40 | 45
45 | 50
50 | 55
55 | 60
60
IMPORTANCE OF FOLLOWING UP WITH COMPLAINTS

Expecting Follow-up

Not Expecting Follow-up

No follow-up from company after complaint

With follow-up from company after complaint

Customer Satisfaction

40

45

50

55

60

CSISG 2009

T&L 2009

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Importance of Following up with Complaints

Expecting Follow-up

Not Expecting Follow-up

Customer Satisfaction

No follow-up from company after complaint

With follow-up from company after complaint

Expecting Follow-up

Not Expecting Follow-up

Wednesday, February 9, 2011
Importance of Following up with Complaints

- Expecting Follow-up
- Not Expecting Follow-up

- With follow-up from company after complaint
- No follow-up from company after complaint

Customer Satisfaction

- CSISG 2009
- T&L 2009

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Importance of Following up with Complaints

Customers who received a follow-up to their complaints (represented by green bars) have significantly higher satisfaction scores regardless of whether they initially expected any follow-up action from the company.

Since it is not possible to know whether customers expect follow-ups or not, as a dominant strategy, companies should always follow up on complaints.