



SMU

SINGAPORE MANAGEMENT
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INSTITUTE OF
SERVICE
EXCELLENCE

CUSTOMER SATISFACTION INDEX OF SINGAPORE 2021

Q2 RESULTS OVERVIEW LAND TRANSPORT



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2021 Q2 SCORES LAND TRANSPORT

↔ 74.1 Land Transport

↔ 74.4 Public Buses

↔ 74.5 SBS Transit

↔ 74.3 SMRT

↔ 74.1 Other bus operators

↔ 74.2 Mass Rapid Transit System

↔ 78.2 SBS Transit*

↔ 72.1 SMRT

↔ 73.1 Point-to-Point Transport

↔ 84.6 SMRT*

↔ 76.4 Gojek*

↔ 71.6 ComfortDelGro

↔ 70.4 Grab

• 77.2 Other Ride Hailing Apps

This chart summarises the results of the CSiSG 2021 satisfaction scores in the 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 $N \geq 50$.

CSISG 2021 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. 2021 marks the 15th year of measurement for the CSISG national study.

SECOND QUARTER RESULTS HIGHLIGHTS

The Land Transport sector scored 74.1 points (on a 0 to 100 scale) in customer satisfaction for 2021, a 0.7% decrease compared to the previous year.

The Air Transport sector, typically measured alongside the Land Transport sector in Q2 of each year, was not measured in 2021 due to Covid-19 travel restrictions making survey fieldwork conditions impractical.

Although the Land Transport sector's year-on-year dip in performance was not statistically significant*, more pronounced movements were observed in its constituent sub-sectors. The Point-to-Point Transport sub-sector scored 73.1 points, a significant 3.6% decrease. The MRT system sub-sector rose by 1.1% year-on-year to 74.2 points, although this change was not significant. The Public Buses sub-sector scored 74.4 points, unchanged from the previous year.

The CSISG Land Transport scores for 2021 and 2020 are summarised in Figure 1.

	CSISG 2021	CSISG 2020
Land Transport	74.1	74.5
MRT System	74.2	73.4
Public Buses	74.4	74.4
Point-to-Point Transport	73.1 ▼	75.9

Figure 1: CSISG 2021 Land Transport performance. The ▼ indicates a significant* decrease compared to 2020.

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

SECOND QUARTER KEY FINDINGS

Covid-19 Changed Singapore's Commuting Patterns

The latest findings, and Figure 2A, show that a majority of commuters interviewed, 61.1%, indicated their commuting patterns have changed since the start of the Covid-19 pandemic.

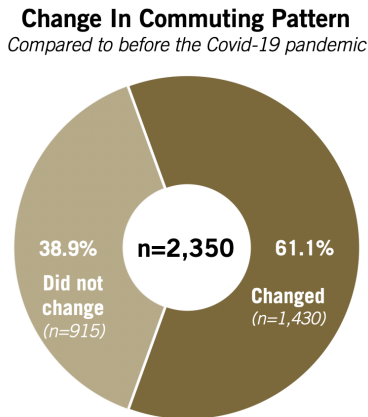


Figure 2A: Proportion of commuters that indicated a change in their commuting patterns since the start of the Covid-19 pandemic.

Specifically, a significant proportion of commuters indicating fewer trips on the MRT (24.7%) and Public Buses (18.3%). In contrast, 15.7% indicated they were relying more on Point-to-Point Transport for their commutes; this included both taxis and private hire cars from ride-hailing services such as Grab and Gojek.

The increased reliance on Point-to-Point Transport options coincided with significantly better perceptions of the operators' Covid-19 safety measures, compared to the MRT and Public Bus operators.

Respondents gave Point-to-Point Transport operators an average rating of 7.54 (on a 1 to 10 scale) when asked if the operator was doing enough to keep them safe from Covid-19. In comparison, MRT and Bus operators scored 7.14 and 7.18 points, respectively. This is illustrated in Figure 2B.

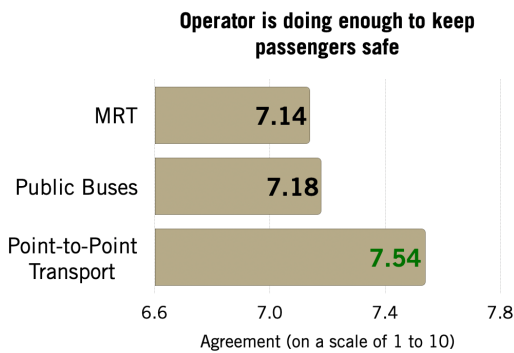


Figure 2B: Commuters' perceptions of Covid-19 safety measures for the respective land transport sub-sectors. The **GREEN Rating** indicates a significantly higher rating than the ratings for MRT and Public Buses.

Poorer Customer Satisfaction for Point-to-Point Transport

The Point-to-Point Transport sub-sector saw a statistically significant year-on-year decline, falling 3.6% to 73.1 points, on a 0 to 100 scale.

While a sizeable proportion of commuters, 15.7%, indicated using more taxis and private hire cars compared to before the start of the Covid-19 pandemic, the decline in year-on-year satisfaction suggest pain-points have been developing.

The lower overall customer satisfaction scores come on the back of poorer performances in several attributes tracked in the study. The three lowest performing attributes, 'Ease of getting a ride', 'Fare charged', and 'Attractiveness of app promotions & discounts' all registered a marked decline year-on-year. The Point-to-Point Transport sub-sector attributes' performance is illustrated in Figure 3.

The poor performance of pricing and ride acquisition-related attributes were also highlighted by survey respondents in their verbatim comments; they alluded to high fares and poor availability of rides.

Operators should review their customers' commuting experience, particularly in the areas with a significant decline in satisfaction.

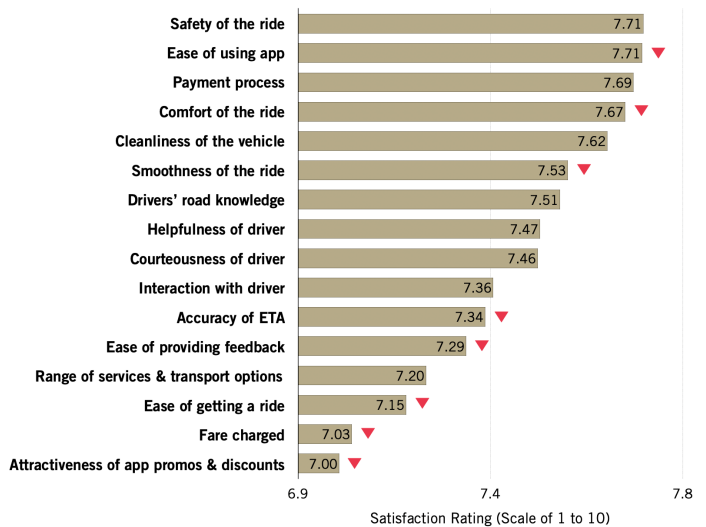


Figure 3: Satisfaction with the Point-to-Point Transport sub-sector's 2021 attributes. A ▼ symbol indicates a significantly lower rating compared to the previous year.

Public Transport Users More Sensitive to Fare Changes in 2021

Within the MRT system and Public Buses sub-sectors, while satisfaction levels held steady year-on-year, the price tolerance metric registered significant movements. Price tolerance in the CSISG study measures consumers' appetite to tolerate price increases, i.e., the respondents' stated threshold to price increases before they defect as customers or will not say positive things about the company.

For public transport overall, this fell from 9.9% in 2020 to 8.2% in 2021. Figure 4 illustrates price tolerance levels for MRT and Public Buses for the past three years.

The issue of price sensitivity has been observed not just in public transport but in other industry sectors. This recurring theme is likely driven by concerns over the uncertain economic environment.

Price Tolerance
(Percentage)

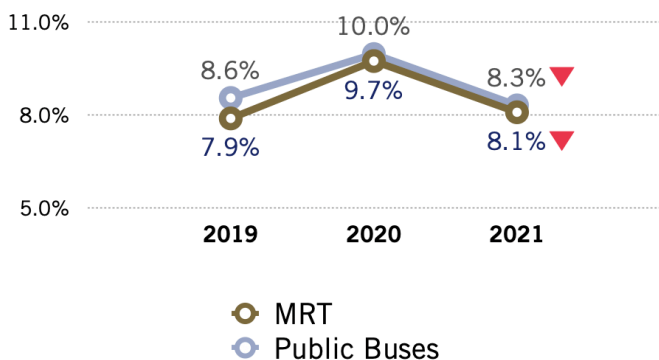


Figure 4: Price tolerance levels from 2019 through 2021, for the MRT and Public Buses sub-sector. The ▼ symbol indicates a significant decline compared to 2020.

Public Transport Safety Key Driver of Quality

Impact analysis, which seeks to determine the most important levers to drive perceptions of quality, revealed shifting priorities among public transport commuters.

Last year, 'Accuracy of in-train information', 'Reliability', and 'Frequency' were the most important drivers of quality for MRT commuters. This year, 'Cleanliness of trains', 'Travel time', and 'Safety' came out on top.

For Public Bus commuters, 'Frequency', 'Ride comfort', and 'Ride smoothness' came out on top last year, while 'Safety', 'Accuracy of bus-arrival information', and 'Bus condition' were the most important drivers this year.

The importance of safety, likely spurred on due to ongoing Covid-19 infections, has become an even more critical driver of perceived quality for our public transport system this year.

Public Transport Operators and relevant agencies should be cognisant to these sentiments and continue investing in these priority areas.

A good example of addressing such key drivers is the recent roll-out (in September 2021) of the new and improved Passenger Information Display Systems for bus stops,. This supports bus commuters' desire for more accurate bus-arrival information.

The top 3 drivers of commuters' perceptions of quality are listed in Figure 5.

	MRT		Public Buses	
	2021	2020	2021	2020
Cleanliness of trains		Accuracy of in-train information	Safety	Frequency
Travel time		Reliability	Accuracy of bus-arrival information	Ride Comfort
Safety		Frequency	Bus condition	Ride Smoothness

Figure 5: MRT and Public Bus sub-sectors' three most important drivers of Perceived Quality, for 2020 and 2021. Safety has surfaced as a key driver in 2021.

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, where appropriate. 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 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, 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 Air Transport sector, typically measured alongside the Land Transport sector in Q2 of each year, was not measured because Covid-19 travel restrictions made survey fieldwork operations impractical. The national score for 2021 will be computed using the data collected over these four quarters.

The Land Transport sector comprised of the MRT System, Public Buses, and Point-to-Point Transport sub-sectors.

CSISG 2021 FIELDWORK PROCESS

Survey data was collected between April and June of 2021. 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 2,350 unique responses in total, covering 15 entities in the Land Transport sector; 11 entities have published scores.

CONTACT US

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