



ISE INDUSTRY FORUM

CSISG 2021 Q2 RESULTS ANNOUNCEMENT

LAND TRANSPORT

**DOES CUSTOMER SATISFACTION
STILL MATTER?**

Customer Experience & Satisfaction



- Great customer experiences tend to lead to satisfaction or even delight.
- Happy customer tend to be more loyalty to the brand.
- Poor experiences tend to lead to customer dissatisfaction and defection and negative word-of-mouth.

- High repurchase
- Price insensitivity
- Positive word-of-mouth
- Higher customer referrals
- Stays longer with brand downturn
- Returns to the brand faster in a recovery



Positive Relationship Between Satisfaction & Other Metrics

Even for monopolistic type industries satisfaction is positively related to key metrics like (1) **Positive-of-Mouth** (2) **Trust**, and (3) **Confidence** in the company.

Mass Rapid Transit System



Public Buses



CSISG METHODOLOGY

How Well Did Companies Satisfy Their Customers?

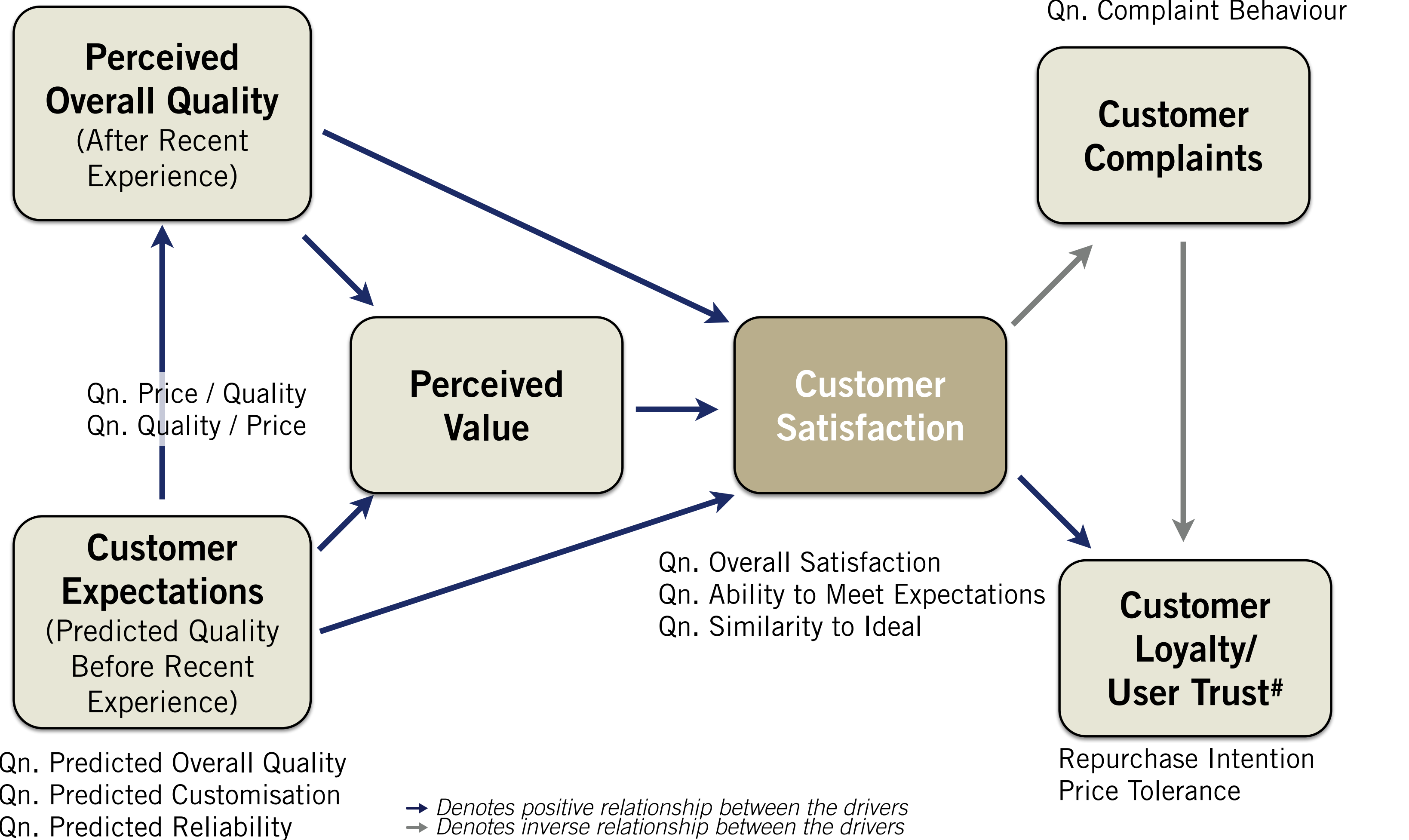
The CSISG Score



- 1. Overall Satisfaction**
- 2. Ability to Meet Expectations**
- 3. Similarity to Ideal**

CSISG Structural Model

Qn. Perceived Overall Quality
 Qn. Perceived Customisation
 Qn. Perceived Reliability

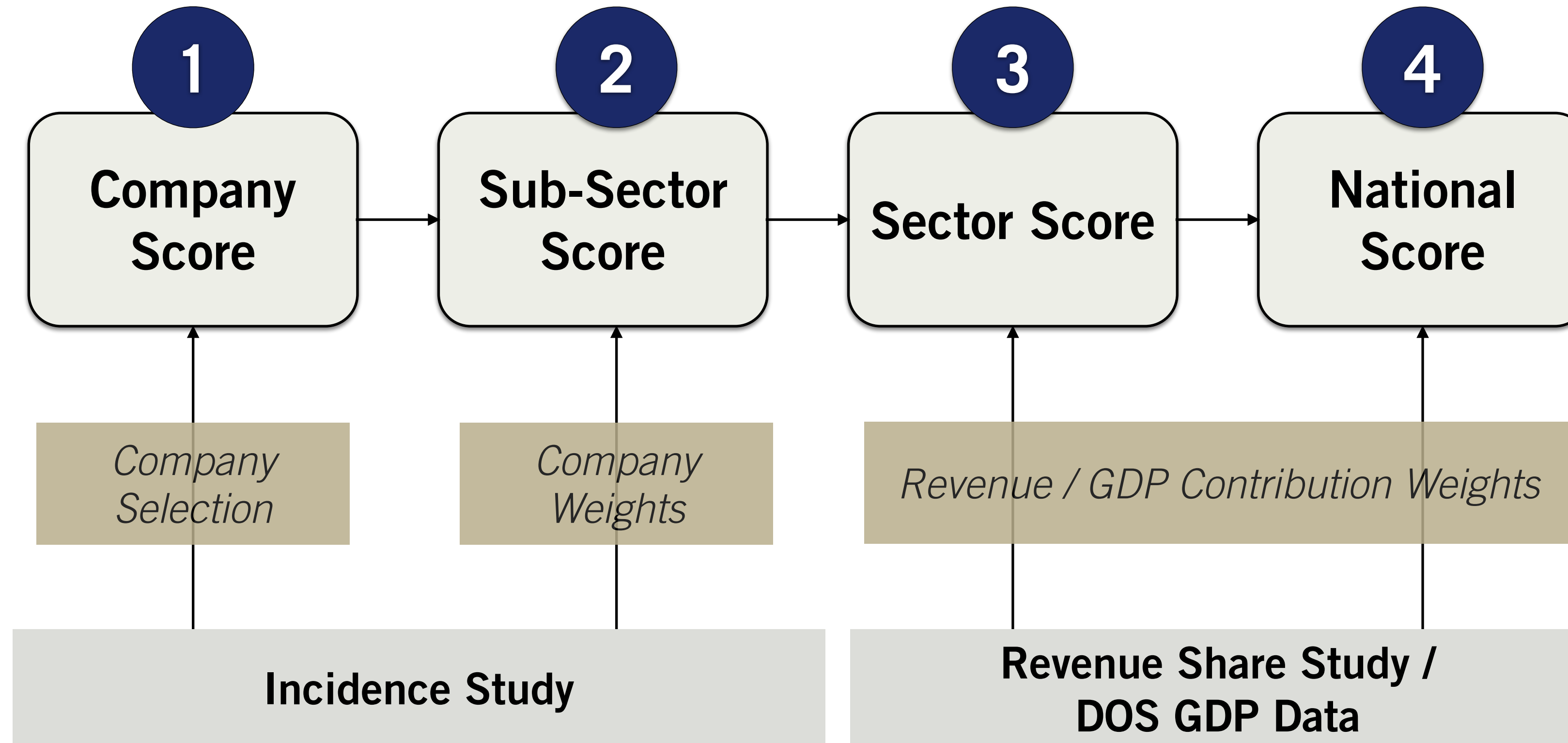


Qn. Predicted Overall Quality
 Qn. Predicted Customisation
 Qn. Predicted Reliability

Note: MRT Systems and Public Buses respondents are administered questions on User Trust instead of Customer Loyalty.

#Qn. Positive Word-of-Mouth
 #Qn. Price Tolerance

Overview of Score Calculation



- Identify companies with highest interactions with locals.
- Locals survey either through randomised door-to-door interviews or online surveys through nationally representative online panels.

- Identify revenue contribution of each sub-sector to its respective sector.
- Identify GDP contribution of each sector to the total GDP of sectors measured in the CSISG.

General CSISG Fieldwork Methodology

Think about your **ACTUAL RECENT EXPERIENCES** with Lazada in the last 3 months regarding the **QUALITY** of their product and services, how would you rate the overall quality you experienced

Not Very High 1 2 3 4 5 6 7 8 9 10 Very High

Overall Quality ○ ○ ○ ○ ○ ○ ○ ○ ○ ○

CONSIDER ALL YOUR EXPERIENCES TO DATE

Singapore citizens and PRs were asked to complete an online survey. Respondents were randomly selected from a nationally representative online panel.

101. How often do you use Lazada? (English/Chinese)

102. How often do you use Lazada? (English/Chinese)

103. How often do you use Lazada? (English/Chinese)

104. How often do you use Lazada? (English/Chinese)

105. How often do you use Lazada? (English/Chinese)

106. How often do you use Lazada? (English/Chinese)

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110. How often do you use Lazada? (English/Chinese)

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114. How often do you use Lazada? (English/Chinese)

115. How often do you use Lazada? (English/Chinese)

116. How often do you use Lazada? (English/Chinese)

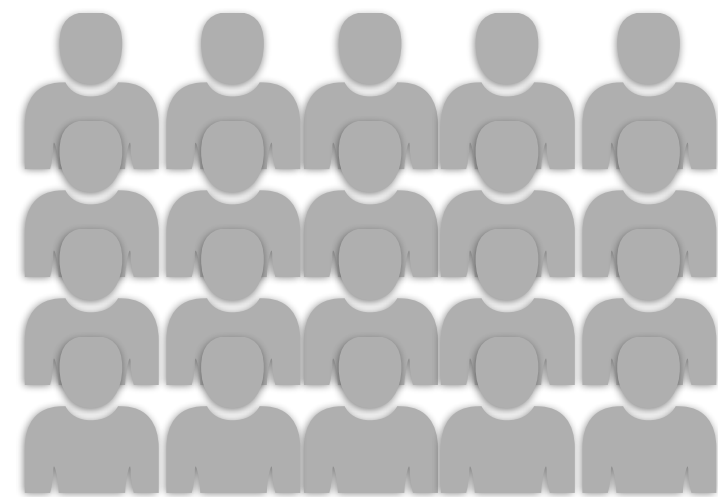
117. How often do you use Lazada? (English/Chinese)

118. How often do you use Lazada? (English/Chinese)

119. How often do you use Lazada? (English/Chinese)

120. How often do you use Lazada? (English/Chinese)

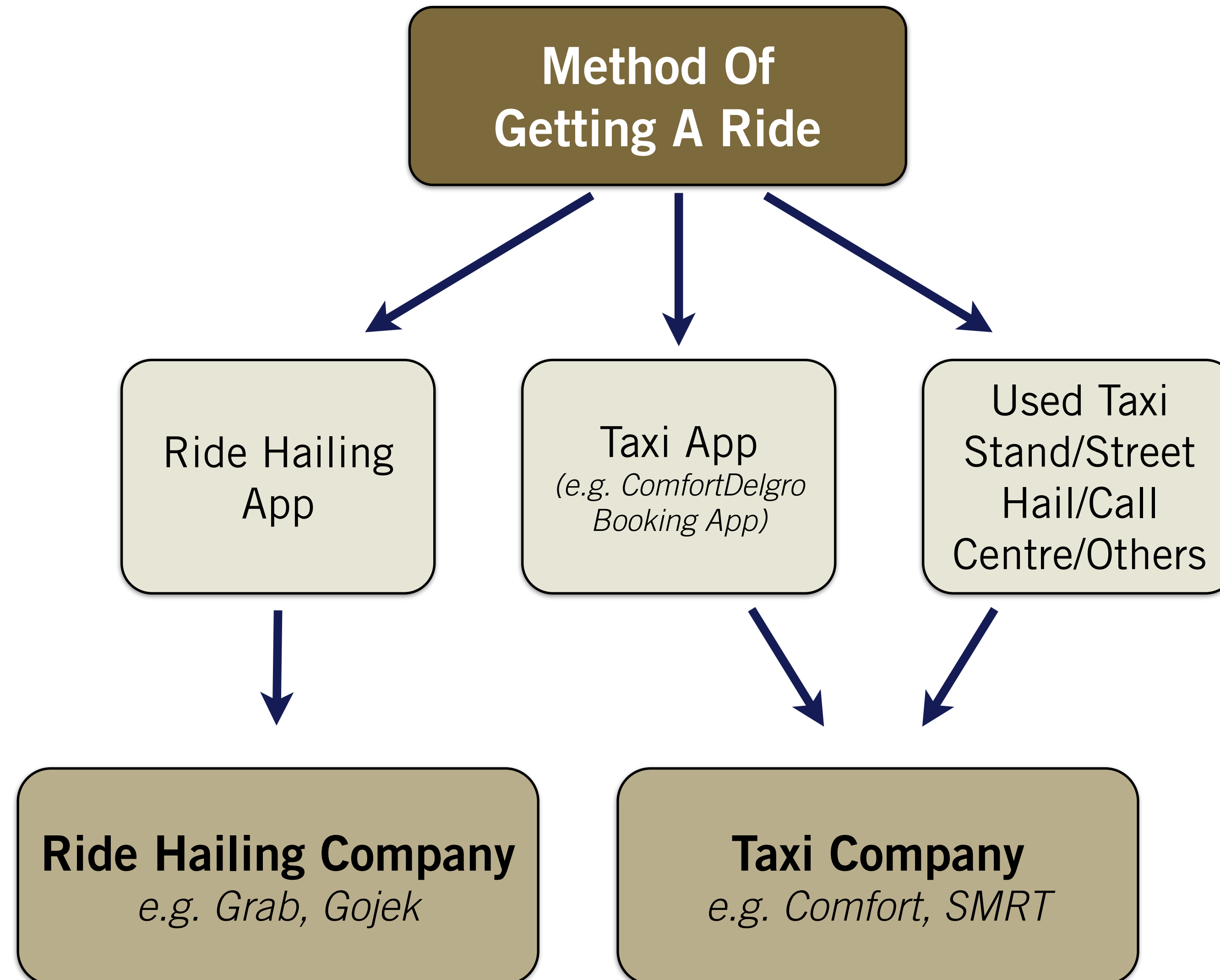
Each respondent answers up to 21 CSISG questions and about 25 industry-specific attribute/touchpoint questions about the company/brand they had recent experiences with. Each respondent evaluates only 1 company/brand.



Typically 50-200 respondents per company would have answered the CSISG questionnaire.

Measuring The Point-to-Point Transport Sub-Sector

(Company Identified for Evaluation Based on How Ride Was Acquired)



CSISG 2021 Q2 Quick Facts

Sectors Covered	Land Transport
Sub-Sectors Covered	<ul style="list-style-type: none">• Mass Rapid Transit System• Public Buses• Point-to-Point Transport
Survey Period	Apr to Jun 2021
Total Questionnaires Completed	2,350
Online (Locals)	2,350
Distinct entities measured	15
Entities with published scores	11

CHANGE IN COMMUTING PATTERNS

COVID-19 Measures Across Phases For Workforce, Retail and F&B



2020
Circuit Breaker



2020
Post-Circuit Breaker



2021
Phase 3/ Phase 3 HA



2021
Phase 2 HA

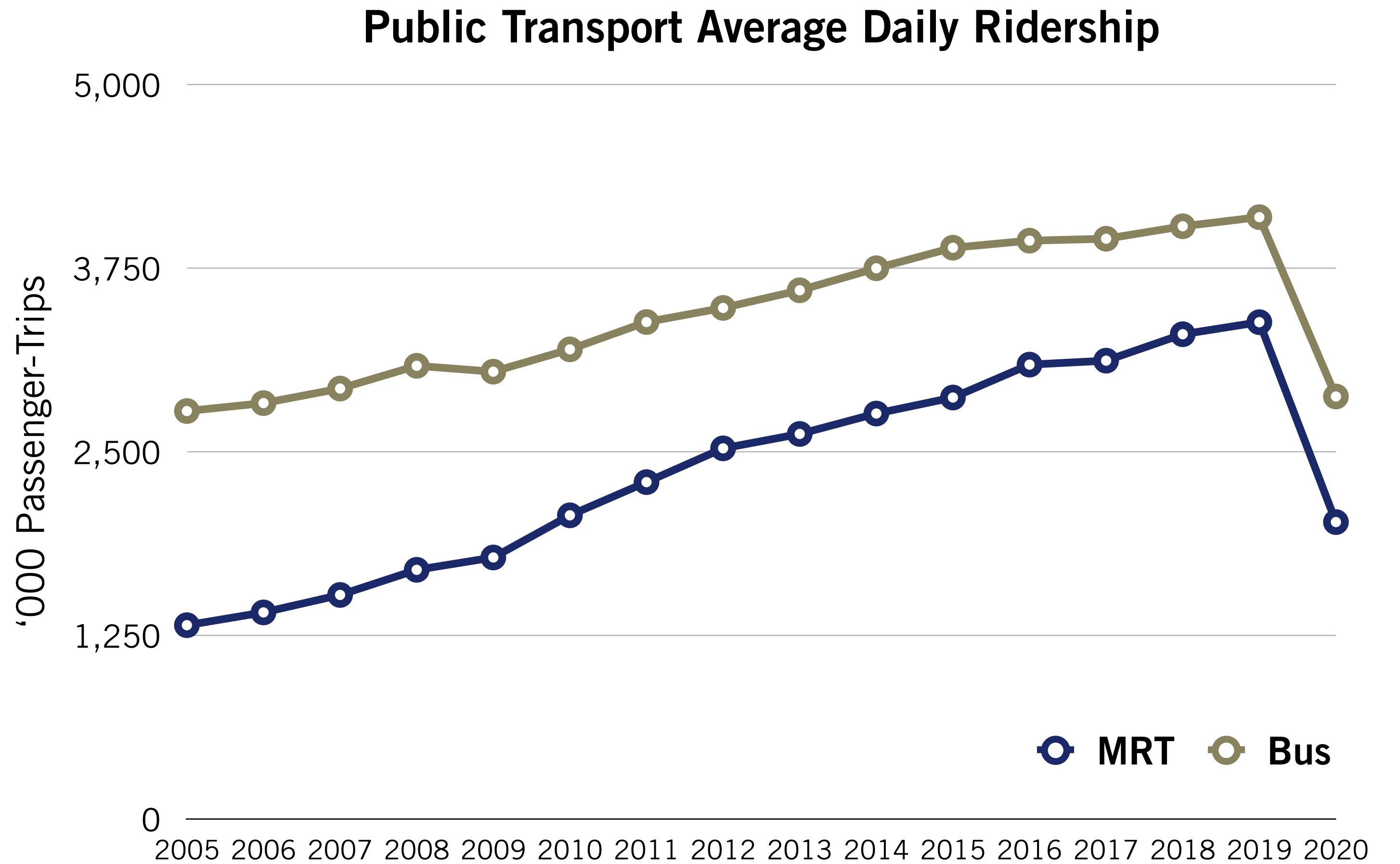


Phase period:

	Circuit Breaker <i>7 Apr 2020 to 1 Jun 2020</i>	Phase 1 <i>2 Jun 2020 to 18 Jun 2020</i>	Phase 2 <i>19 Jun 2020 to 27 Dec 2020</i>	Phase 3 <i>28 Dec 2020 to 7 May 2021</i>	Phase 3 HA <i>8 May 2021 to 15 May 2021</i>	Phase 2 HA <i>16 May 2021 to 13 Jun 2021</i>
Workforce	Essential	Essential	WFH default 50%	WFH default 75%	WFH default 75%	WFH default 50%
Retail	Essential	Essential	Open	Open	Open	Open
F&B	Take-away/ delivery	Take-away/ delivery	5pax	8pax	5pax	2-5pax

Image sources:
<https://www.straitstimes.com/singapore/health/day-1-of-covid-19-circuit-breaker-measures-and-singapore-is-a-stiller-city>
<https://www.tnp.sg/news/singapore/mrt-trains-and-buses-more-crowded-after-circuit-breaker>
<https://www.straitstimes.com/singapore/thin-crowds-on-public-transport-in-office-buildings-as-singapore-returns-to-phase-2>
<https://www.channelnewsasia.com/singapore/covid-19-community-cases-new-format-daily-update-moh-1932926>

Significant Decline In Public Transport Ridership

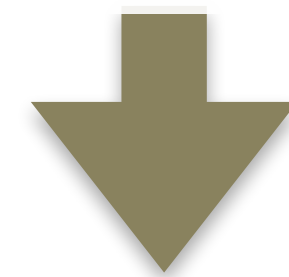
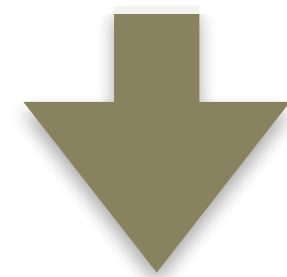
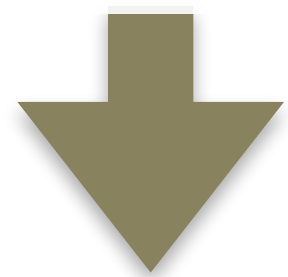


Source:
 (1) Article: <https://www.todayonline.com/singapore/public-transport-ridership-falls-60-pre-pandemic-levels-govt-relook-financial-impact-only>
 (2) LTA Data: https://www.lta.gov.sg/content/ltagov/en/who_we_are/statistics_and_publications/statistics.html

Commuting Patterns Have Changed for The Majority of Working Commuters

(Change In Commuting Pattern Compare to Pre-Covid-19)

		MRT Respondents	Public Buses Respondents	Point-to-Point Transport Respondents
Overall:		62.5%	58.4%	62.7%
Work Status	Working	70.1%	60.7%	68.2%
	Non-Working	47.3%	53.9%	46.0%
Present Work From Home Status	Do not work from home	50.9%	39.1%	46.4%
	Work from home	77.7%	71.2%	75.5%



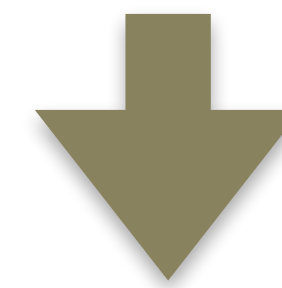
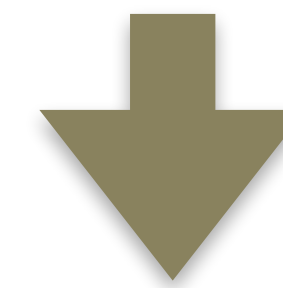
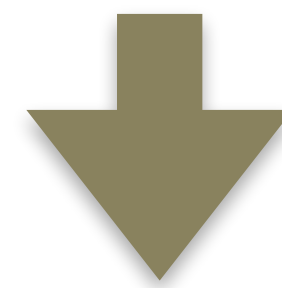
% Who Indicated A Change In Commuting Patterns

Note: Work from home status is only asked to respondents who are currently working

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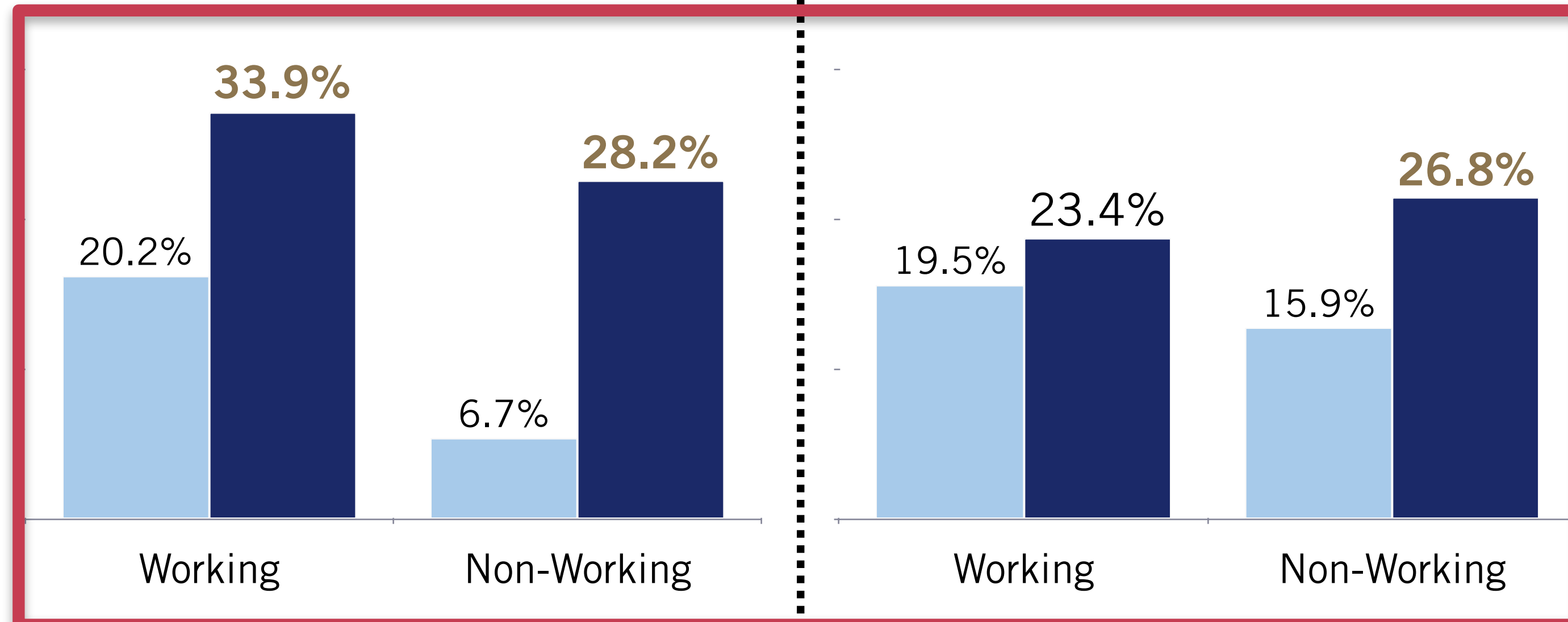
Public Transport: More Respondents Taking Less Trains & Buses

Thinking about your pre-COVID-19 commuting pattern, how has that changed now?

Changes in commuting pattern compared to Pre-Covid-19

MRT Respondents

- Take more MRT now
- Take less MRT now



Text in **GOLD** indicates a statistically higher proportion of those who take less of the respective public transportation than those who take more.

Point-to-Point: More Respondents Taking More Taxis/PHCs

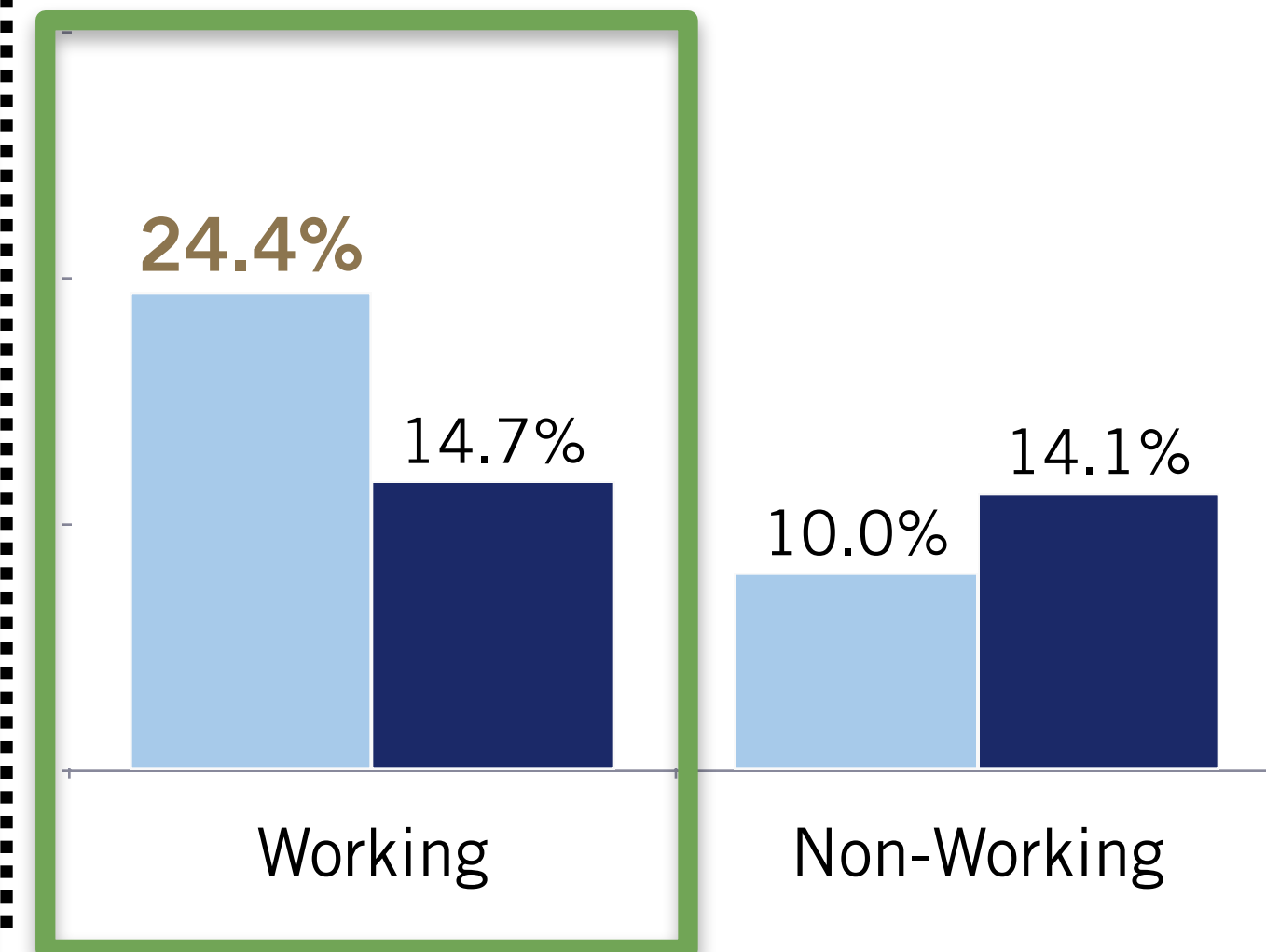
Thinking about your pre-COVID-19 commuting pattern, how has that changed now?

Changes in commuting pattern compared to Pre-Covid-19



Point-to-Point Transport Respondents

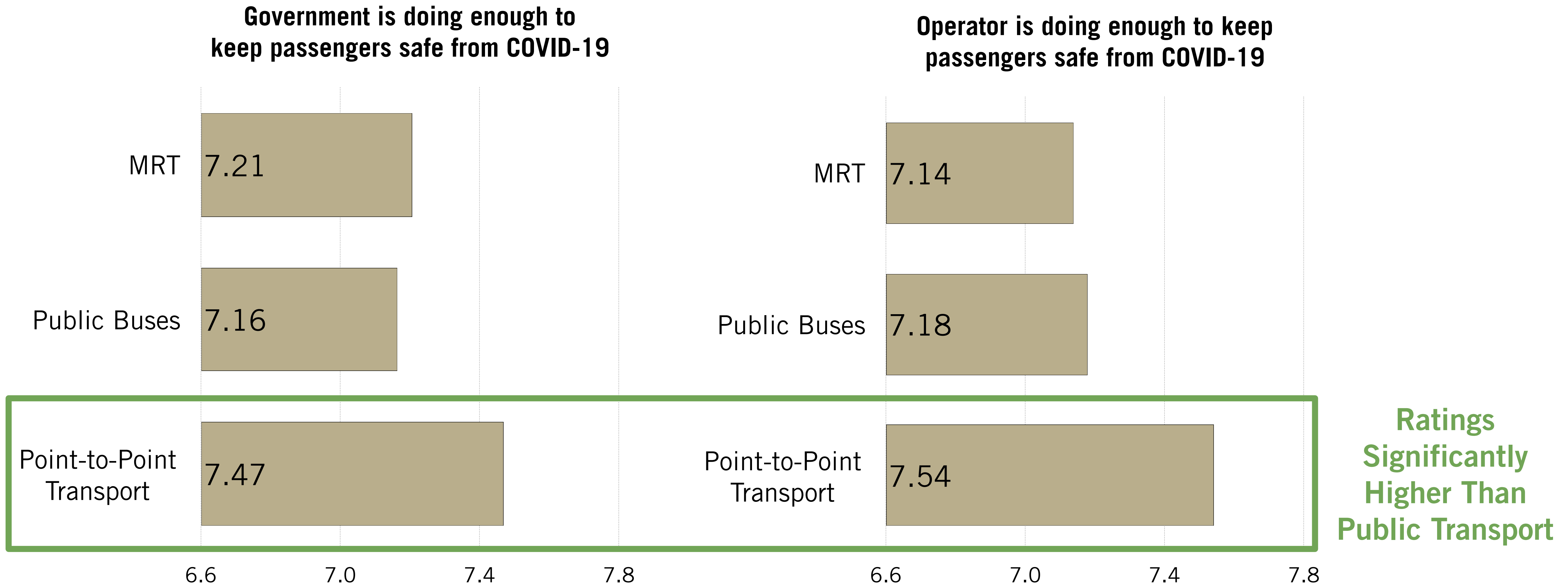
- Take more taxis/ private hire cars now
- Take less taxis/ private hire cars now



Text in **GOLD** indicates a statistically higher proportion of those who take more taxis/ private hire cars than those who take less.

Point-to-Point Commuters Rate COVID Measures Higher Than Public Transport

Commuters Perception of COVID-19 Measures



LAND TRANSPORT SECTOR RESULTS

How Well Did Companies Satisfy Their Customers?

CSISG 2021 Q2 Results Overview

↔ 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

QUALIFIER FOR RESPONDENT

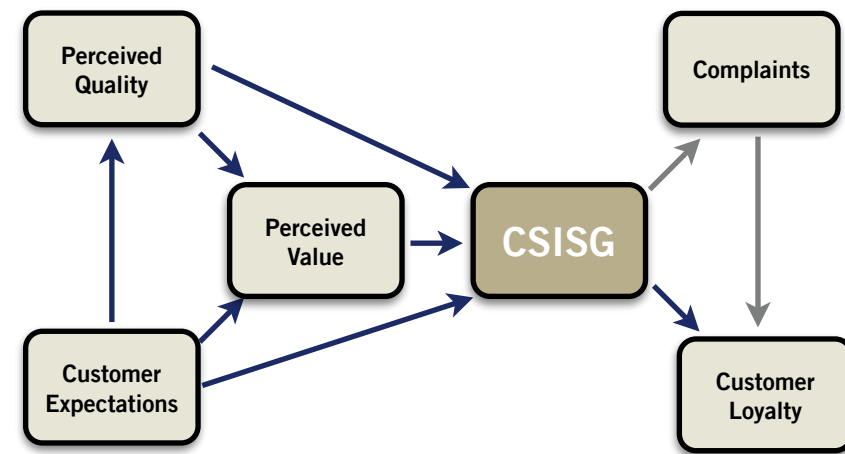
- (1) Recently interacted with company (Past 3 months)
- (2) Each respondent evaluates satisfaction with 1 company within the Land Transport sector

* Refers to companies/sub-sectors that are statistically significantly above their sub-sector/sector scores

Entities shown in this scorecard have samples of $N \geq 50$.

Marginal Changes to Public Transport Scores

(Land Transport Scores: Year-on-Year Movement in Satisfaction Drivers)



	Customer Expectations (Predicted Quality Before Recent Experience)	Perceived Quality (After Recent Experience)	Perceived Value	CSISG	User Trust/ Customer Loyalty
Mass Rapid Transit System	74.9 ■ (+1.9%)	75.5 ■ (+1.8%)	72.2 ■ (+2.3%)	74.2 ■ (+1.1%)	68.2 ■ (-0.4%)
Public Buses	73.9 ■ (+0.6%)	74.5 ■ (-0.3%)	72.4 ■ (+0.5%)	74.4 ■ (0.0%)	69.1 ■ (-1.0%)
Point-to-Point Transportation	72.9 ▼ (-3.5%)	73.9 ▼ (-3.1%)	70.6 ▼ (-4.7%)	73.1 ▼ (-3.6%)	73.9 ▼ (-3.1%)

Significant declines

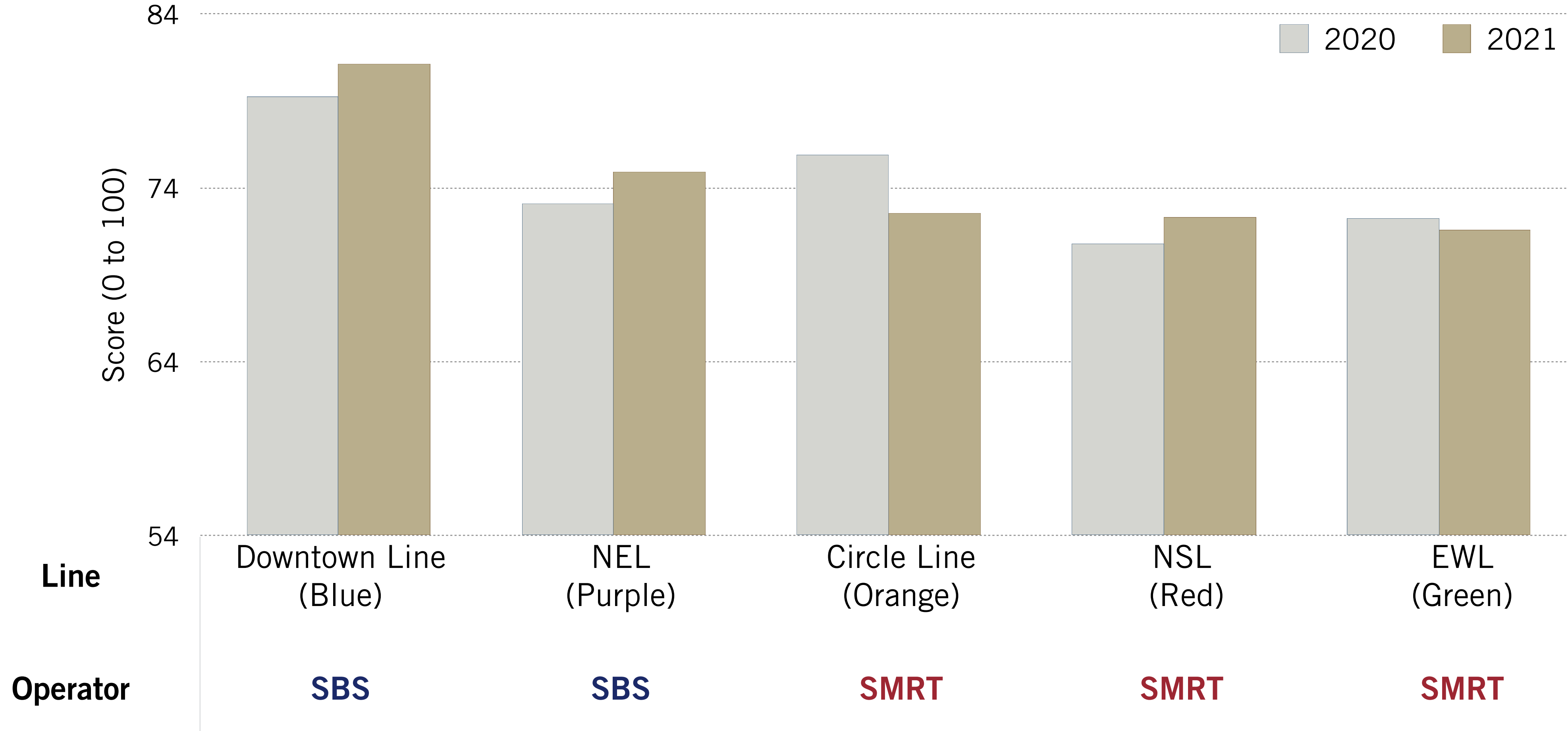
▲ ▼ Statistically significant year-on-year **increase/drop** at 90% confidence
 ■ No statistically significant year-on-year change at 90% confidence

Marked Improvement in SBS Transit Trains (MRT System)



CSISG Scores by Train Lines

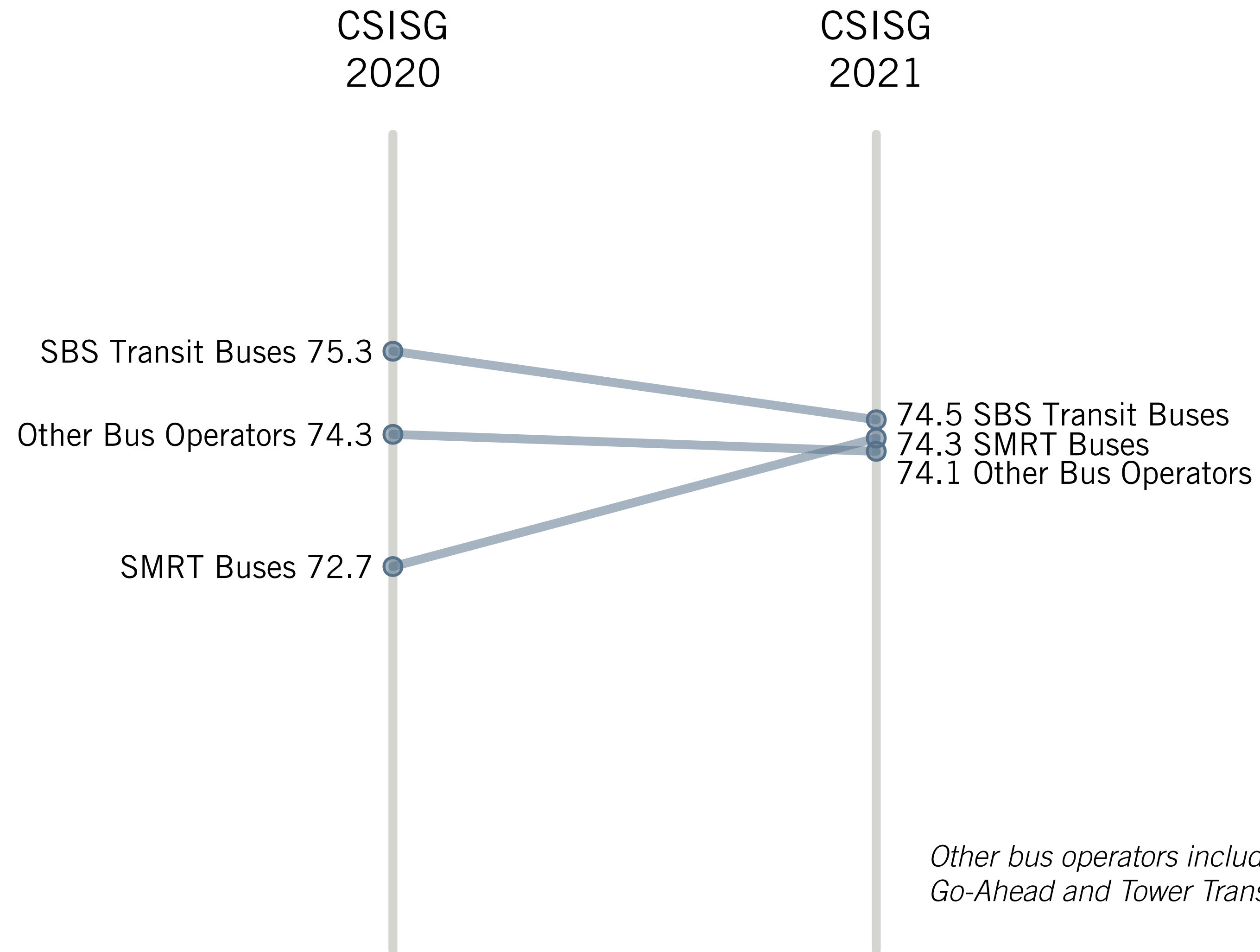
Overall MRT CSISG: 74.2



No statistically significant year-on-year movement at the line level

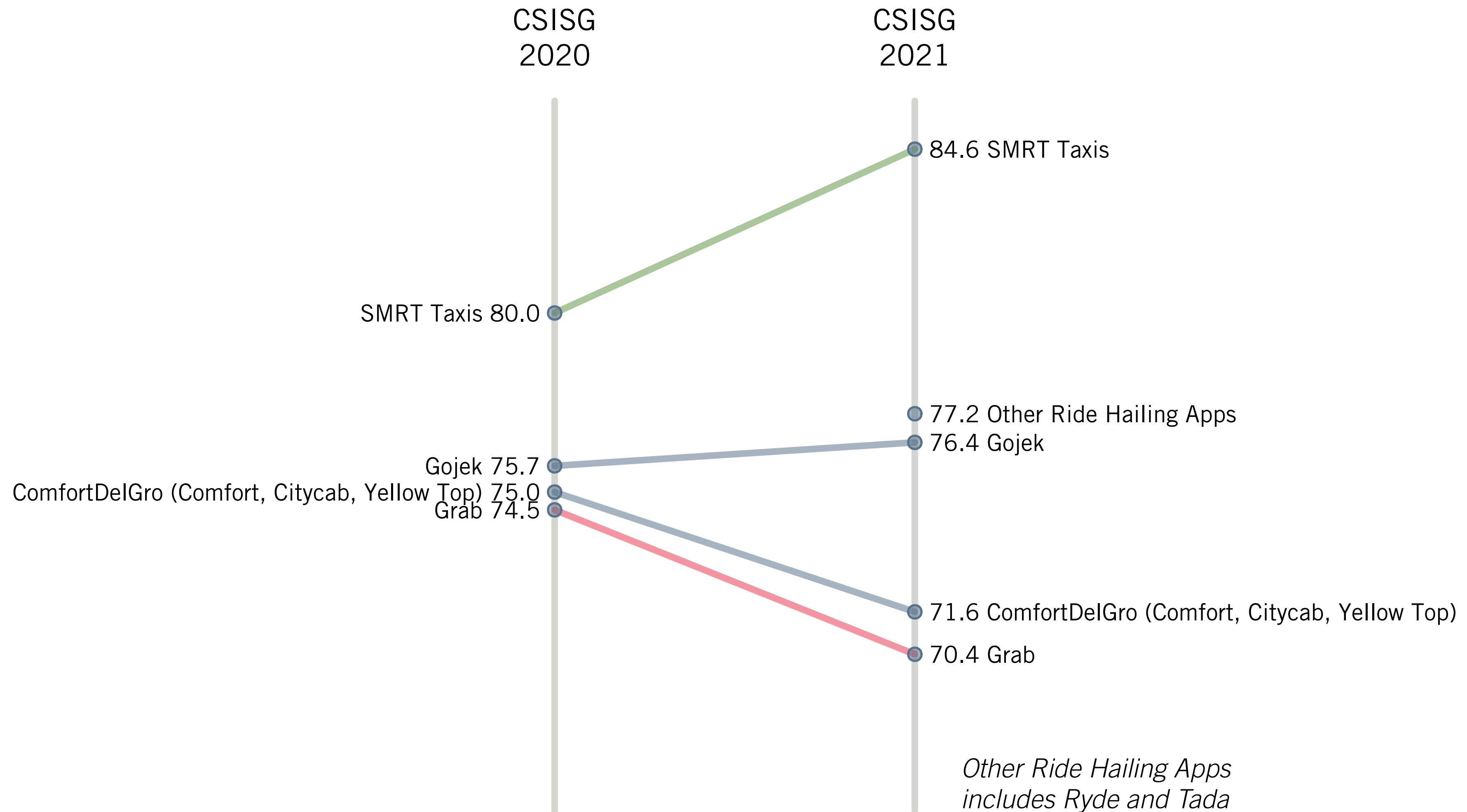
▲ ▼ Statistically significant year-on-year increase/drop at 90% confidence

Scores Remain Statistically Unchanged Year-on-Year (Public Buses)



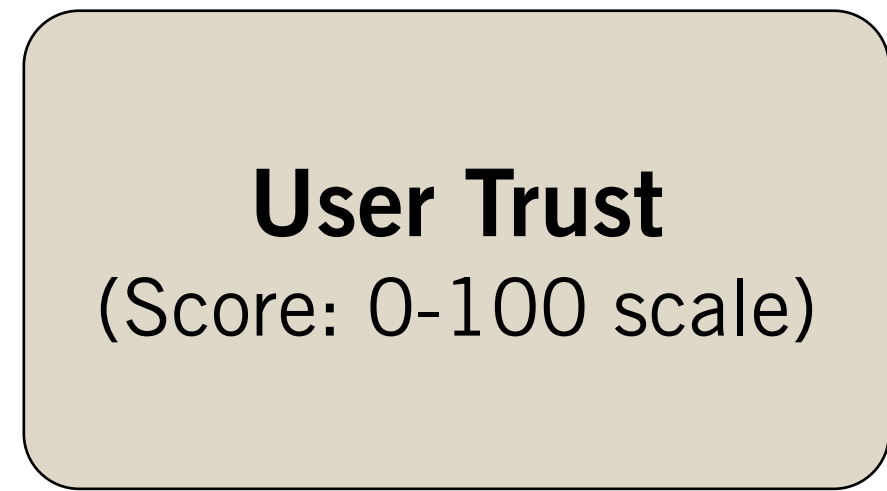
Grab & SMRT Taxis Saw Significant Score Movements

(Point-to-Point Transport)

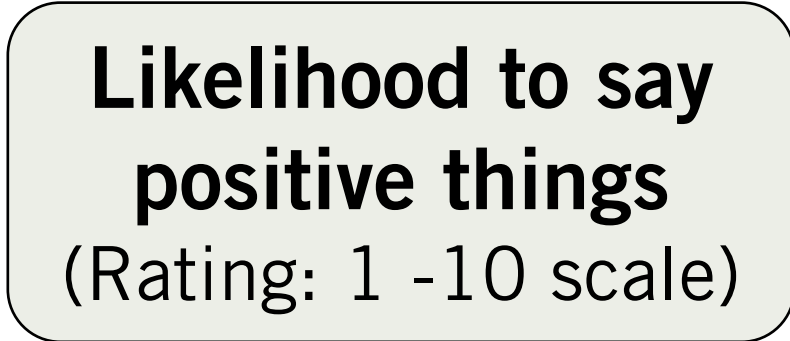


Higher Price Sensitivity Among Public Transport Commuters

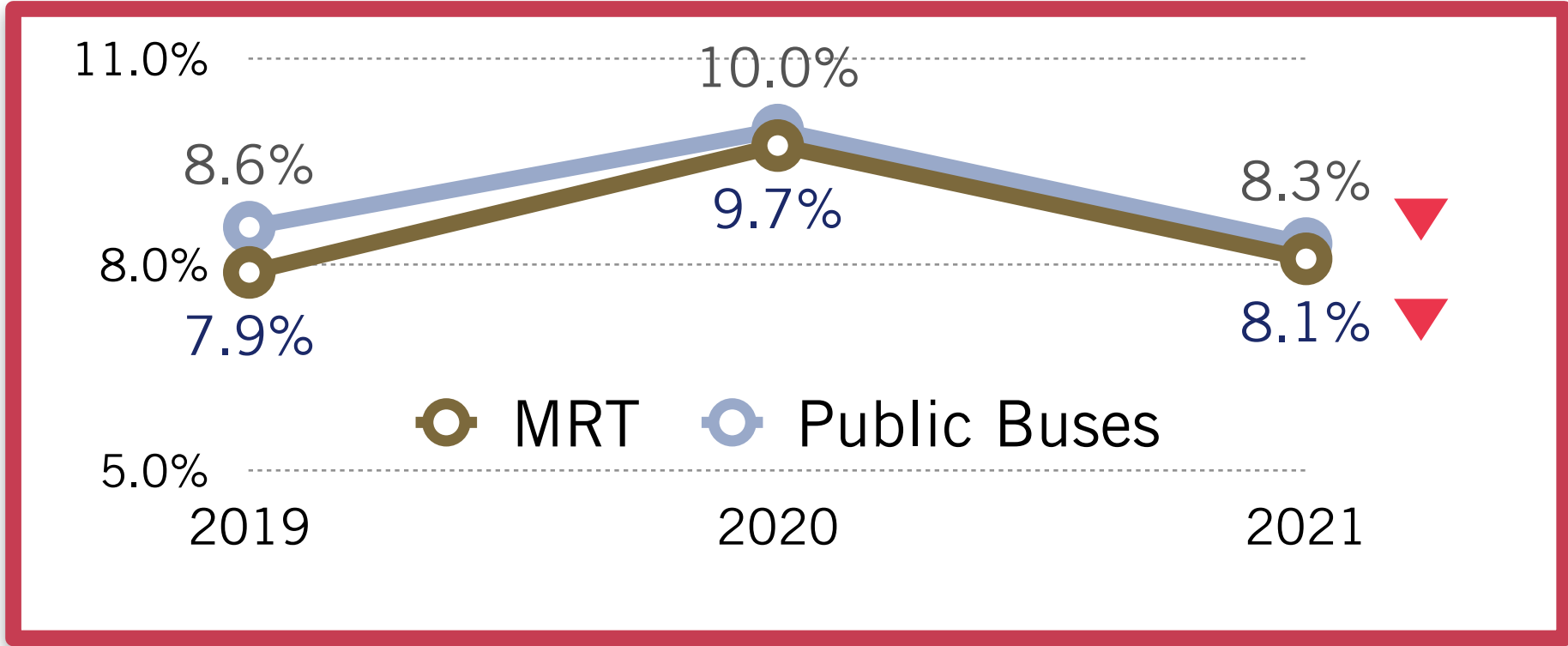
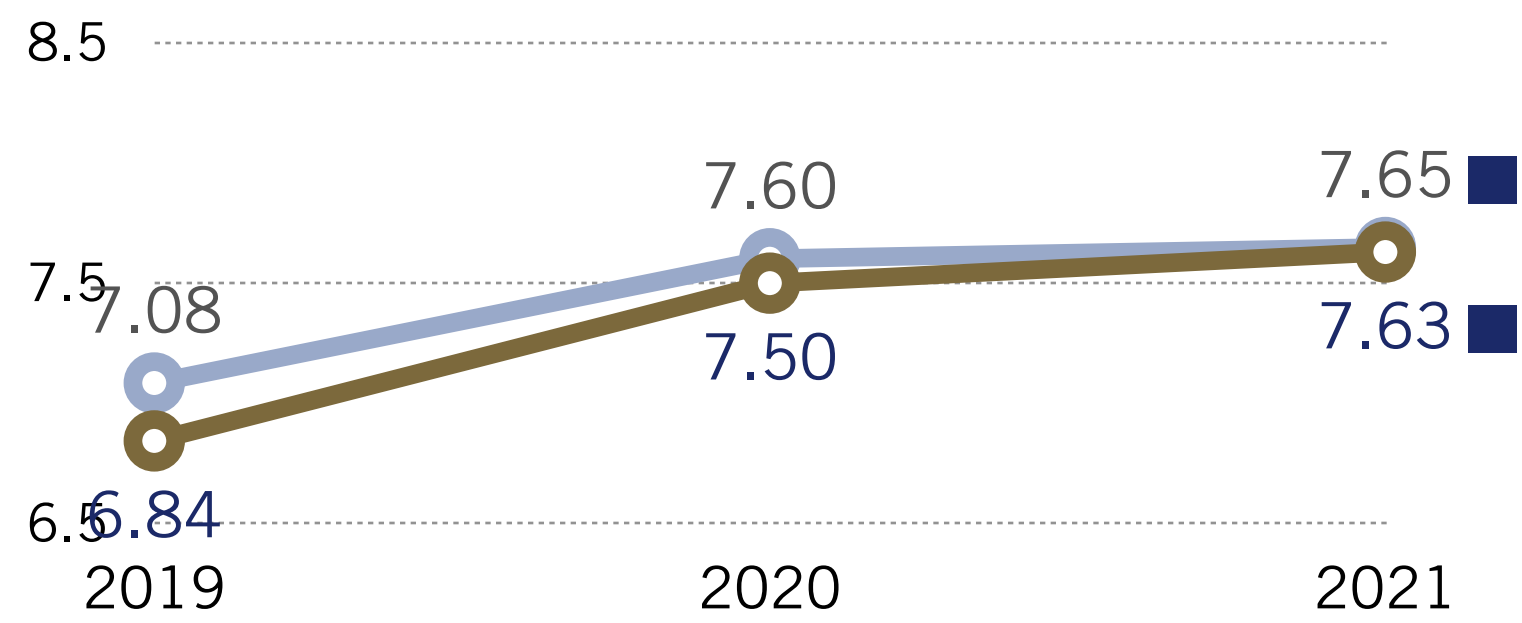
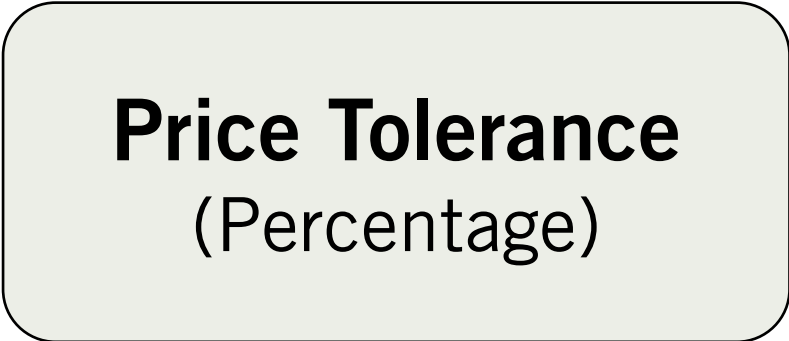
Components of User Trust for MRT & Public Buses



If asked, how likely would you be to say positive things about the operator?
(All respondents)



How much can the operator raise its fares before you definitely would not say positive things about the operator?
(For respondents who rated likelihood to say positive things from 6 -10)

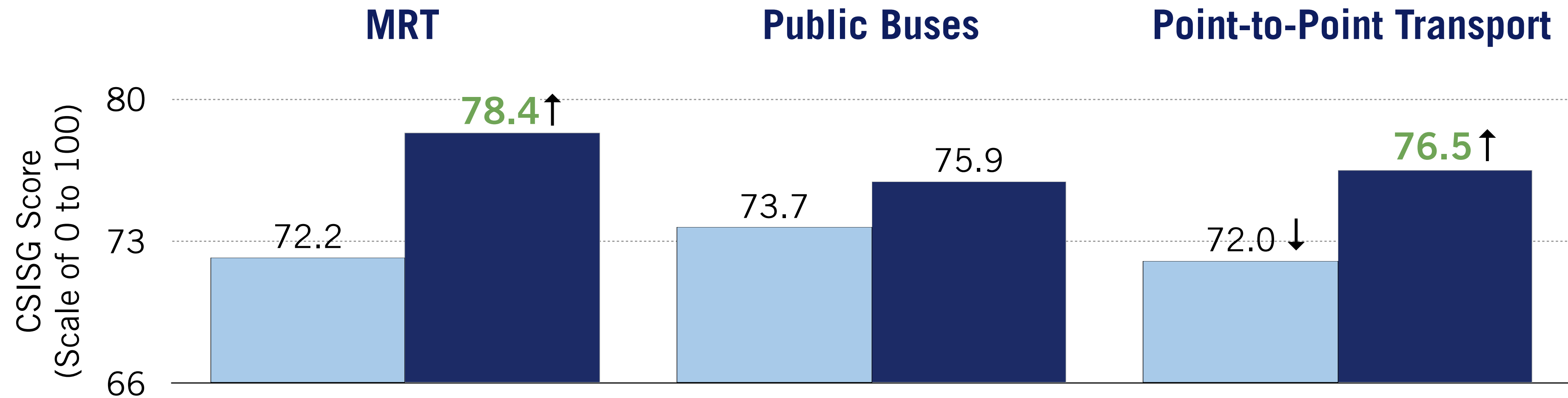


▲ ▼ Statistically significant **increase/drop** between the 2021 and 2020 scores at 90% confidence
 ■ No statistically significant change between the 2021 and 2020 scores at 90% confidence

WORKING VS NON-WORKING

Non-Working Commuters Gave Higher Scores For MRT & Point-to-Point

(Land Transport: Year-on-Year Change in Scores By Work Status)

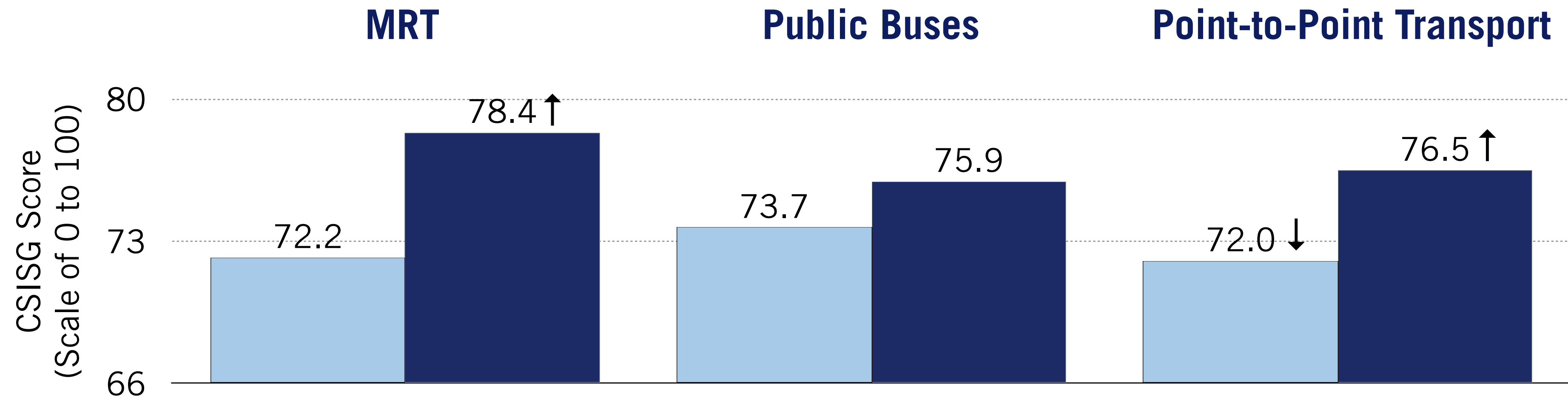


Score (0 to 100)	Category	MRT		Public Buses		Point-to-Point Transport	
		Working	Non-Working	Working	Non-Working	Working	Non-Working
	Customer Expectations	73.0	78.6 ↑	73.3	75.1	71.7 ↓	76.5 ↑
	Perceived Quality	73.7	79.2 ↑	73.5	76.6	72.6 ↓	77.6 ↑
	Perceived Value	70.0	76.5 ↑	72.2	72.7	69.5 ↓	74.0 ↑
	User Trust	66.9 ↓	71.5 ↑	68.3	70.2	72.5 ↓	76.9 ↑

↑ ↓ denotes statistically significant year-on-year **increase/decrease** at 90% confidence.
GREEN/RED score indicates a **BETTER/WORSE** performance than Working segment with statistical significance.

Working Commuters Gave Lower Scores For Point-to-Point

(Land Transport: Year-on-Year Change in Scores By Work Status)

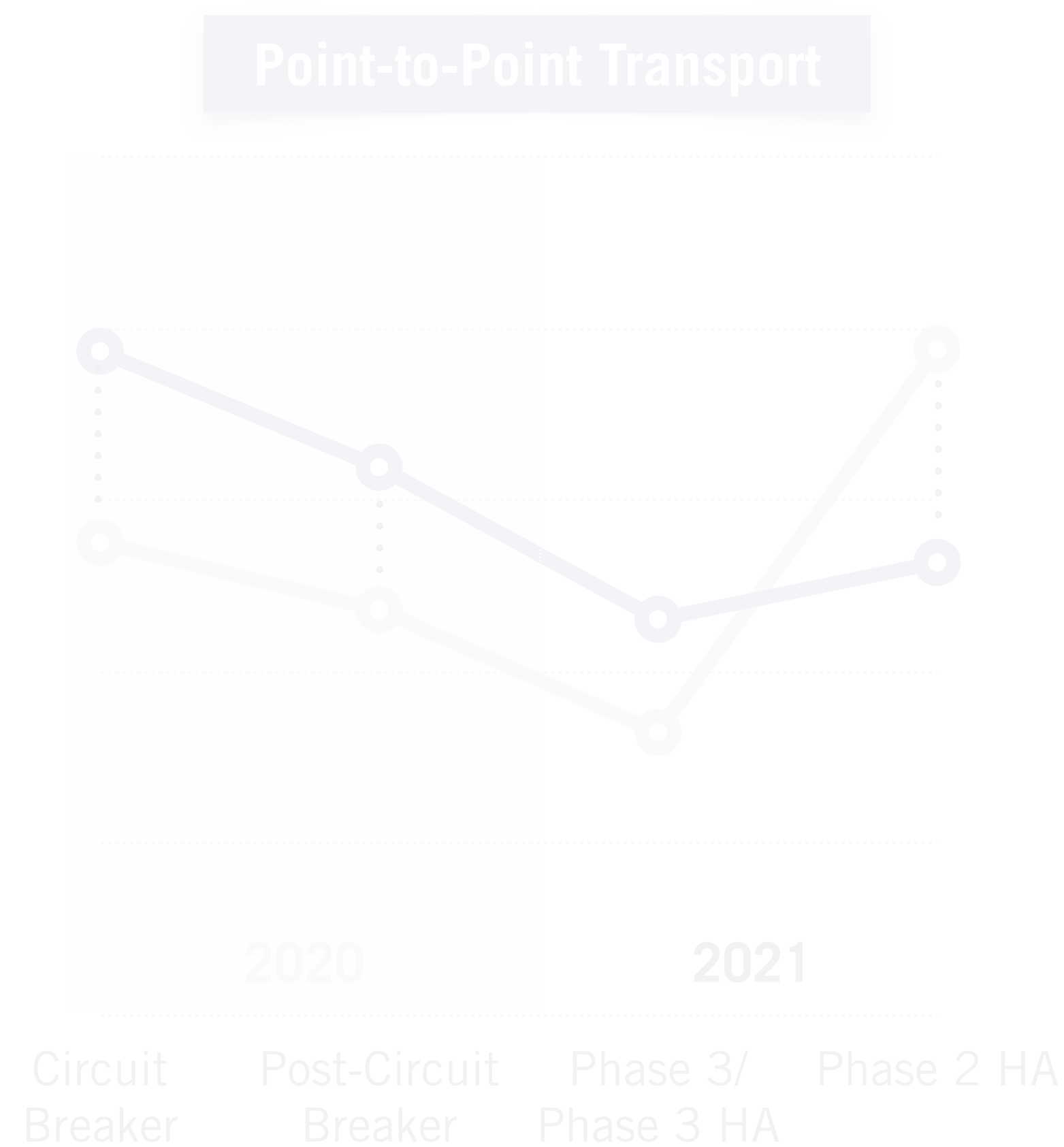
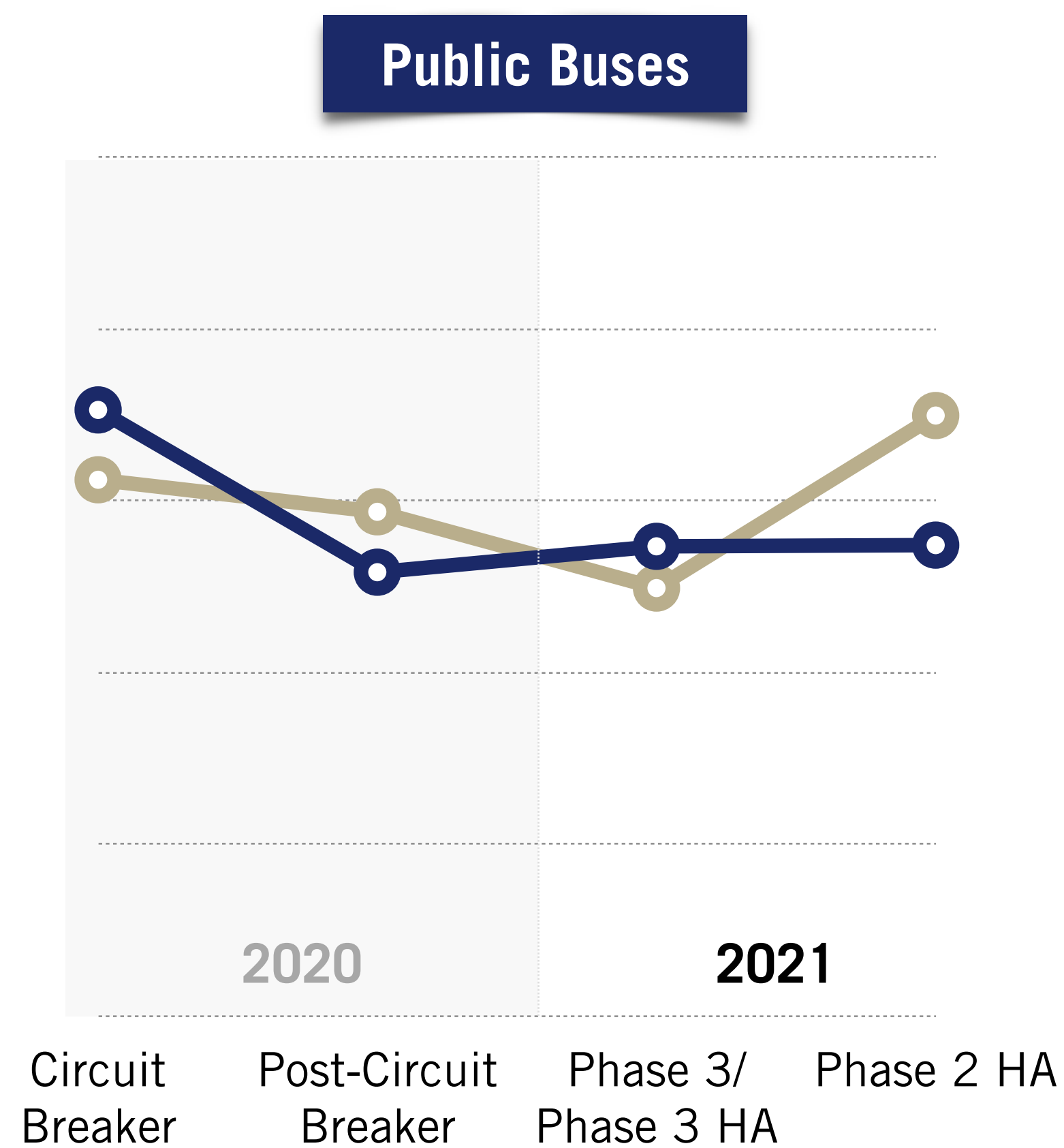
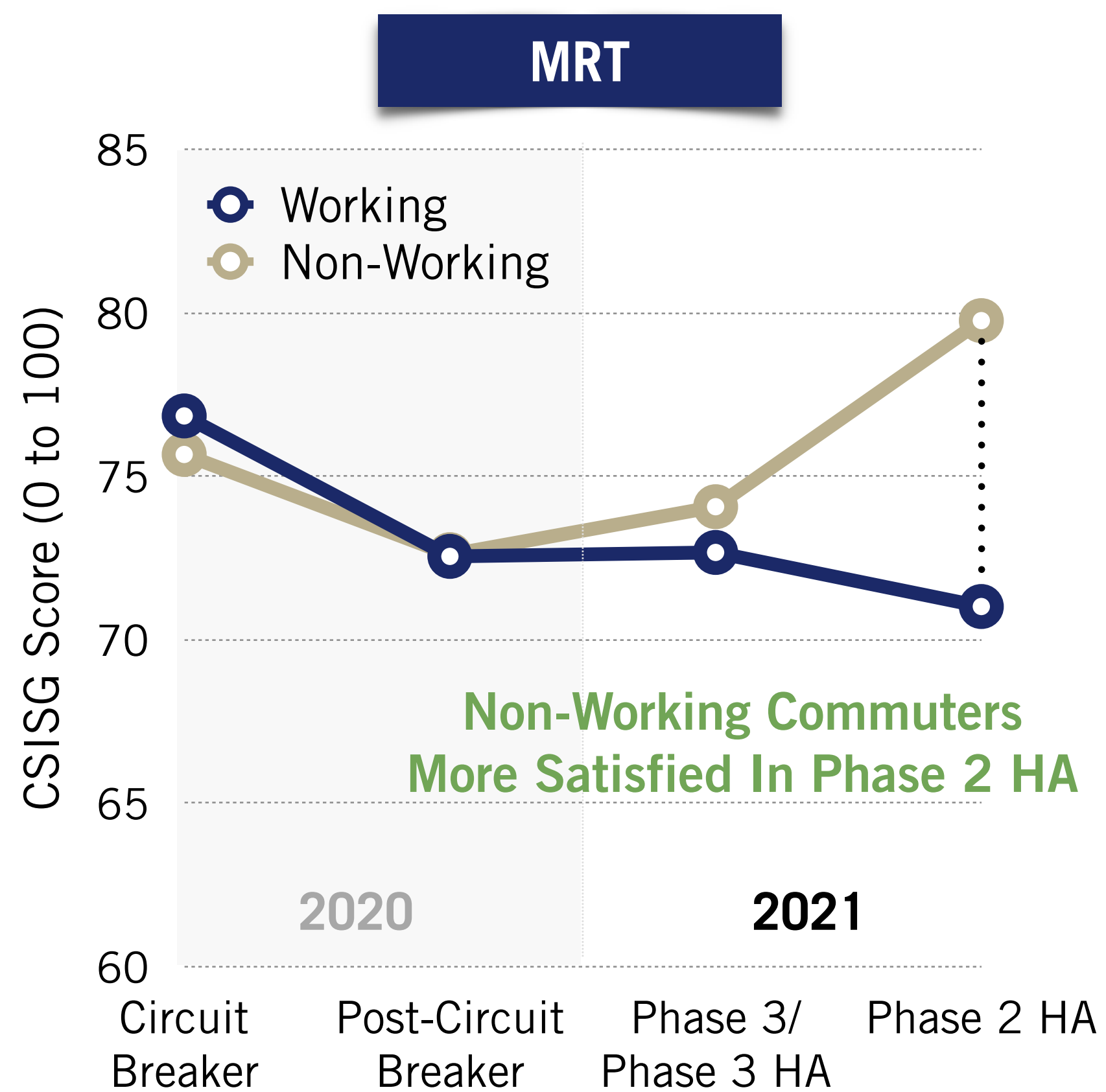


Score (0 to 100)	Metric	MRT		Public Buses		Point-to-Point Transport	
		Working	Non-Working	Working	Non-Working	Working	Non-Working
Score (0 to 100)	Customer Expectations	73.0	78.6 ↑	73.3	75.1	71.7 ↓	76.5 ↑
	Perceived Quality	73.7	79.2 ↑	73.5	76.6	72.6 ↓	77.6 ↑
	Perceived Value	70.0	76.5 ↑	72.2	72.7	69.5 ↓	74.0 ↑
	User Trust	66.9 ↓	71.5 ↑	68.3	70.2	72.5 ↓	76.9 ↑

↑ ↓ denotes statistically significant year-on-year **increase/decrease** at 90% confidence.

Working Commuters Less Affected By 2021 COVID-19 Phases

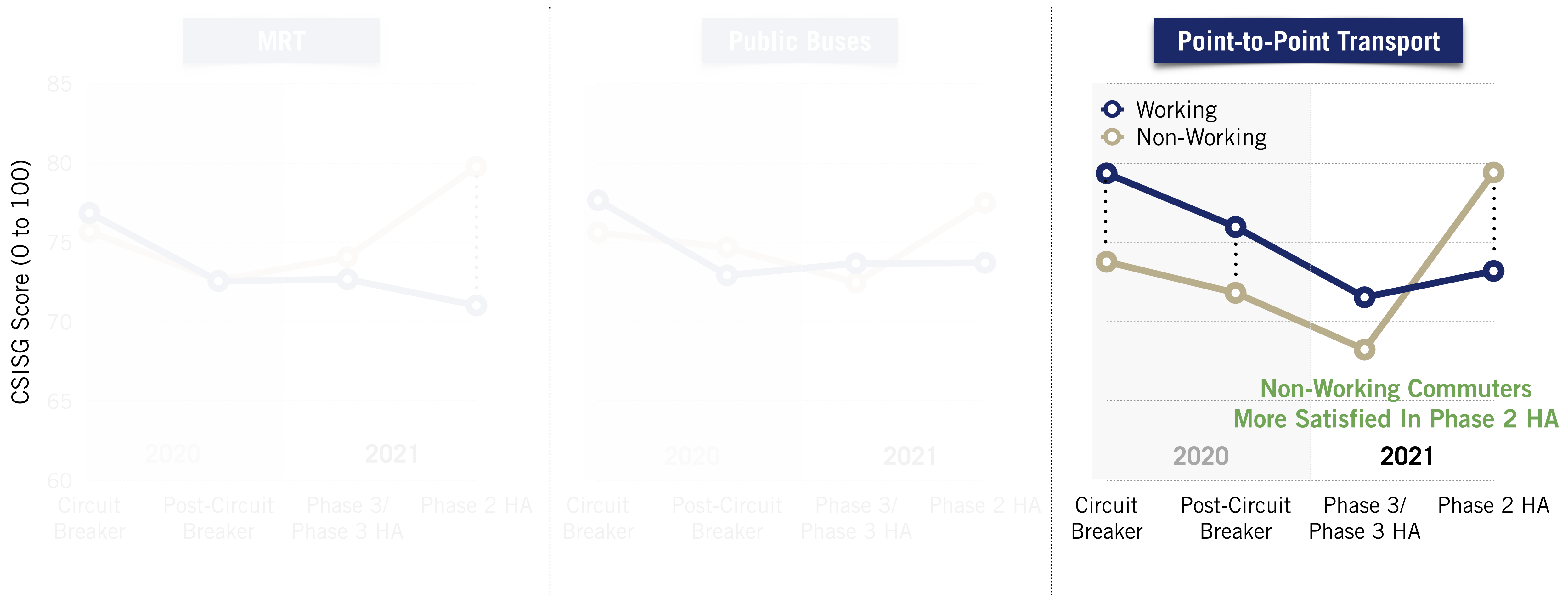
Public Transport CSISG Scores By Work Status Across COVID-19 Phases



⋮ Statistically Significant Difference

Working Commuters Less Affected By 2021 COVID-19 Phases

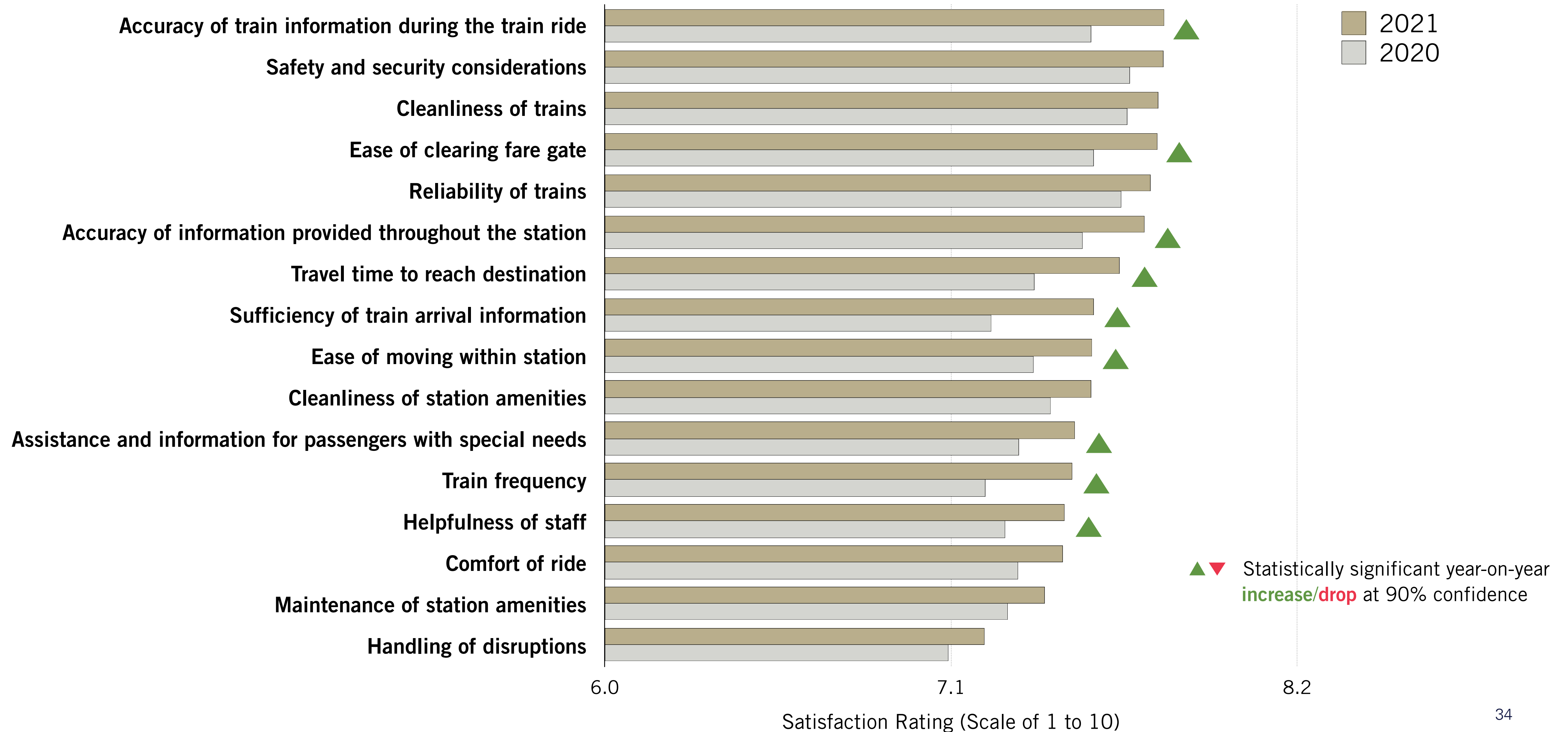
Public Transport CSISG Scores By Work Status Across COVID-19 Phases



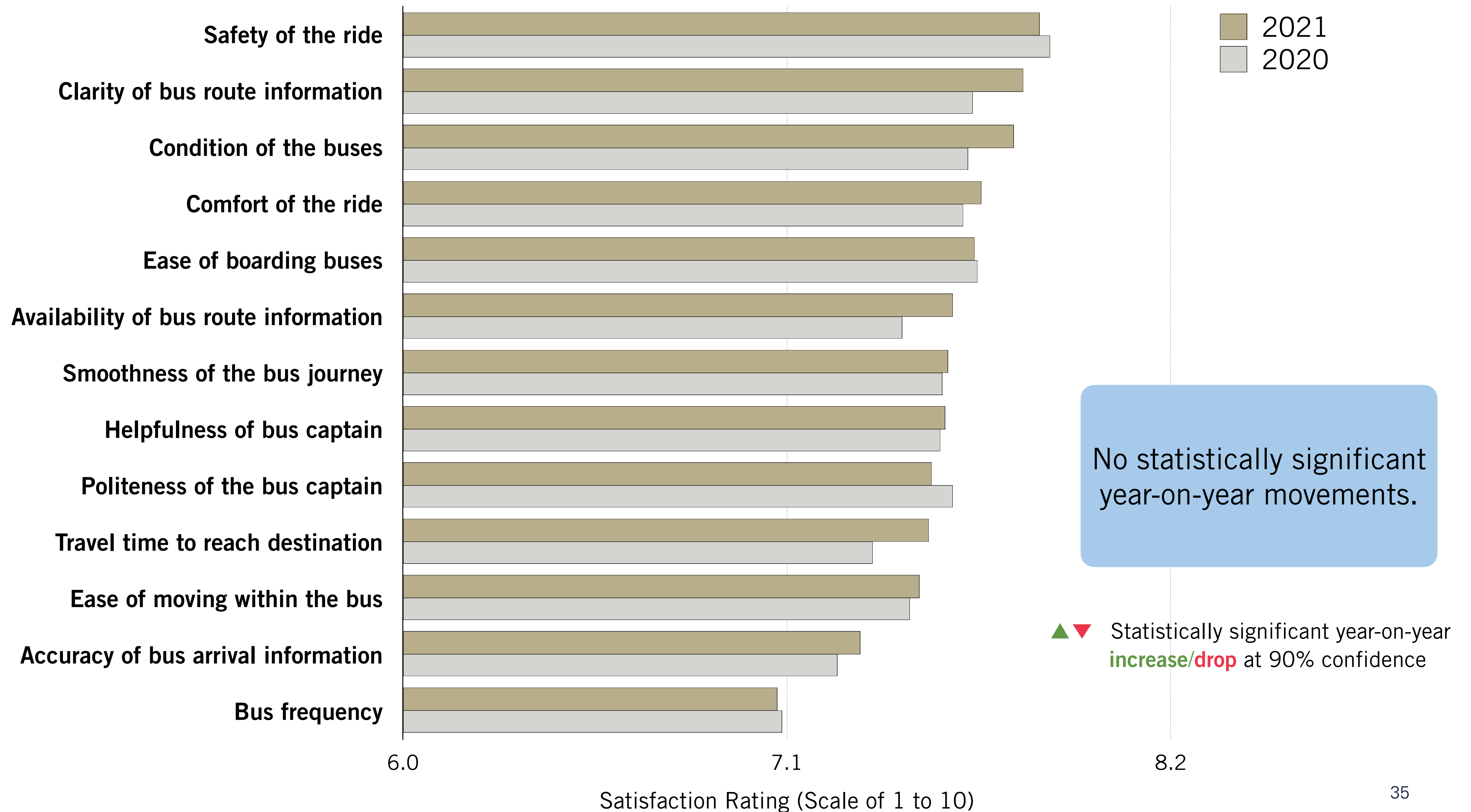
⋮ Statistically Significant Difference

ATTRIBUTE PERFORMANCE

Trains: Statistically Significant Increase Across Several Attributes

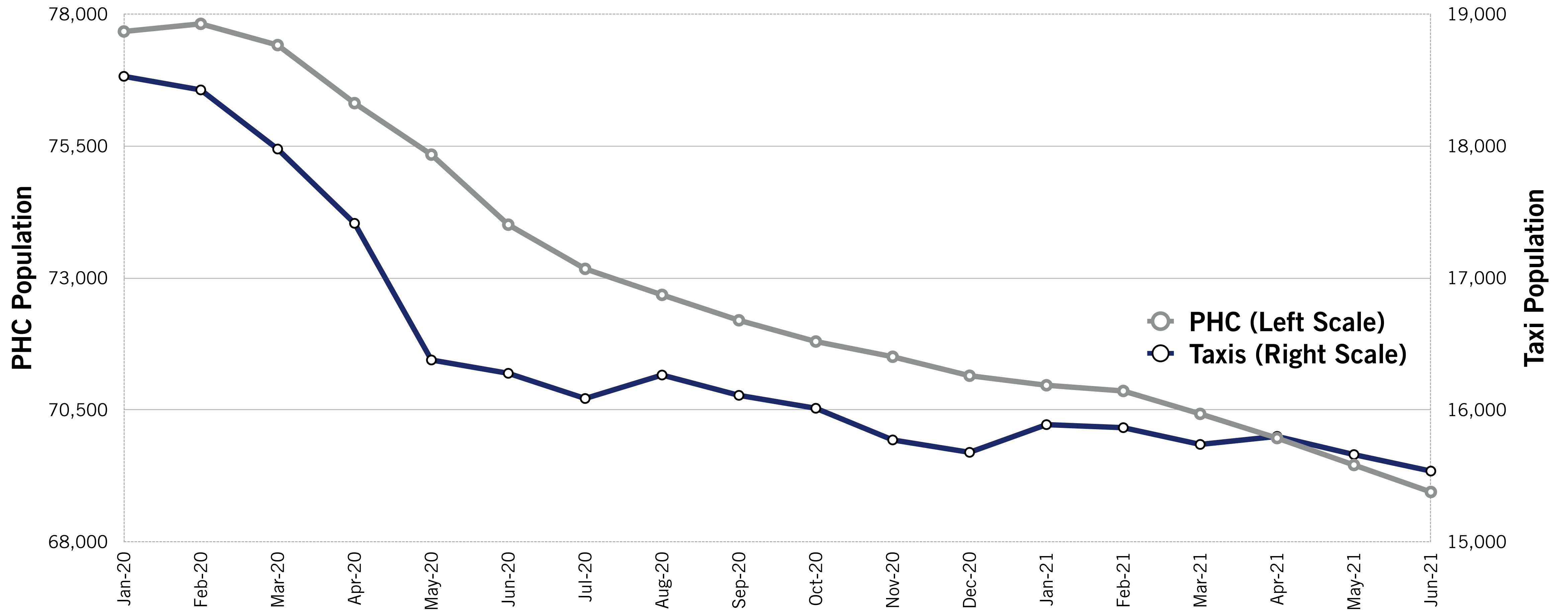


Public Buses: Attribute Ratings Remain Statistically Unchanged



PHC and Taxi Population On The Decline Since 2020

Point-to-Point Transport



Data Source: LTA https://www.lta.gov.sg/content/dam/ltagov/who_we_are/statistics_and_publications/statistics/pdf/M06-Vehs_by_Type.pdf

Grab Increased Fares While Gojek Offered Vouchers and Flat Fees To Build Rapport With Passengers and Drivers

Grab to increase fares by S\$1 to improve earnings for drivers in Singapore

SINGAPORE: From June, passengers using ride-hailing platform Grab will have to pay an additional S\$1 as the Singapore-based firm says it wants to improve earnings for its drivers.

The increase - which will apply to all its transport services except the standard taxi, GrabHitch and GrabCoach options on its app - will take effect from Jun 1, with 100 per cent of the S\$1 going to drivers for the month of June 2021.

All 487 384 172 More ▾

Tay Chin Peng
Only in the month of June, the increment 100% goes to drivers. After that, definitely Grab is taking a cut. Helping drivers is just an excuse to increase earnings for the company.

Like · Reply · 13w 34

Joseph Sim
Sometimes I wonder who gave the person the idea to have price increase when people are losing jobs or have their pay cuts. So what next for the jobless (if the need to go somewhere urgently) and those having pay cuts, including those who found jobs with lower income due to Covid, who is helping them. Dont increase cost when one group has problem, think about the rest of the people who are facing hardship as well. It is just solving one problem and dont care the problem created for the others - a selfish move.

Like · Reply · 13w 67

Alvin Tan
\$0.3 increase was not longer ago. Now \$1. Helping drivers, sure a not?

Like · Reply · 13w · Edited 23

Sources:

- (1)<https://www.straitstimes.com/singapore/transport/grab-free-to-change-its-pricing-policies-and-driver-commission-rates-after-two-year-freeze>
- (2)<https://www.straitstimes.com/singapore/transport/grab-to-implement-30-cents-platform-fee-for-rides-from-dec-18-move-comes-after>
- (3)<https://www.channelnewsasia.com/business/grab-increase-fares-one-dollar-improve-driver-earnings-covid-19-1401331>
- (4)<https://www.straitstimes.com/singapore/gojek-offers-two-vouchers-worth-15-each-for-users-commuting-to-vaccination-centres>
- (5)<https://www.businesstimes.com.sg/garage/gojek-to-cut-service-fees-to-10-roll-out-minimum-earnings-safety-net-for-drivers>

Grab to implement 30-cent platform fee for rides from Dec 18



Toh Ting Wei

UPDATED DEC 11, 2020, 7:27 PM ▾

PUBLISHED DEC 11, 2020, 11:03 AM SGT

SINGAPORE - Ride-hailing firm Grab will start charging a platform fee of 30 cents for rides booked through its platform from Dec 18.

The fee is inclusive of goods and services tax, and will apply to all Grab rides except those from the GrabHitch and GrabResponse services.

Grab free to change its pricing policies and driver commission rates after two-year freeze by consumer watchdog



Toh Ting Wei

UPDATED NOV 20, 2020, 11:55 AM ▾

PUBLISHED NOV 20, 2020, 11:23 AM SGT

SINGAPORE - Restrictions on Grab's ride-hailing service have been lifted, allowing the company to change its pricing policies and driver commission rates after a two-year freeze.

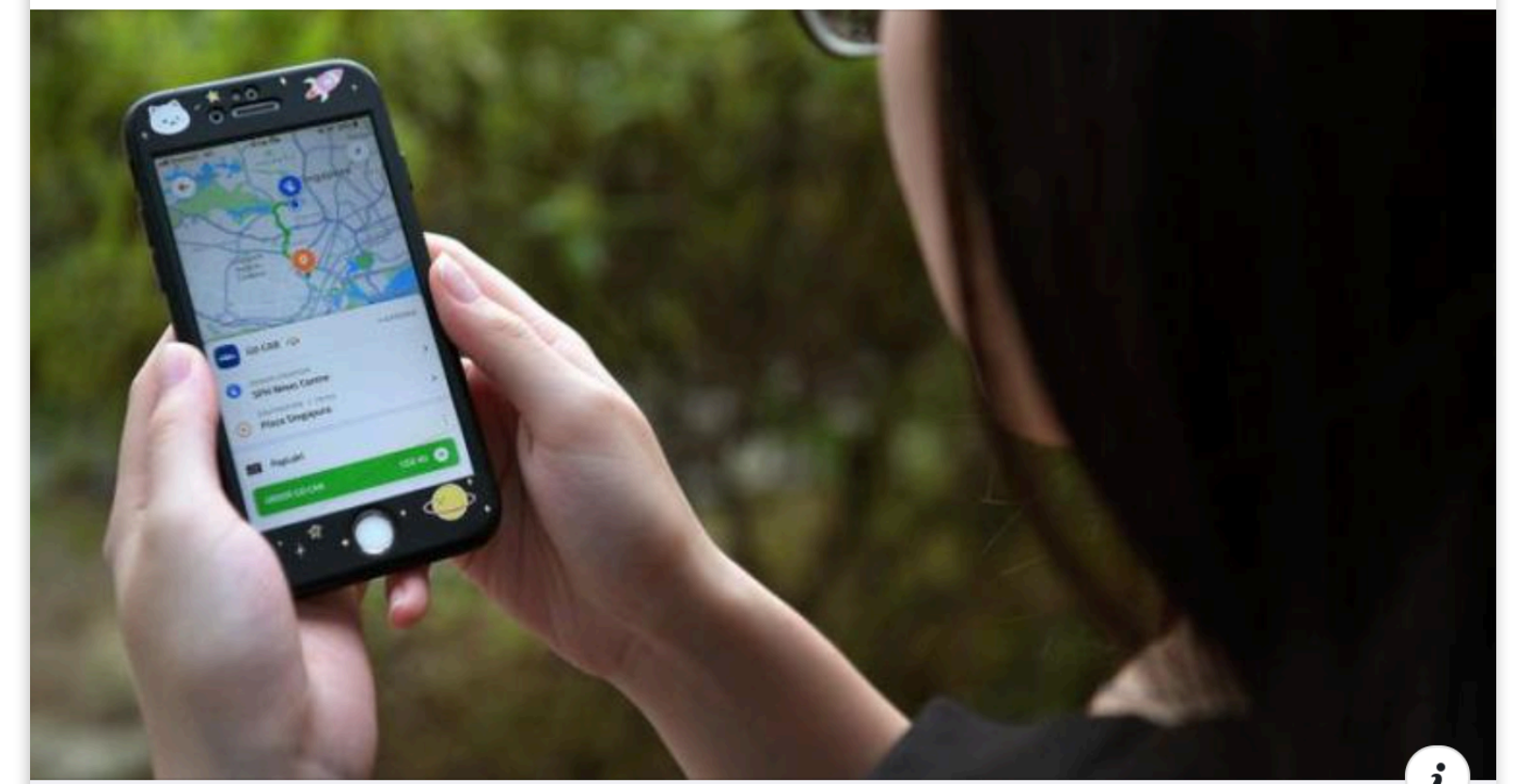
The operator is also free to **charge an extra fee of about 30 cents for each ride in the coming months.**

Gojek offers two vouchers worth \$15 each for users commuting to Covid-19 vaccination centres

BT The Business Times

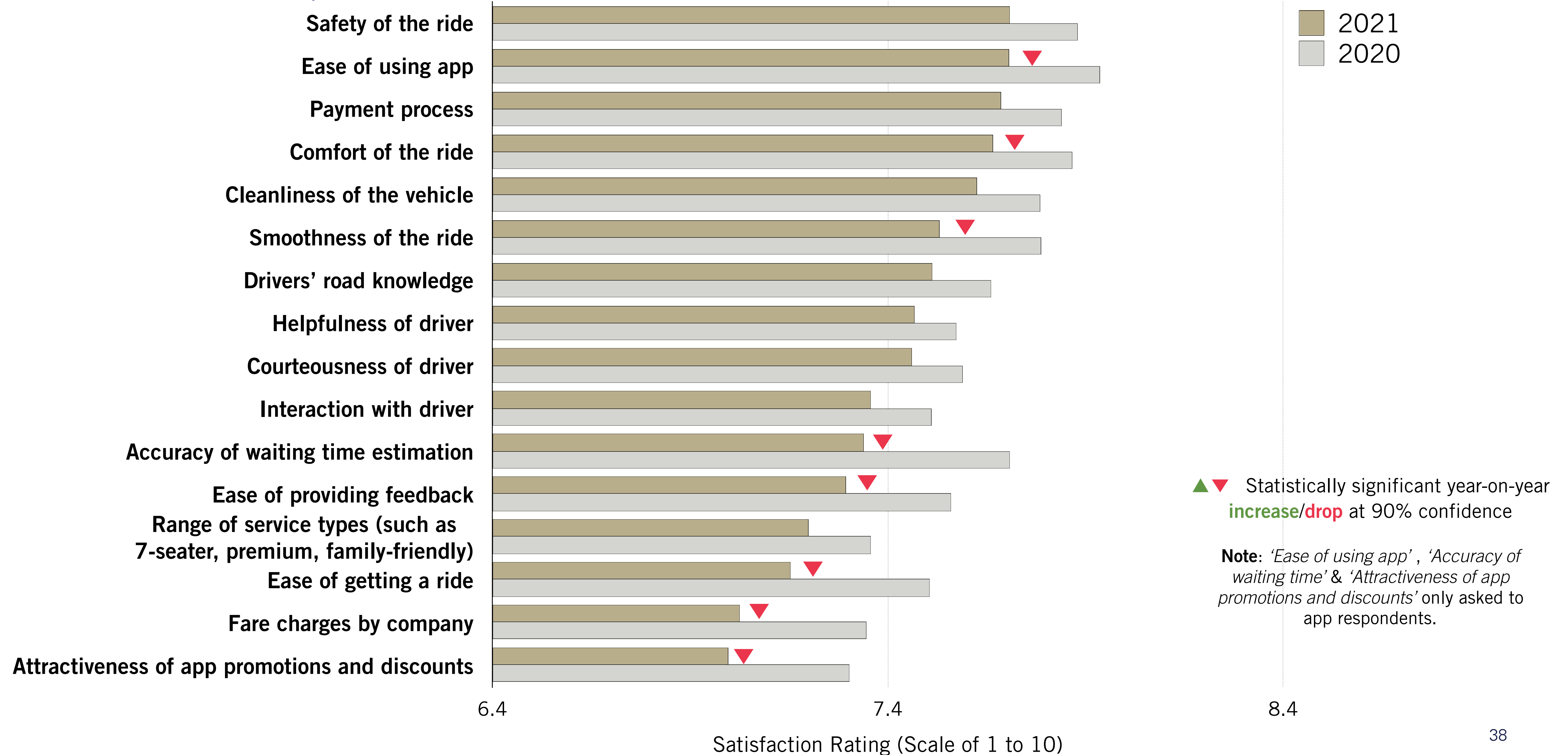
June 14 ·

Gojek will implement a flat fee payout of S\$3 for pickups that are three kilometres or more, as well as new daily peak-hour targets to boost earnings by up to S\$100 during peak hours.



Ratings Declined Across Various Point-to-Point Attributes

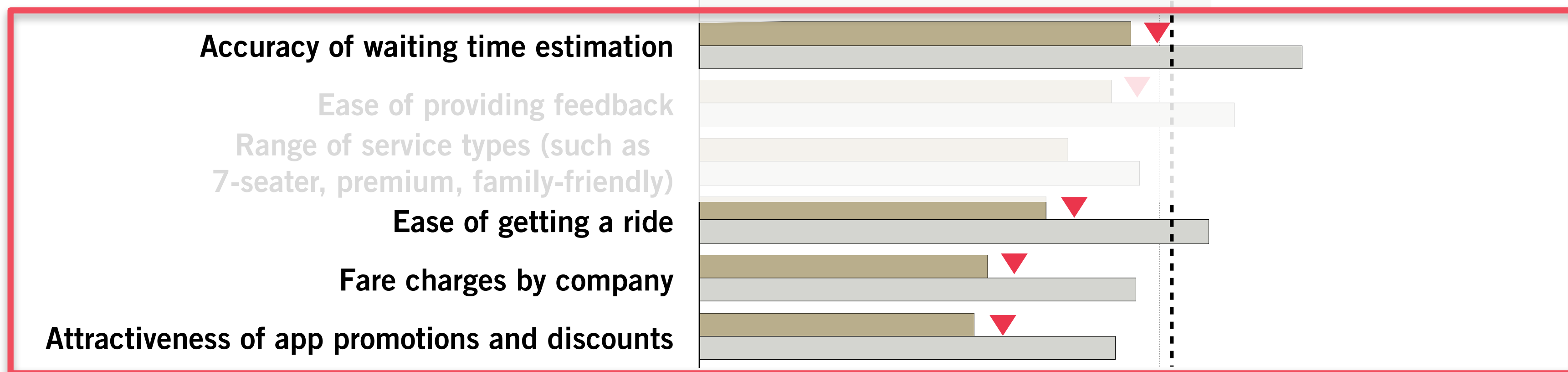
Point-to-Point Transport Attributes



Attributes Relating to Price & Ride Acquisition Declined

Areas of Improvement (Selected Verbatim)

Pricing	Waiting time & Availability
Fares could be reviewed to attract more customers.	On their driver been choosy on picking up passengers and the waiting time .
More reasonable fare charges	Waiting time of accepting ride during weekends and night time
Improve on the fare	Making sure that drivers are legit and penalised when they are late/ don't pick up calls/ etc.
The fare price can be reduced to affordable level and matching with other operator...	Better availability of vehicles and minimize assigning vehicles that are quite far away to reduce the wait time..
Its pricing and surcharges . The app reliability and turnaround time needs improvement.	The accuracy of estimated arrival time of driver, minimize the last min cancellation of booking, reduce the waiting time of booking a
More promotion to encourage ridership.	Cancellation rate from drivers



▲ ▼ Statistically significant year-on-year increase/drop at 90% confidence

Note: 'Ease of using app', 'Accuracy of waiting time' & 'Attractiveness of app promotions and discounts' only asked to app respondents.

IMPACT ANALYSIS

Safety & Cleanliness More Critical For MRT Commuters

MRT: Attributes with Significant Impact on Perceived Overall Quality

Increasing Positive Impact

MRT			
Working		Non-Working	
2021	2020	2021	2020
Safety & security considerations	Accuracy of information during the train ride	Cleanliness of trains	Reliability of train
Travel time to reach destination	Reliability of train	Sufficiency of train arrival information	Accuracy of information provided throughout the station
Train frequency	Train frequency	Safety & security considerations	Accuracy of information during the train ride
Cleanliness of trains	Safety & security considerations	Ease of moving within station	Maintenance of station amenities
Ease of clearing fare gate	Assistance and information for passengers with special needs	Accuracy of information provided throughout the station	Train frequency

Legend:

Frequency / Travel Time / Reliability

Information

Safety/Cleanliness

Trains: Areas of Improvement

Covid-19 related	Crowd Control & Management of Train Delays
They should work on improving the arrival times so that the trains aren't as crowded as there is a Covid 19 situation right now.	... more responsibility from the control station or staff on platform to notify the delay and expected time delay in the event of train fault...
Be transparent on cleaning frequency to make sure hygiene is prioritised at all times...	More train frequently during morning peak hours. More crowd control at crowded station...
... If the public cannot speak in train, then staff should do the same	... Crowd management and ventilation in the older trains can also be improved...
Regular sanitizing and cleaning in the train. Put markings on the floor so that people would be 1 metre distance from each other...	Clear indication of crowd level in each of the cabin so commuters can adjust and queue at the less crowded cabins
Have more Control on the passenger usage during Covid-19	... can improve on how they manage the train disruptions , which can result in delays of up to hours...
Good to improve on the seating space during this period of covid19. At least 1m apart on seat.	Less train disruptions , more trains during peak hours



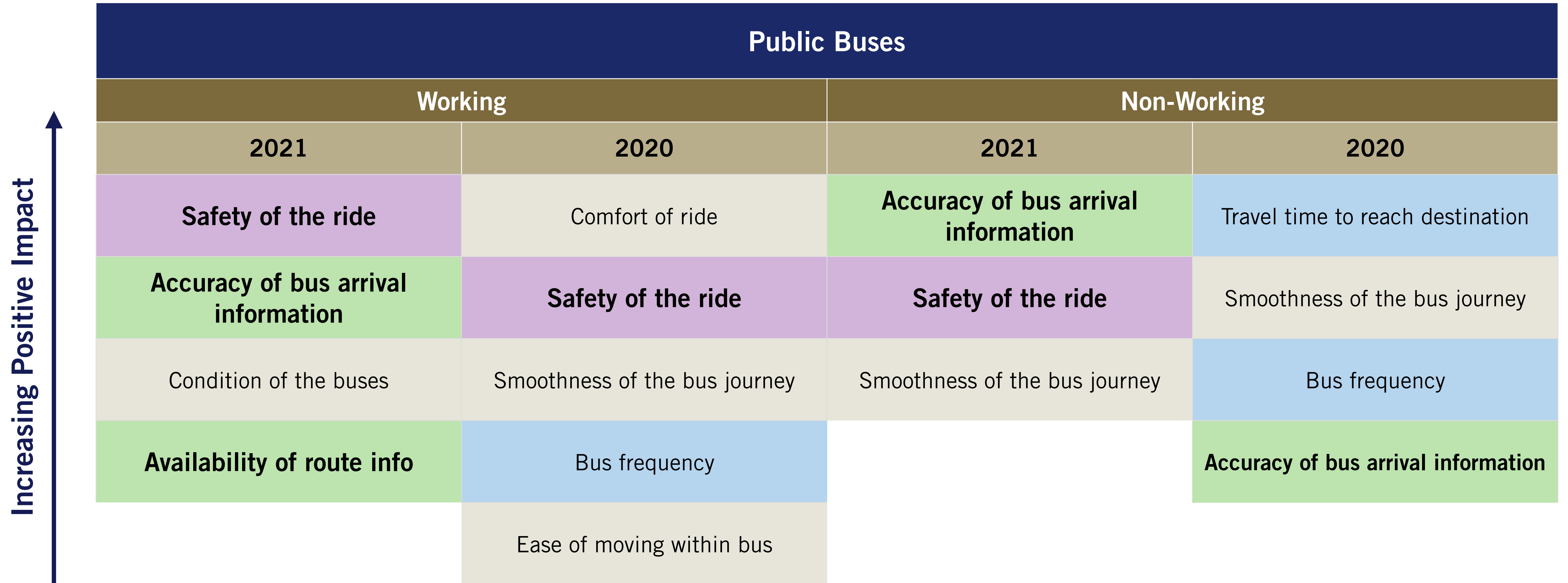
Train Service At Several Stations On North East Line Disrupted By Power Fault

Signalling fault delays MRT services for more than 4 hours on North-South Line

Source: <https://www.straitstimes.com/singapore/smrt-staff-to-carry-placards-to-remind-commuters-not-to-talk-on-trains-to-keep-safe-from>
<https://www.straitstimes.com/singapore/cleaning-robots-deployed-at-circle-line-stations>
<https://www.sbstransit.com.sg/news/train-service-at-several-stations-on-north-east-line-disrupted-by-power-fault>
<https://www.todayonline.com/singapore/mrt-signalling-fault-causes-rush-hour-delays-north-south-line>

Safety & Information More Critical For Public Buses Commuters

Public Buses: Attributes with Significant Impact on Perceived Overall Quality



Legend: Frequency / Travel Time / Reliability Information Safety

Public Buses: Areas of Improvement

Covid-19 Related	Safety
<p>Bus drivers should be more pro-active into stopping passengers without masks...</p>	<p>Improve on the driving skill. Do not accelerate speed unnecessarily and then apply emergency braking.</p>
<p>... should check all passenger with mask...</p>	<p>Go try to learn how to drive safely again, you are not in a race, you drive with passengers</p>
<p>Would be good if they can have an announcement as and when to remind passengers not to communicate nor talk in the bus or train...</p>	<p>Drivers can be more careful while driving... Be less reckless while driving & most importantly, do not speed when they are in a hurry to return back to interchange to clock their hours...</p>
<p>More emphasis on cleanliness and crowd control</p>	<p>Maybe the bus driver can sometimes not jerk too much when driving</p>
<p>... If hand sanitiser can be provided during this covid19 period, it would be much better.</p>	<p>Can driver drive slower when full boarded with people...</p>

Upcoming New Bus Stop Information Displays

Public Buses: Areas of Improvement Information-related

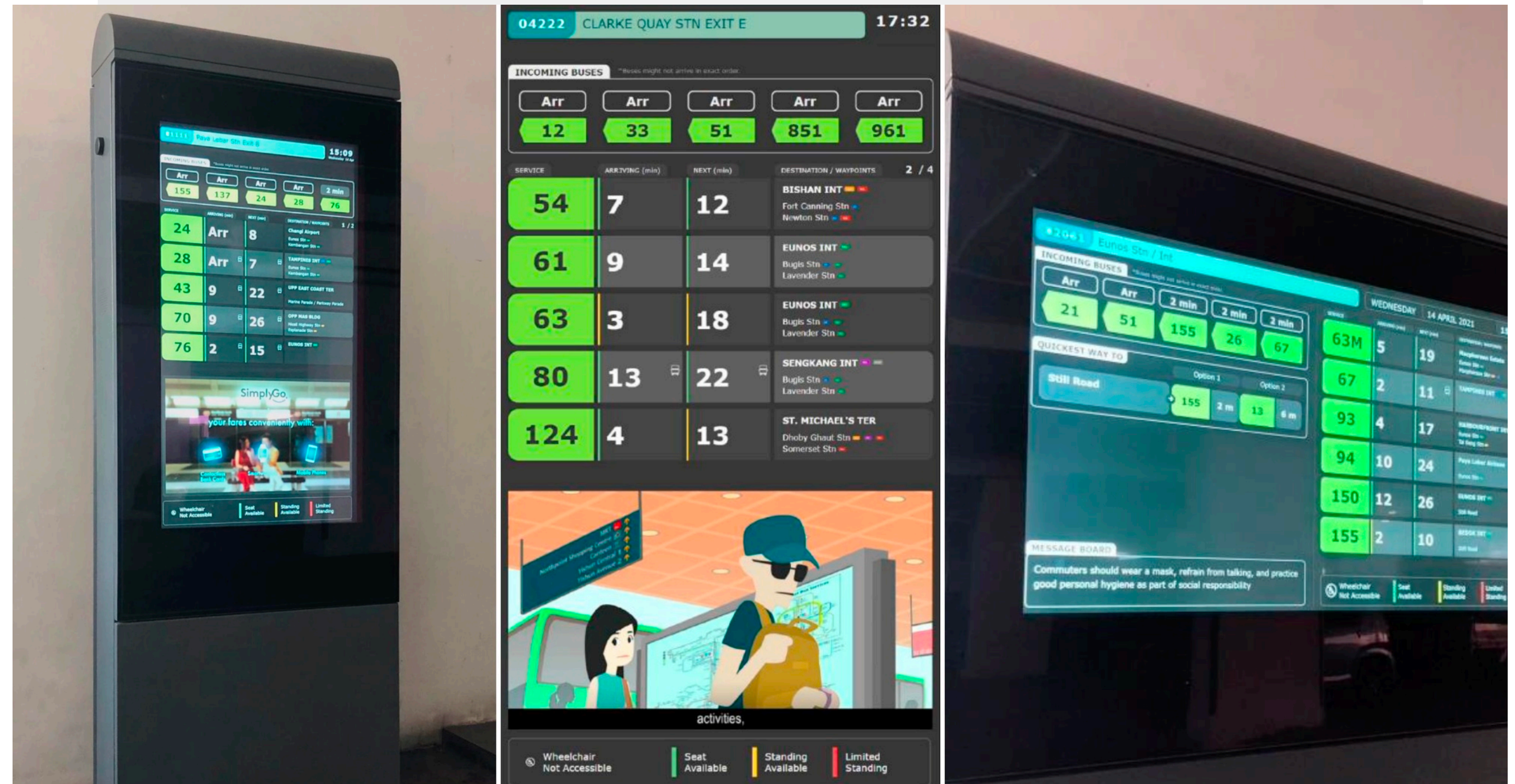
They could improve their **reliability of their information for bus arrival timings**

More specific **timing on arrival for weekends**

Maybe can have **tv to show route location and timing.**

Buses sometimes **depart earlier than what is written on the bus interchange information display...**

310 bus stops across S'pore will have new information displays over next 2 years



Source: <https://mothership.sg/2021/09/bus-stop-new-passenger-information-display-system-panels/>

Ride Experience Attributes More Important For Working Commuters

Point-to-Point: Attributes with Significant Impact on Perceived Overall Quality

Increasing Positive Impact ↑

Attributes with Significant Impact on Perceived Overall Quality			
Point-to-Point Transport			
Working		Non-Working	
2021	2020	2021	2020
Smoothness of the ride	Interaction with driver	Ease of providing feedback	Safety of the ride
Comfort of the ride	Helpfulness of driver	Smoothness of the ride	Ease of providing feedback
Helpfulness of driver	Payment process	Drivers' road knowledge	Smoothness of the ride
Ease of getting a ride	Fares charged by company	Ease of getting a ride	Drivers' road knowledge
Ease of providing feedback	Drivers' road knowledge		Fares charged by company

Legend:

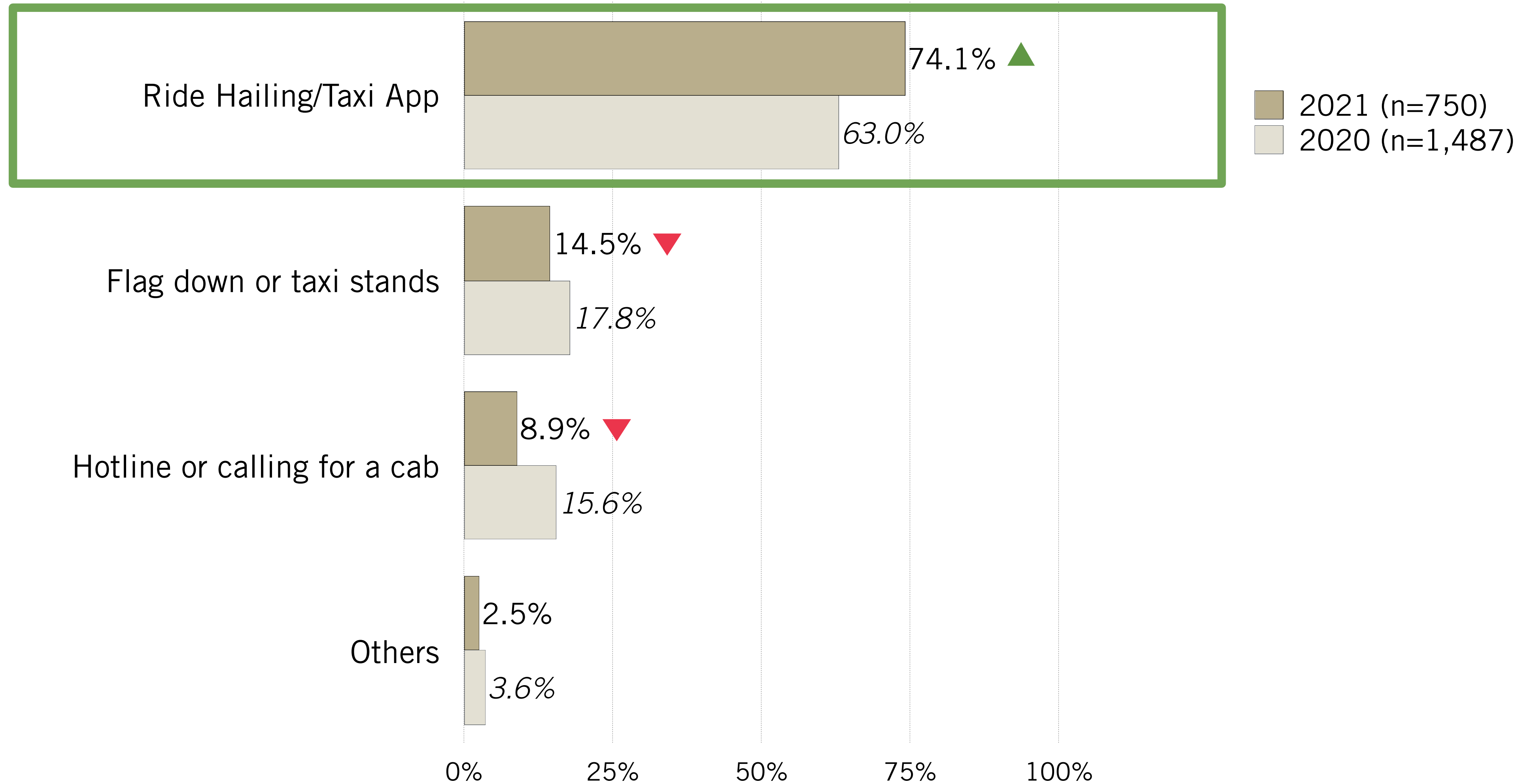
Driver Attributes

Ride Experience

**PREFERRED MODE OF GETTING
TAXI OR PRIVATE HIRE CAR**

Preference for Ride/Taxi Hailing Apps Rose While Non-Digital Modes Declined

In general, which is your most preferred mode of getting a taxi or private hire car?



▲ ▼ Statistically significant year-on-year **increase/drop** in proportion at 90% confidence

Price, Availability & Waiting Time Key To Mode of Getting A Ride

Reason for Preference In Mode Of Getting Taxi or Private Hire Car

In general, which is your most preferred mode of getting a taxi or private hire car? (n=750)

▲▼ Statistically significant year-on-year increase/drop in proportion at 90% confidence

**Ride Hailing/
Taxi App**
73.8% ▲

**Flag down/
taxi stands**
14.5% ▼

**Hotline/ calling
for a cab**
8.9% ▼

**Other
methods**
2.7%

Reason for preferred mode

Top Reason

Price	34.6%	Availability	33.0%	Availability	34.9%
Availability	32.8%	Price	29.6%	Waiting time	25.3%
Waiting time	16.9%	Waiting time	28.3%	Price	22.7%
Rewards	7.0%	Vehicle options	6.9%	Vehicle options	8.7%
Vehicle options	4.3%	Rewards	0.0%	Rewards	1.8%
Others (e.g.convenience, customer service)	4.4%	Others	2.2%	Others	6.6%

Small sample size for Other Methods (n<30), thus there is no breakdown for reasons for preference.

PREFERRED CAR TYPE WHEN SELECTING A RIDE

When selecting a ride, which car type do you prefer the most?

Government Initiatives To Encourage Electric Vehicles Adoption & SMRT's Plans To Change Entire Taxi Fleet To Electric Vehicles

SINGAPORE BUDGET 2021

ENCOURAGING ELECTRIC VEHICLE (EV) ADOPTION

- 60,000 EV charging points at public carparks and private premises by 2030
- S\$30 million over the next 5 years for EV-related initiatives
- Increasing affordability of electric cars by narrowing the cost differential between electric cars and internal combustion engine (ICE) cars
 - Lower Additional Registration Fee floor from S\$5,000 to S\$0 for electric cars from Jan 2022 to Dec 2023
 - Adjust road tax for electric cars so that mass-market electric cars pay road tax comparable to ICE cars

This will firstly come in the form of the lowering of the Additional Registration Fee (ARF) floor to zero for electric cars from Jan 2022 to Dec 2023, said Mr Heng, who is also Deputy Prime Minister.

The EV Early Adoption Incentive (EEAI) allows those who buy fully electric cars and taxis to receive a rebate of up to 45 per cent on the ARF. Such a rebate is capped at S\$20,000. This initiative will run all the way to Jan 31, 2023.

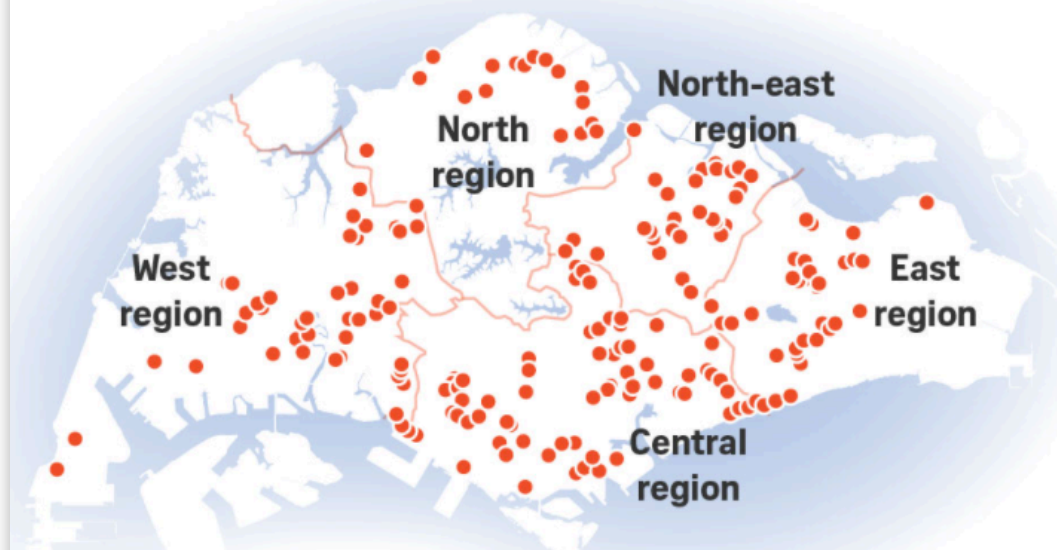
In addition, there will also be a revision of the road tax bands so that a mass-market electric car will have road tax comparable to an internal combustion engine equivalent, revealed Mr Heng. Further details on these plans will be provided at the Committee of Supply debates in Parliament, he noted.

Echoing an announcement made in Singapore's Green Plan last week, he said that Singapore will aim to deploy 60,000 charging points at public carparks and private premises by 2030, more than double its initial target of 28,000.

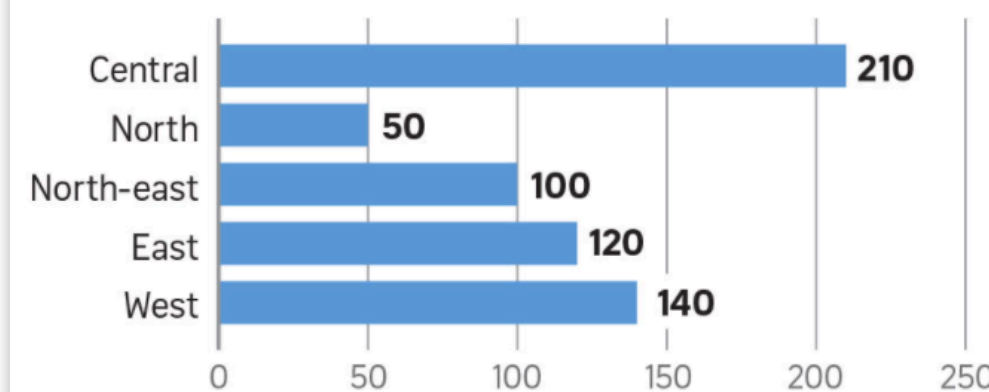
Powering up electric vehicles

By September next year, users of electric vehicles will be able to tap 620 charging points at more than 200 public carparks across the island.

WHERE THE PARTICIPATING CARPARKS ARE



NUMBER OF CHARGING POINTS



AREAS/OPERATORS

Central, east and west	• ComfortDelGro Engineering
	• Engie South East Asia
North and north-east	• Primech A&P
	• Sunseap Group
	• Charge+
	• Oyika

LTA unveils new grant to install electric vehicle chargers in condos



SMART CHARGING SYSTEM
Co-fund amount 50%

Charger equipment itself, isolator, residual current device circuit breaker, etc.



CABLING & INSTALLATION COSTS
Co-fund amount 50%

Electrical cables, supporting accessories, installation works and installation labour costs
*capped at \$1,000



LICENSED ELECTRICAL WORKER
Co-fund amount 50%

The fees for both the NLPR's LEW and the LEW responsible for installing the charger are eligible

SMRT plans to change entire taxi fleet to electric vehicles within 5 years

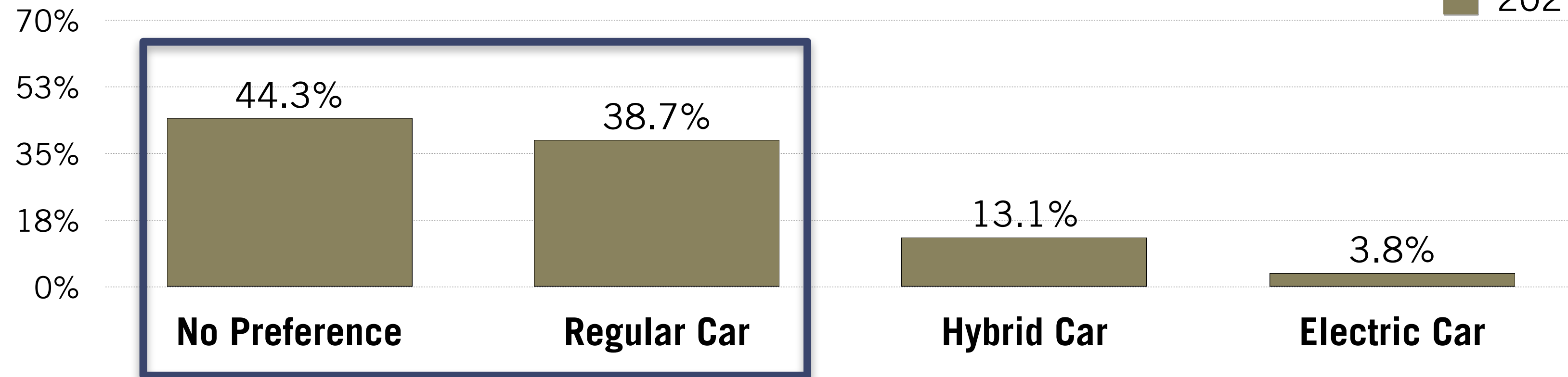
Sources:

- <https://www.channelnewsasia.com/singapore/budget-2021-singapore-electric-vehicles-adoption-incentives-354531>
- <https://www.straitstimes.com/singapore/transport/620-electric-vehicle-chargers-to-be-installed-at-public-carparks-in-the-next-12>
- https://mobility.eigen.sg/evchargers?campaignid=12643149240&adgroupid=121400060538&gclid=Cj0KCQjwm9yJBhDTARIsABKlcGZN7VKFki75fSyJDD4NkGDsLbFUR4UuKM8rSho-WalHleLd_SFPQgkaAlxGEALw_wcB
- <https://www.straitstimes.com/singapore/transport/620-electric-vehicle-chargers-to-be-installed-at-public-carparks-in-the-next-12>

Most Respondents Have Either No Preference or Prefer Regular Cars

Point-to-Point Preferred Car Type: When selecting a ride, which car type do you prefer the most?

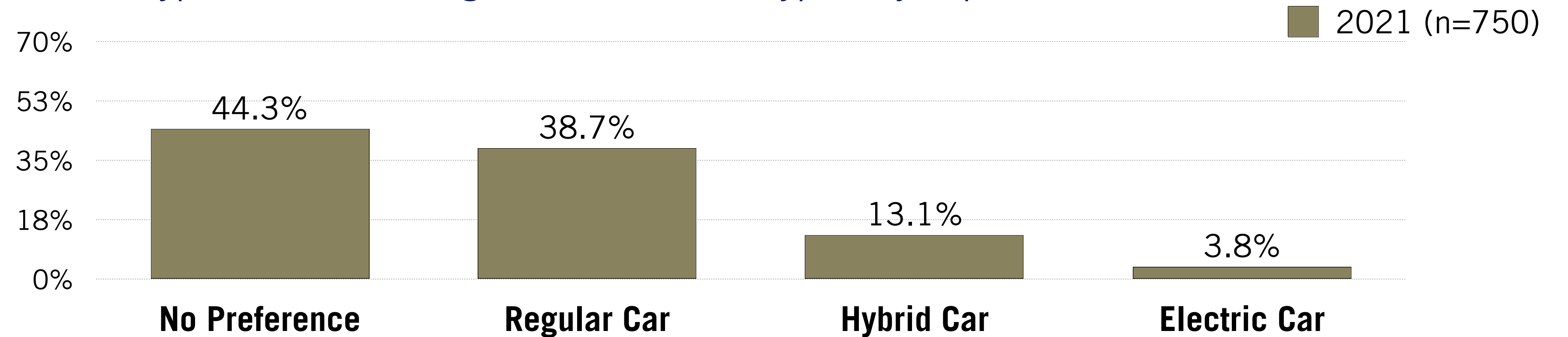
2021 (n=750)



		No Preference	Regular Car	Hybrid Car	Electric Car
Age	18-29 years old	39.4%	38.3%	19.2%	3.2%
	30-49 years old	39.4%	42.1%	13.7%	4.8%
	≥50 years old	56.8%	33.5%	7.1%	2.6%
Gender	Male	41.0%	35.7%	18.9%	4.4%
	Female	47.5%	41.6%	7.8%	3.2%
		% Respondents (Row percentage)			

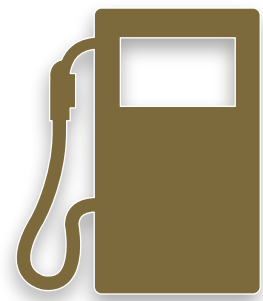
Younger Customers & Male Higher Preference for Hybrid Cars

Point-to-Point Preferred Car Type: When selecting a ride, which car type do you prefer the most?



Age	18-29 years old	39.4%	38.3%	19.2%	3.2%
	30-49 years old	39.4%	42.1%	13.7%	4.8%
≥50 years old	56.8%	33.5%	7.1%	2.6%	
Gender	Male	41.0%	35.7%	18.9%	4.4%
	Female	47.5%	41.6%	7.8%	3.2%
% Respondents (Row percentage)					

Reason For Preferred Car Type



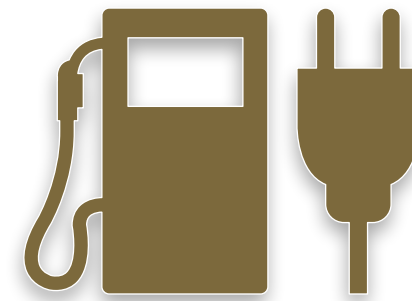
Regular Car

Because it is **cheaper**

Cheaper flag down price

I have never tried other cars and **choosing a specific car makes the price higher** and I do not think there is a need to pay a higher price for something I do not need
 I prefer regular car because the **fares will be cheaper than electric or hybrid car.**

I realised there is **great fare difference**. Hybrid cab, I took once and am shocked it's much more expensive...



Hybrid Car

More sustainable

Environment friendly

Save the earth at the same time also support the petrol industry

Environmental friendly and **worry free of run out battery**



Electric Car

Electric car is **good for the environment.**

Because it is **environmentally friendly** and **does not cause noise pollution.**

It is **environmentally friendly** and has **no gasoline smell.**

Environment friendly, no carbon produce, **quietly and comfortable** for riding.

Protect the environment
it protects environment

Key Takeaways

- **Shifts in Commuting Behaviour:** Commuting patterns have changed especially for the working crowd. Commuters who are taking less public transport outweigh those who have increased their usage. Preference for ride/taxi hailing apps have also increased.
- **Score Movements:** Scores for Trains and Buses generally unchanged, with improvements in various Train attributes detected. However, Point-to-Point transport declined across multiple areas, including attributes relating to ride acquisition and price.
- **Public Transport Focus Areas:** Consider improving (1) perception of safety, especially for pandemic-related measures, and (2) accuracy of Bus information.
- **Point-to-Point Focus Areas:** Consider improving (1) ride experience and (2) ride-acquisition.

QUESTIONS?



ISE INDUSTRY FORUM

CSISG 2021 Q2 RESULTS ANNOUNCEMENT

LAND TRANSPORT