ISES INDUSTRY FORUM

CSISG 2014 Q2 RESULTS

TRANSPORT & LOGISTICS AND PUBLIC & PRIVATE EDUCATION

CSISG 2014 Q2

- CSISG 2014 Q2 Quick Facts & Sampling

- Results Overview

- Results and Highlights of Transport & Logistics Sector

- Results and Highlights of Public & Private Education Sector

The CSISG Score

Customer Satisfaction CSISG

1. Overall Satisfaction

2. Ability to Meet Expectations

3. Similarity to Ideal

Overview of the CSISG Main Fieldwork

Singapore citizens and PRs are interviewed at their homes.

Homes are selected from a random listing of 40,000 household addresses that match housing profile of Singapore resident population.

Departing tourists are interviewed at Changi Airport.

All respondents answering for the airport were interviewed at the airport.

Each respondent answers up to 14 CSISG questions and 24 touchpoint questions about a company they had recent experiences with.
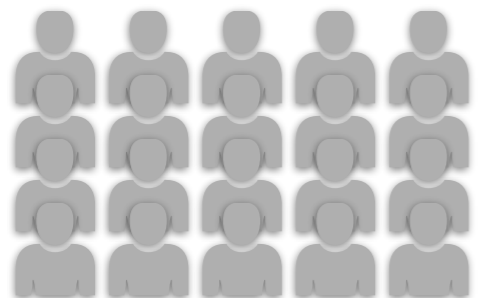
Typically 250 respondents per company would have answered the CSISG questionnaire.

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CSISG 2014 Q2 Quick Facts

Sectors Covered	**Transport & Logistics** **Public & Private Education**
Survey Period	**April–June 2014**
Total Questionnaires Completed	**13,002**
Face-to-face at residents' homes	**6,453**
Face-to-face at Changi Airport	**2,700**
Online	**3,849**
Distinct entities measured	**333**
Entities with published scores	**31**

CSISG 2014 Q2 Quick Facts

Changes implemented this year:

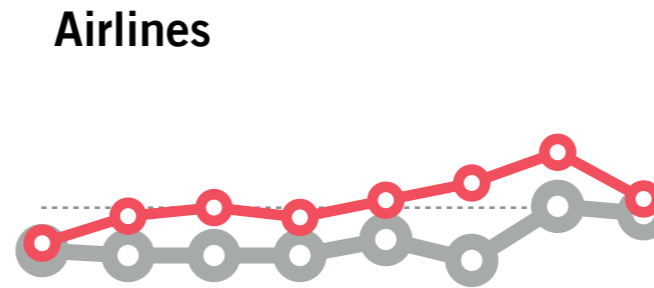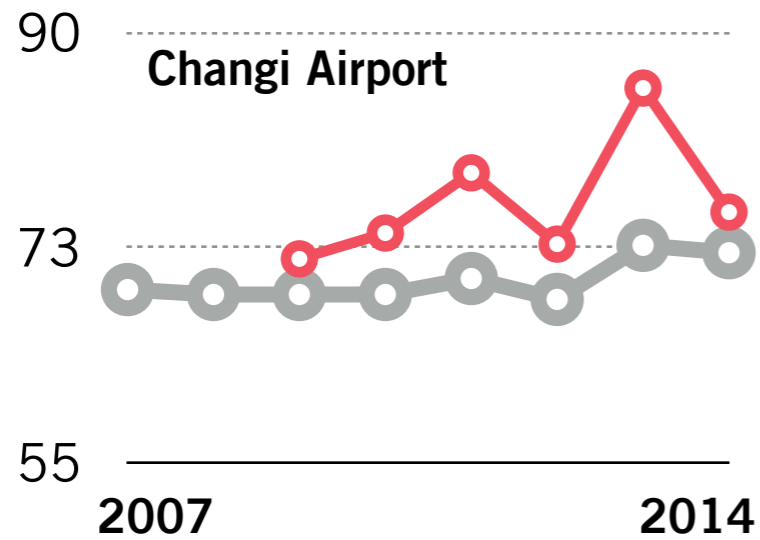Commercial schools were renamed to Private Education Institutions.

Respondents for Private Education Institutions were surveyed online.

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CSISG 2014 QUARTER 2 RESULTS OVERVIEW

CSISG Transport & Logistics Sector Trends

CSISG Public & Private Education Sector Trends

ITE

Universities

90

72.5

55

2007   2014

○ Public Education Sector

Polytechnics

PEIs

○ Private Education Sector

CSISG 2014 Q2 Results Overview

72.8 Public Education

74.3 ITE*

73.5 Universities
79.2 SMU*
74.3 NUS
70.6 NTU

71.1 Polytechnics
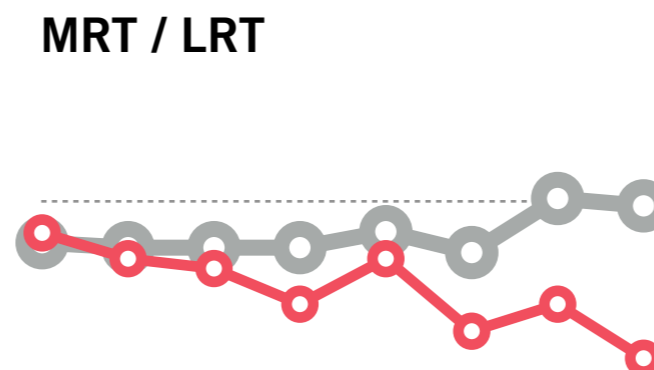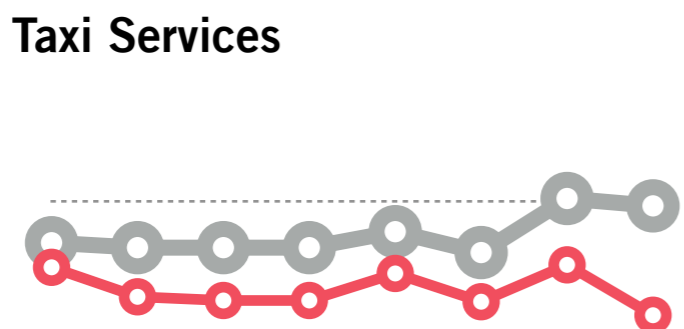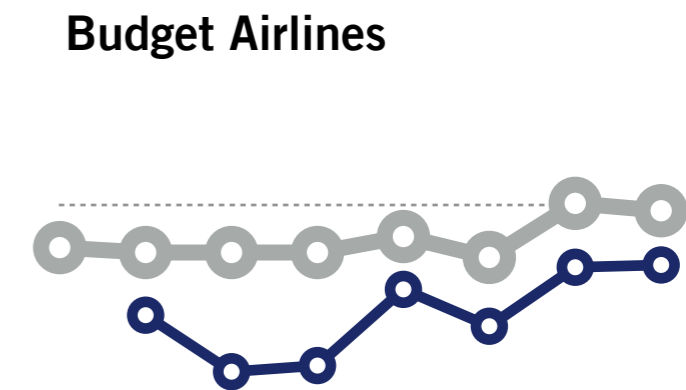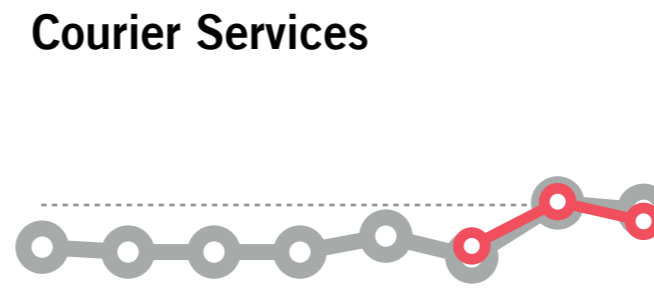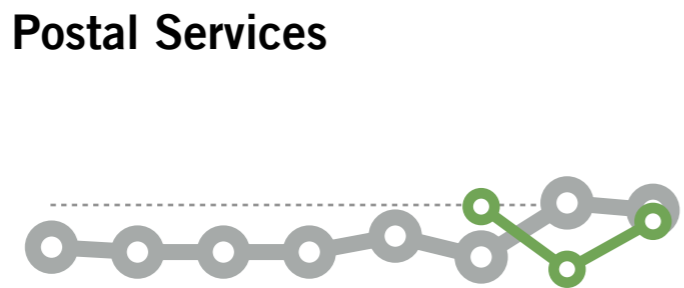**76.5** Singapore*
71.6 Temasek
70.1 Ngee Ann
69.4 Republic
66.5 Nanyang

72.1 Transport & Logistics

75.4 Airport*
75.4 Changi Airport

73.3 Airlines*
74.9 Singapore Airlines*
73.3 Cathay Pacific Airways
73.0 Emirates
71.7 Qantas Airlines
71.4 SilkAir
69.8 Other Airlines

71.2 Postal Services
71.2 Singapore Post

71.2 Courier Services
72.6 FedEx
72.4 Speedpost
72.0 UPS
71.9 DHL
68.5 Other Courier Services

68.3 Budget Airlines
68.0 Jetstar Asia
66.9 AirAsia
65.2 Tiger Airways
71.5 Other Budget Airlines*

63.2 Taxi Services
65.1 Premier
64.3 Transcab
63.5 SMRT Taxis
62.9 ComfortDelGro Taxis
59.5 Other Taxi Operators

59.7 Mass Rapid Transit System
60.3 SBS Transit Trains
59.6 SMRT Trains

58.5 Public Buses
60.5 SMRT Buses
57.7 SBS Transit Buses

66.3 Private Education

66.3 Private Education Institutions

CSISG 2014 Q2 RESULTS
TRANSPORT & LOGISTICS

CSISG 2014 Q2 Transport & Logistics
Year-on-Year Changes

CSISG 2013 **72.7**

CSISG 2014 **72.1**

Airport 85.5

Airlines 77.1

Courier Services 72.9

Budget Airlines 67.5
Postal Services 67.4
Taxi Services 67.3

Mass Rapid Transit System 64.1

Public Buses 60.7

75.4 Airport

73.3 Airlines

71.2 Courier Services
71.2 Postal Services

68.3 Budget Airlines

63.2 Taxi Services

59.7 Mass Rapid Transit System
58.5 Public Buses

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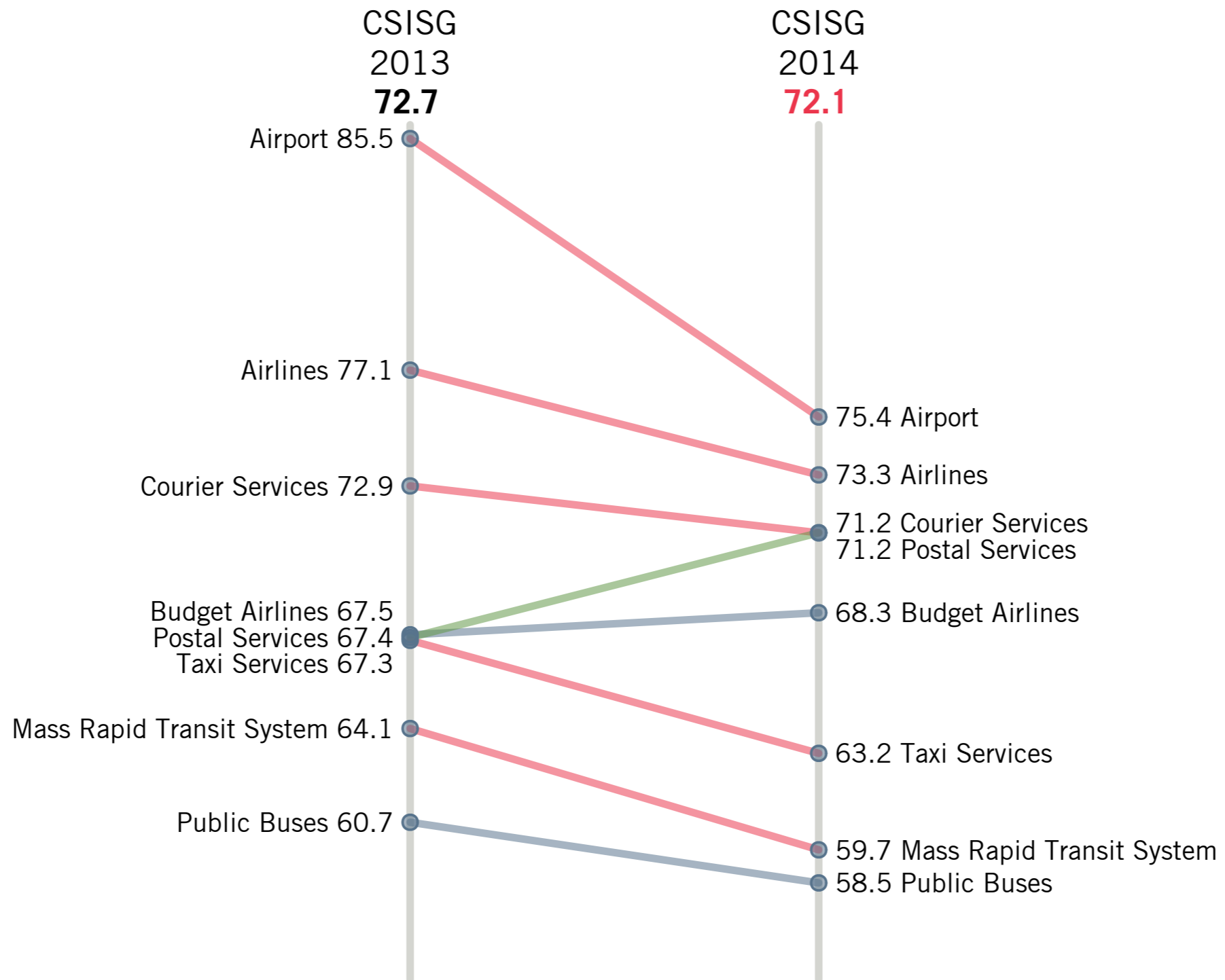
CSISG 2014 Q2 Transport & Logistics
Courier Services

CSISG
2013
72.9

CSISG
2014
71.2

Fedex 73.7
Other courier services 72.8
DHL 72.5
UPS 70.6
Speedpost 70.1

72.6 Fedex
72.4 Speedpost
72.0 UPS
71.9 DHL

68.5 Other courier services

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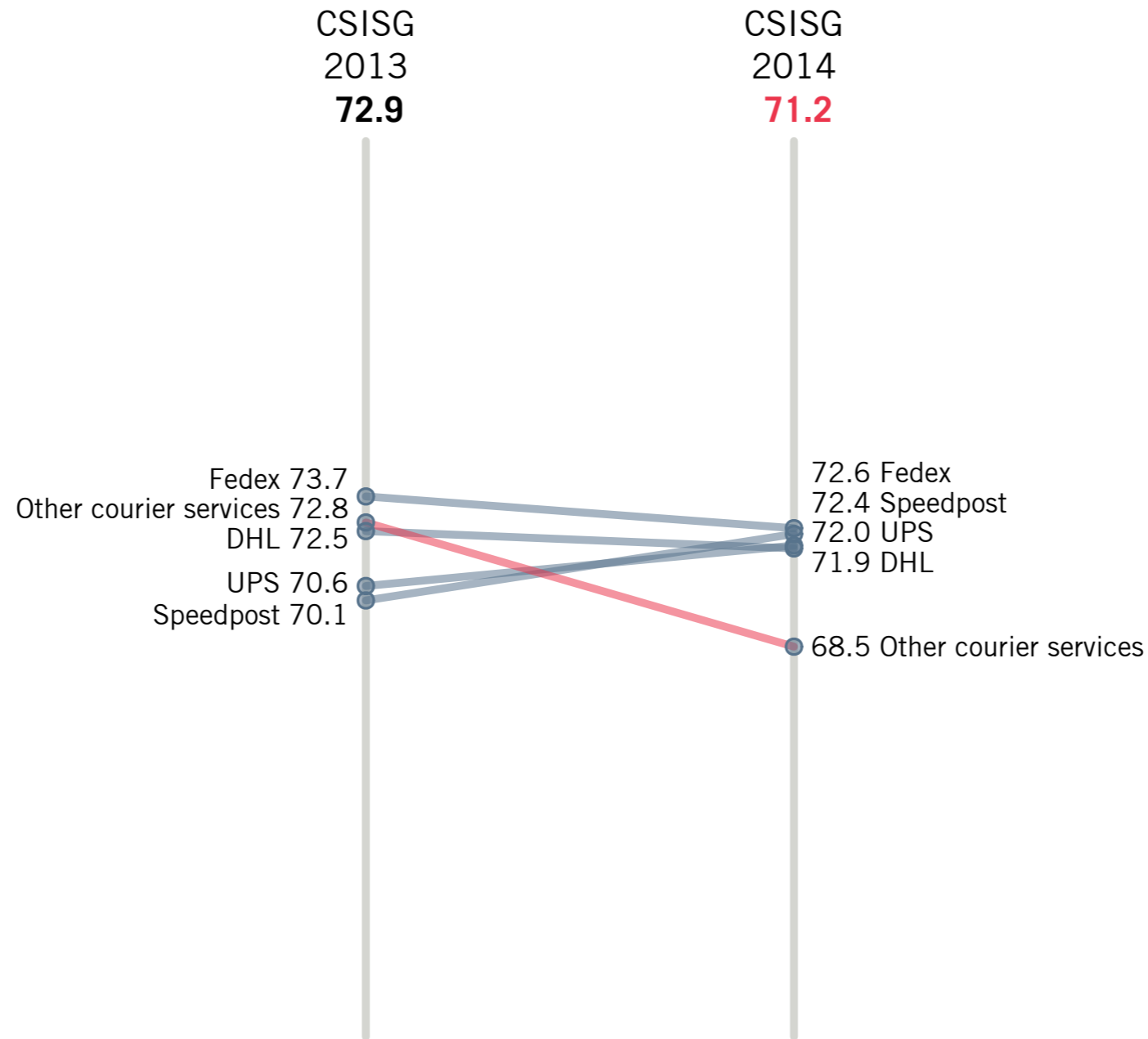
CSISG 2014 Q2 Transport & Logistics
Airlines

CSISG
2013
77.1

CSISG
2014
73.3

Singapore Airlines 79.5

SilkAir 76.5
Cathay Pacific 76.3
Emirates 76.1

Qantas Airlines 74.1

Other airlines 70.6

74.9 Singapore Airlines
73.3 Cathay Pacific
73.0 Emirates
71.7 Qantas Airlines
71.4 SilkAir
69.8 Other airlines

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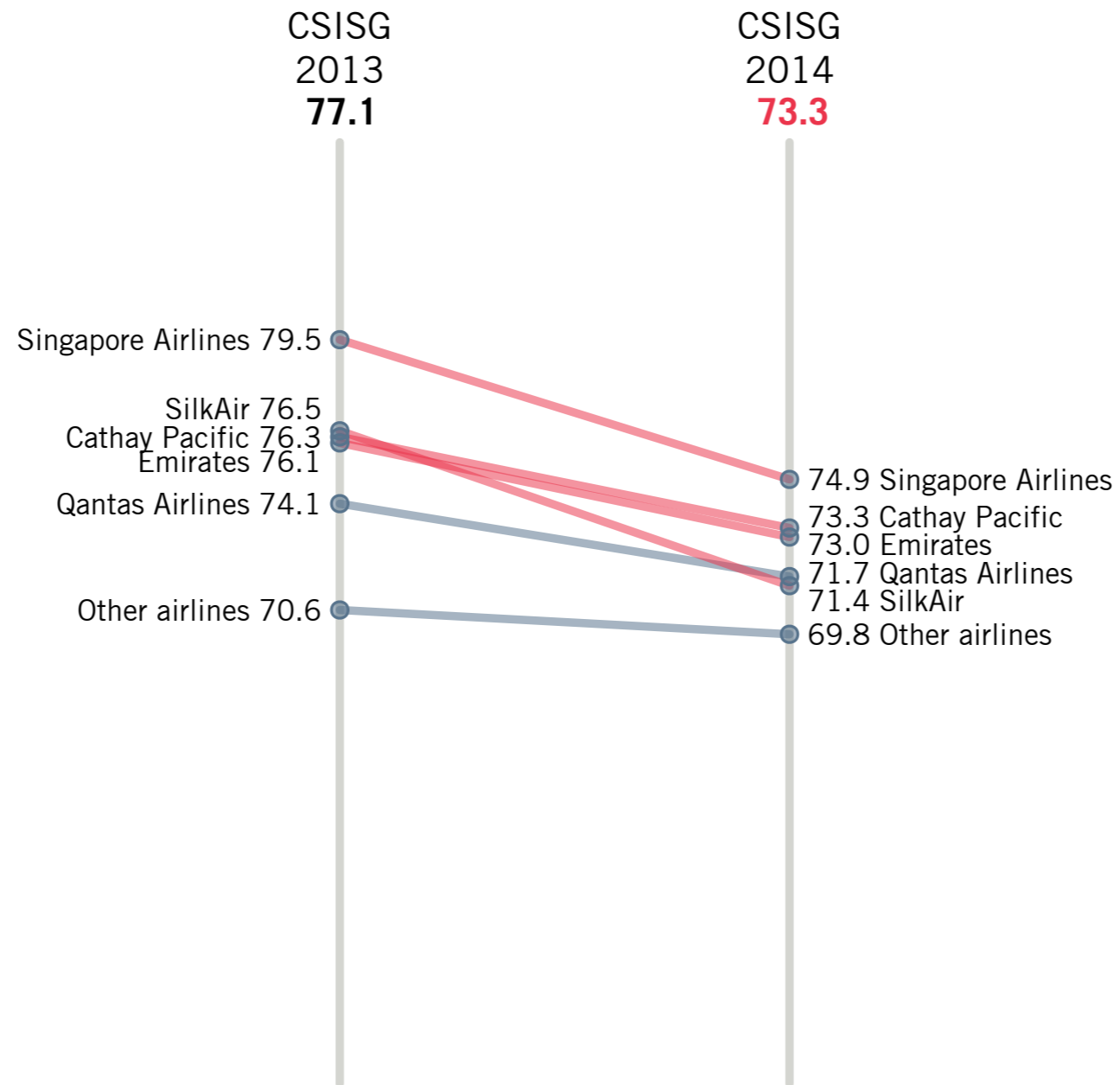
CSISG 2014 Q2 Transport & Logistics
Budget Airlines

CSISG
2013
67.5

CSISG
2014
68.3

71.5 Other budget airlines

Other budget airlines 70.4

AirAsia 68.3

68.0 Jetstar Asia

Jetstar Asia 66.9

66.9 AirAsia

Tiger Airways 66.0

65.2 Tiger Airways

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CSISG 2014 Q2 Transport & Logistics
Taxi Services

CSISG
2013
67.3

CSISG
2014
63.2

Premier 72.0
SMRT Taxis 70.5
Other taxi operators 70.4
Transcab 69.4

ComfortDelGro Taxis 65.7

65.1 Premier
64.3 Transcab
63.5 SMRT Taxis
62.9 ComfortDelGro Taxis

59.5 Other taxi operators

CSISG 2014 Q2 Transport & Logistics
Mass Rapid Transit System

CSISG
2013
64.1

CSISG
2014
59.7

SBS Trains 67.3

SMRT Trains 63.3

60.3 SBS Trains
59.6 SMRT Trains

CSISG 2014 Q2 Transport & Logistics
Public Buses

CSISG
2013
60.7

CSISG
2014
58.5

SMRT Buses 62.1

SBS Buses 60.1

60.5 SMRT Buses

57.7 SBS Buses

CSISG 2014 Q2 Transport & Logistics
Year-on-Year Changes in Local Respondents' Satisfaction

Locals' year-on-year T&L Sector performance

Category	Change
MRT / LRT	-5.0
Public Buses	-1.8
Taxi Services	-2.7
Airlines	2.9
Budget Airlines	3.4
Changi Airport	-5.7

-15　　-9　　-2　　4

Average Local Satisfaction

2014　69.5

2013　69.9

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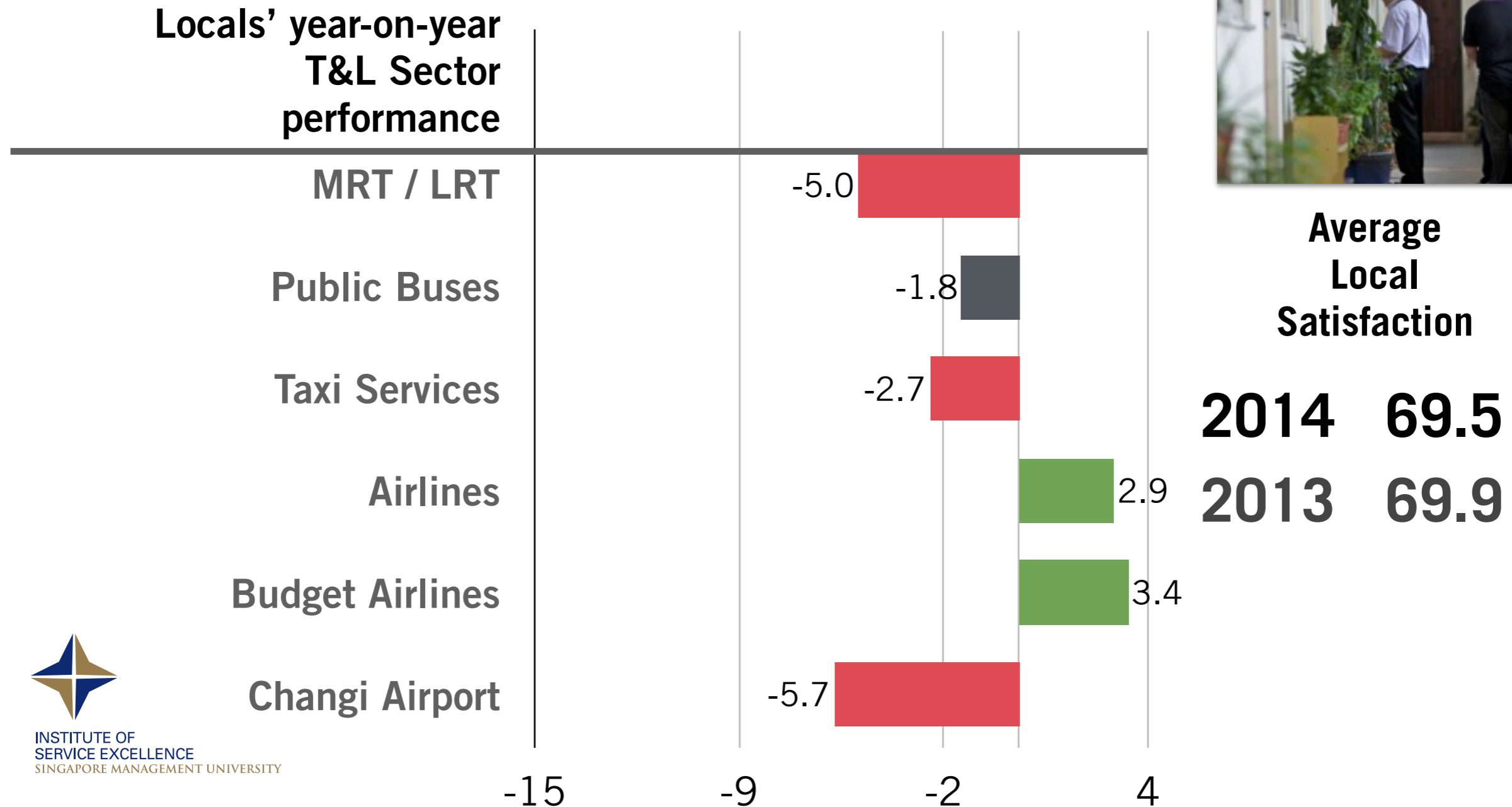
CSISG 2014 Q2 Transport & Logistics
Year-on-Year Changes in Tourist Respondents' Satisfaction

Tourists' year-on-year T&L Sector performance

Sector	Change
MRT / LRT	-10.3
Public Buses	-7.9
Taxi Services	-11.1
Airlines	-9.2
Budget Airlines	-3.3
Changi Airport	-11.0

-15   -9   -2   4
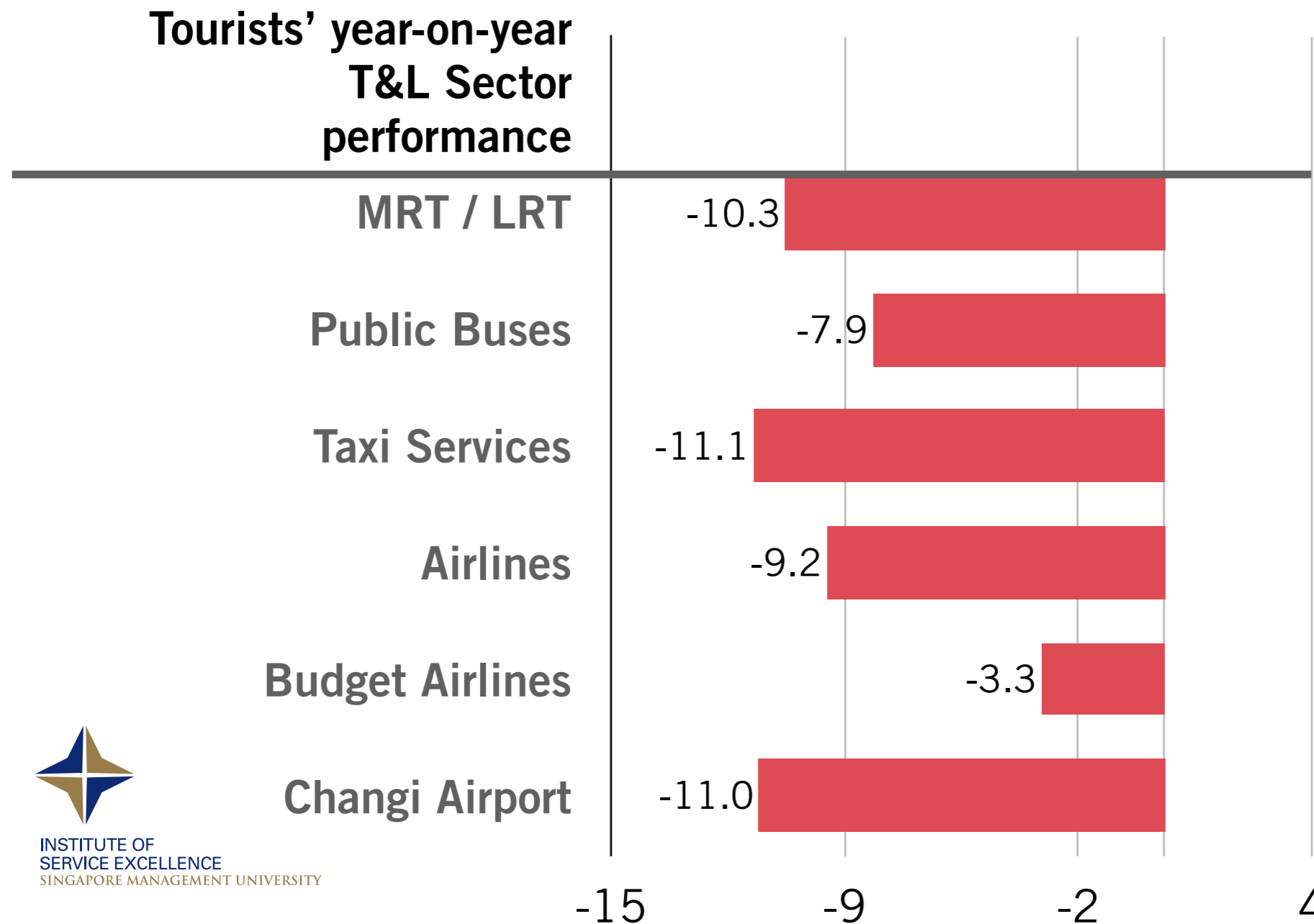
Average Tourist Satisfaction

2014 **71.4**

2013 **80.1**

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CSISG 2014 Q2 Transport & Logistics

Public Transport Respondents' reasons for no complaints (97.9%)

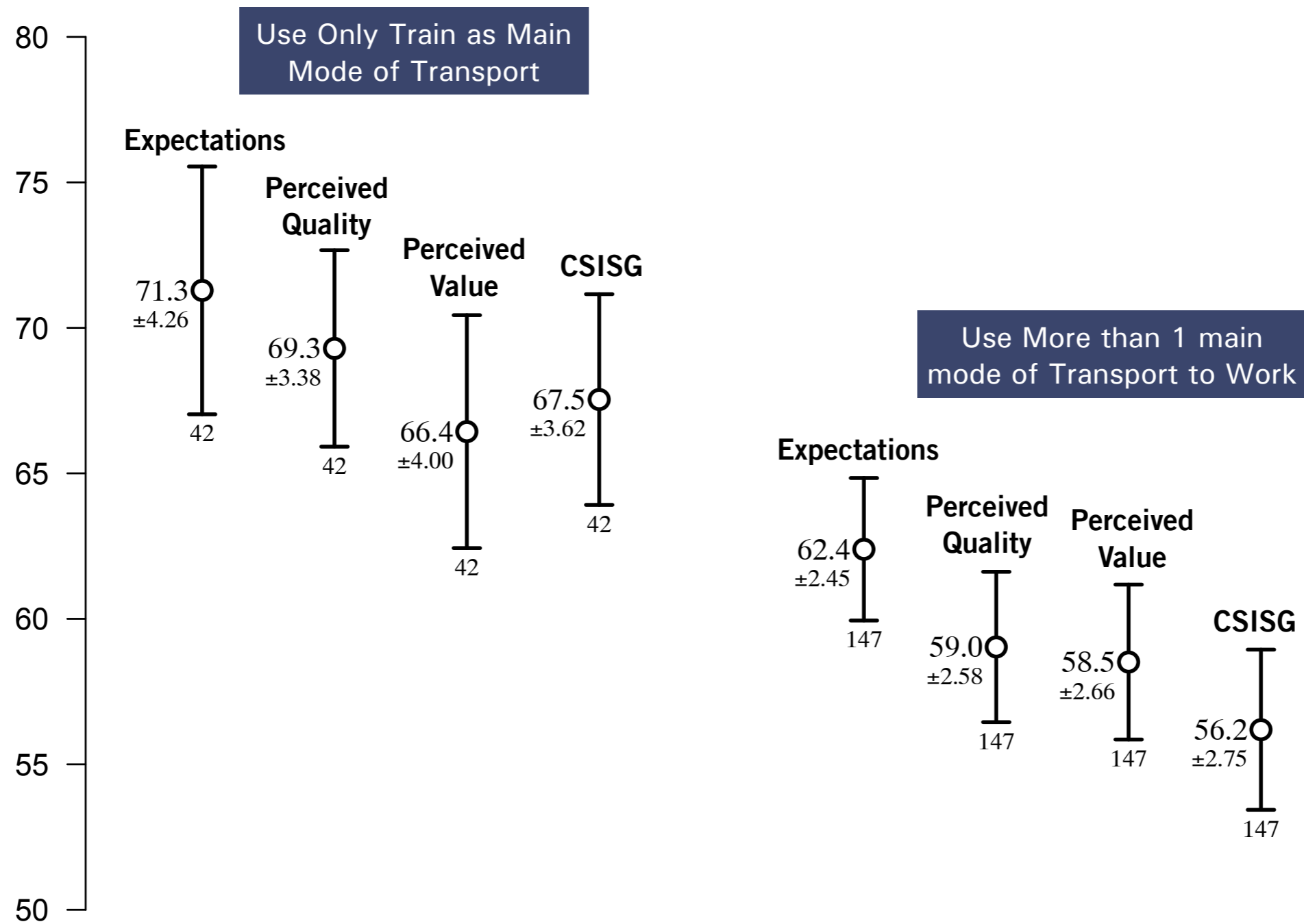|	No reason	Too difficult	No point	Other reason
	78.4%	**4.8%**	**16.8%**	**0%**
CSISG	67.6	49.9	44.8	
Positive Word-of-mouth / Loyalty	73.8	51.1	36.8	

CSISG 2014 Q2 Transport & Logistics

- A similar pattern is noticed across all other sub-sectors where satisfaction levels of customers who did not complain because there was no need to were significantly higher than other customers who did not complain

- MRTs sub-sector has the highest number of customers who did not complain because it was too difficult or there was no point complaining. This is followed by Public Buses sub-sector (21.4%) and Taxi Services sub-sector (15.8%)

- As such, these commuters have significantly lower scores for Positive Word-of-mouth.

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CSISG 2014 Q2 Transport & Logistics
MRT sub-sector

Use Only Train as Main Mode of Transport

Expectations 71.3 ±4.26 42

Perceived Quality 69.3 ±3.38 42

Perceived Value 66.4 ±4.00 42

CSISG 67.5 ±3.62 42

Use More than 1 main mode of Transport to Work

Expectations 62.4 ±2.45 147

Perceived Quality 59.0 ±2.58 147

Perceived Value 58.5 ±2.66 147

CSISG 56.2 ±2.75 147

Note: Data based on those that took Trains as transport to work and completed trains questionnaire. Only locals in dataset.

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CSISG 2014 Q2 Transport & Logistics
MRT sub-sector

Use Only Train as Main Mode of Transport

Use More than 1 main mode of Transport to Work

CSISG

67.5
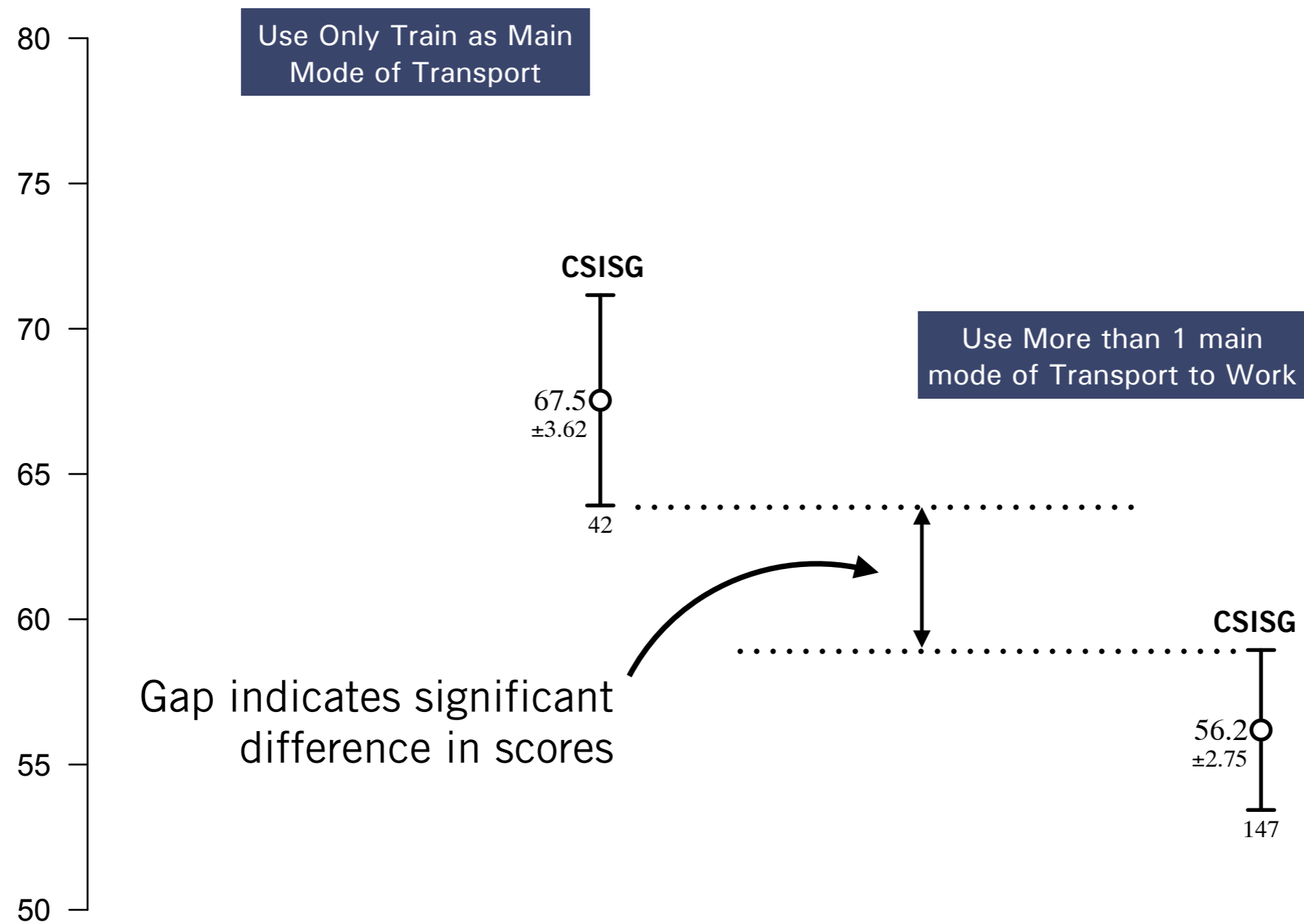±3.62

42

CSISG

56.2
±2.75

147

Gap indicates significant difference in scores

Note: Data based on those that took Trains as transport to work and completed trains questionnaire. Only locals in dataset.

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CSISG 2014 Q2 Transport & Logistics
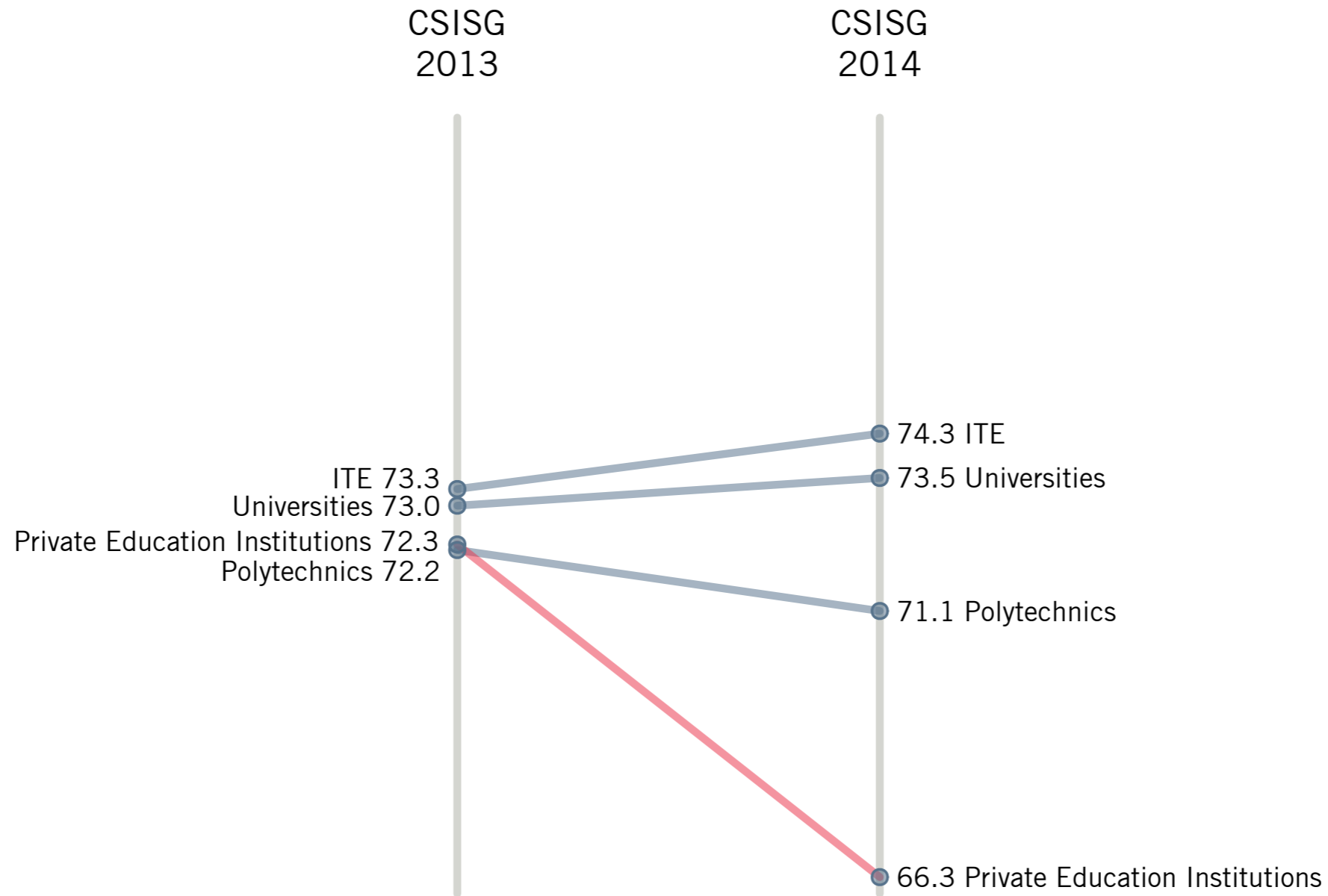## *MRT sub-sector*

- Commuters who have more than 1 main mode of transport to work are less satisfied than those with only 1 main mode of transport to work.

- This suggests that satisfaction for MRT Trains is dependent on the use of other modes of transports as well.

- When it comes to commuting, customers design their own solutions; how service providers interact with one another affects the customers' satisfaction with each of them.

CSISG 2014 Q2 RESULTS
PUBLIC & PRIVATE EDUCATION

CSISG 2014 Q2 Public & Private Education
Year-on-Year Change

CSISG
2013

CSISG
2014

74.3 ITE

ITE 73.3
Universities 73.0

73.5 Universities

Private Education Institutions 72.3
Polytechnics 72.2

71.1 Polytechnics

66.3 Private Education Institutions

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CSISG 2014 Q2 Public Education
Universities

CSISG
2013
73.1

CSISG
2014
73.5

79.2 SMU

74.3 NUS

NUS 73.3
SMU 73.2

NTU 72.7

70.6 NTU

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29
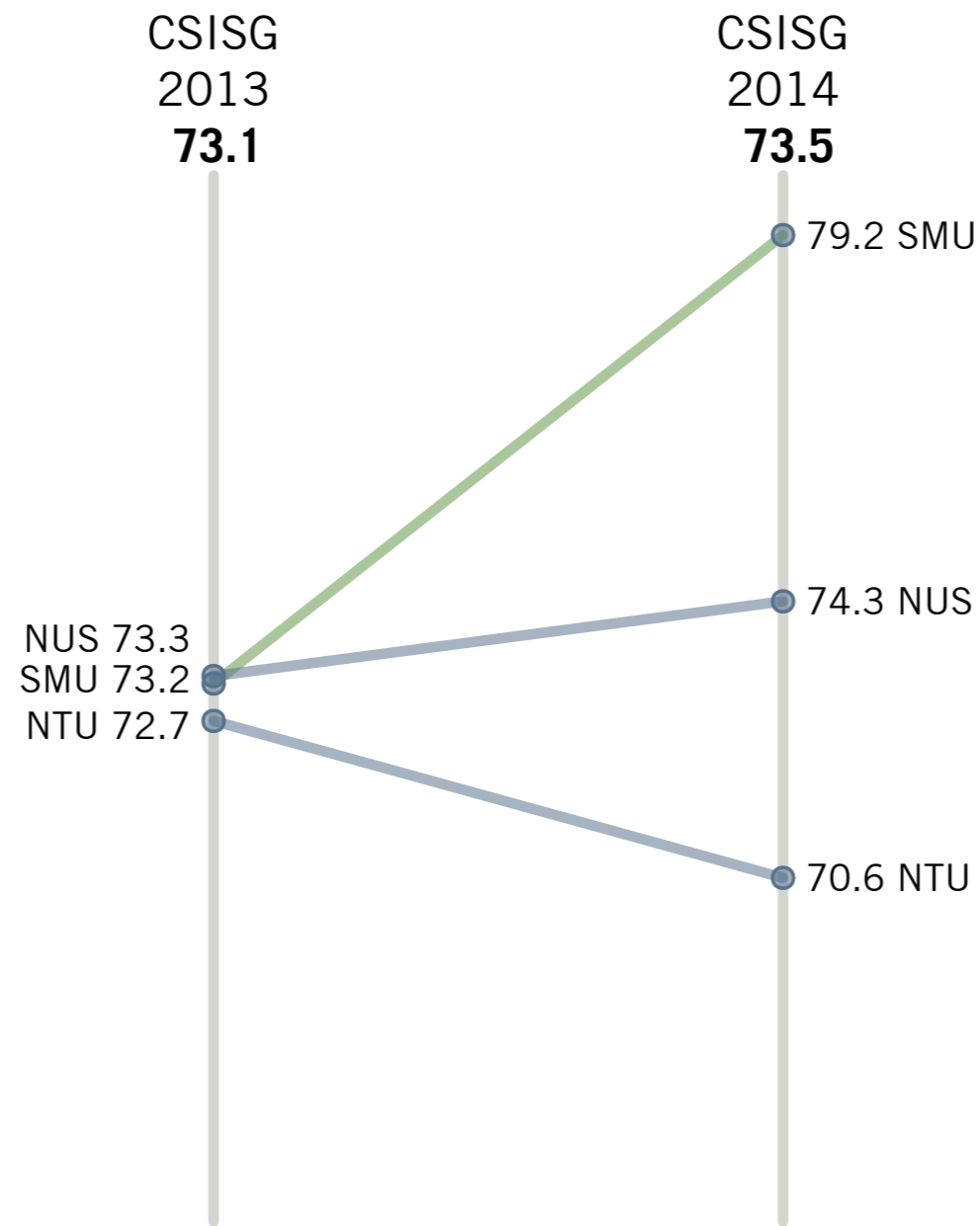
CSISG 2014 Q2 Public Education
Polytechnics

CSISG
2013
72.2

CSISG
2014
71.1

76.5 Singapore Poly

Singapore Poly 73.8

Republic Poly 72.0
Temasek Poly 71.6
Ngee Ann Poly 71.5
Nanyang Poly 71.4

71.6 Temasek Poly

70.1 Ngee Ann Poly
69.4 Republic Poly

66.5 Nanyang Poly

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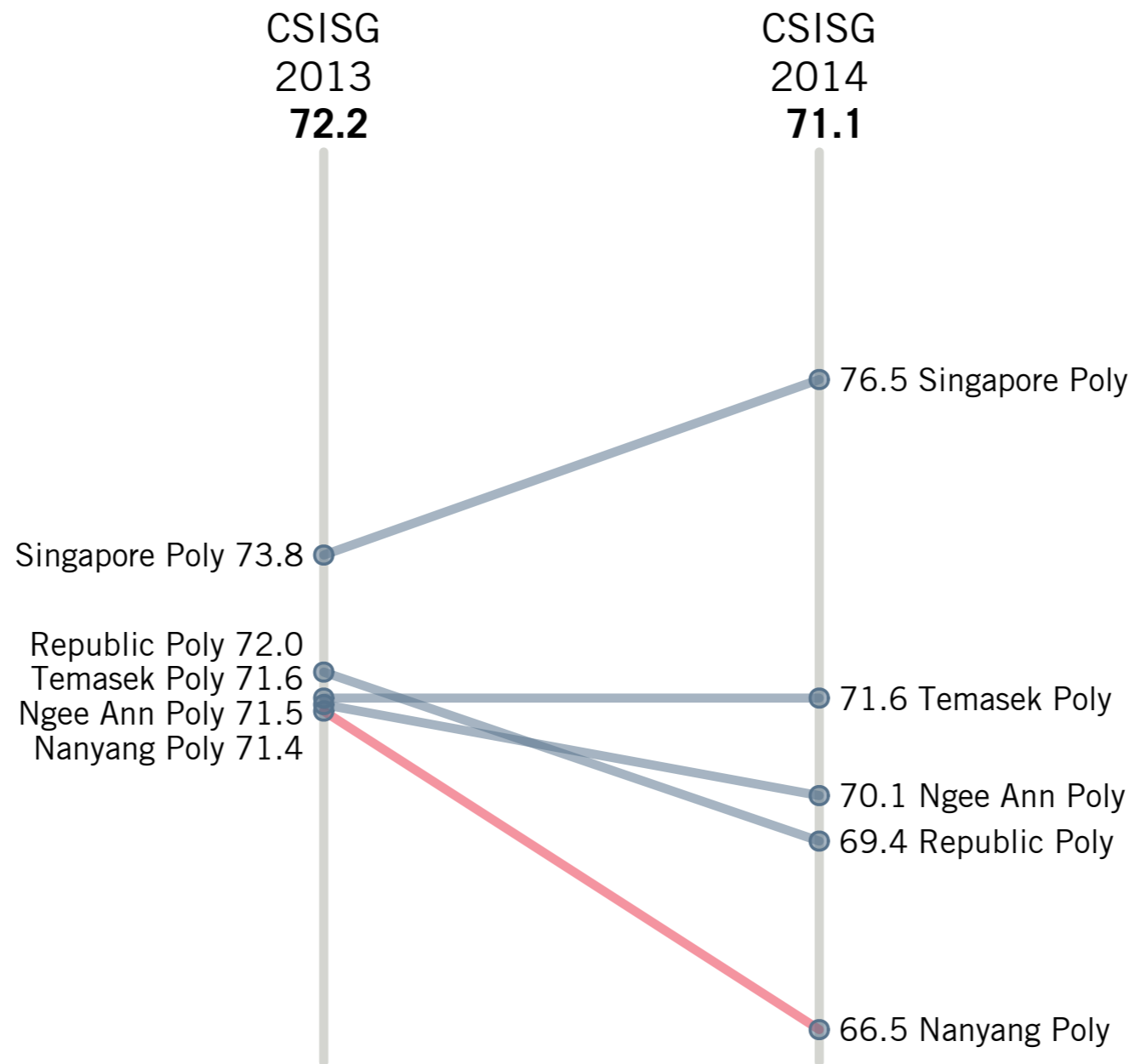
CSISG 2014 Q2 Education

Students from each Education sub-sector were asked about various aspects of their student life.

Campus	Convenience, facilities, study spaces, learning resources, campus life
Computing	IT infrastructure and support
Course-Fit	Suitability, interest, expectations in relation to the enrolled course
Relevance	Belief in the enrolled course to provide relevant experience and future opportunities
Support	Counselling, career, and financial assistance
Teaching	Quality, dedication, mutual respect exhibited by teaching staff

CSISG 2014 Q2 Education

ITE	Universities	Polytechnics	Private Education Institutions
Relevance	Support	Support	Teaching
Support	Campus	Computing	Support
Course-Fit	Computing	Campus	Relevance
Teaching	Teaching	Teaching	Campus
Campus	Relevance	Relevance	Course-Fit
Computing	Course-Fit	Course-Fit	Computing

The importance ranking of these dimensions are accurate at the sub-sector level.

CSISG 2014 Q2 Education

- Regardless of the Education sub-sector, Student Support is consistently of high importance to students.

- Student support refers to financial, career, and emotional support for students in the schools

- This is consistent also for the individual Polytechnics and Universities.

In conclusion

Adopt collaborative approach to raise service standards.

Example:

Transport operators working together with regulators

Education institutions working with industry for meaningful work placements and internships

More information

CSISG 2014 Q2 Executive Summary is available at ises.smu.edu.sg

If you are from a CSISG-measured company, email ise@smu.edu.sg with your professional contact information for your complimentary company-specific CSISG score card

The ISES Membership Programme provides a comprehensive CSISG benchmarking report for your company along with a host of associated benefits. An application form is available in your Forum folder and also at ises.smu.edu.sg