TRANSPORT & LOGISTICS
AND EDUCATION
CSISG 2012 Q2 RESULTS
Updates in CSISG 2012 Q2
CSISG 2012 Q2 Sector Results
Q2 CSISG 2012 Results Overview
Results and Findings of Transport and Logistics
Results and Findings of Private and Public Education
Conclusion
UPDATES TO THE CSISG FOR Q2

First year of measurement for the following companies:

- Singapore Post (Postal Services)
- Tiger Airways
- Jetstar Asia
- AirAsia

Courier and Postal Services sub-sector has been broken into

- Courier sub-sector
- Postal service sub-sector

Water Transport is no longer measured from 2012.
CSISG 2012 Q2 SECTOR RESULTS

All three sectors performed significantly lower than 2011

• Transport & Logistics: 68.3-points (-1.8pts/-2.4%)
• Public Education: 67.5-points (-2.8pts/-4.0%)
• Private Education: 69.0-points (-5.4pts/-7.4%)
CSISG 2012 Q2 RESULTS OVERVIEW

69.0 Private Education
- 69.0 Commercial Schools

68.3 Transport & Logistics
- 74.6 Airlines
  - 77.8 Singapore Airlines*
  - 76.5 Emirates
  - 73.2 Cathay Pacific Airways
  - 72.9 Qantas Airlines
  - 68.9 SilkAir
  - 68.2 Others Airlines
- 72.8 Airport
  - 72.8 Changi Airport
  - 72.4 Postal Services
  - 72.4 Singapore Post
- 69.2 Courier Services
  - 72.3 DHL*
  - 72.1 FedEx*
  - 70.3 UPS

68.7 Speedpost
- 66.6 Other Courier Services

64.3 Taxi Services
- 64.6 Transcabs
- 64.4 ComfortDelGro Taxis
- 63.6 SMRT Taxis
- 62.7 Premier
- 63.8 Other Taxi Operators

62.7 Budget Airlines
- 63.2 Tiger Airways
- 62.2 Jetstar Asia
- 61.9 AirAsia
- 63.9 Other Budget Airlines

61.9 Mass Rapid Transit System
- 61.5 SMRT Trains
- 63.2 SBS Transit Trains

61.6 Public Buses
- 63.9 SMRT Buses*
- 60.8 SBS Transit Buses

67.5 Public Education
- 69.6 Polytechnics
  - 73.2 Temasek*
  - 72.8 Ngee Ann*
- 69.0 Singapore
- 67.5 Republic
- 65.1 Nanyang
- 69.6 ITE

66.7 Universities
- 68.6 SMU
- 67.1 NTU
- 66.1 NUS

67.0 Mass Rapid Transit System
- 60.8 SBS Transit Buses
How Sampling for the CSISG Study Works

- Random list from Department of Statistics
- Surveyors are sent to the addresses in the random list

Tourists and Transit Passengers are interviewed at the departure and transit areas of Changi Airport

Up to 18 CSISG questions and 9 touchpoint questions about the respondents’ experiences with the companies

• Respondents qualify for the survey only if they had experienced the services of the companies in the past 3 / 6 / 12 months
• Surveyor will randomly pick two sub-sectors (in different sectors)

Typically 250 respondents per company would have answered the CSISG questionnaire

40,000 household addresses matching housing profile of Singapore Resident population

Typically 250 respondents per company would have answered the CSISG questionnaire
CSISG 2012 Q2 RESULTS
TRANSPORT & LOGISTICS
### CSISG 2012 Q2 Transport & Logistics
#### Sub-sectors year-on-year change

<table>
<thead>
<tr>
<th>Change</th>
<th>CSISG 2012</th>
<th>Sub-sector</th>
</tr>
</thead>
<tbody>
<tr>
<td>+1.4</td>
<td>74.6 *</td>
<td>Airlines</td>
</tr>
<tr>
<td>-2.4</td>
<td>64.3</td>
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</tr>
<tr>
<td>-3.0</td>
<td>62.7</td>
<td>Budget Airlines</td>
</tr>
<tr>
<td>-4.8</td>
<td>61.6</td>
<td>Public Buses</td>
</tr>
<tr>
<td>-5.8</td>
<td>72.8 *</td>
<td>Airport</td>
</tr>
<tr>
<td>-6.0</td>
<td>61.9</td>
<td>MRT</td>
</tr>
<tr>
<td>NA</td>
<td>72.4 *</td>
<td>Postal Services</td>
</tr>
<tr>
<td>NA</td>
<td>69.2</td>
<td>Courier Services</td>
</tr>
</tbody>
</table>

**Notes:** Significant year-on-year changes are represented in **red/green**

* Indicates sub-sector is significantly higher than its sector score
Year-on-year changes in Locals’ satisfaction of Transport & Logistics sub-sectors

**T&L sub-sectors**

- **Airlines**
  - 2012: +1.9
  - 2011: (-2.8)

- **Budget Airlines**
  - 2012: (-0.5)
  - 2011: (-6.0)

- **Taxis**
  - 2012: 0
  - 2011: (-4.2)

- **Buses**
  - 2012: (-4.2)
  - 2011: (-4.9)

- **Airport**
  - 2012: 0
  - 2011: (-4.9)

- **MRT**
  - 2012: (-6.0)
  - 2011: (-2.8)

**T&L Average Local Satisfaction**

- 2012: 67.9
- 2011: 67.6

No year-on-year data for Courier Sub-sector and Postal Services Sub-sector because this is their first year of measurement.
Year-on-year changes in Tourists’ satisfaction of Transport & Logistics sub-sectors

<table>
<thead>
<tr>
<th>T&amp;L sub-sectors</th>
<th>Change in Tourists’ satisfaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Buses</td>
<td>(+1.0)</td>
</tr>
<tr>
<td>MRT</td>
<td>(-1.6)</td>
</tr>
<tr>
<td>Taxis</td>
<td>(-2.1)</td>
</tr>
<tr>
<td>Airlines</td>
<td>(-2.1)</td>
</tr>
<tr>
<td>Airport</td>
<td>(-4.6)</td>
</tr>
<tr>
<td>Budget Airlines</td>
<td>(-5.3)</td>
</tr>
</tbody>
</table>

T&L Average Tourist Satisfaction

<table>
<thead>
<tr>
<th>Year</th>
<th>Tourist Satisfaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>72.1</td>
</tr>
<tr>
<td>2011</td>
<td>75.8</td>
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</tbody>
</table>
CSISG 2012 Q2
Transport & Logistics sub-sectors
Tourists Satisfaction (72.1)

- No change in satisfaction in Singapore’s Public Transport system
- Significant on-year decline in “Airlines”, “Budget Airlines”, and “Airport” sub-sectors
- Overall, tourists are still significantly more satisfied than locals
## CSISG 2012 Q2

### Transport & Logistics sub-sectors (68.3)

<table>
<thead>
<tr>
<th></th>
<th>Score</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>-2.4</td>
<td>64.3</td>
<td>Taxi Services</td>
</tr>
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<td>-2.2</td>
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<td>ComfortDelGro Taxis</td>
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<td>-2.6</td>
<td>62.7</td>
<td>Premier</td>
</tr>
<tr>
<td>-3.0</td>
<td>63.6</td>
<td>SMRT Taxis</td>
</tr>
<tr>
<td>-3.2</td>
<td>64.6</td>
<td>Transcab</td>
</tr>
<tr>
<td>-1.9</td>
<td>63.8</td>
<td>Other taxi operators</td>
</tr>
<tr>
<td></td>
<td>-4.8</td>
<td>Buses</td>
</tr>
<tr>
<td></td>
<td>61.6</td>
<td></td>
</tr>
<tr>
<td>-2.8</td>
<td>63.9</td>
<td>* SMRT Buses</td>
</tr>
<tr>
<td>-5.5</td>
<td>60.8</td>
<td>SBS Transit Buses</td>
</tr>
<tr>
<td></td>
<td>-6.0</td>
<td>MRT</td>
</tr>
<tr>
<td></td>
<td>61.9</td>
<td></td>
</tr>
<tr>
<td>-5.8</td>
<td>63.2</td>
<td>SBS Transit Trains</td>
</tr>
<tr>
<td>-6.1</td>
<td>61.5</td>
<td>SMRT Trains</td>
</tr>
</tbody>
</table>

**Notes:** Significant year-on-year changes are represented in **red/green**

* Indicates company is significantly higher than its sub-sector score
## CSISG 2012 Q2
### Transport & Logistics sub-sectors (68.3)

<table>
<thead>
<tr>
<th>NA</th>
<th>69.2</th>
<th>Courier Services</th>
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<th>Postal Services</th>
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<td>FedEx</td>
<td>NA</td>
<td>72.4</td>
<td>Singapore Post</td>
</tr>
<tr>
<td>+5.6</td>
<td>72.3 *</td>
<td>DHL</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>+4.4</td>
<td>70.3</td>
<td>UPS</td>
<td></td>
<td></td>
<td></td>
</tr>
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<td>NA</td>
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<td>+1.5</td>
<td>66.6</td>
<td>Other courier services</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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## CSISG 2012 Q2
Transport & Logistics sub-sectors (68.3)

<table>
<thead>
<tr>
<th>Change</th>
<th>Score</th>
<th>Company</th>
</tr>
</thead>
<tbody>
<tr>
<td>+1.4</td>
<td>74.6</td>
<td>Airlines</td>
</tr>
<tr>
<td>+2.0</td>
<td>76.5</td>
<td>Emirates</td>
</tr>
<tr>
<td>+1.2</td>
<td>77.8</td>
<td>Singapore Airlines</td>
</tr>
<tr>
<td>+0.5</td>
<td>72.9</td>
<td>Qantas Airlines</td>
</tr>
<tr>
<td>+0.2</td>
<td>73.2</td>
<td>Cathay Pacific Airways</td>
</tr>
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<td>-3.4</td>
<td>68.9</td>
<td>SilkAir</td>
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<tr>
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<td>Other airlines</td>
</tr>
<tr>
<td></td>
<td>-3.0</td>
<td>Budget Airlines</td>
</tr>
<tr>
<td></td>
<td>62.7</td>
<td></td>
</tr>
<tr>
<td></td>
<td>NA</td>
<td>Tiger Airways</td>
</tr>
<tr>
<td></td>
<td>NA</td>
<td>Jetstar Asia</td>
</tr>
<tr>
<td></td>
<td>NA</td>
<td>AirAsia</td>
</tr>
<tr>
<td></td>
<td>NA</td>
<td>Other budget airlines</td>
</tr>
</tbody>
</table>

**Notes:**
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- First year of measurement for each Budget Airline.
CSISG 2012 Q2 FINDINGS
TRANSPORT & LOGISTICS
CSISG 2012 Q2
Transport & Logistics sub-sectors
Buses and MRT

Customer Expectations Unchanged

- Commuters’ reference points for Public Buses’ and Trains’ service quality/delivery have not changed

- But commuters are perceiving lower service quality

- Public Transport Operators perceived to be less able to meet their customers’ expectations
Customer Expectations Increased

- Taxis made wide ranging revisions to fare structure in December 2011, intended to increase driver revenues

- Customer Expectations have risen on-year (*Fare increases may give an implicit signal to expect more from the taxi service*)

- But customers perceived no change in service quality

- Thus: Lower perceived value, satisfaction, and loyalty
CSISG 2012 Q2
Transport & Logistics sub-sectors
Public Transport

- Taxis: Higher expectations and unchanged quality
- Buses/MRT: Unchanged expectations and lower quality
- Widening gap between Expectations and Quality, contributing to poorer customer satisfaction
For MRT Commuters

- Our analysis shows that Safety, Travel Time, Frequency, Operating Hours, and Comfort matter most to MRT commuters’ perceptions of Quality

- Perceived Quality is a significant driver of Customer Satisfaction
CSISG 2012 Q2
MRT sub-sector Touchpoints

Touchpoints are rank ordered in decreasing order of importance to Quality, with the most important on the left.
Bus Commuters

- Our analysis shows that Customer Service, Frequency, Comfort, Cleanliness, and Punctuality matter most to Bus commuters’ perceptions of Quality

- Perceived Quality is a significant driver of Customer Satisfaction
Bus Frequencies fell significantly year-on-year; it has significant impact on Quality.

Both Frequency and Punctuality impact Quality significantly, yet they are performing below the other touchpoints.

Touchpoints are rank ordered in decreasing order of importance to Quality, with the most important on the left.
CSISG 2012 Q2
Transport & Logistics sub-sectors
Budget Airlines

The True Non-Complaint Rate (TNCR)

- Budget Airlines’ CSISG performed poorly, delivering less quality and value
- Although Complaint incidence remained unchanged, ‘TNCR’ and the customers’ ‘willingness to recommend’ decreased

![Graph showing TNCR and Recommend rates from 2011 to 2012]
CSISG 2012 Q2
Transport & Logistics sub-sectors
Budget Airlines

- Cannot delight on price alone
- Dissatisfied customers are liabilities
- Effective Customer Engagement gives the company a great opportunity to manage these liabilities
- Illustrated: Benefits of a high TNCR and great Complaint Handling
CSISG 2012 Q2
Budget Airlines Complaints (2008-2012)

Have you complained to [Budget Airline] in the past 6 months? n=3,006

- No 96.4% Loyalty = 66.9
- Yes 3.6%

How would you rate the handling of your complaint on a scale from 1 to 10?

- Handled poorly 26.0
- Handled very poorly 5
- Handled very well 56.8
- Handled well 10

- 1
- 2
- 6
- 10

- No reason 89.1% 69.3
- Too difficult 3.8% 53.3
- No point 6.4% 43.3
- Other reason 0.6% 50.5

Loyalty = 40.7

Have you complained to [Budget Airline] in the past 6 months? n=3,006

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- No reason 89.1% 69.3
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- No point 6.4% 43.3
- Other reason 0.6% 50.5

Loyalty = 40.7
CSISG 2012 Q2
Courier Services

• Customers profiles different: B2B vs B2C
• CSISG data show Business customers MORE satisfied but LESS loyal than personal-use customers
• Engage and find out about their different expectations; what works for Businesses may not work for the Home-user
CSISG 2012 Q2 RESULTS
EDUCATION
CSISG 2012 Q2
Public Education sub-sectors (67.5)

<table>
<thead>
<tr>
<th>Change</th>
<th>CSISG</th>
<th>Public Education Sub-sectors</th>
</tr>
</thead>
<tbody>
<tr>
<td>+0.6</td>
<td>69.6</td>
<td>ITE</td>
</tr>
<tr>
<td>-0.2</td>
<td>69.6</td>
<td>Polytechnics</td>
</tr>
<tr>
<td>-3.8</td>
<td>66.7</td>
<td>Universities</td>
</tr>
</tbody>
</table>

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## CSISG 2012 Q2
### Public Education sub-sectors (67.5)

<table>
<thead>
<tr>
<th>Sector</th>
<th>Score</th>
<th>Change</th>
<th>Company</th>
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<tbody>
<tr>
<td>Polytechnics</td>
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<td>+0.6</td>
<td>ITE</td>
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<tr>
<td></td>
<td></td>
<td>+0.6</td>
<td>ITE</td>
</tr>
<tr>
<td></td>
<td></td>
<td>-0.2</td>
<td>Polytechnics</td>
</tr>
<tr>
<td></td>
<td>+5.9</td>
<td>72.8</td>
<td>Ngee Ann Poly</td>
</tr>
<tr>
<td></td>
<td>+0.8</td>
<td>73.2</td>
<td>Temasek Poly</td>
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<td>Singapore Poly</td>
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<td>-3.2</td>
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</table>

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**CSISG 2012 Q2**

Private Education sub-sector

<table>
<thead>
<tr>
<th>Change</th>
<th>CSISG</th>
<th>Private Education Sub-sector</th>
</tr>
</thead>
<tbody>
<tr>
<td>-5.4</td>
<td>69.0</td>
<td>Commercial Schools</td>
</tr>
</tbody>
</table>

**Notes:** Significant year-on-year changes are represented in red/green. UniSIM is one of the schools measured in Commercial Schools.
CSISG 2012 Q2 FINDINGS
EDUCATION
For University Students

- Teaching staff, Administrative staff, and Campus facilities are all important to their perceptions of Quality.
- Quality is the most important driver of Student Satisfaction.
- But satisfaction with 2 of 3 touchpoints declined year-on-year.
CONCLUSION
CSISG 2012 Q2
In Conclusion

Shaping Expectations

- Customers’ expectations are ever evolving, so feedback is essential
- Make use of complaint channels for communication
- Keep customers in the loop; make them a part of the Improvement Journey
- Deliver on what matters to your customers
- Service Excellence: An ongoing process to measure, monitor, and modify your offering
THANK YOU

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