

News Release

Satisfaction with Public Transport in 2022 Remains Steady Despite Increase in Passenger Volumes

Singapore, 28 September 2022 (Wednesday) – The Institute of Service Excellence (ISE) (卓越服务研究院) at Singapore Management University (SMU) today released the 2022 Customer Satisfaction Index of Singapore (CSISG) research findings for the Land Transport sector, comprising of the Mass Rapid Transit System (MRT), Public Buses, and Point-to-Point Transport (P2P) sub-sectors.

The study, which surveyed commuters between April and July, showed satisfaction with public transport remained steady, despite a strong increase in MRT and bus ridership.

The MRT sub-sector had an overall CSISG score of 74.2 points (on a 0 to 100 scale), while Public Buses scored 74.5 points. Both performances were virtually unchanged compared to the previous year. The P2P sub-sector scored 73.4 points, a small year-on-year increase of 0.4%; the change was not statistically significant.

Delving deeper into the two Public Transport sub-sectors, impact analysis revealed the most important drivers of the commuting experience. For trains, the top three were “Cleanliness”, “Frequency”, and “Ride Comfort”, in order of importance. For buses, they were “Ease of Boarding”, “Ease of Moving Within the Bus”, and “Frequency”.

“While cleanliness continues to be an important aspect of the commuting experience, not surprising since Covid-19 is still very much around us, this latest analysis has shown more pragmatic concerns surface, such as bus and train arrival frequencies,” said Ms Neeta Lachmandas (妮塔.拉切曼达斯), Executive Director (执行总监) of ISE.

In addition, the study had also revealed that the commuting public was expecting to be taking more MRT and bus rides in the next 12 months. Of the public transport respondents polled, 38.4% indicated they expected to take more buses and trains, in contrast to the 6.7% that indicated they were expecting to take less rides.

“These observations suggest people are going to be moving about more often and do care about their ride experience. The findings should serve as a catalyst for public transport operators to start calibrating its infrastructure and services to meet this anticipated resurgence in demand,” suggested Ms Lachmandas.

Within the P2P sub-sector, segment analysis revealed Non-working commuters were significantly less satisfied year-on-year, scoring 72.1 points in 2022 compared to 76.5 points in 2021, a 5.7% decline. Non-working commuters were defined as students, homemakers, retirees, or the unemployed.

And compared to Working commuters, i.e., respondents that indicated they had some form of employment, the Non-working segment was also observed to have comparatively lower

perceptions of value, scoring 67.7 points compared to 70.9 points for the Working segment. In addition, Non-working commuters' satisfaction with "Ease of getting a ride" and "Waiting for a ride" were two other areas which fared significantly poorer.

"The decrease in the numbers of taxis and private hire vehicles plying the roads, coupled with higher ride prices, may have affected the P2P sub-sector's CSISG metrics, particularly for the non-working segment, who presumably have a smaller tolerance for such discretionary spending," surmised Ms Lachmandas.

Impact analysis for the P2P sub-sector revealed the three most important drivers of quality were "Ride Safety", "Driver Interactions", and "Ease of getting a ride".

The CSISG 2022 Q2 study was conducted between April and July 2022. 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.

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.

For media queries, please contact:

Mr Tim Zhuang

Senior Manager, Partnerships and Programme Development

Institute of Service Excellence (ISE) at Singapore Management University

DID: (65) 6808 5258

Mobile: (65) 9748 9389

Email: timzhuang@smu.edu.sg

Ms Audrey Chan

Senior Manager, Corporate Communications

Office of Corporate Communications and Marketing

DID: (65) 6828 0964

Email: audreychan@smu.edu.sg

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. Each company score is generated using a structural equations model (refer to Figure 1) based on survey data collected from end-users after consumption of products and services.

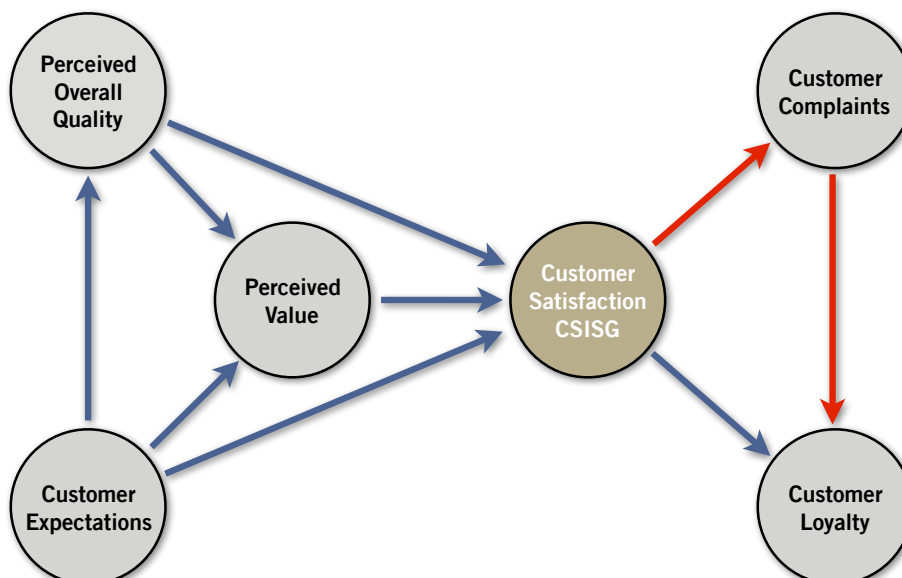
Sub-sector scores are derived as a weighted average of company scores, in proportion to the local (and where applicable, tourist) incidence interactions with the constituent companies. Sector scores are derived by aggregating the sub-sector scores proportionately to each sub-sector's revenue contributions.

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. The ACSI has been a standardised measure of customer satisfaction in the United States economy since 1994.

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Figure 1: CSISG model



Annex B



2022 Q2 SCORES LAND TRANSPORT

- 74.1 Land Transport**
- 74.5 Public Buses**
- 75.0** SMRT Buses
- 74.7** SBS Transit
- 73.1** Other bus operators

- 74.2 Mass Rapid Transit System**
- 76.3** SBS Transit
- 73.1** SMRT

- 73.4 Point-to-Point Transport**
- 77.1** Gojek*
- 76.7** Other Ride Hailing Apps*
- 76.5** Strides Taxis (SMRT)*
- 75.3** ComfortDelGro
- 71.5** Grab

This chart summarises the results of the CSiSG 2022 satisfaction scores in the Land Transport sectors at the sector, sub-sector and company levels.

Each sector score (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.

* Sub-sectors indicated with an asterisk(*) are sub-sectors that have performed significantly above their sector average.

The sparklines indicate the satisfaction score of their respective sectors, sub-sectors and companies over the past few years.

- statistically significant increase in customer satisfaction from 2021 to 2022
- statistically significant decrease in customer satisfaction from 2021 to 2022
- no significant year-on-year change in customer satisfaction score

Entities shown in this scorecard have samples of N≥50.

CSISG Quarter 2

Previously reported scores based on the door-to-door methodology (See Note 1)							2019 Internal Online Study	Note 1 2020	2021	2022	2021–2022 Year-on-Year Change / % Change		SECTOR / Sub-sector / Company Measured
2013	2014	2015	2016	2017	2018	2019							
NM	NM	63.3	66.8	67.8	67.8	68.0	NM	74.5	74.1	74.1	+0.02	(+0.0%)	LAND TRANSPORT (Sector)
64.1	59.7	62.0	66.4	64.8	63.6	64.9	66.1	73.4	74.2	74.2	-0.04	(-0.1%)	MRT System (Sub-sector)
67.3	60.3	63.9	66.5	65.1	63.9	64.7	71.0	75.3	78.2	76.3	-1.89	(-2.4%)	SBS Transit Trains
63.3	59.6	61.5	66.3	64.6	63.4	65.0	63.9	72.5	72.1	73.1	+0.97	(+1.3%)	SMRT Trains
60.6	58.5	60.9	62.7	64.9	65.6	66.7	68.9	74.4	74.4	74.5	+0.04	(+0.0%)	Public Buses (Sub-sector)
62.2	60.5	62.2	64.4	66.6	67.3	68.2	70.8	72.7	74.3	75.0	+0.71	(+1.0%)	SMRT Buses
60.1	57.7	60.4	61.9	64.0	65.2	67.0	67.3	75.3	74.5	74.7	+0.16	(+0.2%)	SBS Transit Buses
NM	NM	NM	NM	NM	63.4	64.3	70.2	74.3	74.1	73.1	-1.04	(-1.4%)	Other bus operators
NM	NM	NM	NM	NM	NM	Note 2	NM	75.9	73.1	73.4	+0.26	(+0.4%)	Point-to-Point Transport (Sub-sector)
NM	NM	NM	NM	NM	NM	68.2	NM	75.7	76.4	77.1	+0.77	(+1.0%)	Gojek
70.5	63.5	66.2	70.1	71.8	72.1	72.9	NM	80.0	84.6	76.5	-8.17	(-9.7%)	Strides Taxis
65.5	62.9	65.6	69.3	71.4	72.3	72.9	NM	75.0	71.6	75.3	+3.71	(+5.2%)	ComfortDelgro
NM	NM	NM	69.0	69.5	67.5	68.1	NM	74.5	70.4	71.5	+1.12	(+1.6%)	Grab
NM	NM	NM	NM	NM	NM	NM	NM	NM	77.2	76.7	-0.50	(-0.7%)	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.