



DE – CZ – AT – SK – HU – RO – BG – EL

RFC7
Orient/East-Med

RFC User Satisfaction Survey 2017

Additional analysis

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- Regulation (EU) No 913/2010 requires Rail Freight Corridors' (RFC) Management Board to gauge the satisfaction level of their users yearly and to publish the results of the survey.
- RNE created a common platform of Corridor Satisfaction Survey for all RFCs willing to participate, in order to make the results more comparable, to ease the answering for respondents and to ensure a modern and efficient research technique for the survey series.
- The MB of RFC7 decided to join RNE RFC User Satisfaction Survey Common Platform.

General

- The main objective of this survey is to provide detailed picture of users' opinion and experience regarding the services and products of RFCs, and to reveal motivations of potential users for the further development of rail freight corridors.
- RNE and Satisfaction Working Group of RFCs have developed a harmonised questionnaire including standard blocks covering relevant topics. An independent market research institute (marketmind) has been commissioned by RNE to carry out the fieldwork and the basic analysis.
- The research methodology is based on CAWI (Computer Assisted Web Interview - adequate for international, business target group). CAWI can diminish the language barrier, increase the response rate, it fits the target group profile and provides automated data collection and pre-cleaning (logical, irrelevant values).
- The high level of standardisation (not only in the questionnaire, but also in main directions of analysis, as well as in database and output form) aims to reach the more complete comparison among the corridors' results in the interest of a complex European view.
- 2015 - Target group narrowed on basis of relevance for better-based (more information, real experience) sample.
- 2016 – three new corridors' joining, revision of target population definition to reach the relevant segment more precisely, amendments to suit the requirements of new members.

2017

- The experience of earlier research waves provided us the possibility to make the questionnaire more efficient and shorter at the same time. Thus the time to be spent on filling in the questionnaire was decreased considerably, whereas the strata of service can be measured toned enough. Limited possibility for comparison: Due to shorter questionnaire the number of factors decreased and the composition of some areas changed, as well as a new filter being added.
- The fieldwork of the fourth wave was conducted between 12th September and 18th October, 2017.

Background to this additional analysis

- Using marketmind reports as source of basic figures this additional analysis tries to apply a different approach to reveal a more specific RFC7 picture described by customer satisfaction.
- For the time being the target population is not extended, as a consequence the sample size cannot be numerous either. Because of the small sample size we have to make the analysis very carefully. The results have low significance power and generally indicative value only.
- However, the results reflected real market phenomena, which validate the survey, thus it provides a good basis to reveal the main changes in RFC7's developmental path.

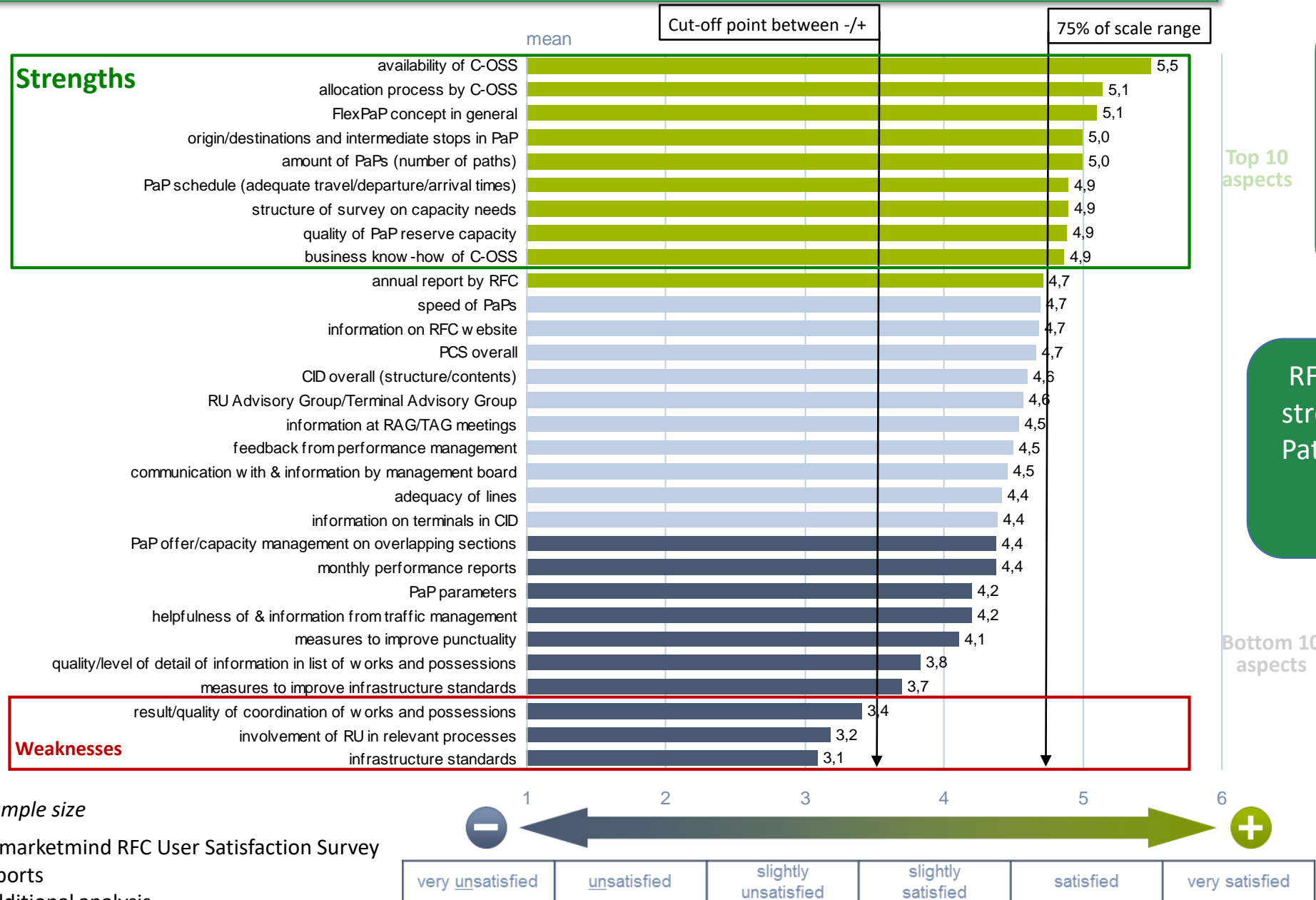
Interview statistics

	Overall	RFC1	RFC2	RFC3	RFC4	RFC5	RFC6	RFC7	RFC8
Total interviews (user + non user)	76 (69)	22 (18)	21 (17)	12 (10)	14 (21)	13 (14)	27 (23)	17 (16)	15 (14)
Full interviews	72 (65)	21 (15)	20 (13)	9 (9)	13 (20)	13 (13)	26 (20)	17 (15)	14 (12)
Partial interviews	4 (4)	1 (3)	1 (4)	3 (1)	1 (1)	0 (1)	1 (3)	0 (1)	1 (2)
RFC user	70 (64)	22 (18)	19 (17)	11 (10)	13 (19)	13 (13)	25 (22)	17 (15)	15 (14)
non/potential user	6 (5)	0 (0)	2 (0)	1 (0)	1 (2)	0 (1)	2 (1)	0 (1)	0 (0)
Invitations sent	324 (321)	66 (42)	84 (93)	34 (20)	81 (80)	31 (41)	36 (44)	68 (61)	44 (41)
Interviews (user + non user)	76 (69)	17 (10)	18 (14)	8 (5)	10 (19)	10 (12)	19 (15)	14 (13)	11 (9)
Response rate overall	23% (21%)	26% (24%)	21% (15%)	24% (25%)	12% (24%)	32% (29%)	53% (34%)	21% (21%)	25% (22%)
topic-forward used	22 (9)	9 (4)	5 (2)	8 (4)	6 (3)	5 (3)	7 (2)	7 (3)	3 (1)
forward name/company	34 (14)	11 (3)	10 (3)	5 (1)	5 (3)	7 (4)	11 (3)	6 (4)	6 (1)

2017 (2016)

RFC7 could increase the number of interviews moderately, and the response rate among corridor users is 62%.

Summary - Satisfaction Rating



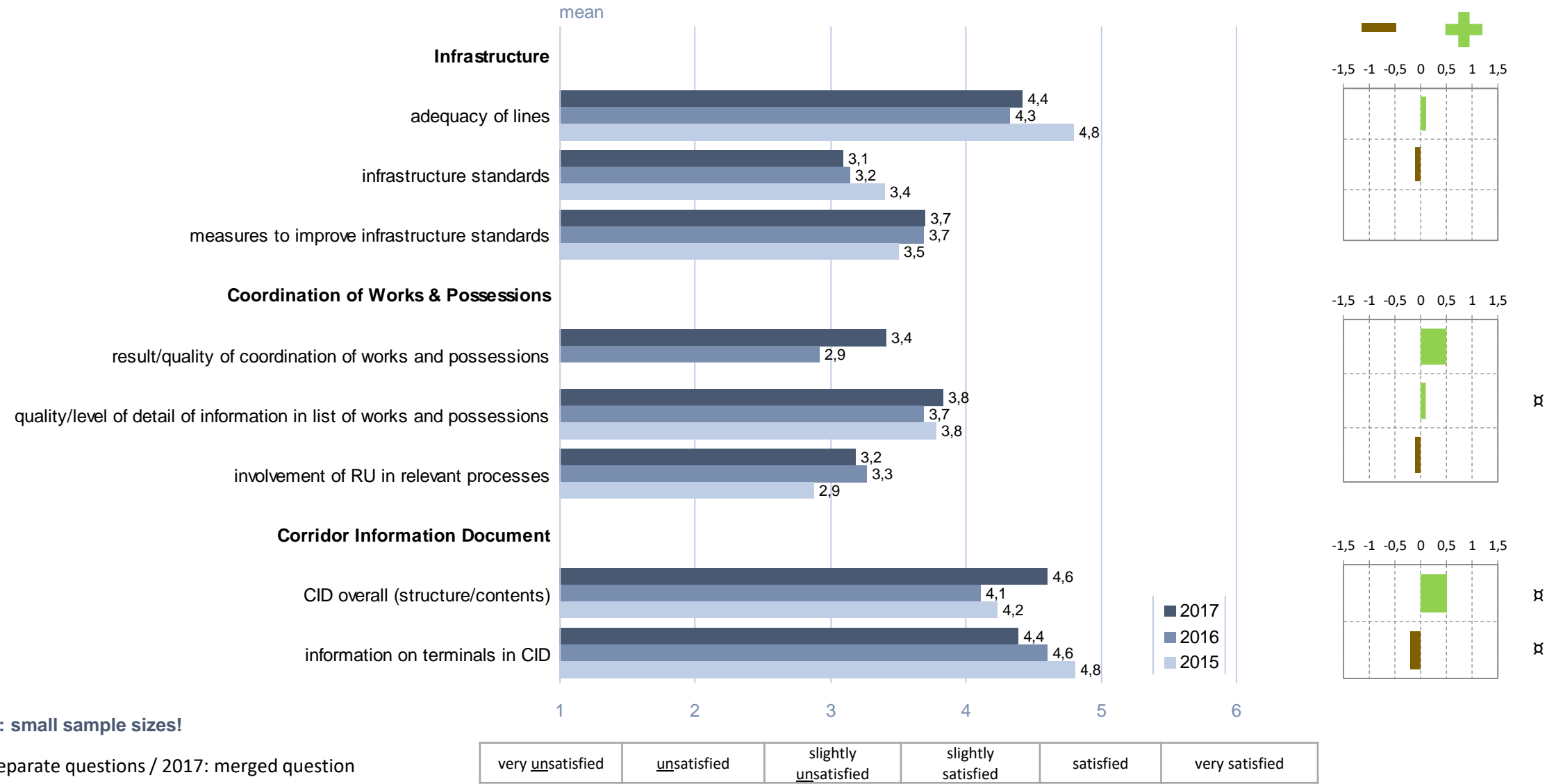
Different interpretation
(instead of top/bottom 10):

- Middle of the scale: substantial, turning point between dissatisfied and satisfied areas
- More rigorous but progressive anchor point at the 75% of the scale, where the best quarter of the scale begins
- TB10 implies that we have 10 weaknesses ever – no development possibility
- TB10 implies that the number of our strengths and weaknesses are the same – it is not necessary

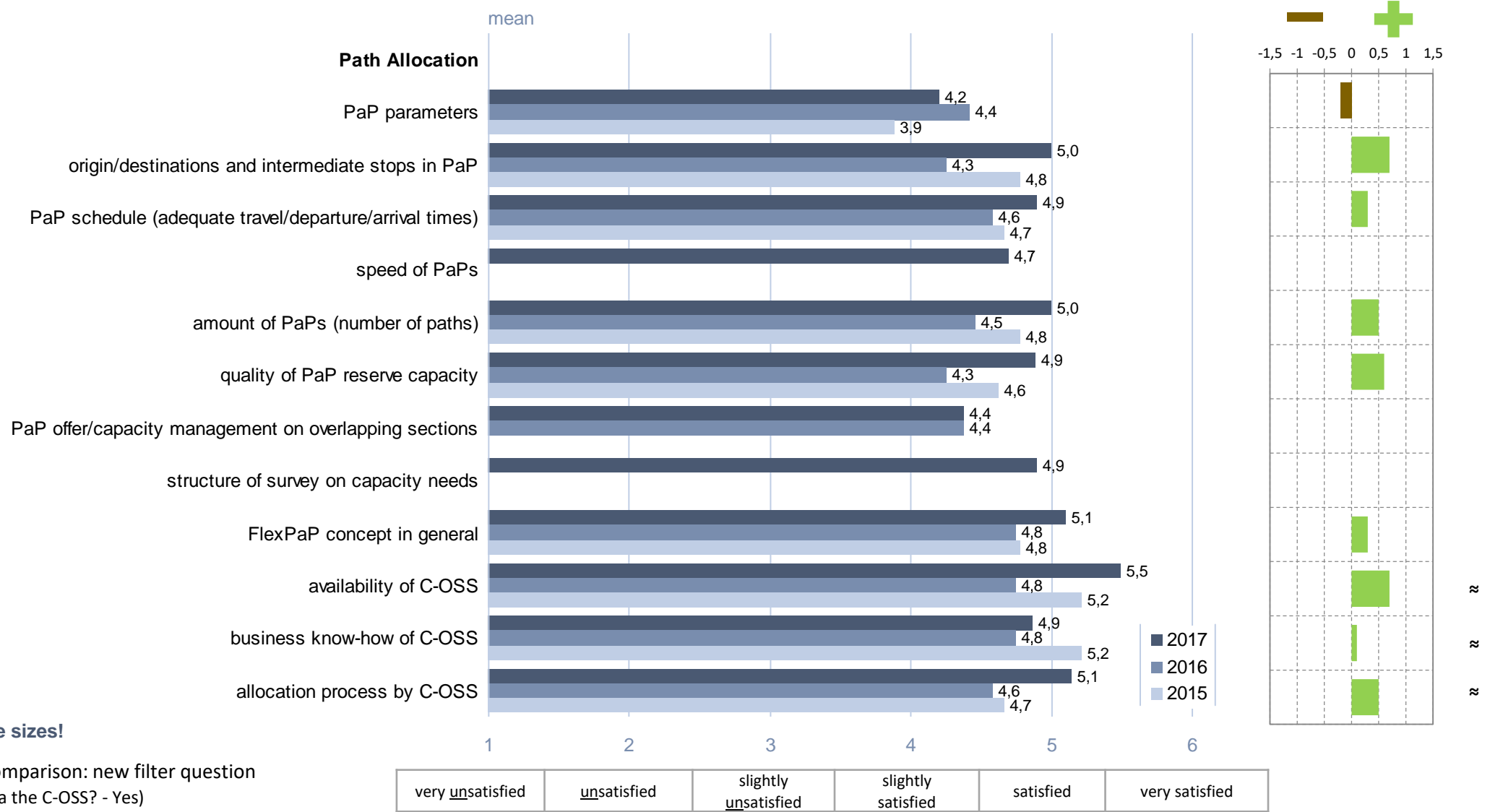
RFC7 has convincingly more strengths than weaknesses.*
Path Allocation dominance is well tangible among strengths.

*The modified element composition deriving from reduction of the questionnaire does not enable complete comparison to 2016.

Summary - Satisfaction Rating - Comparison to 2016 (1)



Summary - Satisfaction Rating - Comparison to 2016 (2)

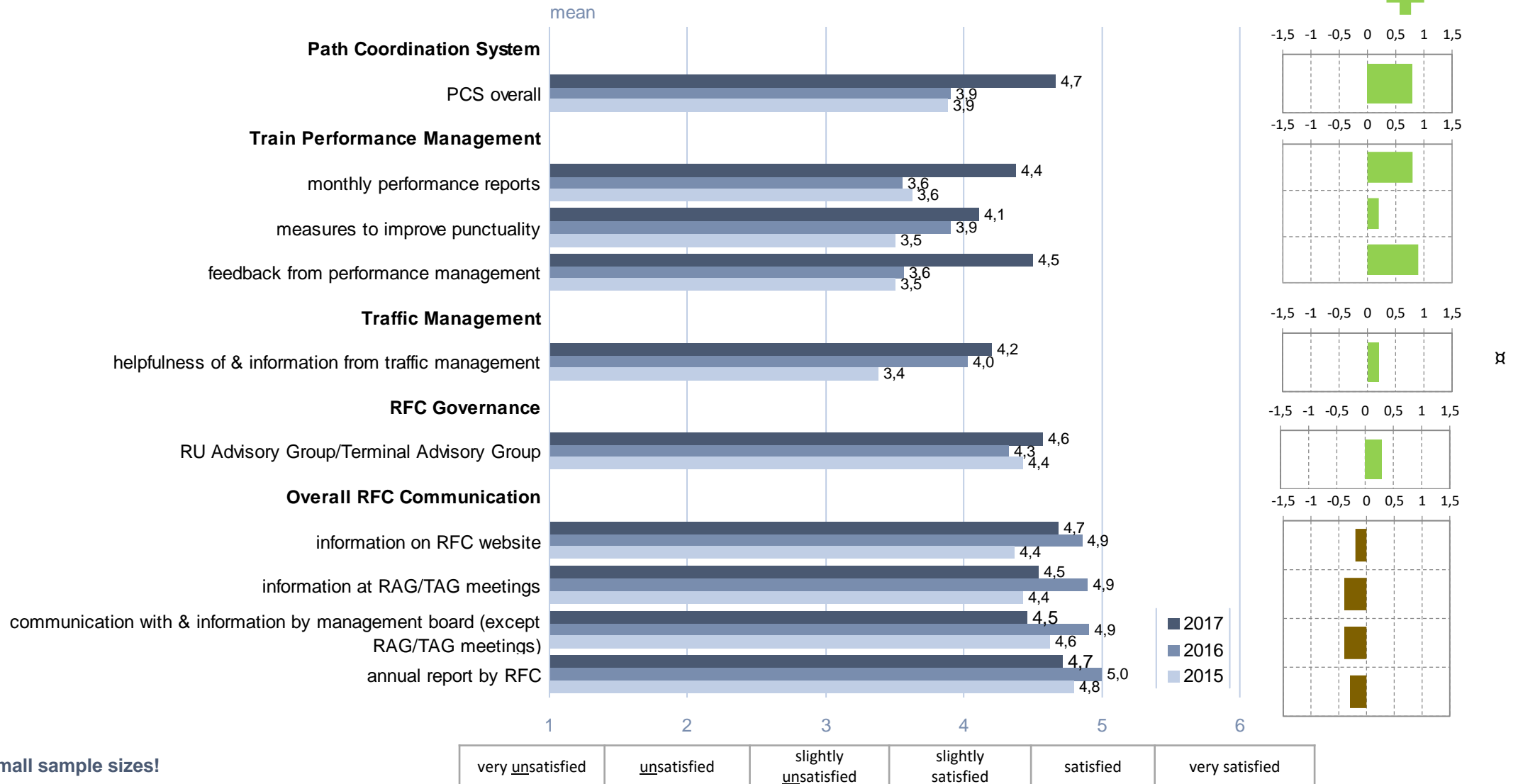


Attention: small sample sizes!

≈ Limited possibility to comparison: new filter question
 (Did you order capacity via the C-OSS? - Yes)

Source: marketmind RFC User Satisfaction Survey 2017 reports
 RFC 7 additional analysis

Summary - Satisfaction Rating - Comparison to 2016 (3)



Attention: small sample sizes!

⌘: 2016: separate questions / 2017: merged question

Source: marketmind RFC User Satisfaction Survey 2017 reports

RFC 7 additional analysis

To do Christmas Tree

■ 2017 ■ 2016

*Limited possibility to comparison
Due to questionnaire shortening
(2017) the number of factors
decreased and the composition of
some areas changed, as well as a
new filter was added.*

COORDINATION OF
WORKS AND
POSSESSIONS

INFRASTRUCTURE

TRAFFIC
MANAGEMENT

TRAIN
PERFORMANCE
MANAGEMENT

TERMINAL
INFORMATION

OVERALL
COMMUNICATION

CID

PCS

PATH ALLOCATION-
PAP

PATH ALLOCATION -
FLEXPAP

C-OSS

**Area
averages**

(total average of every
element belonging to
the particular area)

To be developed

- Infrastructure standards
- Coordination, information quality and RU involvement in Works and possessions
- Terminal information

Steps forward

- Train Performance Management

Further strengthening

- Overall Communication

Key areas

- Path Allocation
- C-OSS

Small sample size

Source: marketmind RFC User Satisfaction Survey 2017 raw data
RFC 7 additional analysis

Orient/East-Med Corridor 2017

- More steps forward than backward – Positive balance 3 years in a row
- OEM performed above Overall corridor average in every area we examined
- Need to focus on:

'Where - Hardware'

- ☐ Infrastructure standards
- ☐ Train parameters
- ☐ Works and possessions
- ☐ Running conditions
- ☐ Interoperability
- ☐ Terminal information

'How - Software'

- Harmonisation
- Cooperation
- Communication
- Integration level of RUs and terminals
- Business-oriented approach

On the right track

However, still lots of efforts required to keep achievements, as well as developing both on functional and conceptual levels

Thank you for your attention

Any remarks, feedbacks,
suggestions are very welcomed

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