

SINGAPORE AIRLINES LIMITED: BUILDING A CULTURE OF SERVICE EXCELLENCE

INTRODUCTION

Business concept innovation (BCI) aims at doing business in ways that has never been done before. The goal is to gain competitive advantage in the marketplace and reap the benefits of “first-mover” advantage. The objective of this paper to ‘unpack’ the business model used by Singapore Airlines Limited (SIA), a most successful airline company from an Asian country, which has weathered the turbulence of the Asian financial crisis, and came out unscathed. Hopefully, some useful lessons can be gleaned from this case study.

COMPANY BACKGROUND

SIA is one of the two offshoots of the Malayan Airways, an airline company formed in 1947 by British interests when both Malaya and Singapore were under British rule. When Malaysia was formed in 1963 the airline became known as Malaysian Airways. In 1966, the company’s name was changed to **Malaysia-Singapore Airlines** (MSA), only to cease operation in 1972 when both governments aspired to have their own airlines (Nationmaster, 2005), bearing their country’s name.¹ The Malaysian Airlines System (MAS) is the spin-off on the Malaysian side while SIA goes to Singapore (Chan, 2000a).

Singapore International Airlines can only operate international flights, Singapore being an island city (area 647.5 km²) at the tip of the Malaysian peninsula; yet the company has grown in stature to become one of the most successful airlines globally. This is judged from the various industry awards it has garnered since its inception in 1972. Now, SIA is the world's second-biggest airline by market capitalization (common stocks valued at USD 6.8 billion) after U.S.’s Southwest Airlines (Morningstar, 2005). Its current assets are valued at USD 9.2b and current liabilities stands at only USD 2b (Appendix Table A1), which gives a current ratio of 4.58, way above the rule of thumb standard of 2.0.

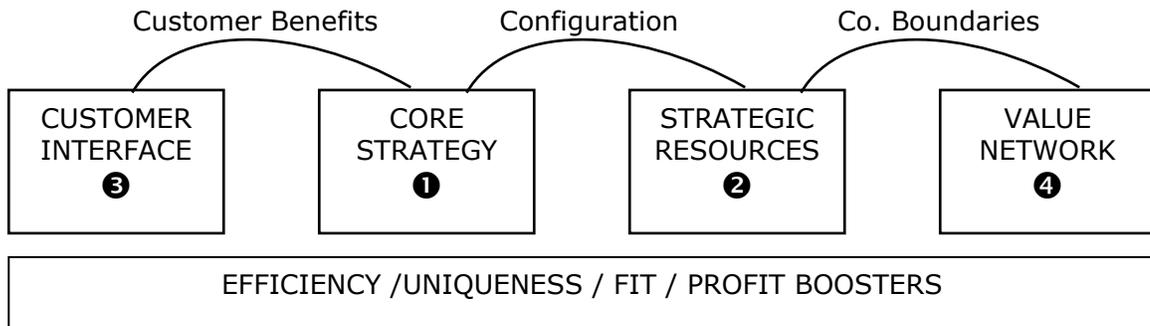
In 2004, SIA sales totaled USD 5,795.6 millions; down from USD 5,933.6 millions of the previous year (Appendix Table A2). It has a workforce of 29,734 employees drawn from all over the world. Its major competitors are Cathy Pacific,

¹ Singapore left the Federation of Malaysia in 1965 to become an independent nation. This explains the new name, Malaysia-Singapore Airlines.

Japan Airlines, and Malaysian Airlines. It also competes against eleven other airline companies as listed in List A (SIA, 2005):

SIA's 'terrain of combat' (to borrow from Sun Tzu's *Art of War*)² includes East Asia (contributing 48% to sales), Europe (19%), Southwest Pacific (12%), the Americas, West Asia & Africa, and other regions (each claiming 7% of sales) (Appendix Table A4). Although 94% of its 2004 sales originated from airline operations, the company is also involved in airport terminal (4%), engineering (1%) and other services (1%).

The **four components of a business strategy** are as depicted in Fig. 1. They include the **core strategy**, the **strategic resources**, **customer interface** and the **value network** (Hamel, 2002, p. 73). The four components are linked by three 'bridges': *customer benefits*, *configuration* and *company boundaries*. In the following pages, I will attempt to explain how SIA's business concept might fit into Hamel's model.



Source: Gary Hamel. 2002.

Fig. 1: Components of a Business Concept

1.0 CORE STRATEGY

The first component of a business concept is the core strategy (Hamel, 2002, p. 74). Essentially, the core strategy delineates the way the firm has chosen to compete. The three elements that make up the core strategy are the business mission, product/market scope and basis for differentiation.

² Read more than 20 years ago, I cannot remember the secondary source; but it left a lasting impression in my mind.

1.1 The Business Mission

A search of the literature failed to unearth SIA's mission statement. Even the company's website did not carry a mission statement. Does this mean that SIA is more of a doer than a firm mired in rhetoric, which seems to be the preoccupation of Western companies? For example, the Mission Statement of Southwest Airlines is: *dedication to the highest quality of Customer Service delivered with a sense of warmth, friendliness, individual pride, and Company Spirit.*³ It has to be assumed, therefore, that SIA's top management has been able to communicate in other ways to its employees about the company's mission, and that a written mission is unnecessary. There is no doubt that SIA's implicit mission is to meet the needs of customers beyond their dreams! This is evident from the accolades and awards that SIA has received from aviation bodies. By 1979, SIA became the ninth largest airline in the world, up from the 57th position prior to its spin-off from MSA, achieved due to a continuous average annual growth rate of 46% over its initial seven-year period (Harvard Business School, 1989, cited in Chan, 2000a). The *raison d'être* for SIA was service, and at the heart of its service reputations is the "Singapore Girl" (Chan, 2000a).⁴

1.2 Product/Market Scope

SIA's major product is air travel. Since it has no domestic routes to monopolize, SIA had to target the global market and compete with more experienced players. In 1973, SIA set up its subsidiary Singapore Airport Terminal Services Ltd (SATS) to provide ground services. In 1977, together with British Airways, it introduced the supersonic Concorde on the London-Bahrain-Singapore route. This service had to be terminated in 1980. SIA's geographical area of operations includes East Asia, Europe and West Pacific (Appendix Table A3).

³ From company's website: (http://www.southwest.com/travel_center/customer_service_commitment.html)

⁴ The creator of 'Singapore Girl' is Ian Batey, author of *Asian Branding a Great Way to Fly* (Prentice Hall / Pearson Education, April 2002).

1.3 Basis for Differentiation

The airline industry is a service industry. Service is provided by people; hence the basis for differentiation in the airline industry is the way the company's employees treat customers. SIA stewardesses are dressed in an elegantly crafted Malay sarong kebaya, designed by famous fashion house, Pierre Balmain (Chan, 2002a). Passengers are treated to excellent food, served with lots of smiles, warm towels, and attention to details. The airline provides all passengers, regardless of class, with cocktails, fine wines, and in-flight movies at no extra charge. In fact, SIA pioneered all these "frills," which were followed by other airlines of the East (MAS for example).

Singapore Airlines (SIA) has also introduced the innovative new Raffles Class SpaceBed. The ground-breaking new forward facing bed (measuring 78" x 27") provides first-time luxury and comfort, ensuring that passengers wake up at their destination feeling refreshed and ready to go (Anon, 2005).

2.0 STRATEGIC RESOURCES

2.1 Core Competencies

SIA's core competencies include the skills of its top management at planning marketing strategies and the interpersonal skills of its flight attendants. Making flights as comfortable as possible is what they do best.

2.2 Strategic Assets

SIA is now the world's largest operator of the Boeing 777 family of aircraft, following the arrival of a new B777-300 in Singapore on 6 May 2005. That delivery brought to 58 the number of Boeing 777s operated by SIA. Of those, 12 are B777-300s, 31 B777-200s and 15 B777-200s Extended Range. Currently, SIA has on order 19 new B777-300s Extended Range aircraft, which will be delivered from late 2006 onwards. With the latest addition, Singapore Airlines now has a total 90 aircraft, with an average fleet age of 5 years and 4 months, maintaining the Airline's position as an operator of one of the world's youngest fleet of aircraft (Anon, 2005b).

Employees are also SIA's strategic assets. They are selected from the global labor market, including its pilots. Its flight attendants come from all countries of the Asian region where its aircraft flies. They speak all major

languages of the South/Far East Asian region – Malay/Indonesian, Mandarin, Japanese, and Korean.

2.3 Core Processes

Serving customers on the airplane is SIA's core process, which translate customers' payment into value and utility. In-flight service includes serving customers with food and drink, providing them with information on anything asked, providing customers with blankets, assisting them with the carry-on luggage, and a host of other assistance. Ground services include ticket sale, seat reservation, checking in, baggage handling, etc.

2.4 Configuration

Linking the core strategies and the strategic resources is what Hamel calls 'configuration,' which is how assets and core competencies, assets and processes are combined and interrelated in support of a particular strategy (Hamel, p. 81). SIA uses the 'Singapore Girl' as its icon of great service to customers. In 1972, SIA became the first airline to introduce free food and alcoholic drinks on its flights served by the 'Singapore Girl' of course!

3.0 CUSTOMER INTERFACE

The third component of the business concept, **customer interface**, has four ingredients: *fulfillment and support, information and insight, relationship dynamics* and *pricing structure* (Hamel, p. 83).

3.1 Fulfillment and Support

This refers to the manner SIA competes, the way it reaches out to customers – its choice of channels, the kind of customer support it offers and what level of service it provides. To support its service excellence strategy, SIA adopts a rigorous quality control system and process for staff recruitment and selection, and a rigorous training and service policy (Chan, 2000a, pg. 7). SIA has one flight attendant for every 22 seats, said to be the best in the world and well above the industry average. SIA will even serve instant noodles on request! In 1997 SIA introduced Electronic Ticketing for flights from Singapore to Kuala Lumpur and Penang. In the same year, it launched **innovative** in-flight entertainment offering passengers viewing and listening options, where they are able to choose from 15 movies, 20 short features and about 50 CDs. Internet check-in for First Class,

Raffles Class and PPS Club members flying out of Singapore was introduced in 1996 (Chan, 2000a, p. 7)

3.2 Information and Insight

SIA does collect information from its passengers. For example, in 1998, it conducted a survey on 4,000 passengers from all classes to determine their needs and preferences. The passengers were from a cross-section of flights, including those to London, New York, Los Angeles, Sydney, Mumbai and Hong Kong (Chan, 2000b). The survey found that people wanted comfort, privacy and the experience that SIA offered. A team of 100 consultants, designers and builders then got down to work. Thereafter, the company undertook a \$500 million cabin revamp covering details from custom-built seats to cashmere blankets.

3.3 Relationship Dynamics

This element deals with the nature of interaction between the company and customers. In SIA's case, this *interaction* is face-to-face between cabin staff and passengers. It is continuous throughout a passenger's journey, which can be as long as 18 hours on the long haul (non-stop Singapore-New York route) where the passengers are 'pampered'. The pampering actually starts on the ground, where a porter and staff member will greet first-class passengers by name as they alight from their car, take their luggage and check in for them. The passengers wait in a special lounge at Changi Airport, just a few steps away from immigration. Business-class passengers get better seats too, which are wider and can recline further. Even economy-class passengers are treated to free champagne, a practice pioneered by SIA (Chan, 2000b).

3.4 Pricing Structure

Fares on Singapore Airlines display the usual pricing structure – very expensive for First Class and Business Class, and quite affordable for Economy. Just to give an idea of the price differentials, a search by a passenger (Thomas, 2003) for a ticket for a round trip from New York to Frankfurt and back leaving July 24 and coming back July 31 (2003), gave the following: An economy class ticket for the trip cost just US\$684. A business-class ticket cost a "whopping" US\$4,869.00, while the same trip in First Class was a "shudder-inducing" \$8,021.90. All are full, unrestricted fares; lower fares are available under certain

conditions. Thus an Economy Class passenger pays only 8.5% of the First Class fare, and 14% of Business fare, while Business Class fare is 60.7% of the First Class fare. No wonder First Class passengers are treated like a head of state! They are paying for superb service and are probably getting value for their money.

3.5 Customer Benefits

What are customers paying for? Certainly, they are not paying for just transportation, but a **service**, with all the frills that go to make the customer feel valued by the service provider. SIA is no budget airline! The latter is suitable only for short distances. The long journey that a passenger makes has to be fulfilling, enjoyable and cozy, especially when he is stuck in an enclosed compartment for nearly a whole day. SIA has certainly succeeded in turning an ordeal into a fun-filled experience, even for money-conscious Economy Class passengers.

4.0 VALUE NETWORK

The fourth component of a business concept is the **value network** which complements and amplifies the firm's own resources (Hamel, 2002, p. 93). They include suppliers, partners and coalitions.

4.1 Suppliers

SIA's major suppliers are the two leading commercial aircraft manufacturers, namely, Airbus, and Boeing. SIA wants to be the first to fly the A380 which will be delivered end of 2006. The delivery of A380 is delayed, but SIA is confident that it will be the first airline company to fly A380 (Sweetman, 2005). This fact has already been imprinted on SIA CEO's call cards! Other suppliers are small by comparison to Airbus and Boeing.

4.2 Partners

SIA partners with several world top hotels, car rental, credit card companies and even a telecommunications company. Passengers can earn miles when they fly, stay, charge, call, book, drive or make purchases from any of its partners worldwide. *KrisFlyer* (frequent flyer) members who are also Samsung credit cardholders can now convert their Samsung (S. Korean Credit) Card Bonus Points to free flights on Singapore Airlines, Singapore Airlines' regional carrier, SilkAir and other partner airlines (see Coalitions, below). With the frequent flyer program, customers are 'locked-in' to SIA.

4.3 Coalitions

To help expand its network of flights, SIA has code-sharing agreements with about 20 airlines, including key partnerships with Delta Airlines and Swissair. SIA, Delta Airlines and Swissair are partners of the Global Excellence Alliance, each holding 5 percent equity stakes in the other two (Chan, 2000b).

In 1998, SIA completed a strategic tie-up with Lufthansa. With this, SIA has secured a new strategic European gateway/hub in its international network, while Lufthansa will now have a strategic gateway in South East Asia. SIA passengers traveling between Singapore and Frankfurt now have more flights from which to choose. SIA owns 49% of Virgin Atlantic (SIA Website). SIA is now a member of The Star Alliance Network formed in 1997 by founding members Air Canada, Lufthansa, Scandinavian Airlines, Thai Airways International and United. Members now include Air New Zealand, ANA, Asiana Airlines, Austrian, bmi, Lot Polish Airlines, Singapore Airlines, Spanair, TAP Portugal, US Airways and VARIG. Membership in this Alliance benefits SIA's customers because they can accumulate frequent flyer mileage whenever they travel in any of the member's aircraft.

5.0 COMPANY BOUNDARIES

Company boundaries have to do with what the company does by itself and what it outsources. SIA, determined to trim as much as \$950 million from overall operating costs in the midst of a worldwide airline slump, outsourced an undetermined number of IT jobs by the end of 2004. The outsourcing would affect a portion of the estimated 30 percent of airlines staff that perform IT or administrative jobs. The precise number of jobs, and potential outsourcing service providers, are still being evaluated by airline management (St. John, 2004).

6.0 WEALTH POTENTIAL

6.1 Efficient

SIA's strategy to differentiate itself on the basis of superior customer service seems to have paid off. The value the customer receives from the added comfort and care exceeds the cost of providing the service (i.e. revamp of the aircraft's cabin).

6.2 Uniqueness of Business Concept

The use of the 'Singapore Girl' icon is unique in the industry; it can be immediately associated with Singapore Airlines itself, very much like Malaysia's kite logo, which is uniquely Malaysian.

6.3 Degree of Fit

From the available information, one cannot find any major internal inconsistency in SIA's business concept. However, based on some business class passengers' feedback, there is a certain anomaly in the service: while, they are greeted by name as they ascended to the upper deck, the range of food was not to their liking, perhaps because they were not used to Asian food. This is despite given four choices for the main meal!⁵ One cannot use isolated personal episodes like this to make a conclusion of the quality of a service. Such a conclusion is only valid if a proper random survey of customers is conducted.

6.4 Exploitation of Profit Boosters

6.4.1 Increasing Returns

SIA is in an increasing returns situation because its success tends to breed success. There appears to be no let up. From year to year, it has been collecting award after award.⁶ The expansion of its fleet is testimony to its continued profitability despite soaring oil prices. Many other airlines have filed, or are in the process of filing, for bankruptcy. Example in the US include United Airlines, US Airways, Hawaiian Airlines, ATA Airlines (also known as "American Trans Air"), and Aloha Airlines (Hasbrouck, 2005).

6.4.2 Competitor Lock-out

SIA has been able to lock out competitors by always upgrading its fleet, having a great cash flow, best airport on the globe, enviable cuisine, excellent flight operations, improved seating, return check-in if within 48

⁵ Ah Yat's style braise duckling with yam, carrot, asparagus and steamed rice,
or Seared tournedos of beef in thyme jus with selected vegetables and new potatoes,
or Seafood Linguini with garlic and chopped basil in extra virgin olive oil,
or Braised fillet of fish in oriental black peppercorn sauce with Chinese greens, carrots, mushrooms and steamed rice

⁶ See Website: <http://www.singaporeair.com/> for awards between 2000-2004.

hours, fax check-in, internet check-in, and of course, the charming 'Singapore Girl.' (Reisender, 2005)

6.4.3 Strategic Economies

Strategic economies encompass *scale economies* (as 'plant' size expands, average cost decreases – a long term phenomenon, where firms have time to expand plant size), *focus and specialization*, and *economies of scope*. The latter refers to a situation where "a company can [spread out] resources and management talents across a [wide range] of opportunities" (Hax and Wilde, 2001) such that it gives the company an efficiency advantage over companies that cannot.

In the case of SIA, I believe that it has reached the *economies of scale* 'stage' nearly a decade ago. The firm has been enlarging its fleet of aircraft (part of 'plants' to the company) by leaps and bound, much to the delight of its suppliers, Boeing and Airbus. Even though the price of fuel has been rising steadily and been eating into the profits of most airlines, SIA appears to be resilient and doing very well.

As for *focus and specialization*, I believe SIA can be rated 9 on a scale of 1 to 10. There is no doubt that the airline company has stayed focused on its mission to be the top airline for customer service. For the awards and accolades the company has received, one is inclined to believe that without specialization and focus, a company is not likely to gain wide support from the industry and media organizations (see the latest, Appendix Table A4). As written by one SIA passenger (Smith, 2005), one of the main reasons SIA provides superior service is because they only hire people who enjoy a service role – enjoy serving others.

6.4.4 Strategic Flexibility

Hax and Wilde (2001, p. 114-5) believe that in a fast-changing world, "strategic flexibility can generate higher profits by helping a company stay perfectly tuned to the market and avoid getting trapped in dead-end business models." SIA has been exercising 'flexibility' by entering into new markets – opening new routes. Because it has no domestic flights, it has to search out routes that even originate in third countries flying to destinations in another third country. To be flexible is to innovate. Instead of just copying other airlines, SIA takes the lead (Smith, 2005). Instead of

charging an entertainment fee, SIA provides everyone, including economy class, a headset.

CONCLUSIONS

The BCI model is used here to analyze the business approaches adopted by the Singapore International Airlines. A model is only an attempt to explain how the real world works. Whether the SIA fits snugly into the BCI model is a conjectural issue; answers are not easy to come by.

The most important lesson learned from this exercise is that companies must have a clear focus on what they want to give customers – low cost or high quality service, and SIA has chosen the latter. A formal mission statement, while useful, is not necessary in some situations. SIA is a case in point. As long as management can communicate successfully to employees, and treat them as company's asset, they will be committed to deliver excellent service. Even so, people must be selected well and once hired, right behavior must be rewarded appropriately. The BCI model was useful to some extent in understanding the workings of this top Asian airline.

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Appendix

List A: SIA's Lesser Competitors

- AMR Corp.
- British Airways
- China Airlines
- China Eastern Airlines
- China Southern Airlines
- Continental Airlines
- Delta Air
- KLM
- Korean Air
- Northwest Airlines
- Qantas

TableA1. SIA's Balance Sheet (USD million)

Balance Sheet	Mar 04	Mar 03	Mar 02
Assets			
Current Assets			
Cash	901.5	462.7	591.9
Net Receivables	695.5	604.9	729.2
Inventories	36.5	45.6	36.3
Other Current Assets	219.9	246.7	206.4
Total Current Assets	1,853.5	1,359.9	1,563.8
Net Fixed Assets	9,240.8	8,693.6	7,830.9
Other Non-current Assets	773.8	772.1	679.5
Total Assets	11,868.1	10,825.5	10,074.3
Liabilities and Shareholders' Equity			
Current Liabilities			
Accounts Payable	1,140.6	1,088.1	959.6
Short-Term Debt	55.5	162.4	120.2
Other Current Liabilities	823.5	755.0	--
Total Current Liabilities	2,019.5	2,005.5	1,693.5
Long-Term Debt	1,310.4	1,060.7	1,045.8
Other Non-current Liabilities	1,556.7	1,716.4	--
Total Liabilities	4,886.6	4,782.6	4,735.5
Shareholders' Equity			
Preferred Stock Equity	0.0	0.0	0.0
Common Stock Equity	6,800.9	6,043.0	5,338.8
Total Equity	6,981.4	6,043.0	5,338.8
Shares Outstanding (mil.)	--	--	--

Source: Hoovers. 2005. (http://www.hoovers.com/singapore-airlines/--ID_41497,period_A--/free-co-fin-income.xhtml) (Viewed 8 July 2005).

Table A2. SIA's Annual Income Statement (USD million)

View: Annual	Mar 04	Mar 03	Mar 02
Revenue	5,795.6	5,933.6	5,122.6
Cost of Goods Sold	2,244.5	2,319.2	1,921.1
Gross Profit	3,551.1	3,614.5	3,201.5
Gross Profit Margin	61.3%	60.9%	62.5%
SG&A Expense	3,147.1	3,209.8	2,668.3
Depreciation & Amortization	700.7	615.3	--
Operating Income	404.0	404.7	533.2
Operating Margin	7.0%	6.8%	10.4%
Non-operating Income	141.7	182.7	--
Non-operating Expenses	58.2	36.2	31.3
Income Before Taxes	487.4	551.2	501.9
Income Taxes	(44.2)	(80.4)	126.8
Net Income After Taxes	531.5	631.6	375.1
Continuing Operations	531.5	631.6	375.1
Discontinued Operations	0.0	0.0	0.0
Total Operations	531.5	631.6	375.1
Total Net Income	504.2	600.9	342.5
Net Profit Margin	8.7%	10.1%	6.7%
Diluted EPS from Continuing Operations (\$)	--	--	--
Diluted EPS from Discontinued Operations (\$)	--	--	--
Diluted EPS from Total Operations (\$)	--	--	--
Diluted EPS from Total Net Income (\$)	--	--	--
Dividends per Share			

Source: Hoovers. 2005. (http://www.hoovers.com/singapore-airlines/--ID_41497,period_A--/free-co-fin-income.xhtml) (Viewed 8 July 2005).

Table A3. Contribution to Sales by Region (2004)

Region	% of total
East Asia	48
Europe	19
Southwest Pacific	12
Americas	7
West Asia & Africa	7
Other regions	7
Total	100

Table A4: SIA's First Place in Airline of the Year 2004

Airline of the Year 2004 - Final Rankings	
1st	Singapore Airlines
2nd	Emirates
3rd	Cathay Pacific
4th	Qantas Airways
5th	Thai Airways

Source: http://www.airlinequality.com/2004/airline_04_entry.htm (SkyTrax – Best Airline Of the Year 2004)