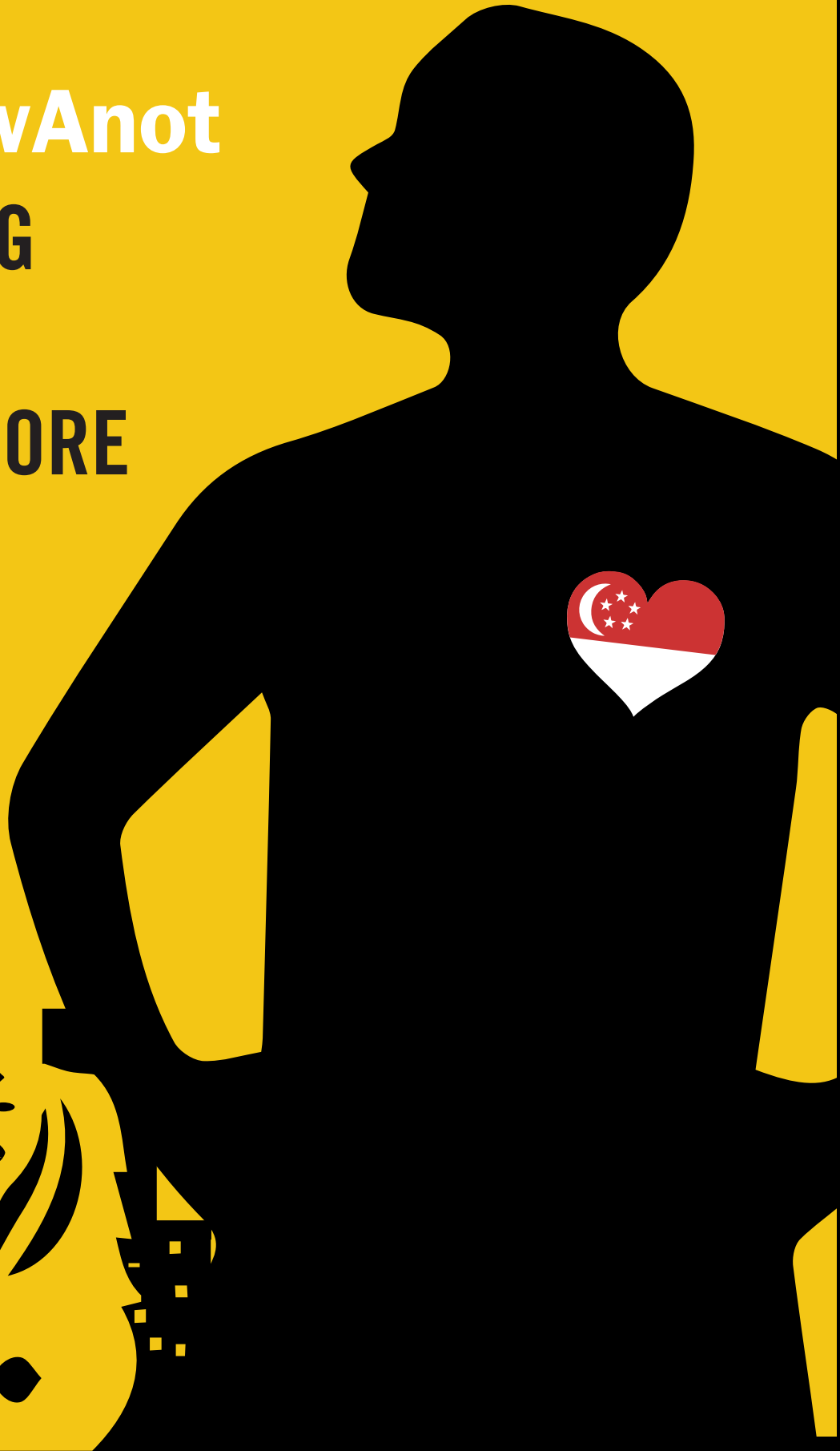


**BLA
CK
BOX**

*Great research
is more than
just data*

YouKnowAnot

MEASURING THE PULSE OF SINGAPORE



SUMMARY

2014 was a year in which the Government announced major changes to medical insurance (Medishield Life) and new benefits for the elderly (the Pioneer Package) and experienced a contrast in fortunes in two major areas – public transport and CPF.

After facing considerable unrest over public transport responses through 2012-13, the Government successfully turned things around in 2014. Community satisfaction with its public transport efforts rose from 53% in January to 73% by the year's end.

In contrast, CPF, which has been a fundamental element of the Government's economic armoury, underwent a crisis of confidence in the wake of the Roy Ngerng's blog posting in May. The Government ended the year down 5% on CPF but,

more critically, satisfaction amongst under 25s and low income earners declined much greater, suggesting that there are now sizeable misgivings about CPF amongst those most worried about their future retirement nest egg.

Overall, the Blackbox Policy Satisfaction Index reveals that after a mid-year slump, the Government regained ground in the last quarter and finished the year with a slightly better index score. Major gains and declines for the Government Jan through Dec were as follows:



The 2014 scorecard reveals the issues confronting the Government heading into 2015. Its recent focus on social policies and helping those most vulnerable to growing income disparity has resulted in some puncturing of its economic credentials, especially amongst upper/middle income earners.

Looking ahead, it is apparent that the Government has a balancing act that it will have to manage carefully. With the rising cost of living continuing to be by far the #1 concern of Singaporeans, the Prime Minister and his colleagues enter the country's 50th anniversary with a new set of challenges on their plate.

NATIONAL MOOD INDICATORS

COMMUNITY SATISFACTION

Jan
78%

Dec
79%

Those who say they are satisfied with the way things are going in Singapore

NATIONAL ECONOMY

Jan
67%

Dec
65%

Those who rate current economic conditions in Singapore as Excellent/Good

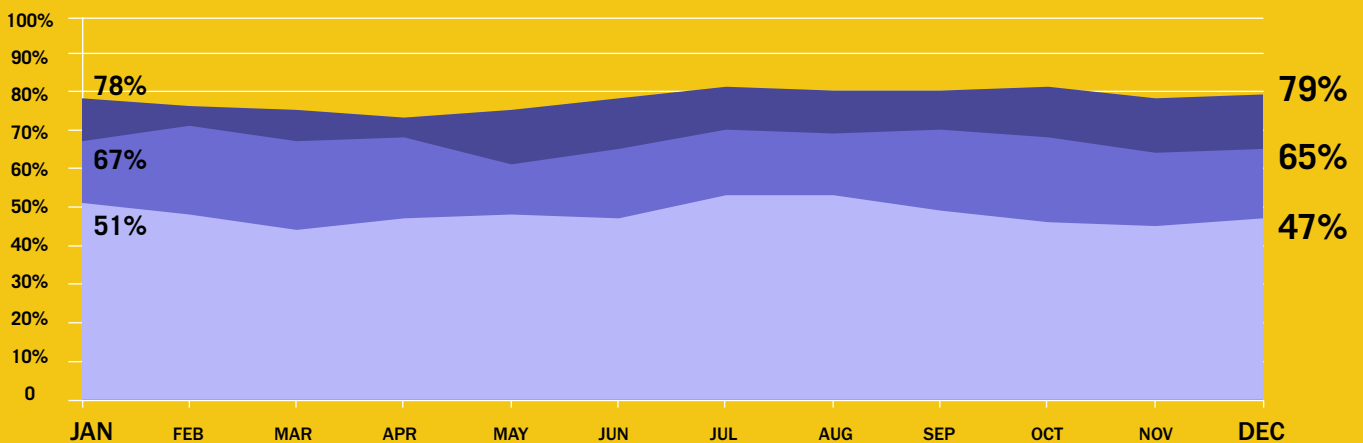
PERSONAL FINANCES

Jan
51%

Dec
47%

Those who rate their personal finances as Excellent/Good

MONTHLY TRENDS IN NATIONAL MOOD INDICATORS



+1 COMMUNITY SATISFACTION
JAN '14 to DEC '14

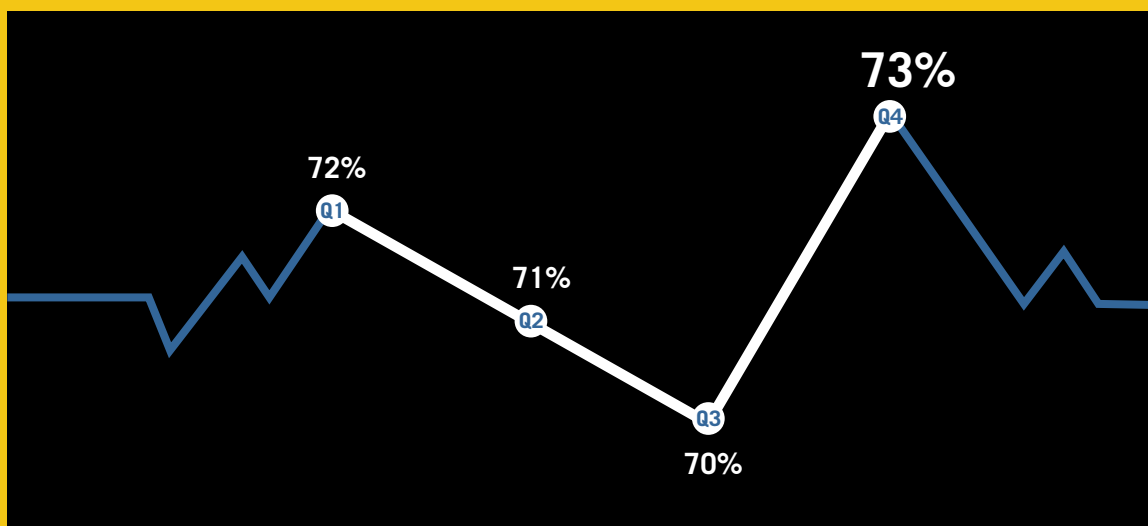
-2 NATIONAL ECONOMY
JAN '14 to DEC '14

-4 PERSONAL FINANCES
JAN '14 to DEC '14

GOVERNMENT SATISFACTION SCORECARD (JAN 2014 & DEC 2014)

ISSUE	SATISFACTION WITH GOVT (JAN 2014)	SATISFACTION WITH GOVT (DEC 2014)	% CHANGE IN 2014
Defence/ National security	93%	93%	0
The Environment	90%	92%	+2
Racial Relations/ Integration	89%	89%	0
Educaiton System	89%	88%	-1
Crime Levels	94%	88%	-6
Moral Standards	90%	88%	-3
Health Insurance / Protection	82%	85%	+3
Management of the Economy	82%	84%	+2
Government Accountability	76%	84%	+7
Civil Rights / Liberties / Free Speech	82%	81%	-1
Care for the Elderly	79%	80%	+1
Jobs & Unemployment	69%	77%	+8
Public Transport	53%	73%	+20
CPF/Pensions	76%	71%	-5
Gap Between Rich & Poor	66%	70%	+4
Taxes	78%	70%	-8
Level of Salaries and Wages	61%	66%	+5
Population Management	63%	64%	+1
Housing Affordability	51%	51%	0
Motor Vehicle Prices / COE	44%	44%	0
Cost of Living	33%	40%	+7

OVERALL SATISFACTION INDEX (BY QUARTER)



SATISFACTION 2014

Low income earners report a huge boost in satisfaction with public transport (up 28%) and are also more upbeat about jobs (up 18%). On the other hand, their satisfaction on CPF, education and crime is down at the end of the year. These are key issues to watch following the 2015 budget announcements.

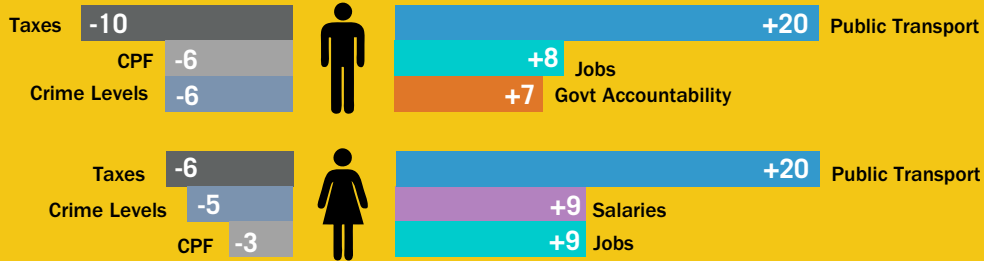
TOP LOSERS



TOP GAINERS



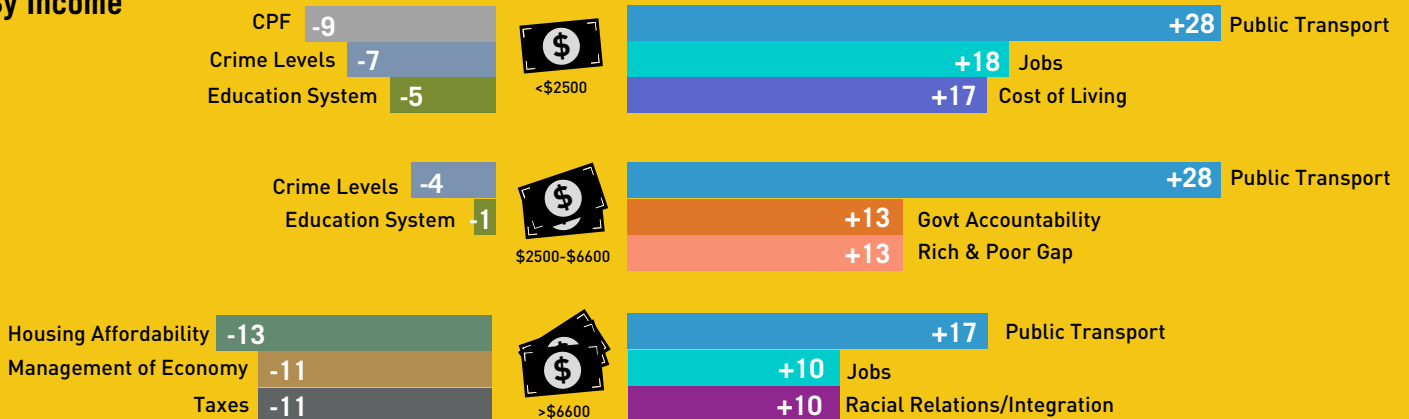
By Gender



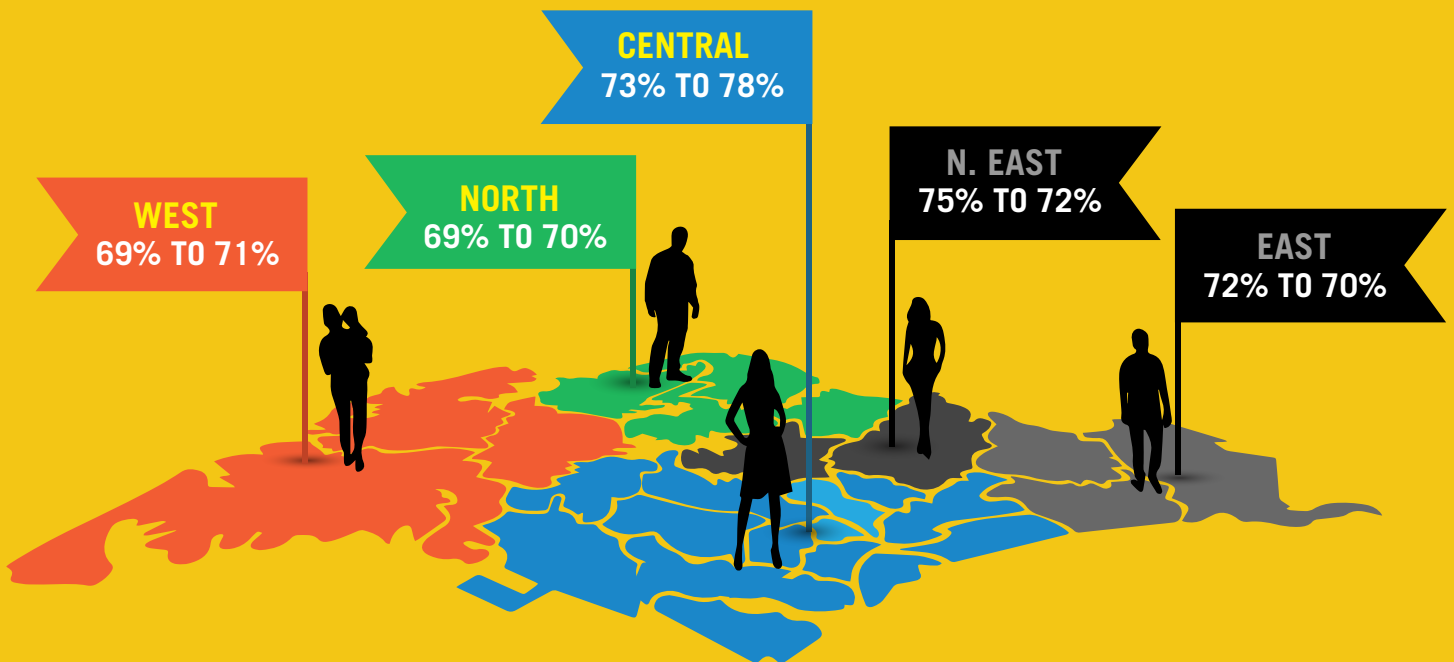
By Age



By Income



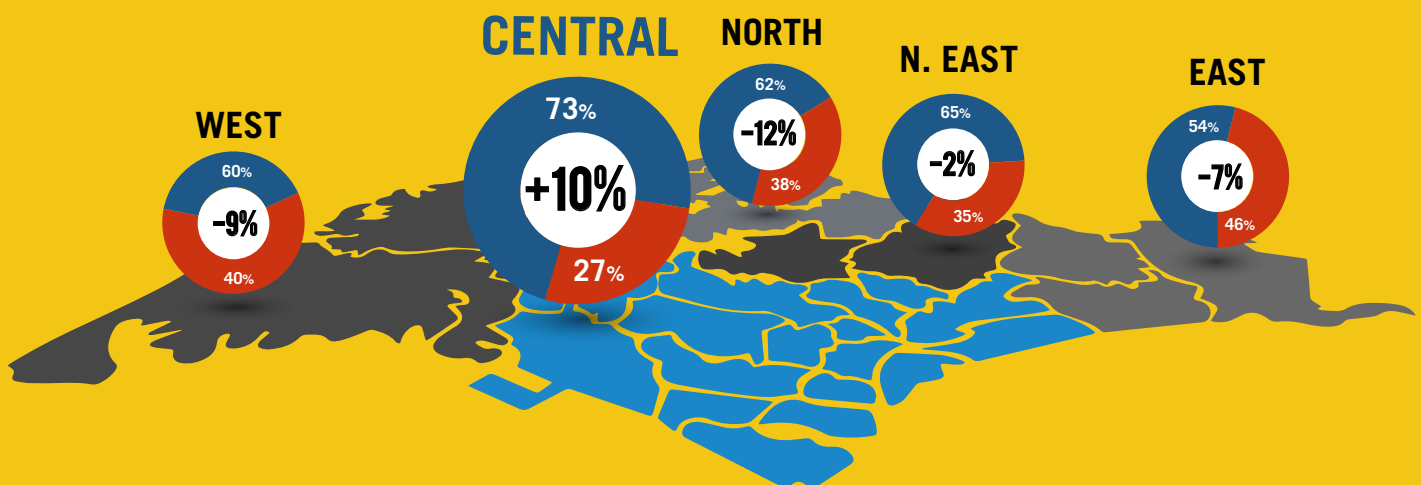
GOVERNMENT SATISFACTION TRENDS (Q1 TO Q4): IT MATTERS WHERE YOU LIVE



%

THOSE WHO ARE SATISFIED WITH THE GOVERNMENT'S PERFORMANCE

GE WAGER: HOW ARE SINGAPOREANS CALLING THE NEXT ELECTION? (AS OF DEC 2014)



%

GOVT VOTE WILL BE HIGHER OR ABOUT THE SAME AS 2011

%

GOVT VOTE WILL BE LOWER THAN 2011

%

GOVT VOTE HAS CHANGED FROM Q1 TO Q4

How are Singaporeans Calling the Next Election?

Our polling through 2014 showed that with the exception of those living centrally, an increasing number of Singaporeans think the Government will secure less than a 60% vote at the next election. Results suggest that outside the upper middle class set living in the middle of the island, Singaporeans are sensing that the stakes are competitive and that the Government will have to argue its case across a range of issues not necessarily working its way at present. 2015 is shaping up as an interesting year.

TO LEARN MORE ABOUT OUR SURVEY
FINDINGS AND RESEARCH SERVICES,
PLEASE CONTACT US AT

 **BBOXPOLL@BLACKBOX.COM.SG**

About the Survey Methodology

Each month Blackbox conducts one thousand [1000] face-to-face interviews with Singapore residents aged 15 and above across the nation. The data is collected following a systematic random door-to-door methodology. The sample is nationally representative and geographically stratified down to the district level. Each monthly sample composition mirrors the residential distribution across the island as well as additional demographic factors such as gender, age, household type and ethnicity. The sample error is approx. +/- 3%. For further information about the survey findings and our research services, please contact us at bboxpoll@blackbox.com.sg.

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