



2022 CUSTOMER SATISFACTION SURVEY

Project:



March 2023

BACKGROUND OF THE STUDY

Since 2021, the conduct of the annual Customer Satisfaction Survey (CSS) of PNCC was subsumed in the ISO Project in connection with the implementation of its Customer Satisfaction Procedure. The ISO Core Team responsible for the implementation of PNCC's Quality Management System has conducted coordination meeting with concerned offices with direct interaction with the customers. For 2022 CSS, coordination meeting was held on November 23, 2022, attended by representatives of Realty Management Department and Legal Department presided by the Deputy Quality Management Representative.

OBJECTIVES

Determine satisfaction levels of PNCC customers: Concessionaires (Lessee) and Joint Venture Partner.

Identify ways on how to improve performance and enhance customer experience.



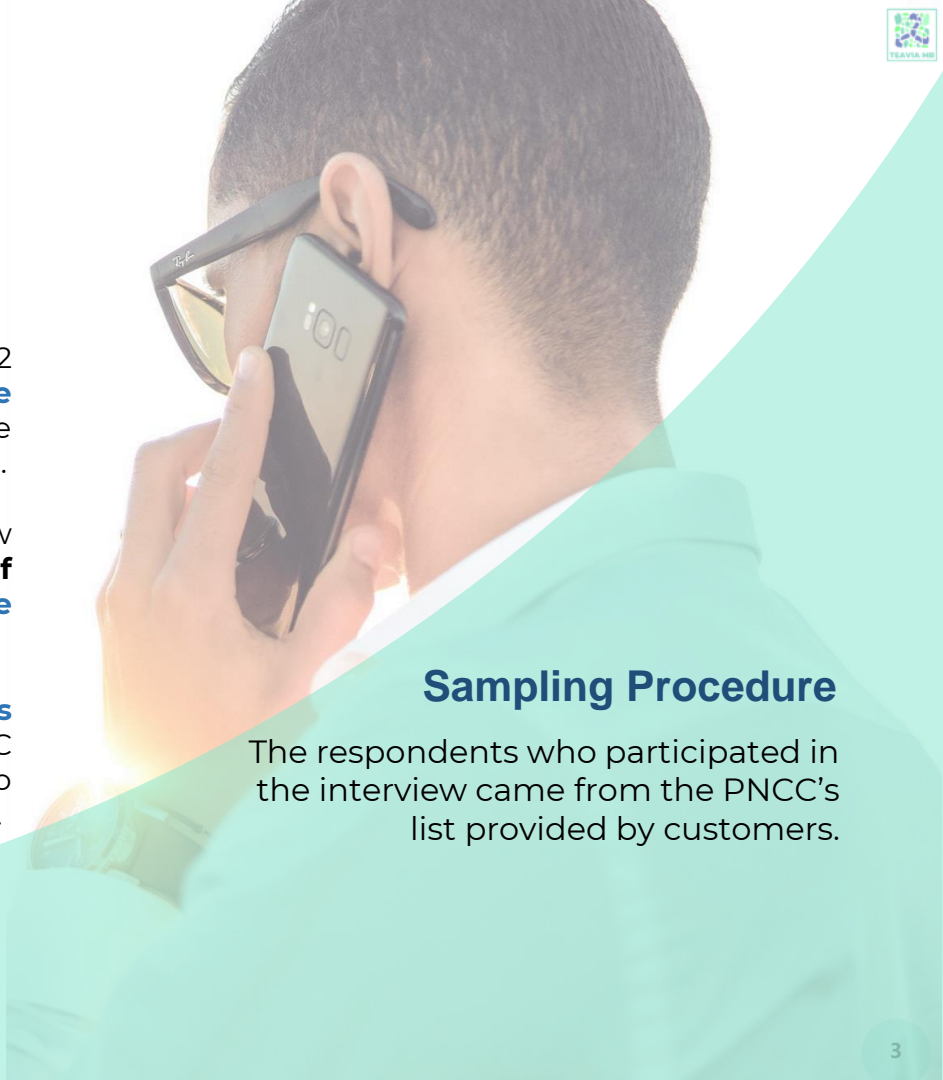
Data Gathering Methodology

- The Data Gathering Method used in PNCC's 2022 Customer Satisfaction Survey (CSS) is **through telephone interview** as it is the most efficient way of reaching the target customers since they do not usually visit the office.
- The respondents that will participate in the interview have been identified from the **current customers of PNCC: (I) Concessionaire (Lessee)** and (I) **Joint Venture Partner** on various Tollway Development Projects.
- PNCC provided a **letter email to the customers** informing that a CSS will be conducted by PNCC personnel, purpose of the CSS, invitation of customers to participate in the survey and assurance of confidentiality.



Sampling Procedure

The respondents who participated in the interview came from the PNCC's list provided by customers.





Respondent Criteria

Target respondents are primary customers with direct business transactions with PNCC. They had met all the required criteria, eligible and their response are relevant.



Sample Size

N= 3 Concessionaire/Lessee
N=3 Joint Venture Partner on various Tollway Development Projects



Sample Universe

For data gathering, the designated researcher prepared a list of customer's representatives (sample universe). The list consists five (5) respondents per customer type.



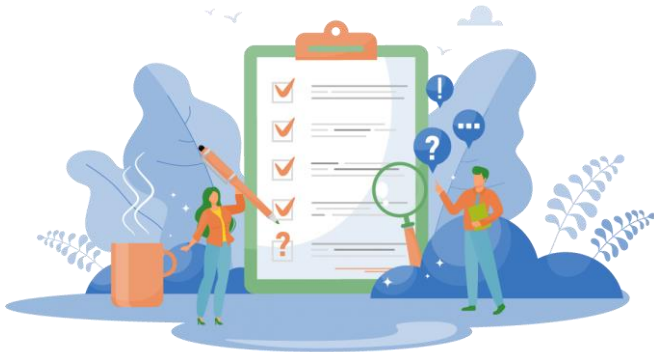
Frequency of Data Collection

Frequency of Data Collection is done annually.



Area Coverage

The primary area coverage for the study depends on where the customers of PNCC can be contacted and interviewed.



DATA COLLECTION INSTRUMENT

- The quantitative study made use of a **structured questionnaire** provided by the GCG. The target length of the interview was 15 minutes at the maximum.
- The actual length of interview was determined during the pretest of the questionnaire.
- Questions under the Main Questionnaire are fixed and was not altered, modified or deleted. PNCC did not add service or product specific questions, under Execution of Service section.

The questionnaire is composed of three (3) sections

- a) Screener**
- b) Main questionnaire**
 - Transacting with PNCC
 - Overall Satisfaction
 - Execution of Service
- c) Socio-Demographic Profile**



5-point Likert scale

Used for the overall satisfaction rating questions that determines the level of satisfaction/dissatisfaction of the customers.

- 5 Very Satisfied**
- 4 Satisfied**
- 3 Neither Satisfied nor Dissatisfied**
- 2 Dissatisfied**
- 1 Very Dissatisfied**



LIKERT SCALE DEFINITION

Explanation of the scale was read out to the respondents. This was done before any of the rating questions were asked. Interviewers explained the scale repeatedly through the conduct of the survey until the respondent gets used to it.

The following are the explanations of each point in the scale:

Very satisfied

Performance of PNCC meets and exceeds the needs and expectations, to the benefit, of the customers. The service was provided with few minor problems or none at all. If there were few minor problems, a corrective action might have already taken place which is deemed highly effective.

Satisfied

Performance of PNCC meets the minimum expectations of the customer. The service was provided with few minor problems or none at all. If there were few minor problems, a corrective action might have already taken place which is deemed highly effective.

Neither Satisfied nor Dissatisfied

This is the midpoint in which the respondents cannot truly pick a side in the spectrum. However, this does not mean that the respondent has no opinion or does not know. Performance of PNCC neither meets nor doesn't meet the minimum expectations of the customer.

Dissatisfied

Performance of PNCC does not meet the minimum expectations of the customers. There are a number of elements or aspects in PNCC's customer service that reflects a problem for which the GOCC has not yet identified corrective actions. If there were corrective actions, then the action is perceived by the customer as ineffective or has not been fully implemented to be effective.

Very dissatisfied

Performance of PNCC does not meet most or did not meet any of the expectations of the customers. There are a number of elements or aspects in PNCC's customer service that reflects a serious problem for which PNCC has not yet identified corrective actions. If there were corrective actions, then the action is perceived by the customer as very ineffective or has totally been disregarded.

Study Considerations

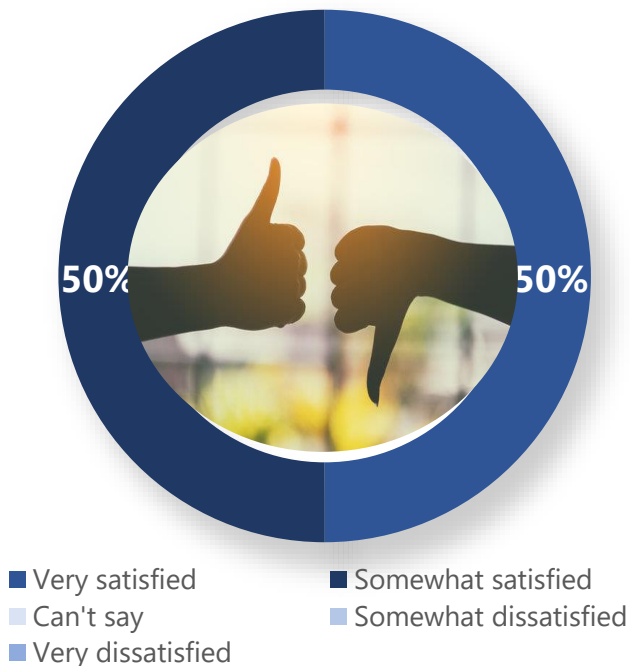
- The previous study was analyzed by combining Lessees and Partners so comparison vs previous year was only done on the Totals level. This report separates the finding for Lessees and Partners.
- *Due to the small sample size the following was not executed:*
 - *Determining derived importance of attributes through Correlation or Kruskal analysis to obtain drivers of satisfaction*
 - *Plotting a scatter diagram of average performance vs derived importance of attributes to determine how PNCC is performing on attributes that matter*
- *Data collection was done by PNCC. Teavia MR Inc. analysis is done on the assumption that the data generated by PNCC is accurate and valid.*
- *The results are on a per segment level but with only n=3 respondents per segment. Thus, percentages are unstable and must all be read with caution.*



OVERALL PERFORMANCE



Overall Customer Satisfaction – TOTAL



AVERAGE:

2021 = 4.7

2022 = 4.5

PNCC's set of customers are generally satisfied with the service they have received from PNCC.

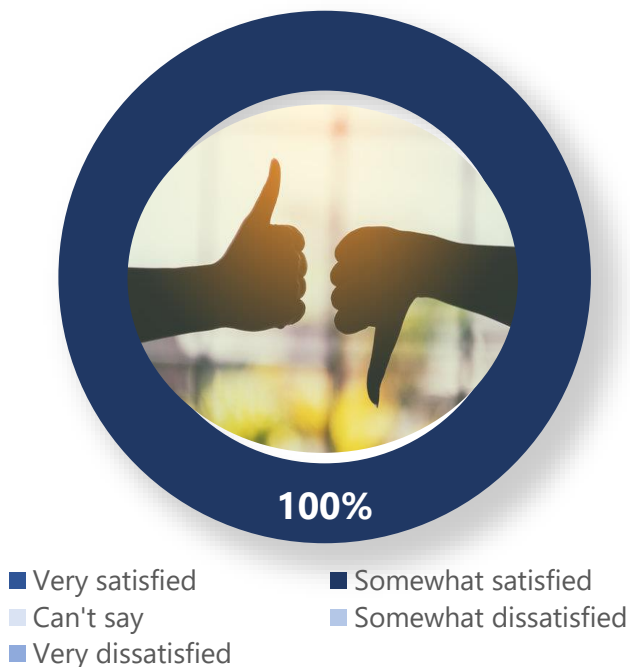
Average score is stable evidencing consistency of PNCC's service delivery to its customers.



Lessees



Overall Customer Satisfaction - Lessees



AVERAGE: 4.0

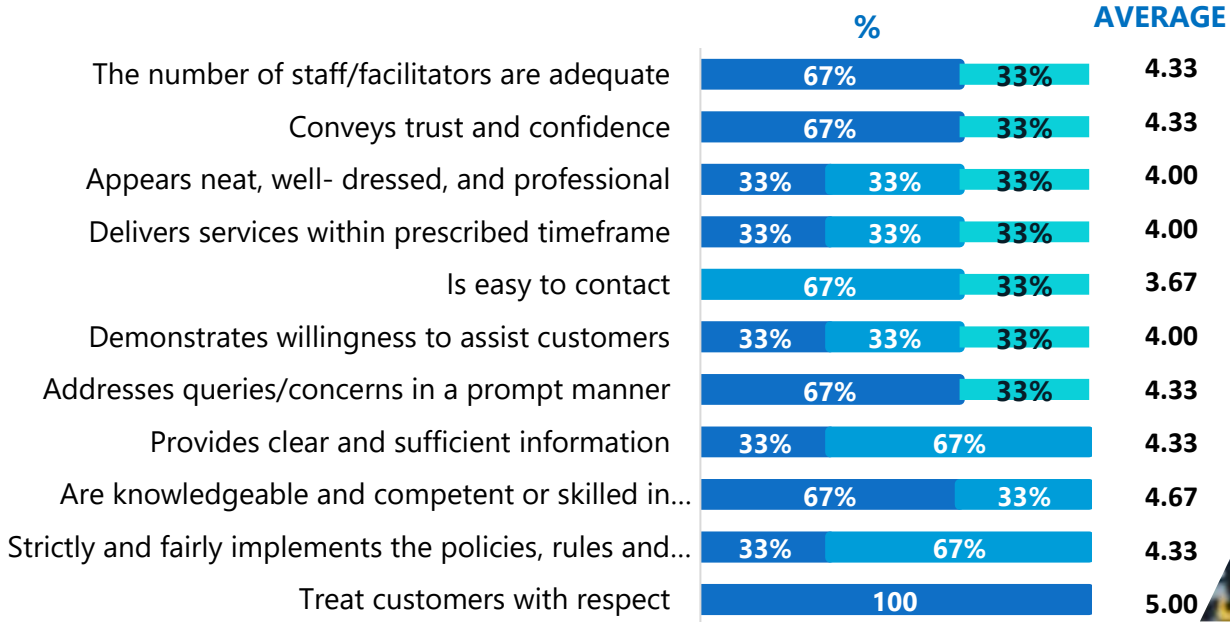
Lessees expressed satisfaction on their experience dealing with PNCC. All 3 have given a score of 4.

Note: No answers were given on Reasons for Satisfaction Rating and Areas for Improvement.



Staff

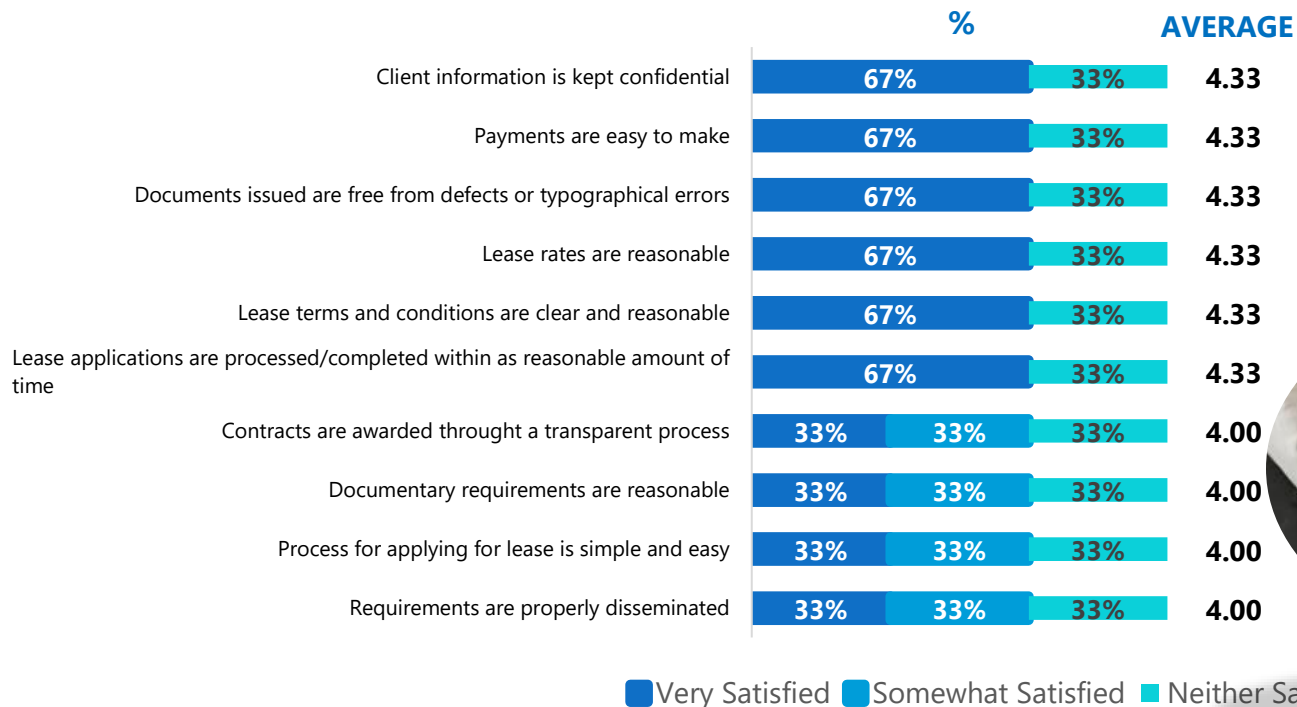
Satisfaction is likewise seen on most service aspects of the PNCC staff, particularly on treating customers with respect. The service aspect that appears to need some work is on being easy to contact. Moreover, there are several aspects of staff performance where Lessees appear indifferent (neither satisfied nor dissatisfied).



■ Very Satisfied
 ■ Somewhat Satisfied
 ■ Neither Satisfied nor dissatisfied

Leasing Services

Services pertaining to leasing are likewise appreciated by customers, specially on the aspects of keeping information confidential, easy to make payments, documents that are free from defects, reasonable lease rates, lease terms and conditions that are clear and reasonable and an application process that is completed within a reasonable amount of time. However, there is 1 respondent who is indifferent across all aspects.

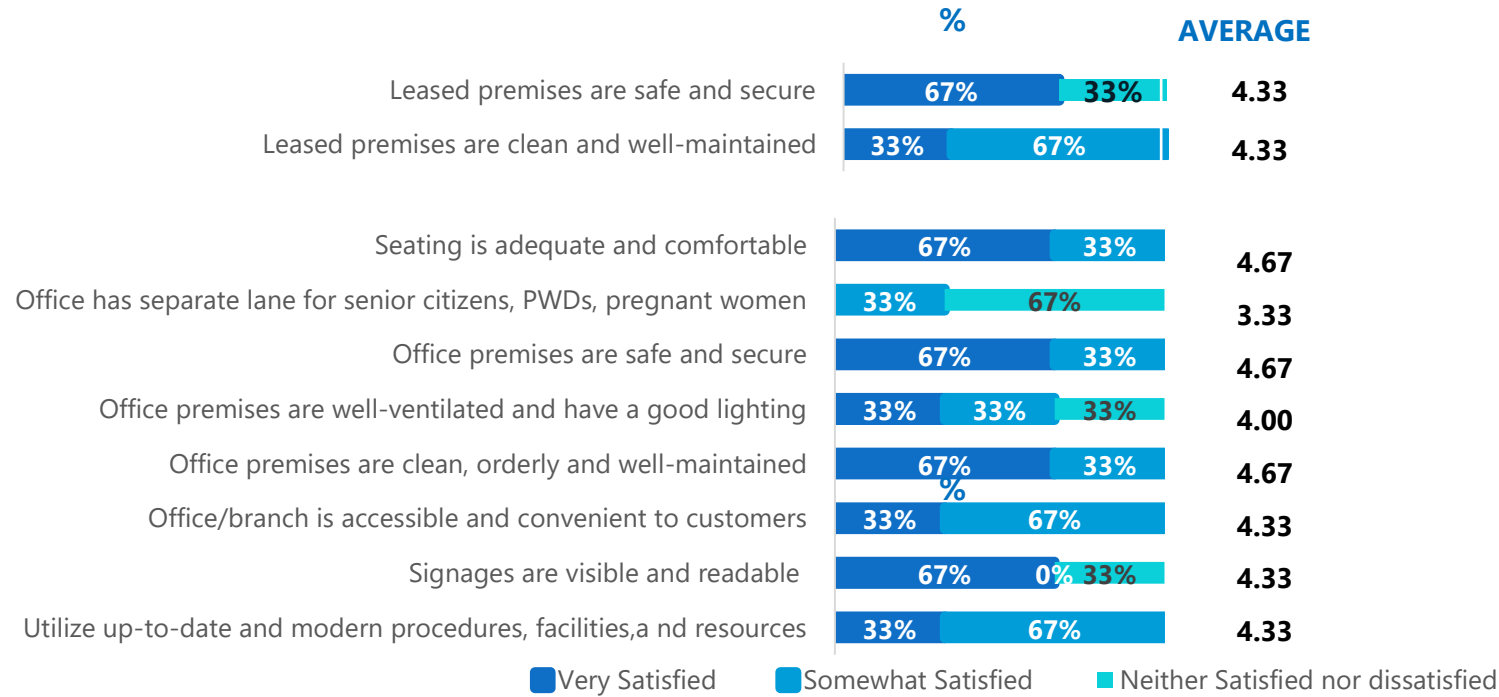




Facilities

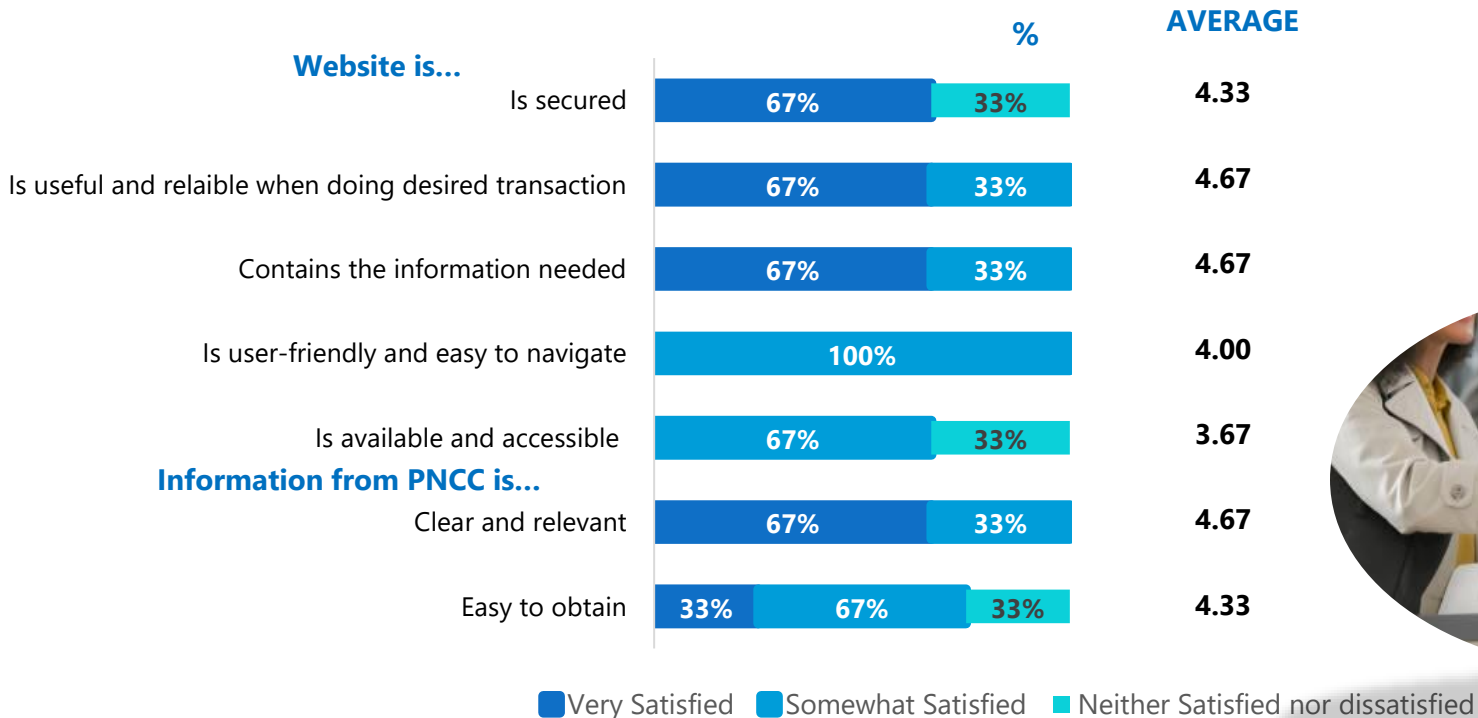


Leased facilities and PNCC office facilities are also acceptable to customers particularly on the safety and security of the leased and office premises, on adequate seating, on cleanliness and having visible signages. The only aspect that needs attention is on having a separate lane for senior citizens, PWD and pregnant women.



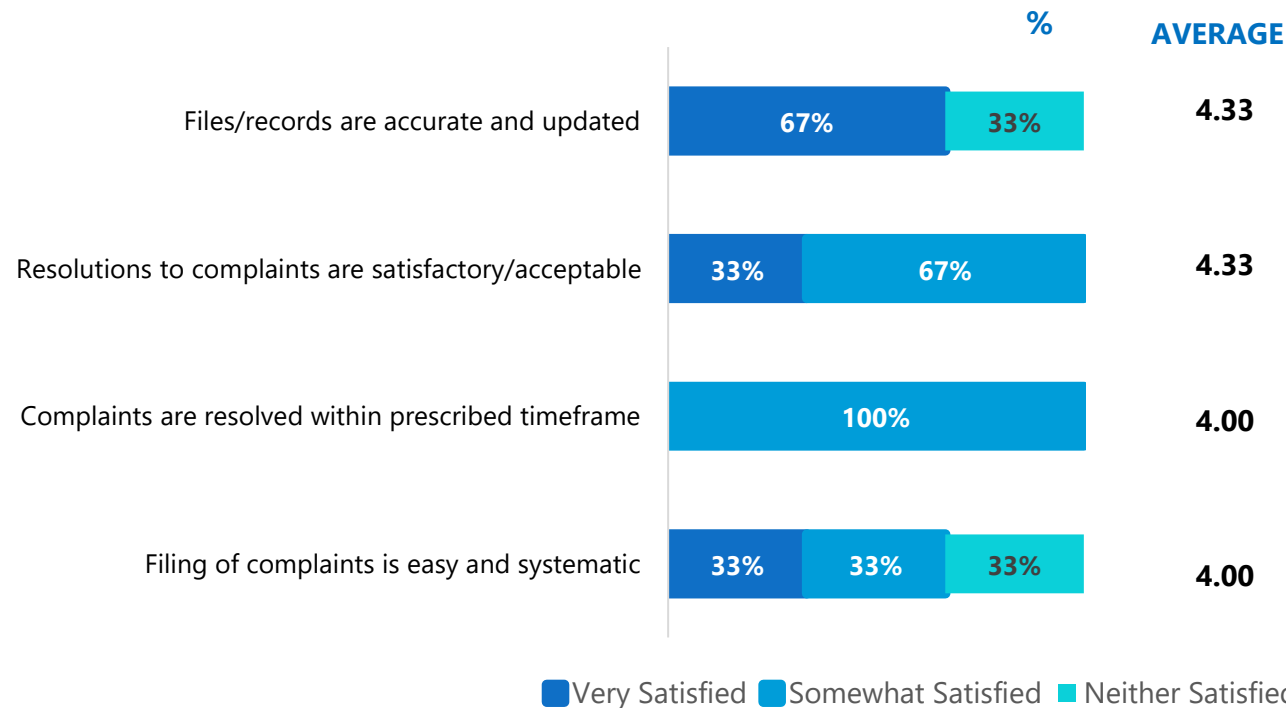
Information and Communication

PNCC is also performing well on virtually all the aspects of Information and Communication, except on the availability and accessibility of the website.



Complaints Handling

PNCC delivers well on handling complaints, specially on the aspects of accuracy of file record and the acceptable resolutions to complaints.



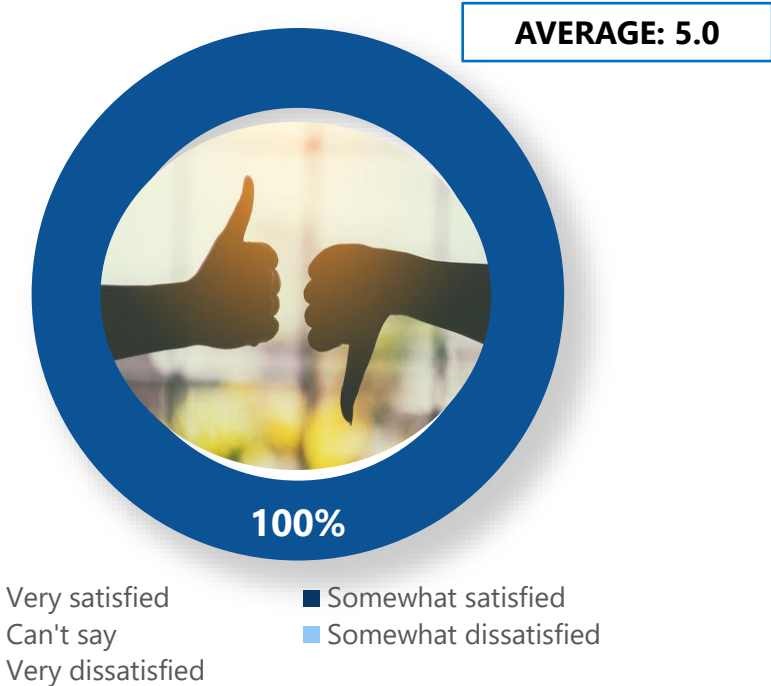


Partners



Overall Customer Satisfaction - Partners

Partners appear to have a perfect experience of PNCC's service as all 3 respondents have given a score of 5.



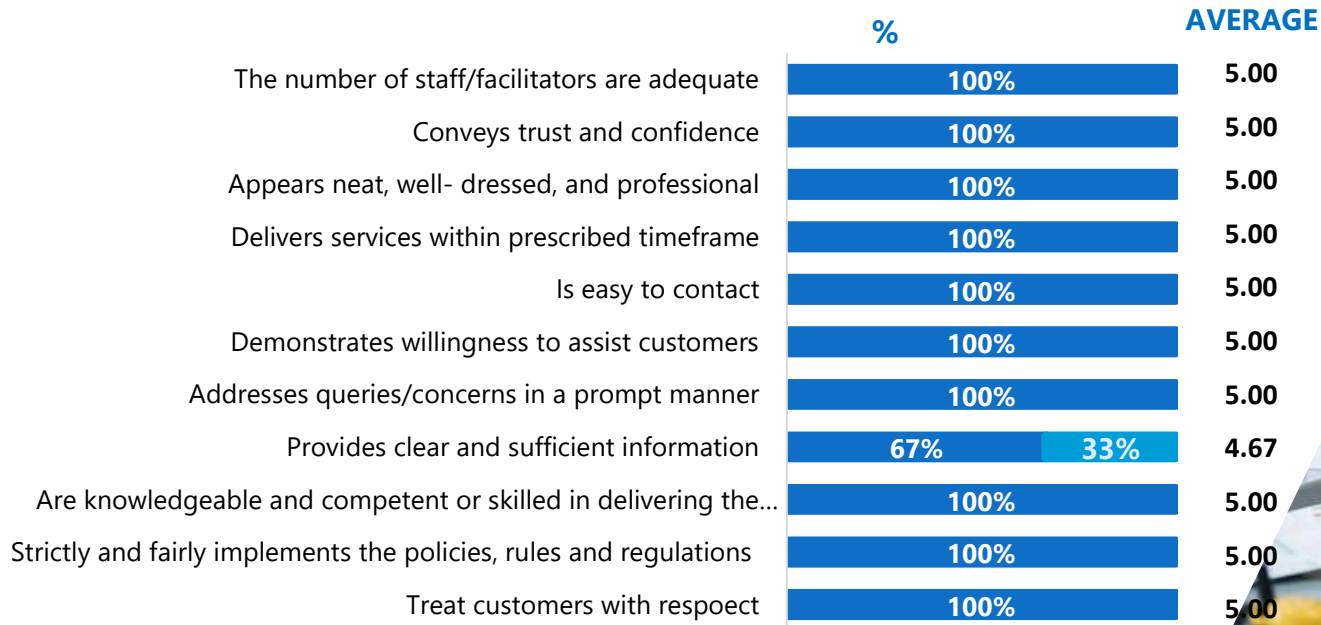
Satisfaction was driven by the good communication and coordination of PNCC staff alongside the sufficient resolution of concerns. The areas for improvement, on the other hand, are on the website and mobile signal of PNCC.

| Reason for Satisfaction | # |
|---------------------------------------------------------------------|---|
| Constant communication and collaboration for productive partnership | 3 |
| Regularly coordinate for relevant matters | 1 |
| Concerns were sufficiently addressed | 1 |

| Areas for Improvement (n=1) |
|-------------------------------------------------|
| Website improvement, accessible anytime |
| Mobile signal so that messages will be received |



PNCC staff received perfect scores across most service aspects. It is only on providing clear and sufficient information where score is relatively lower than the other service attributes.

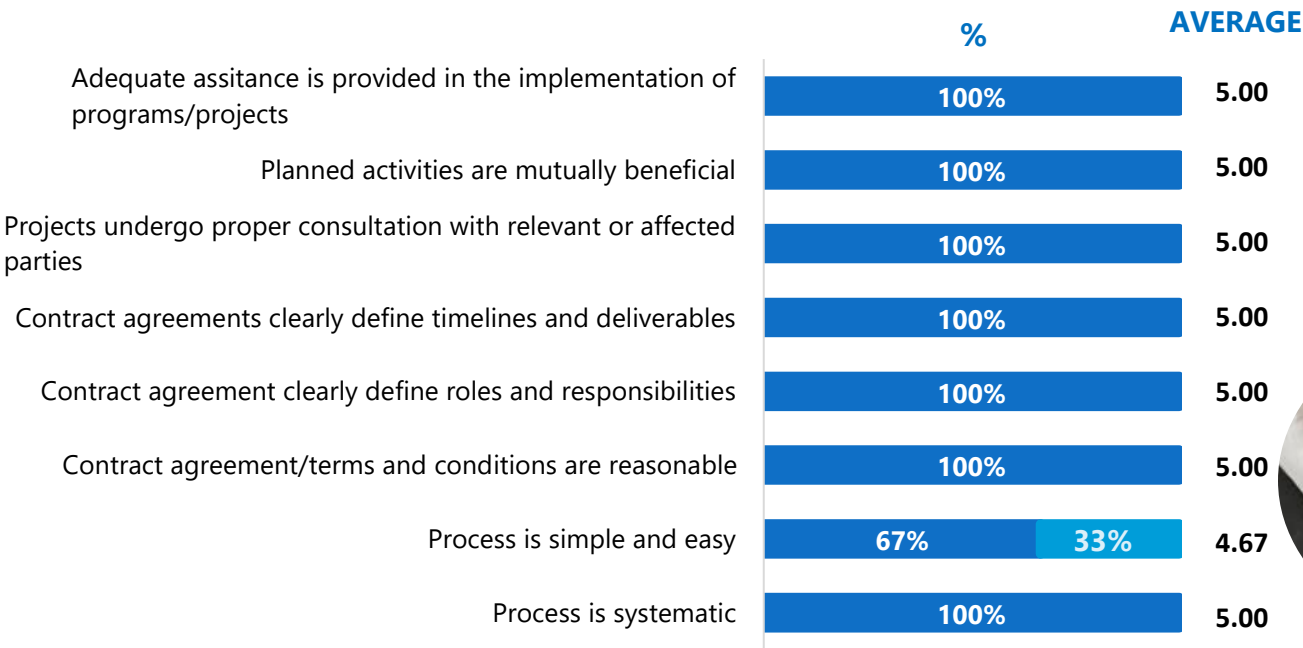


Very Satisfied Somewhat Satisfied Neither Satisfied nor dissatisfied



Partnerships

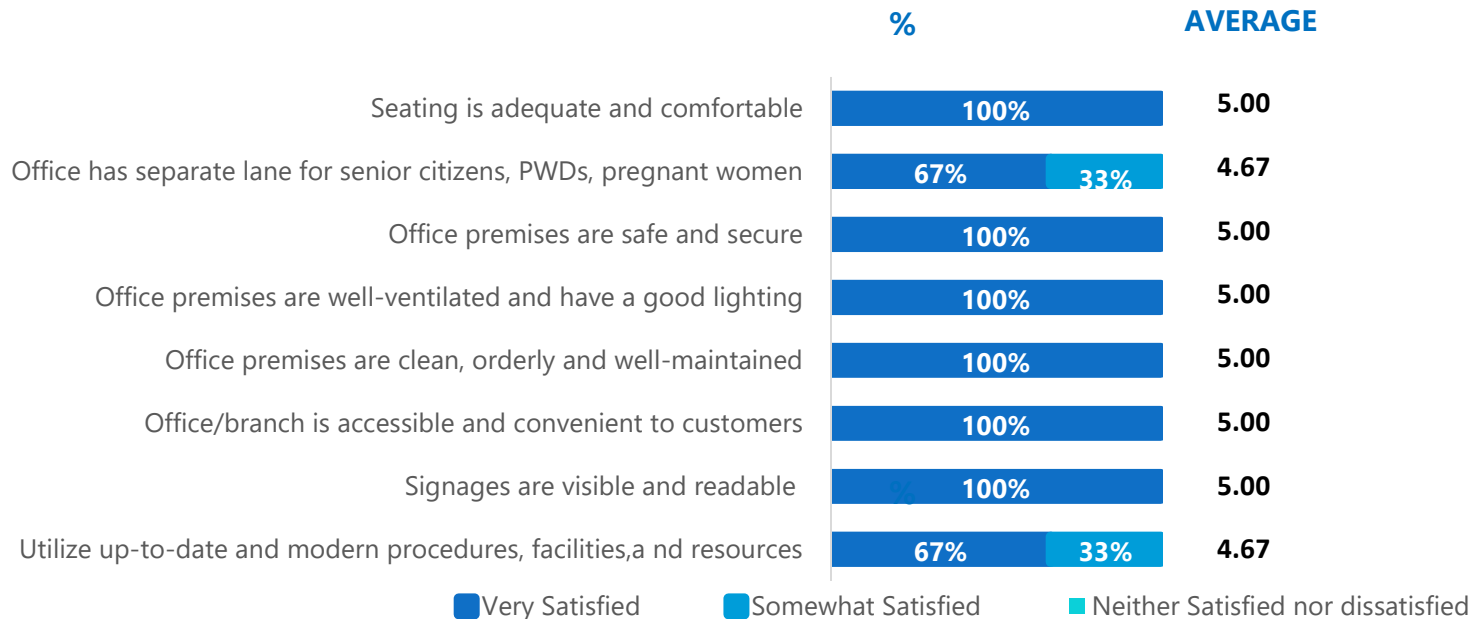
Similarly, service delivery on Partnership attributes is also lauded, relatively lower though on the process being simple and easy.



Very Satisfied Somewhat Satisfied Neither Satisfied nor dissatisfied

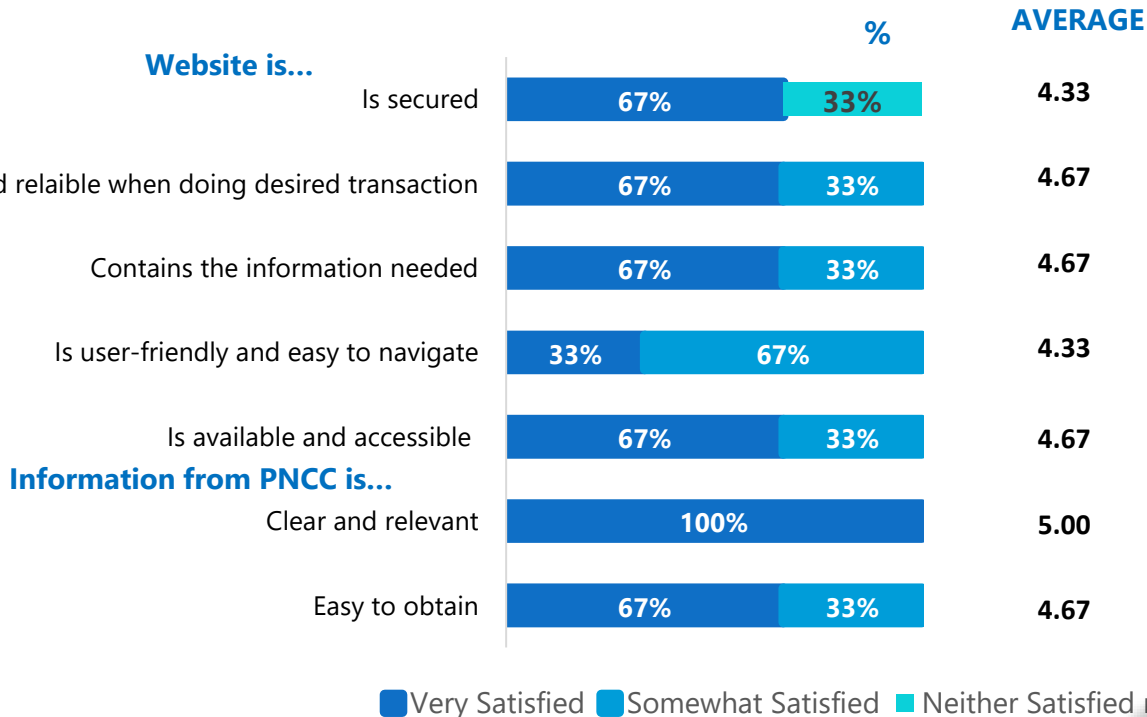
Facilities

High scores were also received on Facilities, the only areas that received relatively lower scores are on having separate lane for senior citizens, PWD and pregnant women and on utilizing up-to-date and modern procedures, facilities and resources.



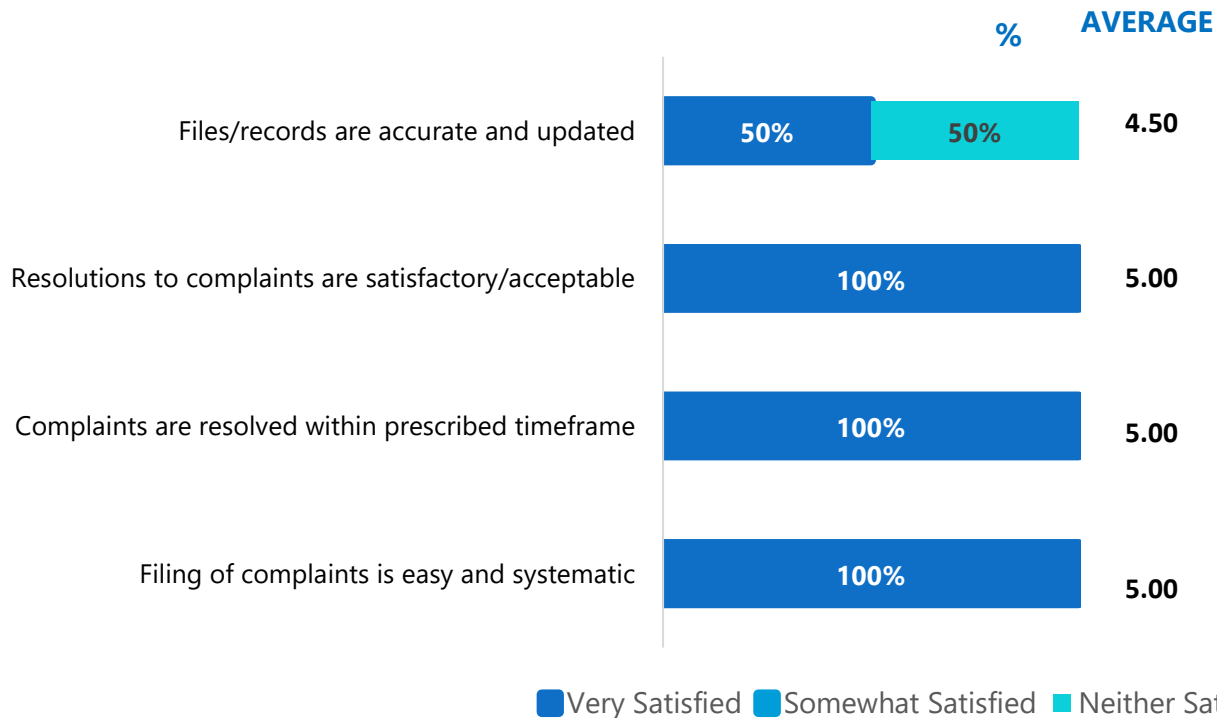
Information and Communication

It appears that relative to the other service dimensions, it is on Information and Communication that some Partners had less than perfect experience, particularly on the security and ease of navigation of the website.



Complaints Handling

Most aspects of Complaints Handling was lauded by Partners except on the accuracy and updated-ness of files and records.





Way forward



PNCC delivers well on customer service

- Both Lessees and Partners are satisfied with their experience working with PNCC, particularly the Partners who all gave a perfect score showing customer 'delight'.
- Driving Partner's delight is the good coordination and collaboration of PNCC when dealing with them. Scores were also mostly perfect on the Staff, Partnerships, Facilities and Complaints Handling. If at all, it is only in the area of Information and Communications that Partners show relatively lower scores, specifically on the security and ease of navigation of the website.
- Lessees are satisfied but there is room for improvement, particularly on:
 - Staff being easy to contact
 - Having PWD, senior, pregnant women separate lanes
 - A website that is available and accessible

They are also more indifferent than Partners on a lot of aspects, but more so on attributes concerning Staff and Leasing Facilities.



Good can be better

- To maintain and bolster PNCCs performance, the following should be considered :
 - Lessees need some attention as between the 2 customer segments, they are the ones who gave a relatively lower score. One particular respondent appears to show indifference on a considerable number of attributes. This is a red flag towards dissatisfaction and must therefore be looked into.
 - The website was also a recurring aspect for improvement, particularly on availability and ease of access. Look into ways on how to make the website more user-friendly.
 - On survey execution, it is still best practice to have a 3rd party interview your customers to minimize bias in respondents response.



Make better decisions



www.teaviamr.com

28/F Antel Corporate Global Center,
Julia Vargas Ave., Ortigas Center,
Pasig City

