



## **News Release**

### **Covid-19 Has Significantly Changed Singapore’s Commuting Patterns**

Less Public Transport, More Private Hire and Taxi Rides, Say Commuters

**Singapore, 29 September 2021 (Wednesday)** – The Institute of Service Excellence (ISE) (卓越服务研究院) at Singapore Management University (SMU) today released the 2021 second quarter (Q2) Customer Satisfaction Index of Singapore (CSISG) research findings for the Land Transport sector.

The annual study looked at local commuters’ travel behaviours and their experiences in three distinct sub-sectors: The Mass Rapid Transit (MRT) System, Public Buses, and Point-to-Point Transport.

The latest findings show that a majority of commuters interviewed, 61.1%, indicated their commuting patterns have changed since the start of the Covid-19 pandemic, with a significant proportion of them 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.

However, in terms of customer satisfaction, 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. On the other hand, the MRT System sub-sector scored 74.2 points while the Public Buses sub-sector scored 74.4 points; both scores were statistically similar to the previous year.

“While we are observing commuters gravitate towards taxis and private hire cars for their commuting needs, likely for the perceived increase in safety from an endemic Covid-19, the decline in satisfaction year-on-year does suggest painpoints have been developing,” said Ms Neeta Lachmandas (妮塔·拉切曼达斯), Executive Director (执行总监) of ISE.

The lower customer satisfaction scores come on the back of poorer performances in several quality 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 marked year-on-year declines.

“The poor performance of these pricing and ride acquisition-related attributes were supported by survey respondents’ verbatim comments alluding to high prices and poor availability,” added Ms Lachmandas.

“It’s understandable that Covid-19 has been disruptive to Point-to-Point Transport services, particularly in relation to driver supply and ride demand, but operators should review customers’ travel experience and work to strengthen themselves as the transport option of choice,” she surmised.

Within the MRT system and Public Buses sub-sectors, while satisfaction levels held steady year-on-year, some key metrics did register notable movements. Price tolerance, essentially commuters' appetite to tolerate fare increases, fell from 9.9% in 2020 to 8.2% in 2021.

Mr Chen Yongchang (陈勇畅), Head of Research and Consulting at ISE, said, "The issue of price sensitivity has been observed not just in public transport but in other industries that we have measured. This recurring theme is likely driven by concerns over the economic environment."

Impact analysis, which seeks to determine the most important levers to drive perceptions of quality, also 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 by ongoing Covid-19 infections, has become an even more critical driver of quality for our public transport system this year," commented Mr Chen.

"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 of the new and improved Passenger Information Display Systems for bus stops, supporting bus commuters' desire for more accurate bus-arrival information," he remarked.

The CSISG 2021 Q2 study was conducted between April and June 2021. A total of 2,350 local residents were surveyed through online interviews.

Please refer to Annex A for a background on the CSISG and Annex B for the detailed scores.

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### **About the Customer Satisfaction Index of Singapore**

The Customer Satisfaction Index of Singapore (CSISG) is a landmark study that computes customer satisfaction scores at the national, sector, sub-sector, and company levels with the intent of producing a rigorous, objective and comprehensive assessment of Singapore's service levels. Given that the CSISG is the only national customer satisfaction measurement tool with cross sector capabilities, ISE is able to provide organisations with exclusive benchmarking insights about customer satisfaction as well as use predictive analytics and regression models to pinpoint drivers that would deliver the most impact.

### **About the Institute of Service Excellence (ISE) at Singapore Management University**

The Institute of Service Excellence was jointly set up by Singapore Management University and Singapore Workforce Development Agency in July 2007 to elevate service levels and promote a culture of service excellence in Singapore. Working in close collaboration with government agencies and business leaders, ISE champions service excellence through an integrated approach that encompasses benchmarking and analysis, research and thought leadership, as well as industry engagement.

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## Annex A

### About the Customer Satisfaction Index of Singapore (CSISG)

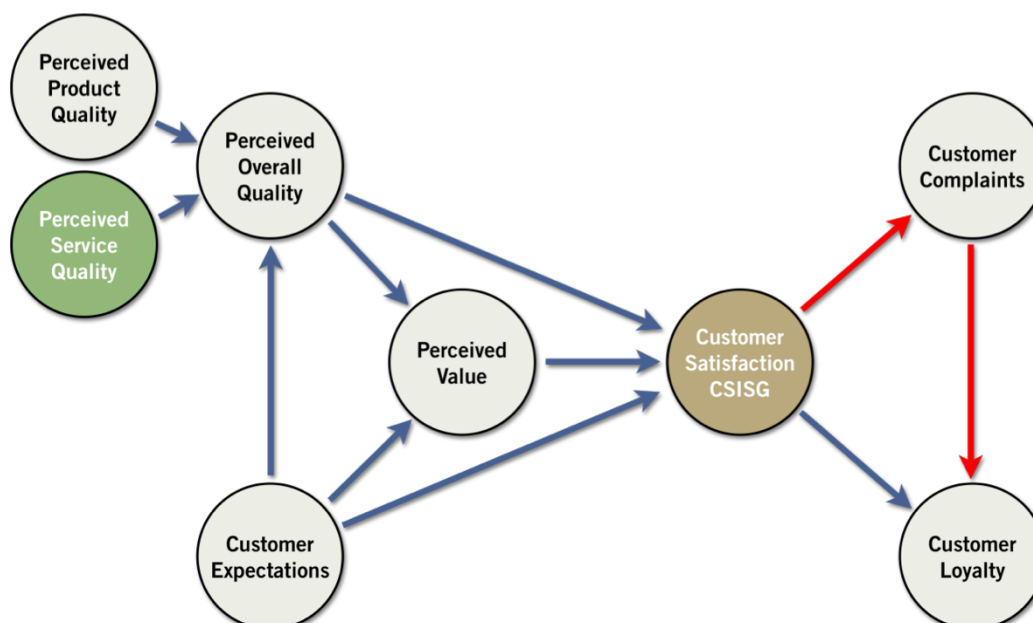
The Customer Satisfaction Index of Singapore (CSISG) is a landmark study that computes customer satisfaction scores at the national, sector, sub-sector, and company levels with the intent of producing a rigorous, objective and comprehensive assessment of Singapore's service levels.

CSISG measures customers' cumulative satisfaction with companies. The scores are generated using a structural equations model (please refer to Figure 1) based on survey data collected from end-users after consumption of products and services. Sub-sector scores are derived as a weighted average of company scores, in proportion to the revenue contributions of companies. Sector scores are derived in a similar fashion, aggregating the sub-sector scores proportionately to each sub-sector's revenue contributions. CSISG scores customer satisfaction on a scale of 0 to 100 with higher scores representing better performance.

The methodological foundations of the CSISG are based on the American Customer Satisfaction Index (ACSI) that was developed by the National Quality Research Center (NQRC) at the University of Michigan. ACSI has been standardised measure of customer satisfaction in the United States economy since 1994.

Given that the CSISG is the only national customer satisfaction measurement tool with cross sector capabilities, ISE is able to provide organisations with exclusive benchmarking insights about customer satisfaction as well as use predictive analytics and regression models to pinpoint drivers that would deliver the most impact.

**Figure 1: CSISG expanded model**





## 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  $N \geq 50$ .

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CSISG Quarter 2

Previously reported scores based on the door-to-door methodology (See Note 1)								2019 Internal Online Study	Note 1 2020	2021	2020–2021 Year-on-Year Change / % Change		SECTOR / Sub-sector / Company Measured
2012	2013	2014	2015	2016	2017	2018	2019						
NM	NM	NM	63.3	66.8	67.8	67.8	68.0	NM	74.5	74.1	-0.49	(-0.7%)	LAND TRANSPORT (Sector)
61.9	64.1	59.7	62.0	66.4	64.8	63.6	64.9	66.1	73.4	74.2	+0.83	(+1.1%)	MRT System (Sub-sector)
63.2	67.3	60.3	63.9	66.5	65.1	63.9	64.7	71.0	75.3	78.2	+2.85	(+3.8%)	SBS Transit Trains
61.5	63.3	59.6	61.5	66.3	64.6	63.4	65.0	63.9	72.5	72.1	-0.38	(-0.5%)	SMRT Trains
61.6	60.6	58.5	60.9	62.7	64.9	65.6	66.7	68.9	74.4	74.4	+0.01	(+0.0%)	Public Buses (Sub-sector)
60.8	60.1	57.7	60.4	61.9	64.0	65.2	67.0	67.3	75.3	74.5	-0.84	(-1.1%)	SBS Transit Buses
63.9	62.2	60.5	62.2	64.4	66.6	67.3	68.2	70.8	72.7	74.3	+1.57	(+2.2%)	SMRT Buses
NM	NM	NM	NM	NM	NM	63.4	64.3	70.2	74.3	74.1	-0.21	(-0.3%)	Other bus operators
NM	NM	NM	NM	NM	NM	NM	Note 2	NM	75.9	73.1	-2.74	(-3.6%)	Point-to-Point Transport (Sub-sector)
63.6	70.5	63.5	66.2	70.1	71.8	72.1	72.9	NM	80.0	84.6	+4.62	(+5.8%)	SMRT Taxis
NM	NM	NM	NM	NM	NM	NM	68.2	NM	75.7	76.4	+0.66	(+0.9%)	Gojek
64.4	65.5	62.9	65.6	69.3	71.4	72.3	72.9	NM	75.0	71.6	-3.38	(-4.5%)	ComfortDelgro
NM	NM	NM	NM	69.0	69.5	67.5	68.1	NM	74.5	70.4	-4.07	(-5.5%)	Grab
NM	NM	NM	NM	NM	NM	NM	NM	NM	NM	77.2	NA	NA	Other Ride Hailing Apps

Not Measured  
Not Applicable

Customer Satisfaction scores are based on a 0 to 100 scale.

Changes coloured in **Green** or **Red** indicates a statistically significant **increase** or **decrease** in score.

Statistical significance is defined at a 90% Confidence Interval.

**Note 1:** From Q2 2020 onwards, data collection for these sub-sectors was done via the online methodology and no tourists were measured.

In Q2 2019, an internal online study was conducted for the MRT System and Public Buses Sub-sectors. Thus, the 2020 scores are comparable with the 2019 internal online study for these sub-sectors.

Data shown in the years before 2020, and collected via the door-to-door methodology, cannot be directly comparable to the 2020 scores and should only be used as references.

**Note 2:** The previously measured Taxis and Transport Booking Apps sub-sectors have been merged to form the Point-to-Point Transport sub-sector.