

RFC User Satisfaction Survey 2016 Additional analysis

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Introduction



- Regulation (EU) No 913/2010 requires Rail Freight Corridors' (RFC) Management Board to measure the satisfaction level of their users yearly and to publish the results of the survey.
- RNE has launched a project to create 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 research technics for the survey series.
- The MB of RFC7 decided to join RNE Satisfaction Survey Platform.

Main goals and methodology of the survey



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 survey from the fieldwork to the analysis of the closed questions.
- The research methodology is based on CAWI (Computer Assisted Web Interview). CAWI can diminish the language banister, increase the response rate, it fits to 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) endeavours to reach the more complete comparison among the corridors' results for the sake of a complex European view.

2016

- Based on the first and second wave's experience beyond the automatic update amendments were implemented in the methodology and in the questionnaire, as well as the target population definition was also revised to reach the relevant segment more precisely and to suit the requirements of three corridors joining in 2016.
- The fieldwork of the third wave was conducted between 13th September and 7th October, 2016.



 Using marketmind's reports as source of basic figures the following additional analysis tries to apply a different approach to reveal a more specific RFC7 picture depicted by customer satisfaction.

- Target group narrowed on basis of relevance in 2015 and 2016 so we have a smaller, but presumably better-based (more information, real experience) sample than in 2014.
- However, 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.
- We concentrated on the averages, although we are aware that the essence is often behind them, however, because of the sample size we cannot analyse the data in deep layers, but the averages provide us a good base to reveal the main changes.

Interview statistics



			CORRIDOR	ScanMed RFC	ATLANTIC	RFC5 Baltic-Adriatic Corridor	CORRIDOR TOTAL TREIGHT CORRIDOR		Rail Freight Corridor North Sea – Baltic	©RFC9 cscorridor
	Overall	RFC1	RFC2	RFC3	RFC4	RFC5	RFC6	RFC7	RFC8	RFC9
Total interviews (user + non user)	69 (47)	18 (13)	17 (10)	10	21 (11)	14	23 (23)	16 (15)	14	4 (5)
Full interviews	65 (40)	15 (11)	13 (9)	9	20 (11)	13	20 (20)	15 (14)	12	4 (4)
Partial interviews	4 (7)	3 (2)	4 (1)	1	1 (0)	1	3 (3)	1 (1)	2	0 (1)
RFC user	64 (40)	18 (13)	17 (10)	10	19 (9)	13	22 (20)	15 (11)	14	3 (5)
non/potential user	5 (7)	0 (0)	0 (0)	0	2 (2)	1	1 (3)	1 (4)	0	1 (0)
Invitations sent	321 (172)	42 (29)	93 (18)	20	80 (62)	41	44 (30)	61 (64)	41	24 (17)
Interviews (user + non user)	69 (47)	10 (12)	14 (7)	5	19 (10)	12	15 (14)	13 (14)	9	3 (2)
Response rate overall	21% (27%)	24% (41%)	15% (39%)	25%	24% (16%)	29%	34% (47%)	21% (22%)	22%	13% (12%)
Response rate user	18% (32%)	24% (45%)	20% (38%)	38%	26% (25%)	60%	54% (100%)	29% (20%)	67%	13% (12%)
Response rate potential user	26% (20%)	-	8% (40%)	0%	21% (9%)	25%	25% (27%)	15% (29%)	14%	0% (-)
topic-forward used	9 (11)	4 (5)	2 (5)	4	3 (2)	3	2 (6)	3 (2)	1	0 (2)
forward name	14 (14)	3 (5)	3 (7)	1	3 (3)	4	3 (6)	4 (3)	1	1 (1)

2016 (2015)

Source: marketmind RFC User Satisfaction Survey 2016 reports RFC 7 additional analysis

RFC7 kept the number of full interviews.



erent interpretation ad of top/bottom 10):

order line at cut-off point unsatisfied/satisfied area es

anchor point in case of at 75% of the scale range also a stage step in the

to 2015:

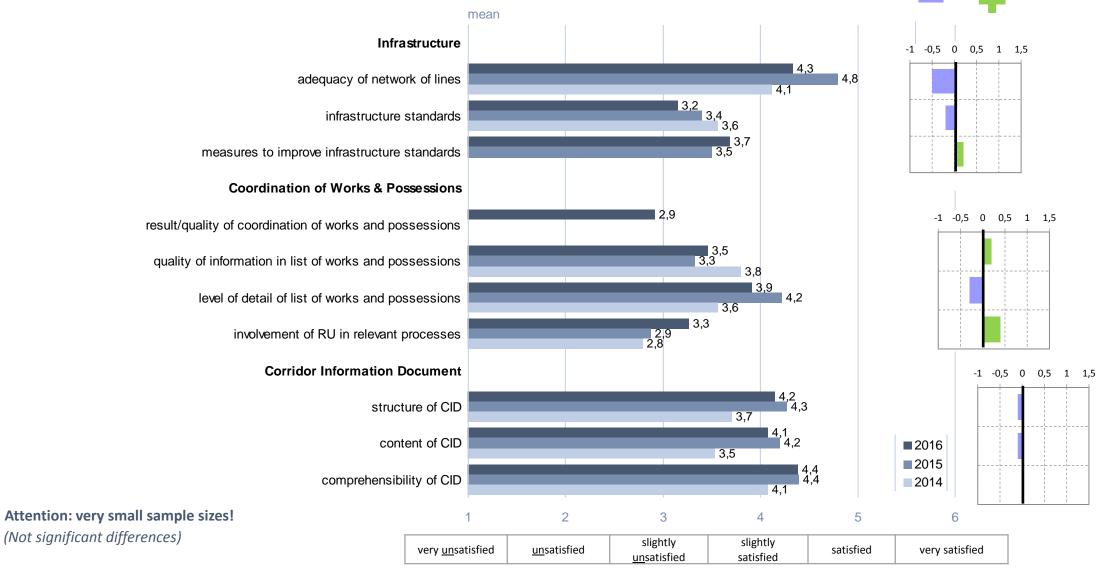
ne number of difference in ile the number decreased.

Summary - Satisfaction Rating

		mean	Cut-off point between -/+		75% of scale rang	
communic Strengths	annual report by RFC ation with management board (except RAG/TAG meetings information at RAG/TAG meetings information on RFC website brochures by RFC FlexPAP concept in genera availability of C-OSS business know -how of C-OSS new sletters by RFC conflict solving procedure by C-OSS supply of information on terminals PAP schedule (adeguate travel/departure/arrival times/ FlexPAP: running/stopping times/description result of allocation process by C-OSS list of terminals amount of PAPs (number of paths usability of PCS - selection of PAPs PAP parameters			4,5 4,5 4,5 4,4	5,0 4,9 4,9 4,9 4,8 4,8 4,8 4,8 4,8 4,8 4,7 4,7 4,6 4,6 4,6	
	reserve capacity concep comprehensibility of CIE PAP offer/capacity management on overlapping sections adequacy of network of linese RU Advisory Group/Terminal Advisory Group origin/destinations and intermediate stops in PAF guality of PAP reserve capacity usability of PCS - display of PAP-offer structure of CIE usability of PCS - selection of remaining/reserve capacity usability of PCS - display of PAP-offer structure of CIE usability of PCS - display of remaining/reserve capacity information from operation centres/traffic control centres content of CIE usability of information in case of disturbances helpfulness of traffic managemen handling of complaints within RFC level of detail of list of works and possessions	t D S S D C C C C C C C C C C		4,4 4,4 4,4 4,3 4,3 4,3 4,3 4,2 4,2 4,2 4,2 4,1 4,1 4,1 4,1 4,1 4,1 4,0 4,0 4,0 3,9	s	Comparison to 2 FC7 has the same nu trengths (some diffe mposition), while th of weaknesses decr
Weaknesses	rever of detail of list of works and bossessions PCS overal measures to improve punctuality measures to improve infrastructure standards feedback from performance managemen performance reports auality of information in list of works and possessions involvement of RU in relevant processes infrastructure standards		3,	3,9 3,9 3,9 3,6 3,6 3,5 3		ing currently tackled by
	result/quality of coordination of works and possessions	3	2,9 ^{3,2} 2 3	4	5 t	he Action Programme
nall sample size!						► 🖯
urce: marketmind RFC User Sa C 7 additional analysis	atisfaction Survey 2016 reports very <u>un</u> satisf	ied <u>un</u> satisfie	ed slightly <u>un</u> satisfied	slightly satisfied	satisfied	very satisfied

Summary - Satisfaction Rating - Comparison to 2015 (1)

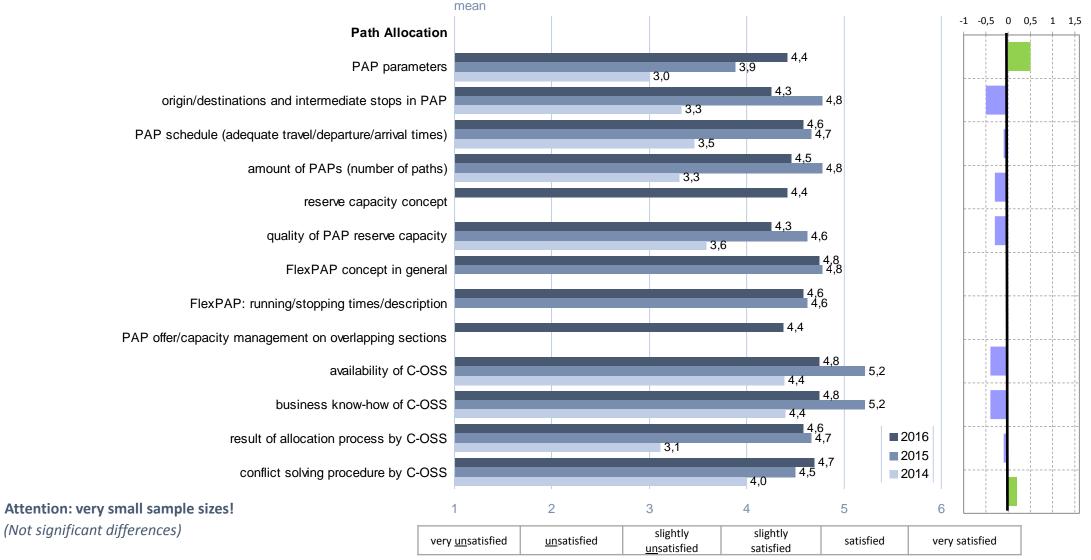




Source: marketmind RFC User Satisfaction Survey 2016 reports RFC 7 additional analysis



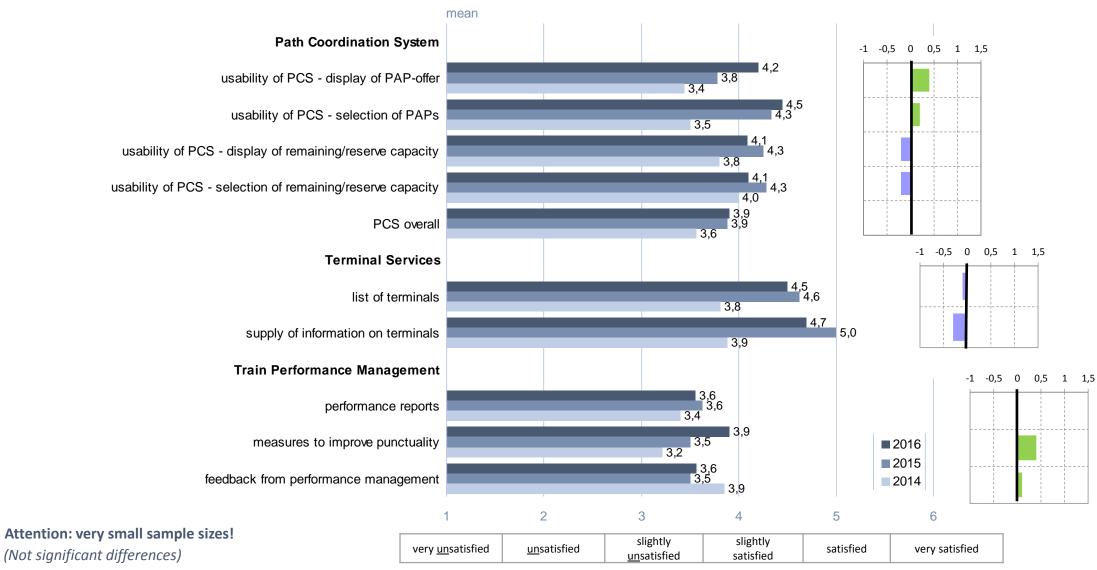
Summary - Satisfaction Rating - Comparison to 2015 (2)



Source: marketmind RFC User Satisfaction Survey 2016 reports RFC 7 additional analysis



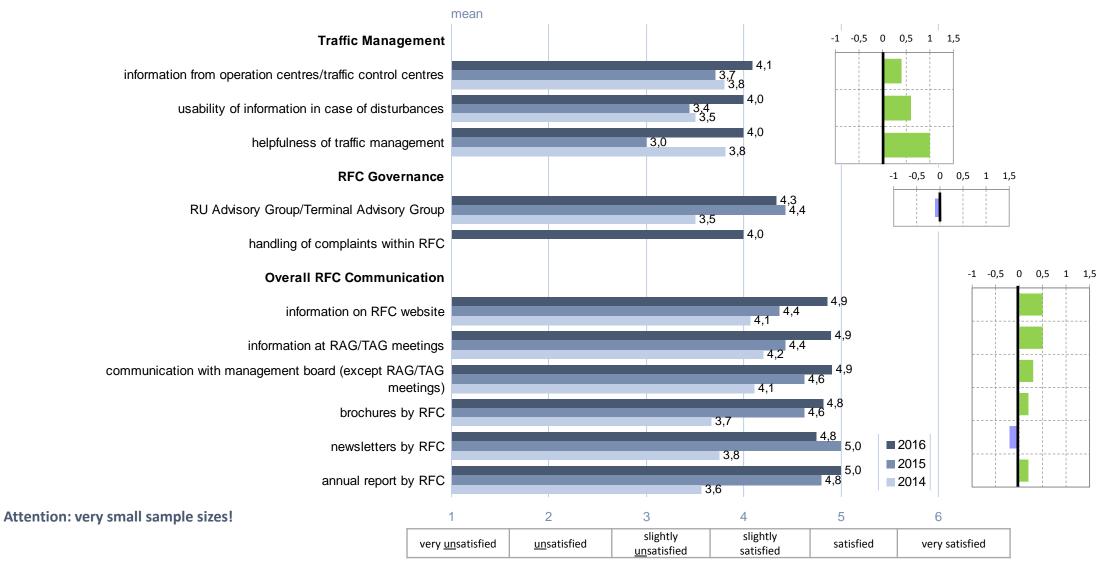
Summary - Satisfaction Rating - Comparison to 2015 (3)



Source: marketmind RFC User Satisfaction Survey 2016 reports RFC 7 additional analysis

RFC7 CZ-AT-SK-HU-RO-BG-GR ORIENT CORRIDOR

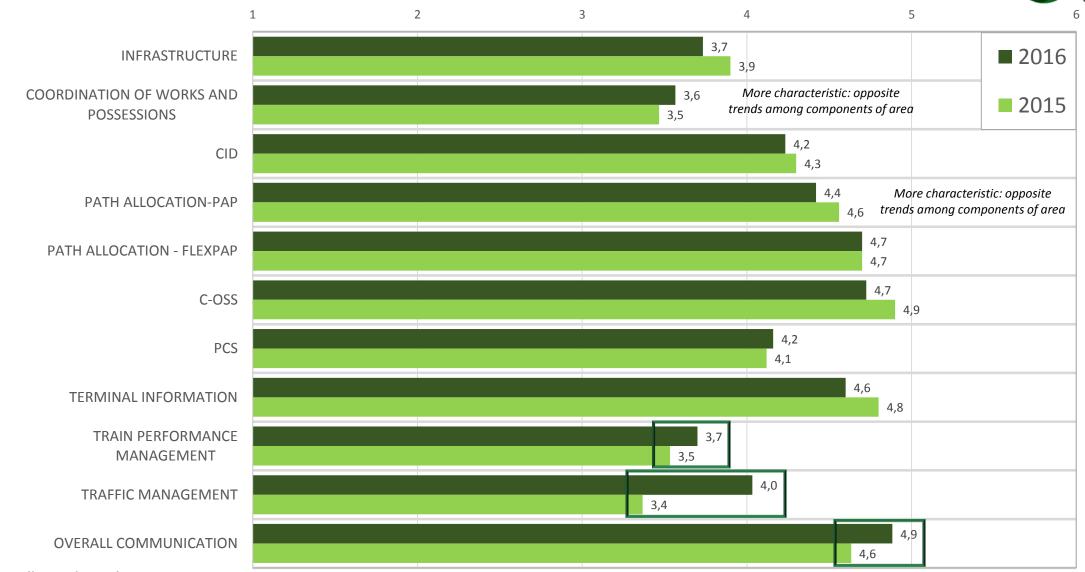
Summary - Satisfaction Rating - Comparison to 2015 (4)



Source: marketmind RFC User Satisfaction Survey 2016 reports RFC 7 additional analysis



Area averages compared to 2015



Small sample size!

Source: marketmind RFC User Satisfaction Survey 2016 raw data RFC 7 additional analysis

Comparable results only!

Main conclusions





- TRAFFIC MANAGEMENT
- OVERALL COMMUNICATION
- TRAIN PERFORMANCE MANAGEMENT

To be retainedAnnual report

- Communication with MB except RAG/TAG meetings
- Information at RAG/TAG meetings
- Information on website
- Brochures
- FlexPAP concept
- Availability and business know-how of C-OSS

Special attention to

PATH ALLOCATION (to keep the outstanding high level)

To be developed

- Works and possessions
 - result/quality of coordination
 - quality of information
 - involvement of RU in relevant processes
- Infrastructure standards

Small sample size!

Source: marketmind RFC User Satisfaction Survey 2016 reports RFC 7 additional analysis

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RFC7 2016



- More steps forward, than backward Positive balance 2 years in row
- Need to focus on:

Infrastructure standards

- Condition of infrastructure
- Train parameters
- Electrification
- Works

Works and possessions

- Coordination
- Quality and time of information
- Keeping to plans
- Alternatives

On a right track

Thank you for your attention!



Any remark, feedback, suggestion are very welcomed!

Thank you for your cooperation so far and we hope your kind participation in the wave 2017!

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