

marketmind



Marketing Evolution

fresh thinking for powerful marketing

We increase the impact of marketing measures and enhance our customers' brand value. In order to achieve this goal we combine market research and consulting to create a tailor-made solution.





RFC User Satisfaction Survey 2016

Overall Report



Co-financed by the European Union
Connecting Europe Facility



November 2016

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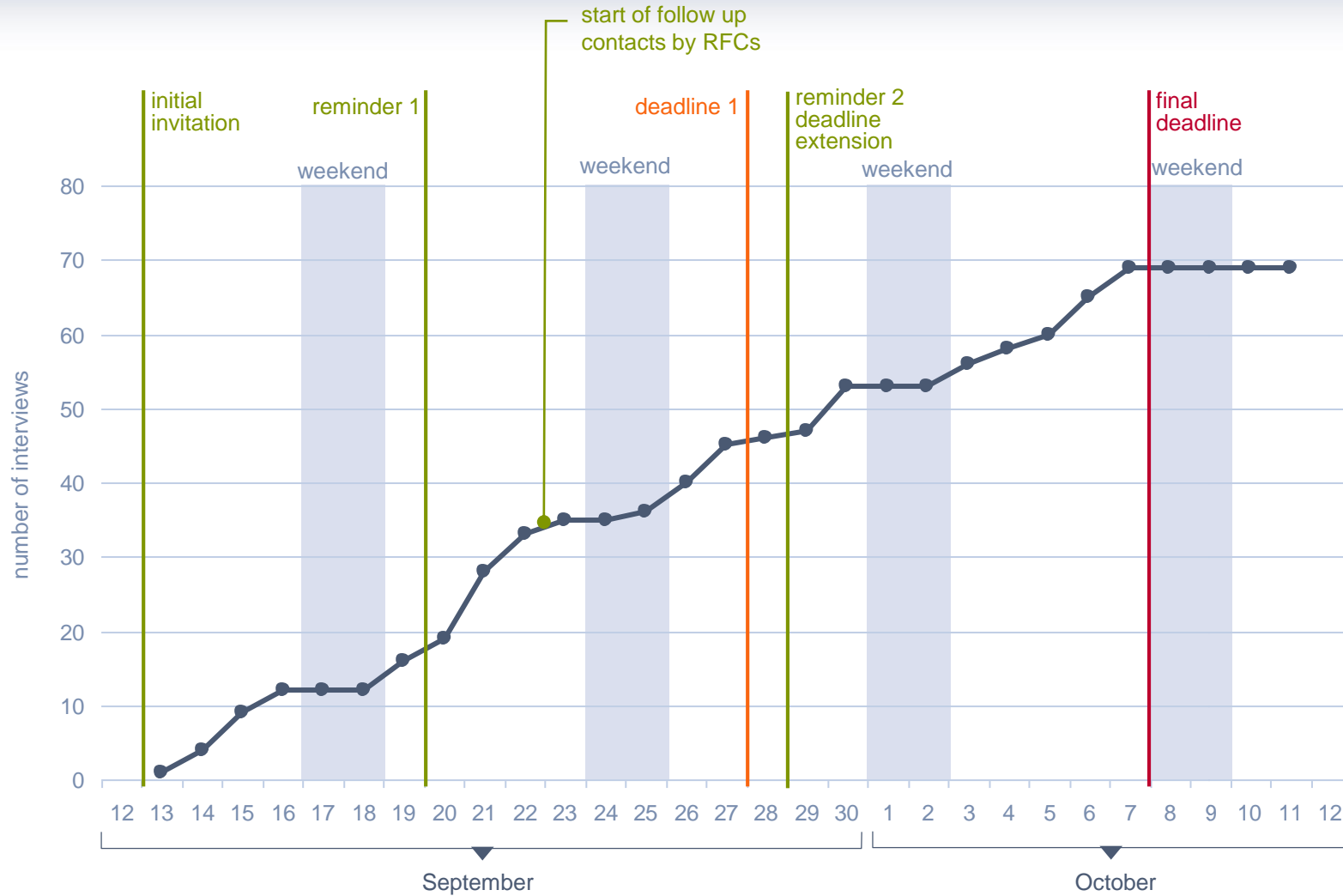











1 Study Design

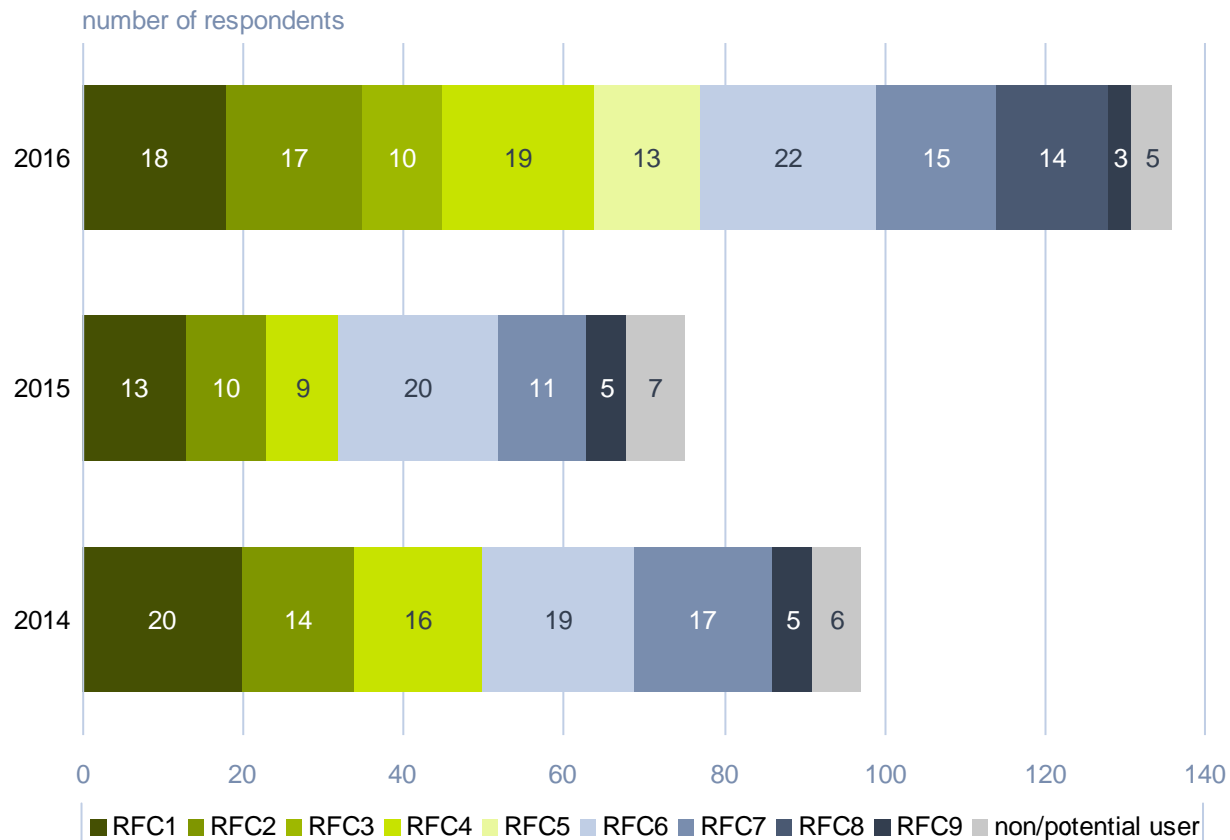


- ▶ 69 respondents || 131 evaluations*
64 RFC users / 5 non-users
65 full interviews / 4 partial interviews
- ▶ Computer Aided Web Interviews (CAWI)
- ▶ Contacts (e-mail address) delivered by RFCs
- ▶ 321 e-mail invitations sent
- ▶ Field Phase: 13 September to 7 October 2016

* one respondent is counted multiple times, if his/her organisation uses multiple corridors



										
	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)										



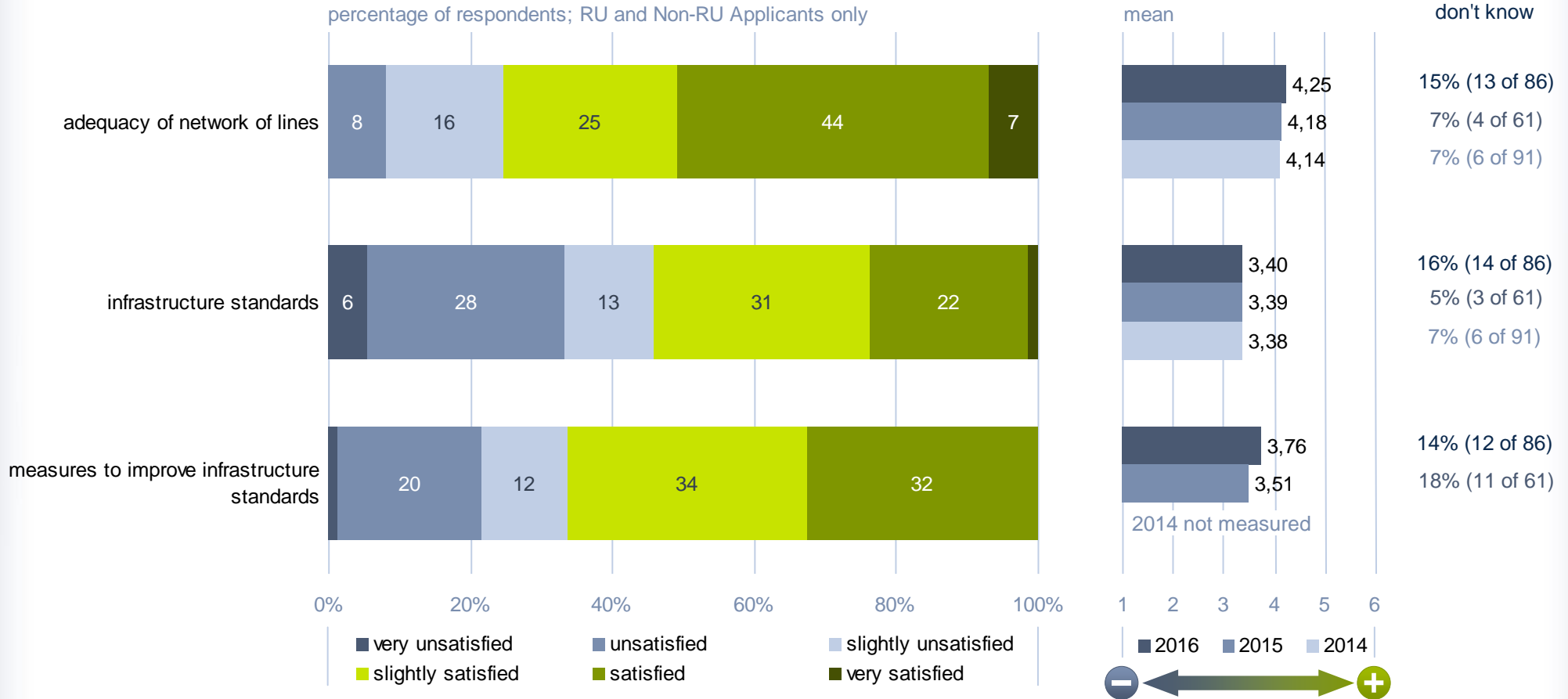
"Which RFCs do you operate/run your services on?"

n = 136; 75; 97



2 Satisfaction with the RFC

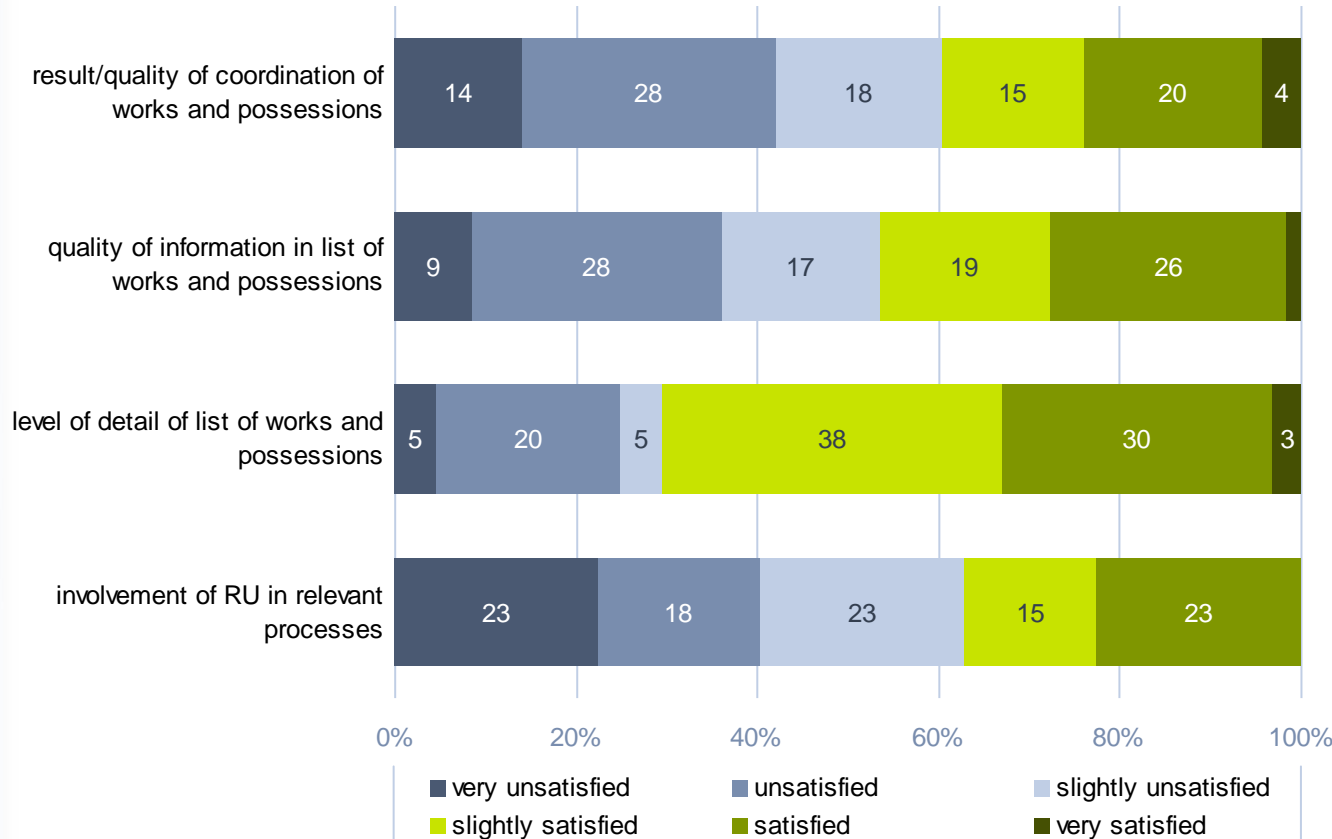
one respondent is counted multiple times, if his/her organisation uses multiple corridors



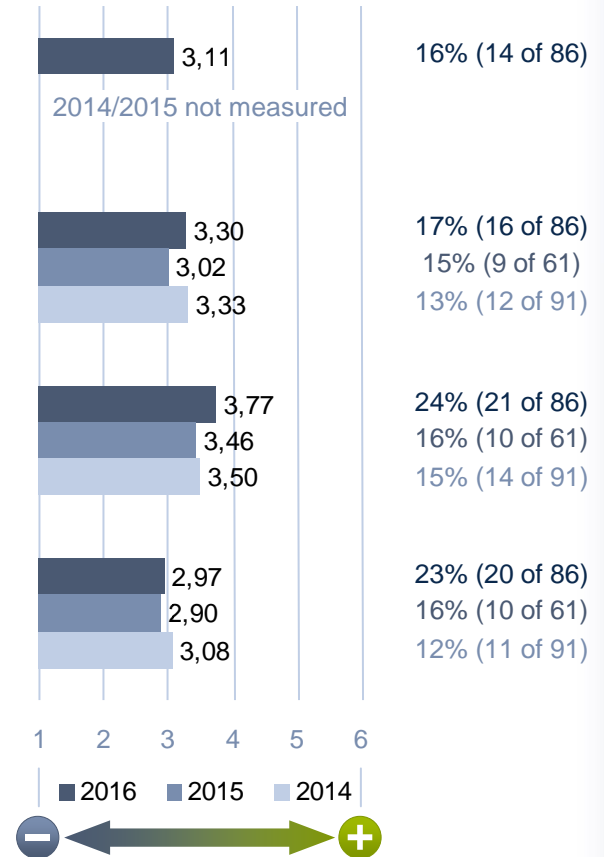
"To what extent are you satisfied with the adequacy of the selected lines? || To what extent are you satisfied with the infrastructure standards of all designated lines, including diversionary routes dedicated to the RFC, concerning parameters such as train length, axle load, electrification, loading gauges, etc.? || To what extent are you satisfied with the measures taken by the RFCs' Infrastructure Managers to improve the infrastructure standards on the lines assigned to the corridor?"

one respondent is counted multiple times, if his/her organisation uses multiple corridors

percentage of respondents; RU and Non-RU Applicants only



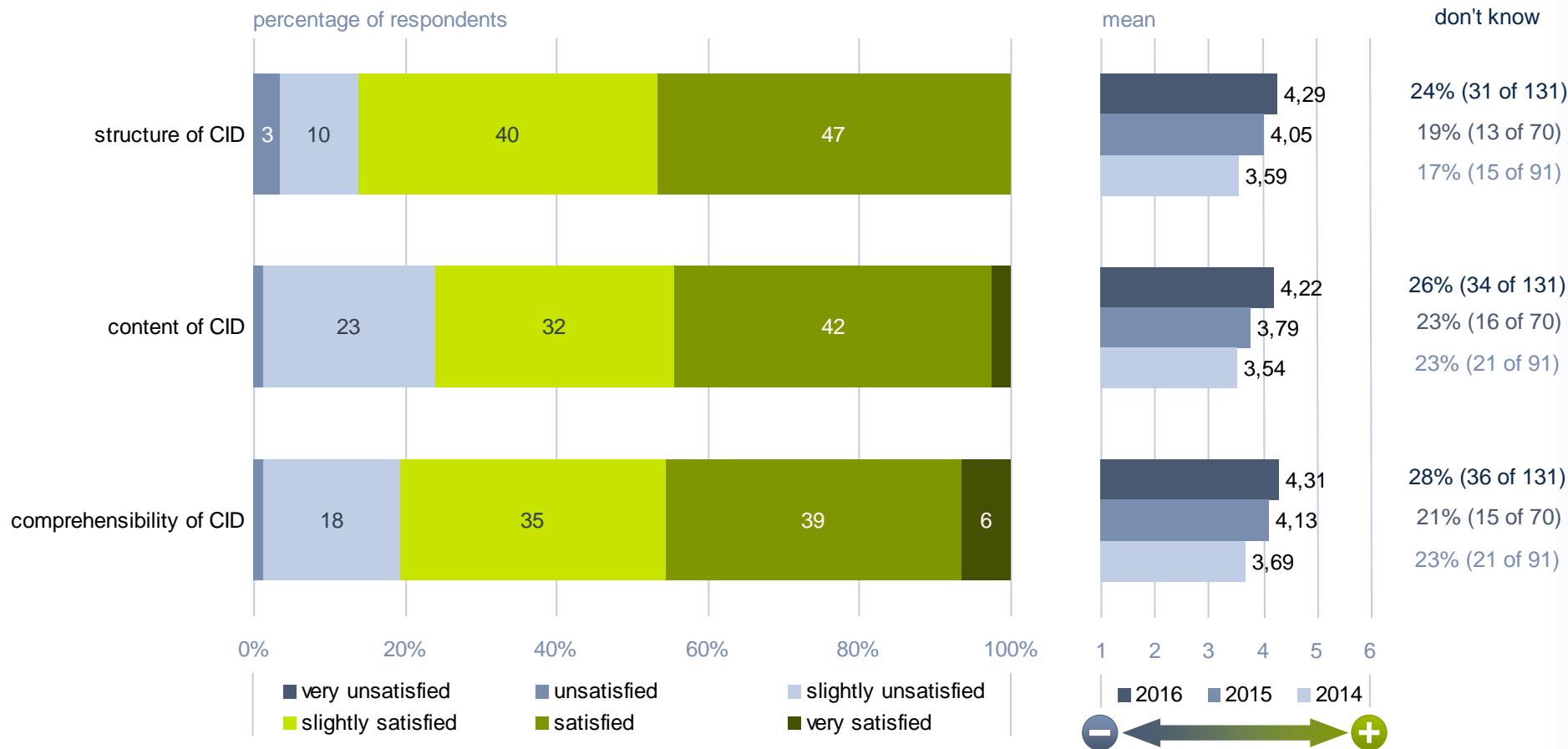
mean



"To what extent are you satisfied with the result/quality of the coordination of planned temporary capacity restrictions (works and possessions) on the corridor? || ... with the quality of the information given in the list of planned temporary capacity restrictions that will affect the availability of the lines assigned to the corridor? || ... with the level of detail in the contents of the list? || How do you feel about the way your opinion is taken into account in the relevant processes?"

Satisfaction with Corridor Information Document (CID)

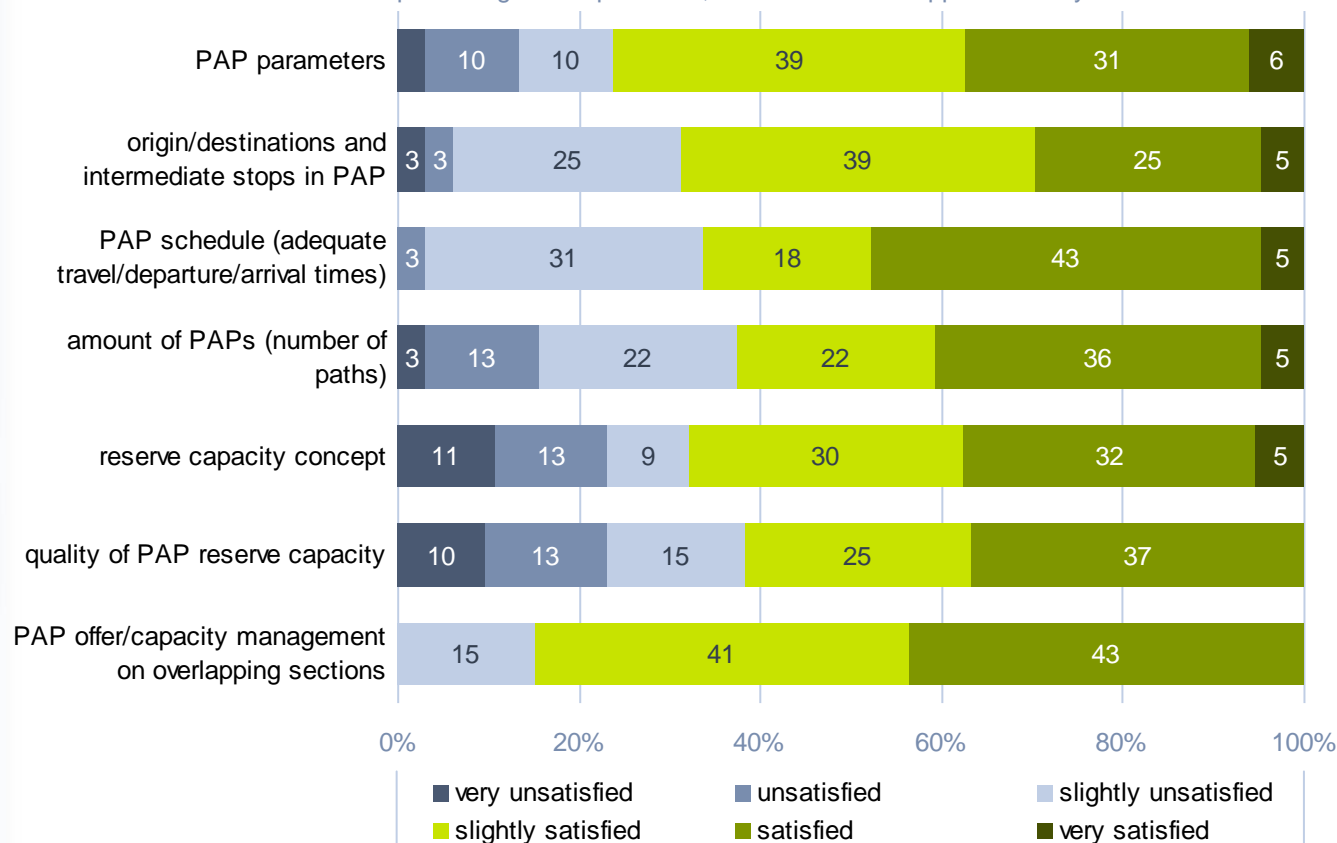
one respondent is counted multiple times, if his/her organisation uses multiple corridors



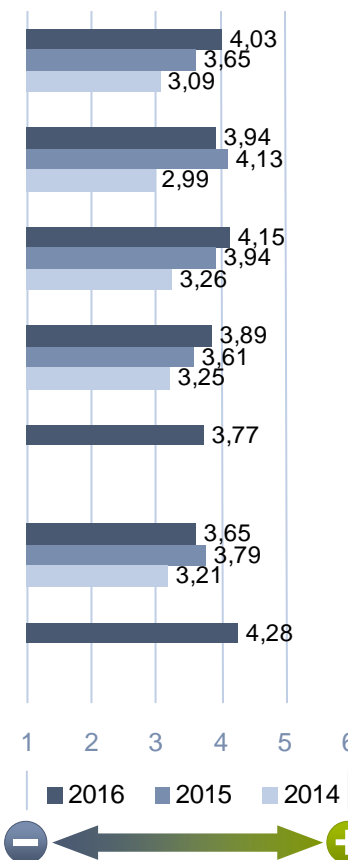
"To what extent are you satisfied with the structure of the CID for the 2017 timetable year? Can you easily find the information you want? Is the information organized in a logical way? || ... with the contents of the CID? Do the contents match your business needs? Is the level of detail sufficient? || ... with the comprehensibility of the CID? Is the wording clear and user-friendly? Are there enough graphical elements (where clear illustration is required)? Is the CID layout/design attractive?"

one respondent is counted multiple times, if his/her organisation uses multiple corridors

percentage of respondents; RU and Non-RU Applicants only



mean



don't know

11% (9 of 86)
8% (5 of 61)
18% (16 of 91)

14% (12 of 86)
7% (4 of 61)
19% (17 of 91)

13% (11 of 86)
10% (6 of 61)
19% (17 of 91)

14% (12 of 86)
13% (8 of 61)
19% (17 of 91)

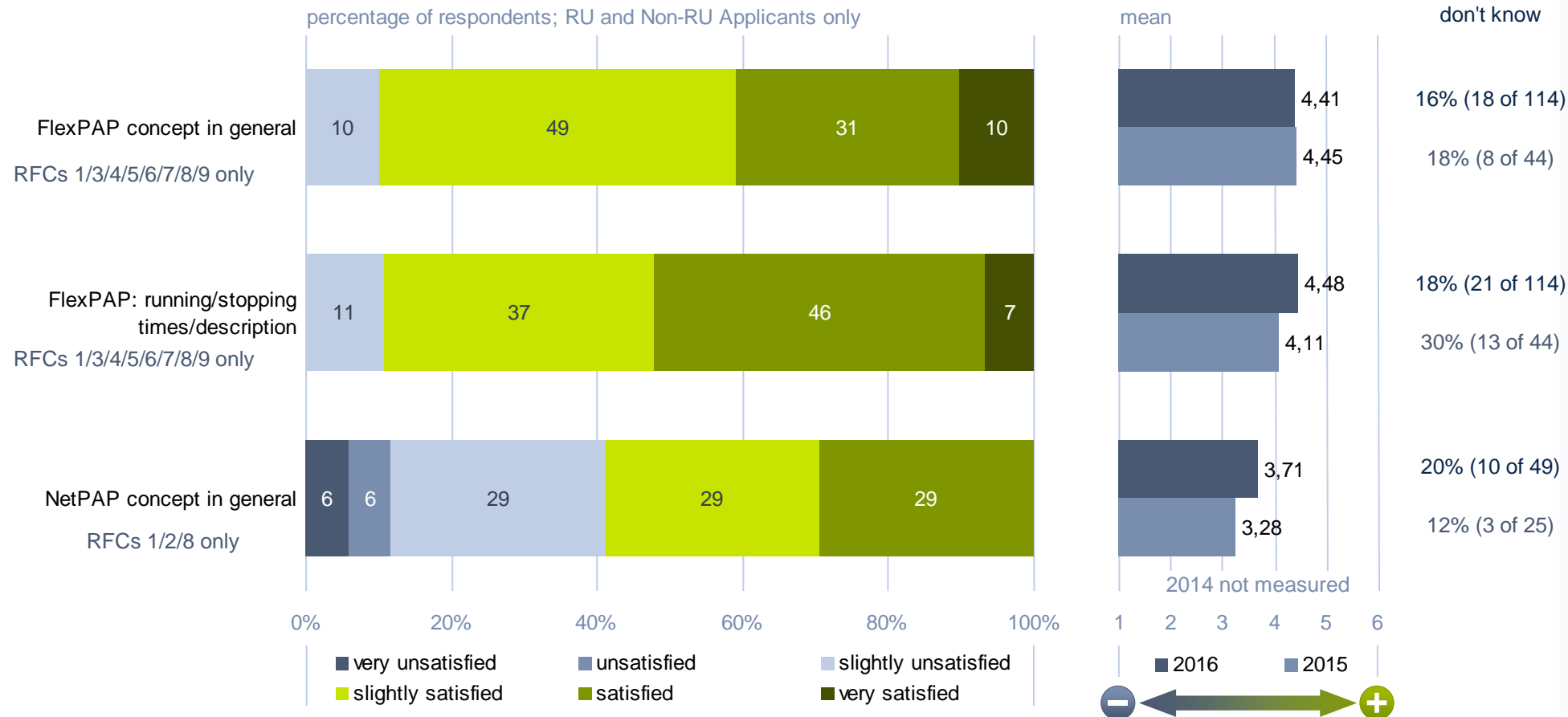
23% (20 of 86)

28% (24 of 86)
38% (23 of 61)
32% (29 of 91)

36% (30 of 86)

"To what extent are you satisfied with the Pre-arranged Path (PaP) parameters such as length, weight, etc.? || ... with the origins/destinations and intermediate stops? || ... with the PaP schedule? || ... with the amount of the PaPs? Is there a sufficient number of PaPs? || ... with the RC concept? || ... with the quality of Reserve Capacity? || PaP offer and the capacity management process on overlapping corridor sections?"

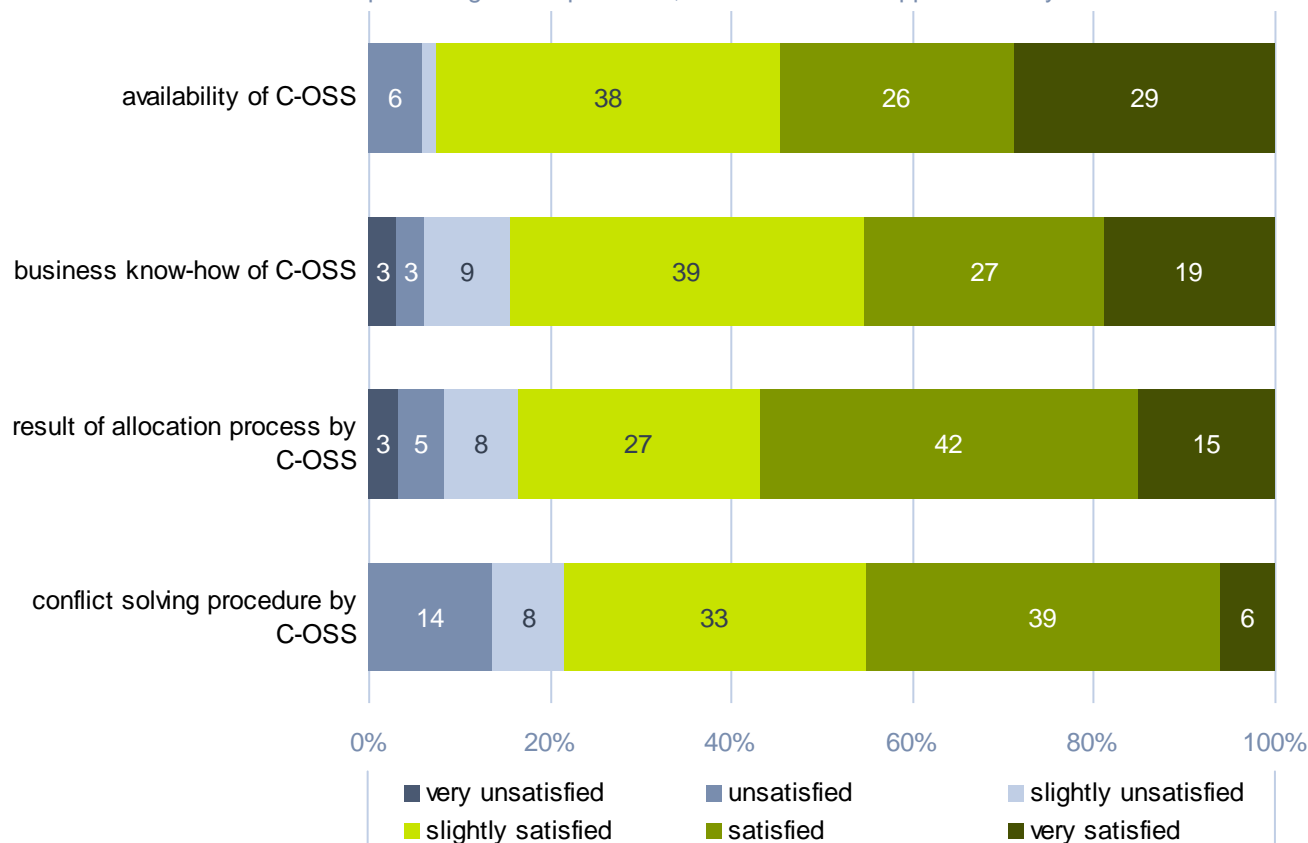
one respondent is counted multiple times, if his/her organisation uses multiple corridors



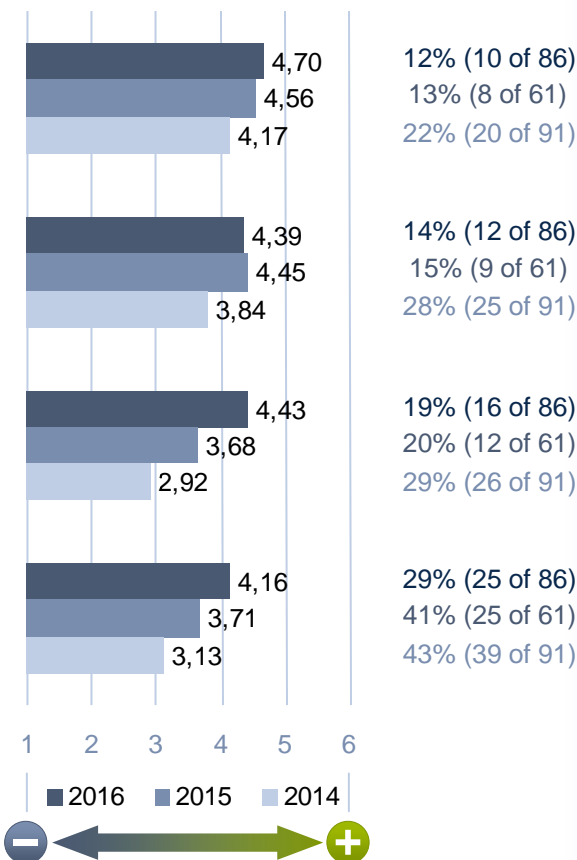
"To what extent are you satisfied with the flexible approach to arrival/departure times and the possibility to shift intermediate stops (FlexPAP concept)? || ... with the FlexPAP concerning running/stopping times and description? Is the indicated range of standard running times / maximum stopping times useful and is the description of the FlexPAP concept in CID 2017 sufficient? || ... with the Net-PaP concept to influence / improve the priority value of your PaP request in case of conflicts?"

one respondent is counted multiple times, if his/her organisation uses multiple corridors

percentage of respondents; RU and Non-RU Applicants only



mean

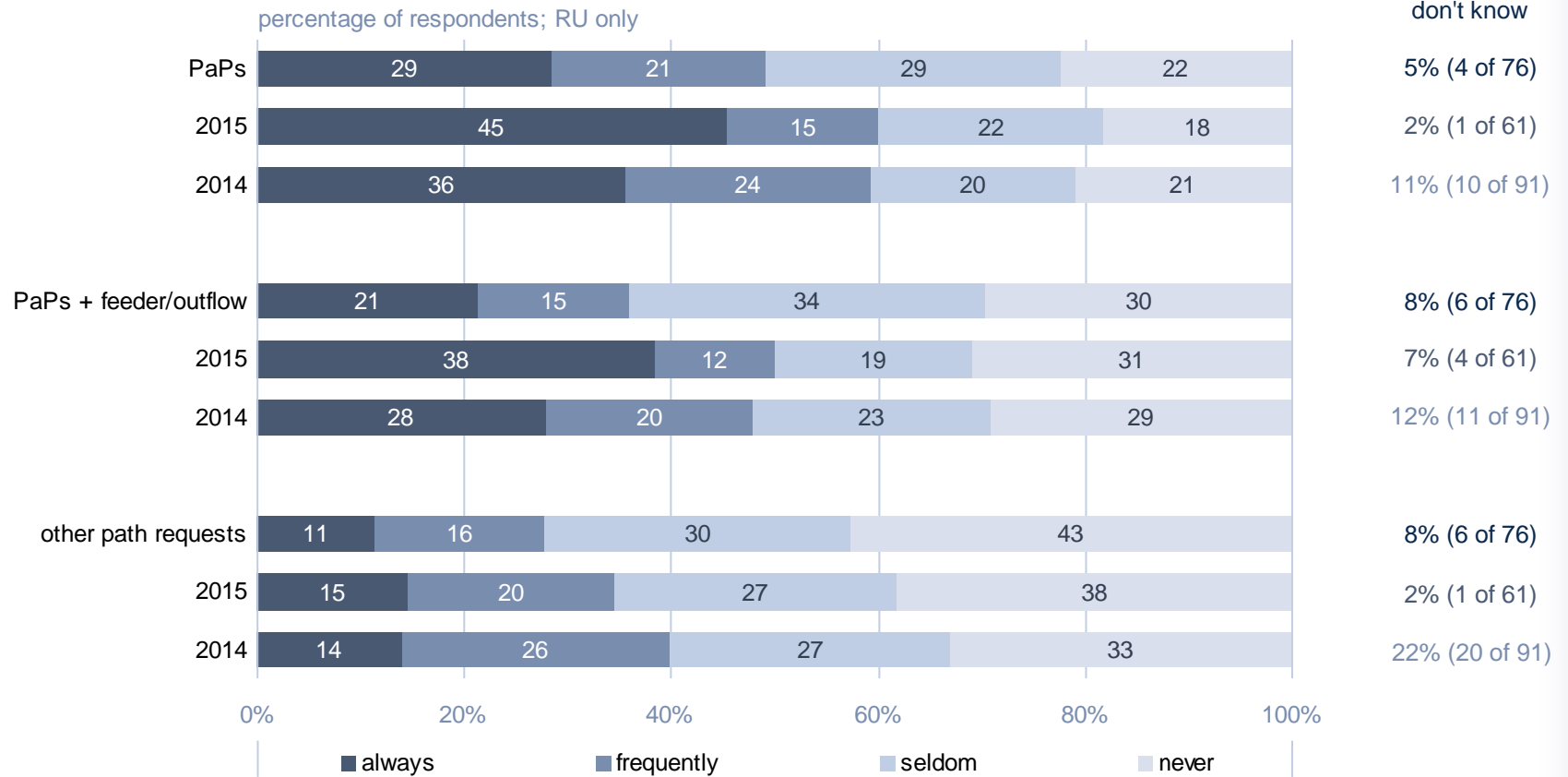


don't know

availability of C-OSS	12% (10 of 86)
business know-how of C-OSS	14% (12 of 86)
result of allocation process by C-OSS	19% (16 of 86)
conflict solving procedure by C-OSS	29% (25 of 86)

"How satisfied are you with the availability of the Corridor One-Stop Shop (C-OSS)? (Is the reaction time of the C-OSS adequate?) || How satisfied are you with the business know-how of the C-OSS? || How satisfied are you with the result of the allocation process for the 2017 timetable year? (Please consider especially the pre-allocation by the C-OSS, and the delivery of the draft and final timetable offers.) || How satisfied are you with the conflict-solving procedure?"

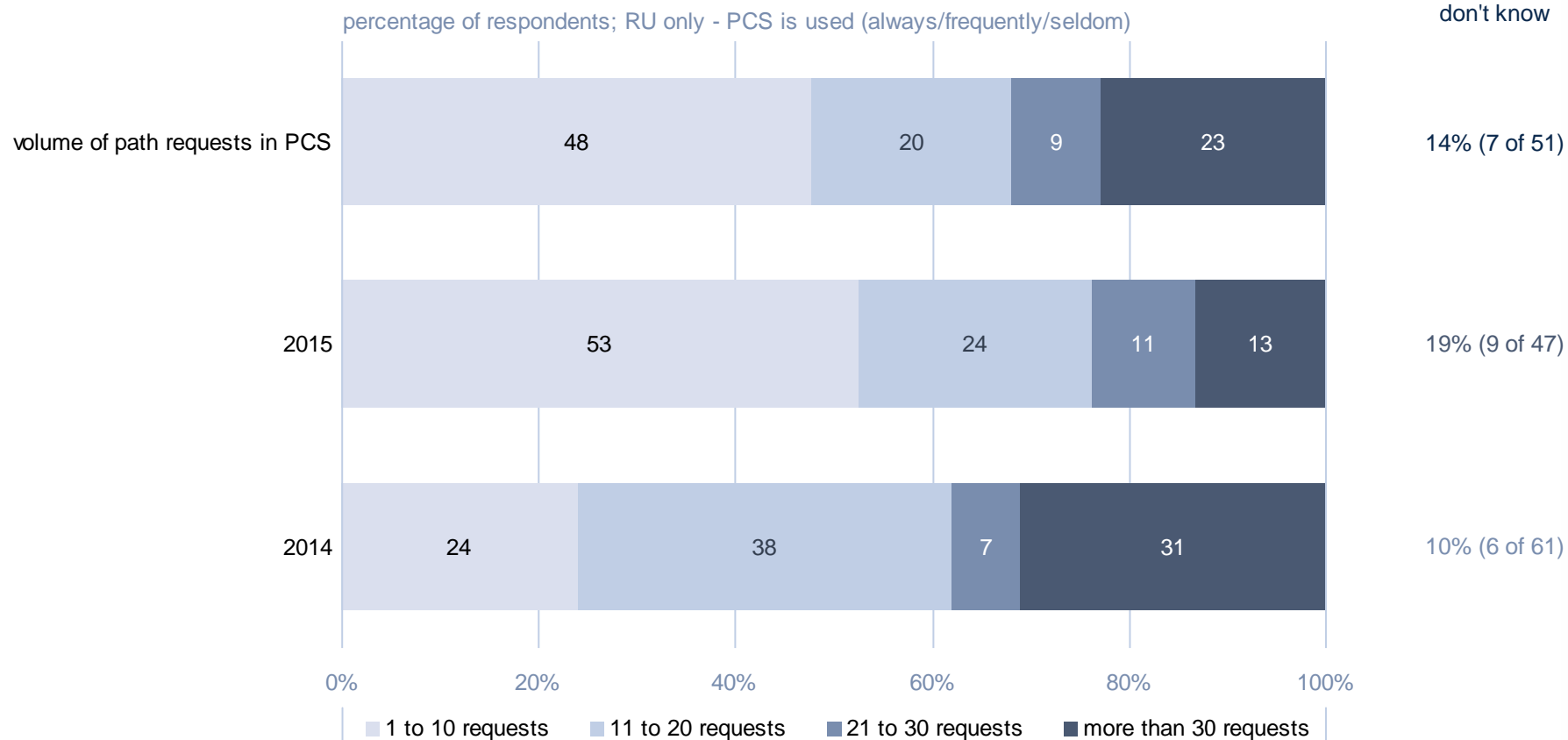
one respondent is counted multiple times, if his/her organisation uses multiple corridors



"How often does your company use the PCS booking tool for international path requests?"

n = 76; 61; 91

one respondent is counted multiple times, if his/her organisation uses multiple corridors

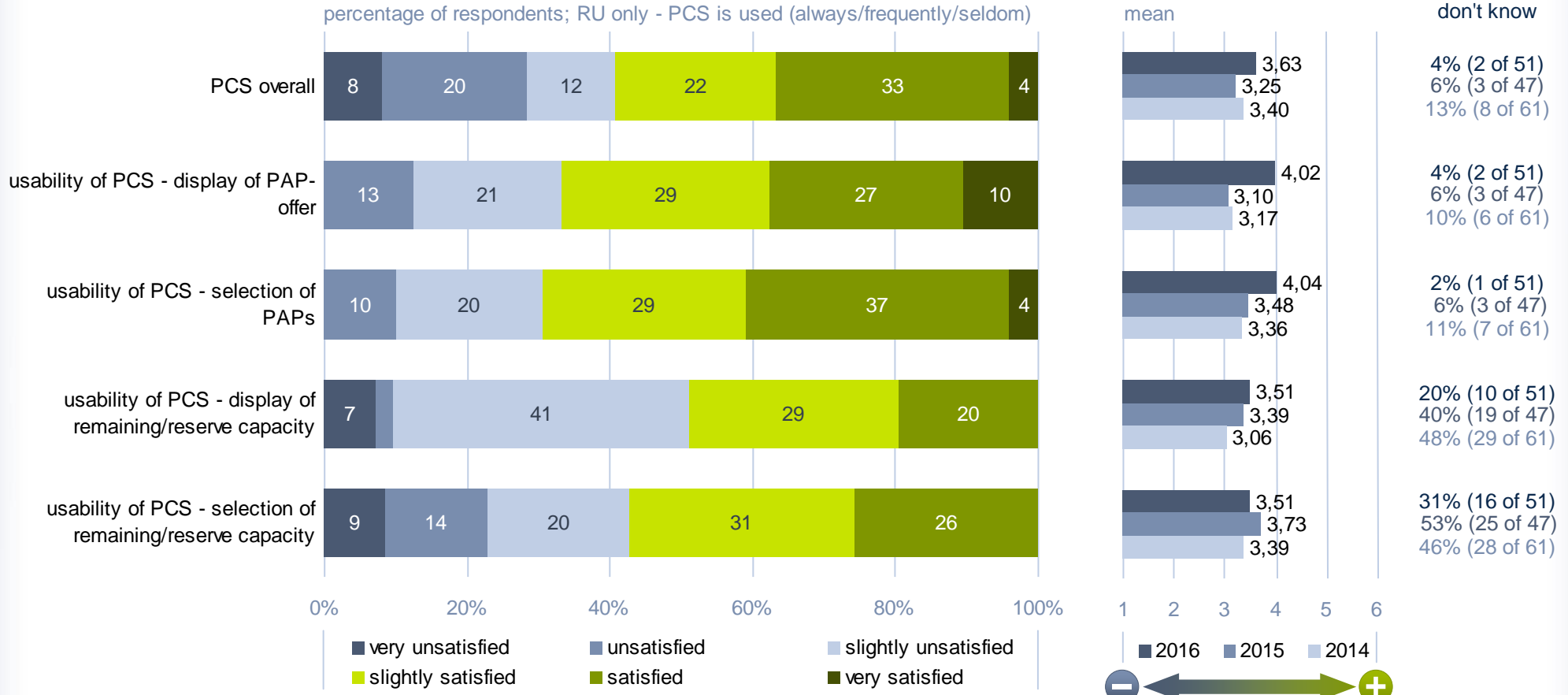


"What is the volume of path requests (dossiers) you placed in PCS for the 2017 timetable year?"

n = 51; 47; 61

Satisfaction with Path Coordination System (PCS)

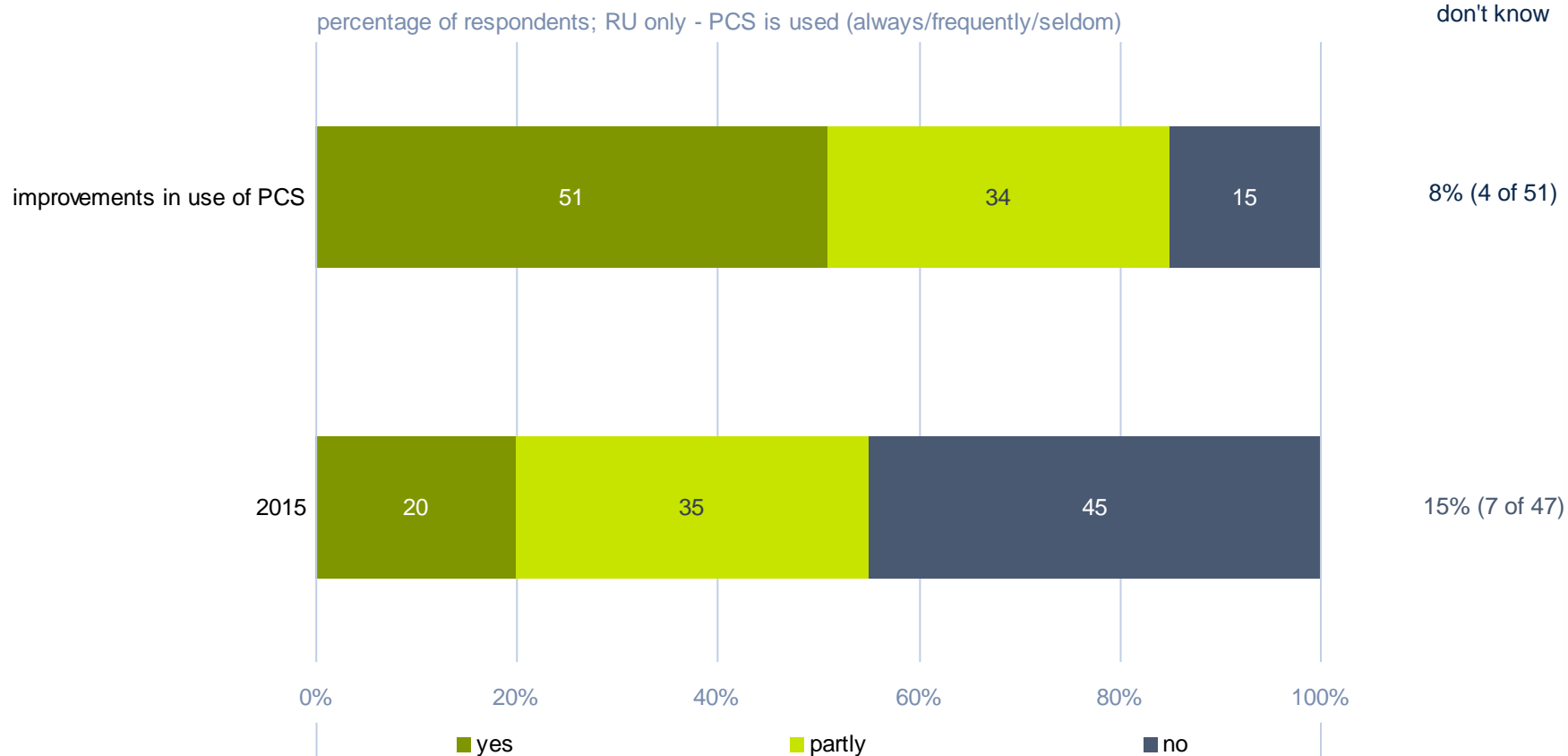
one respondent is counted multiple times, if his/her organisation uses multiple corridors



"How satisfied are you all in all with PCS as a booking tool for international path requests? Does it match your needs? || ... with the usability of PCS concerning the display of the PaP-offer? || ... concerning the selection of required PaPs? || ... concerning the display of remaining / reserve capacity (late and ad-hoc path requests)? || ... with the usability of PCS concerning the handling of required remaining / reserve capacity (late and ad-hoc path requests)?"

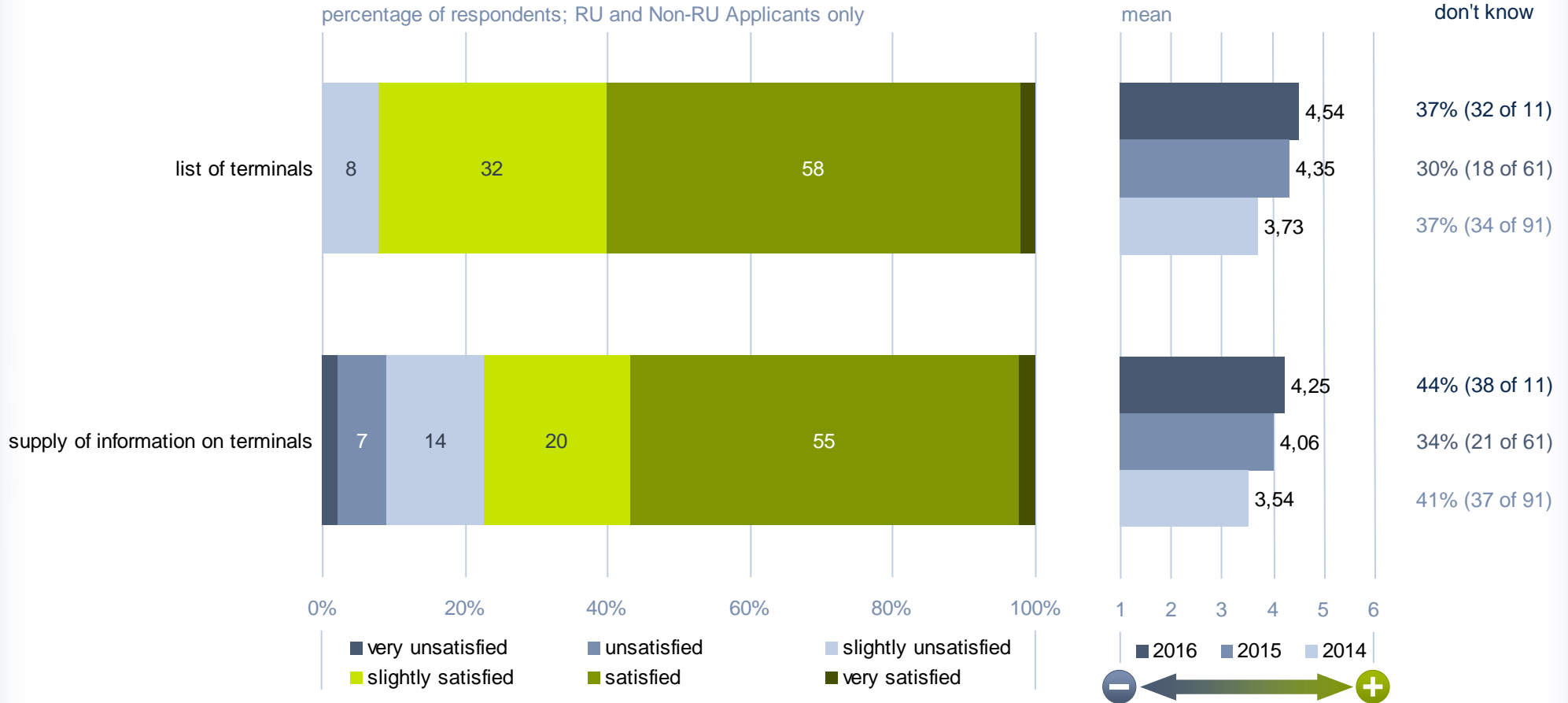
n = 51; 47; 61

one respondent is counted multiple times, if his/her organisation uses multiple corridors



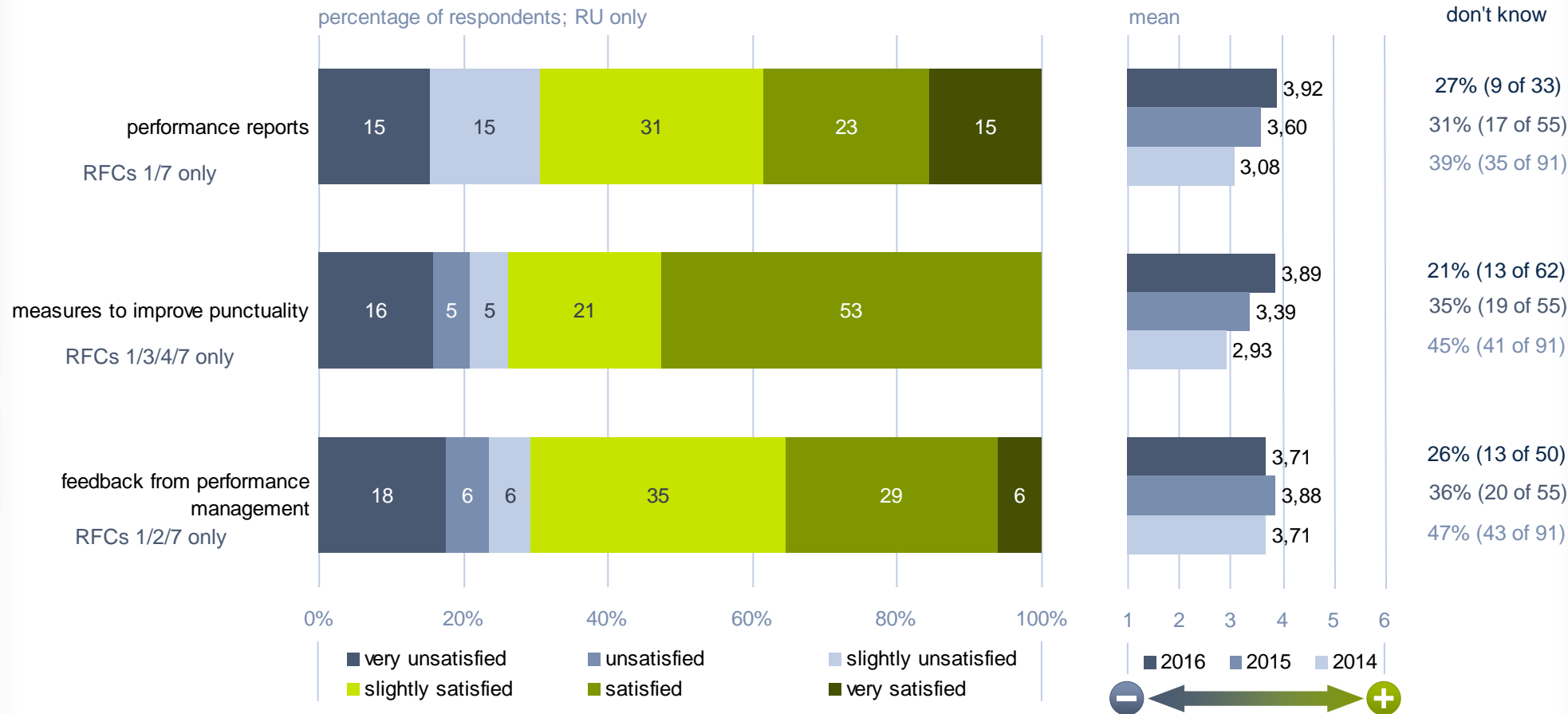
"On 25 January 2016 RNE released an overhauled version of PCS ("PCS Next Generation"). The new system is based on modern standards, its goal being to increase usability. Have you perceived any significant improvements in the use of PCS compared to the previous year?"

one respondent is counted multiple times, if his/her organisation uses multiple corridors



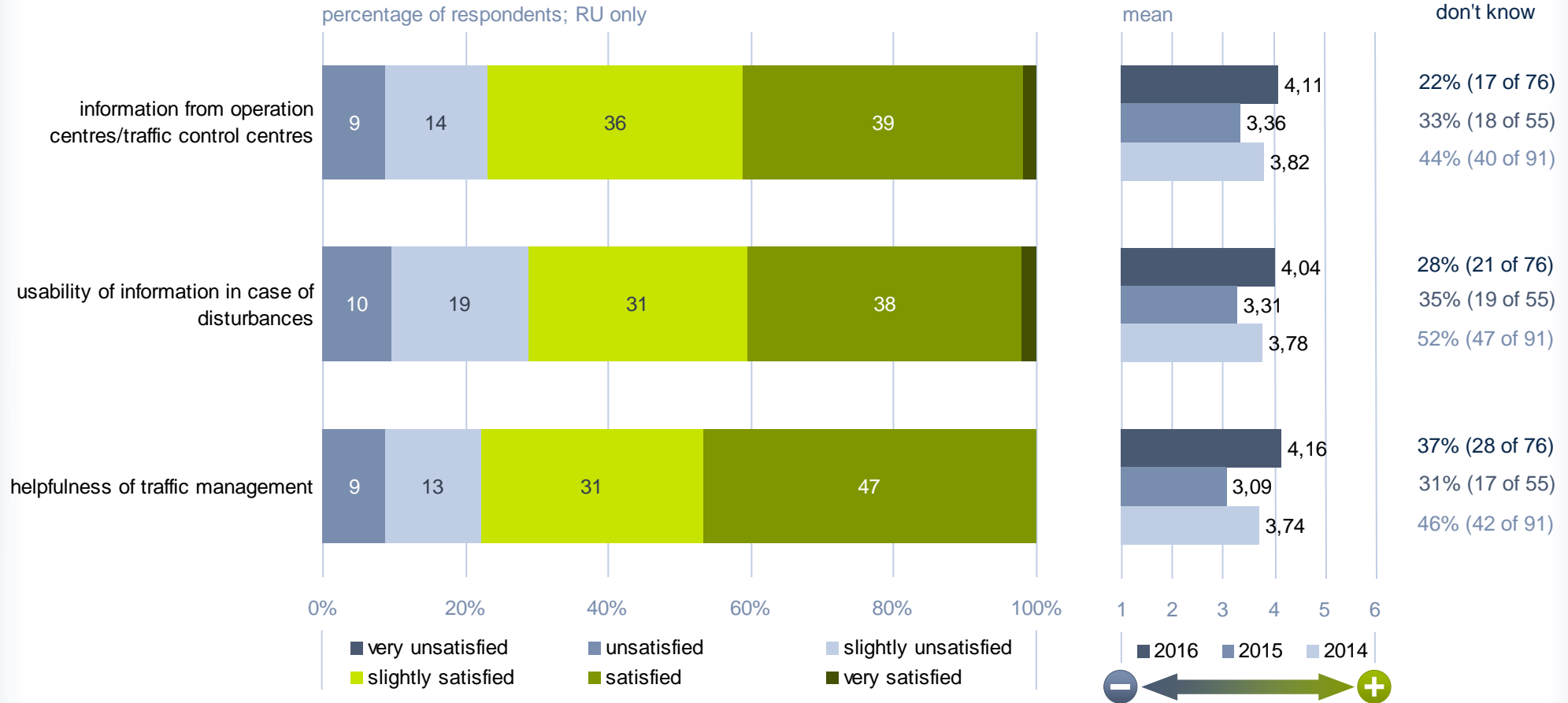
"To what extent are you satisfied with the list of terminals along the RFC that are provided by the RFC? Are all relevant terminals included in the CID 2017? || To what extent are you satisfied with the supply of information on terminals? Is the RFC supplying all relevant information on Terminals (either contained inside the CID 2017 or other sources)?"

one respondent is counted multiple times, if his/her organisation uses multiple corridors



"How satisfied are you with the performance reports? Do they show the information you need? || How satisfied are you with the efficiency of measures taken in order to improve punctuality? || How satisfied are you with the feedback you receive from your whole RFC performance management team (if it exists) / train performance management? The RFC performance management team evaluates the punctuality of your trains and reports it back to you."

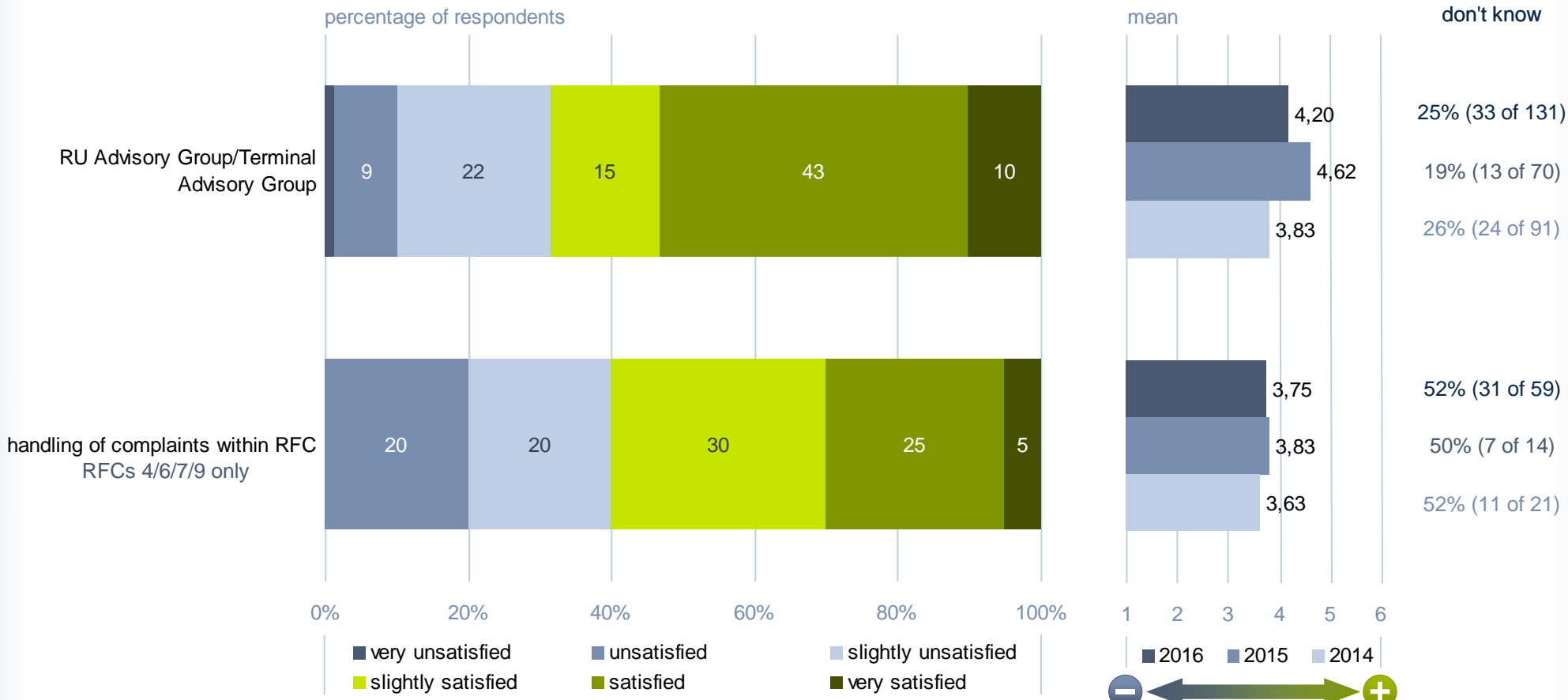
one respondent is counted multiple times, if his/her organisation uses multiple corridors



"How satisfied are you with the information you get from the different operation centres / traffic control centres of the IMs on the corridor while operating trains? || ... with the usability of the information you get from the operation centres / traffic control centres of the IMs on the corridor in case of disturbances? || How helpful is the Infrastructure Managers' (IMs) traffic management as regards running your trains with a high service quality?"

Satisfaction with Co-operation with the RFC Management Board (1)

one respondent is counted multiple times, if his/her organisation uses multiple corridors

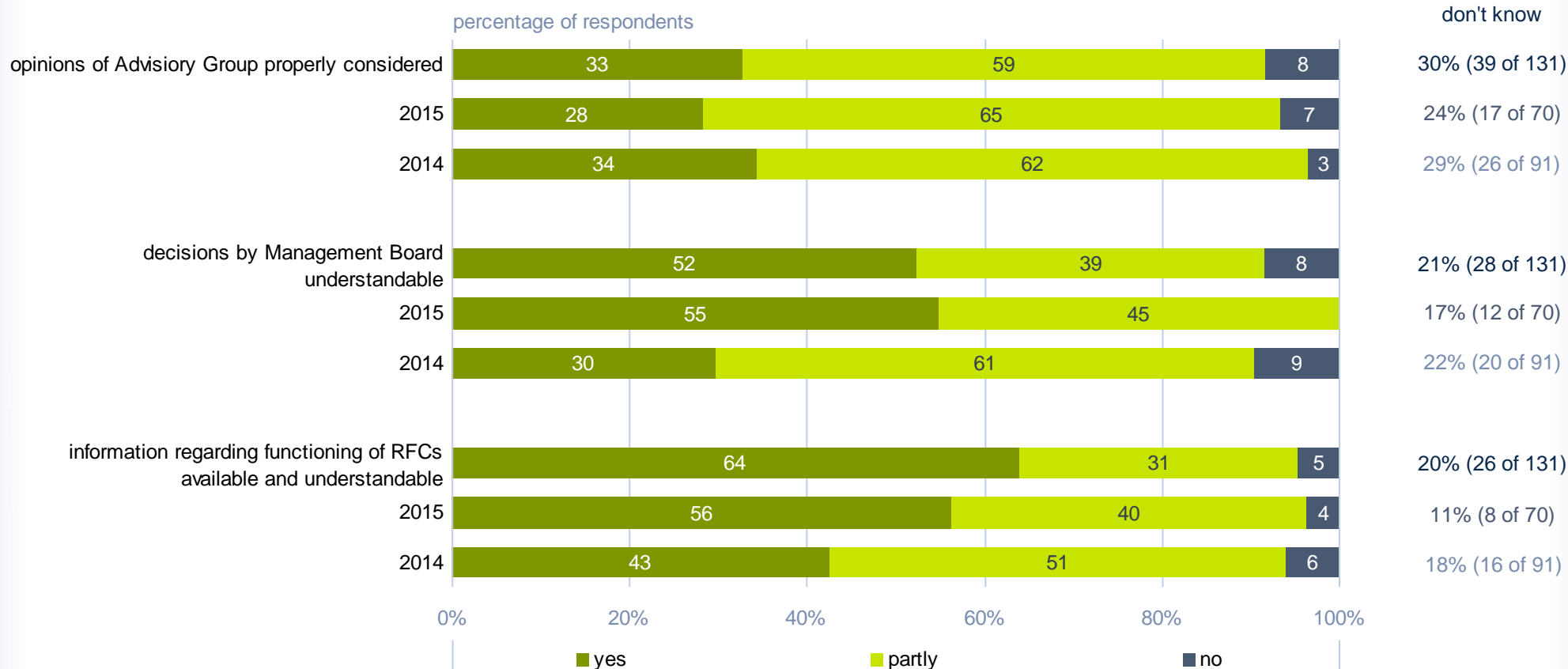


""How satisfied are you with the RU Advisory Group/Tag meetings. Is your attendance beneficial and useful for your company?
 || How satisfied are you with the procedure for handling complaints within the RFC? Please note that this question only refers to complaints – if any – handled by the RFC, it does not refer to complaints handled by the Regulatory Body."

n = 131/59; 70/14; 91/21

Satisfaction with Co-operation with the RFC Management Board (2)

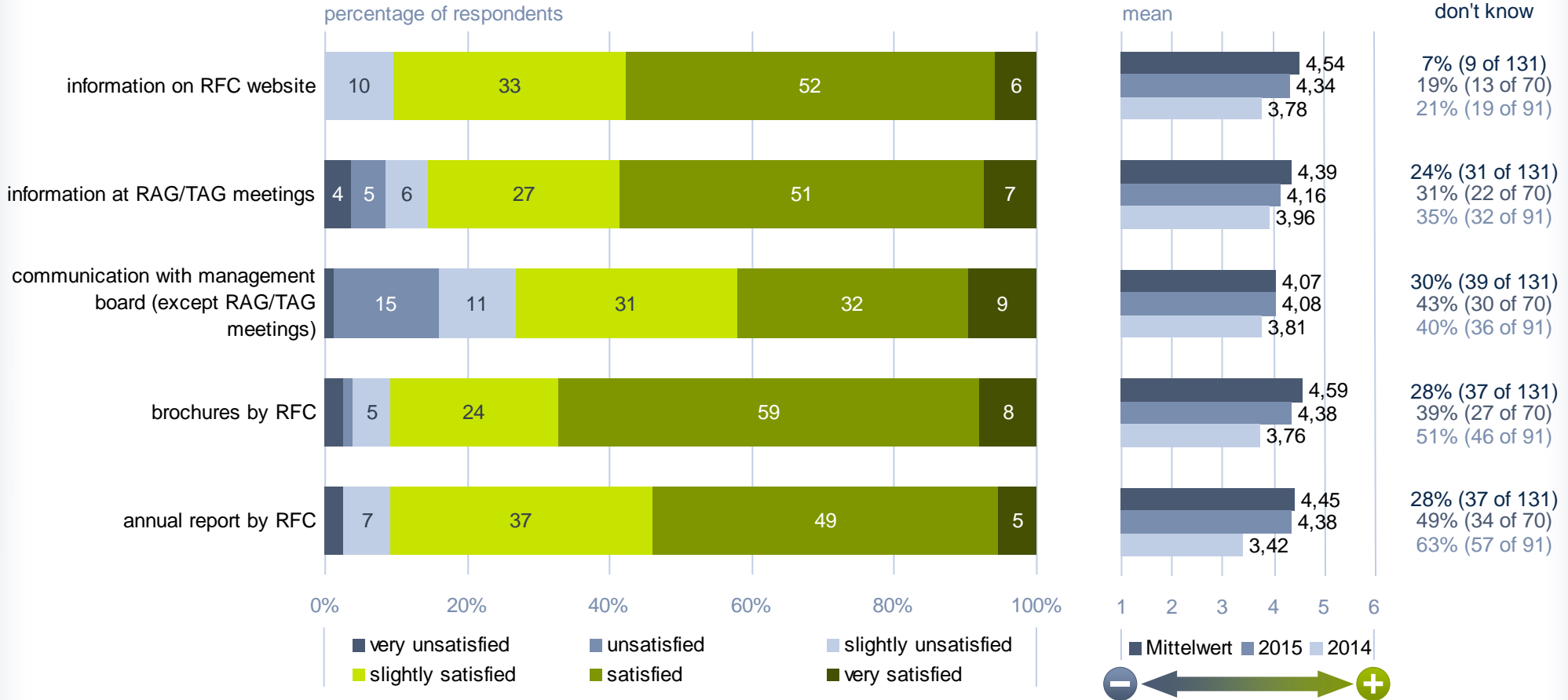
one respondent is counted multiple times, if his/her organisation uses multiple corridors



"Do you consider that the opinion of the Advisory Group has been properly taken into account by the RFC Management Board? || Are decisions taken by the RFC Management Board (that concern your business) understandable for you? || Is information regarding the functioning of the RFC easily available and understandable for you?"

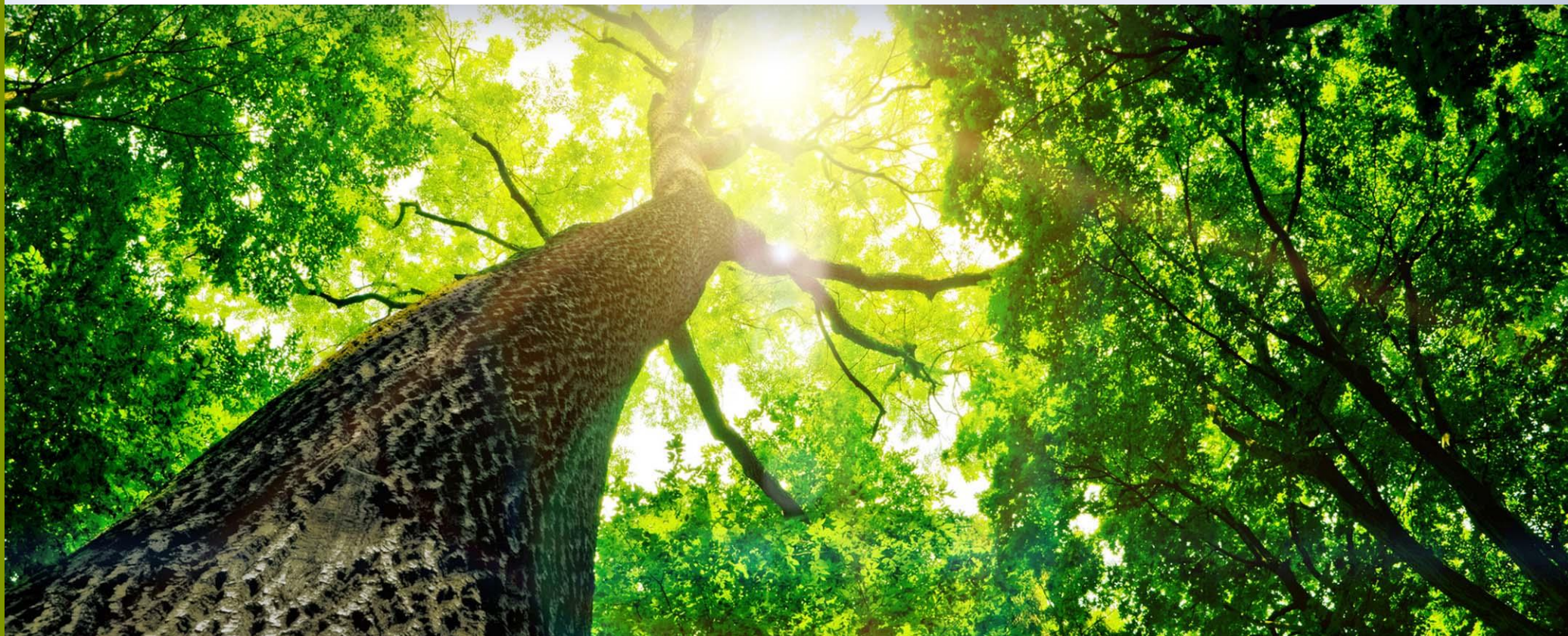
Satisfaction with Overall RFC Communication

one respondent is counted multiple times, if his/her organisation uses multiple corridors



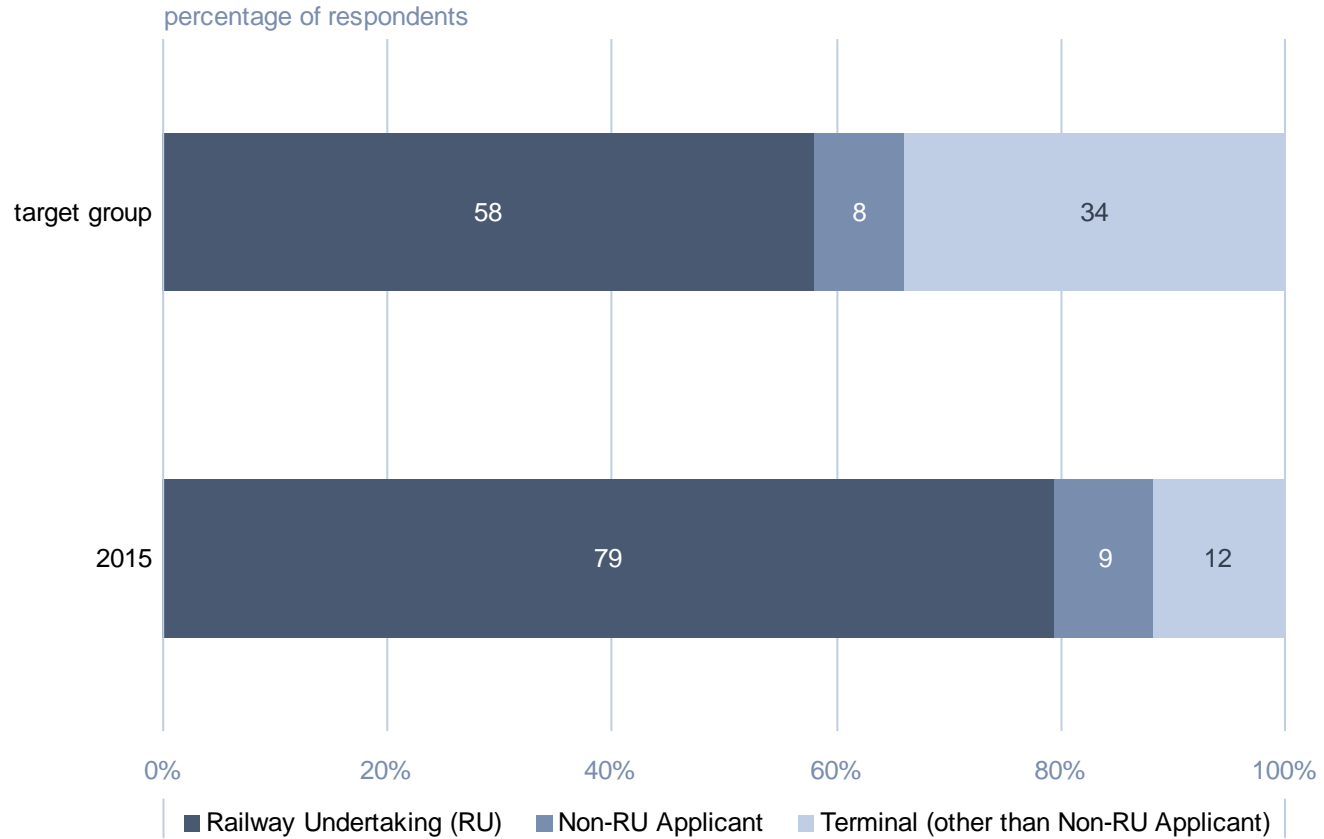
"To which extent are you satisfied with the information provided by RFC's website? || To which extent are you satisfied with the information provided by the RAG/TAG Meetings? || To which extent are you satisfied with the communication with the Management Board of the RFC other than at the RAG/TAG meetings? || To which extent are you satisfied with the brochures/annual report published by the RFC? "

n = 131; 70; 91



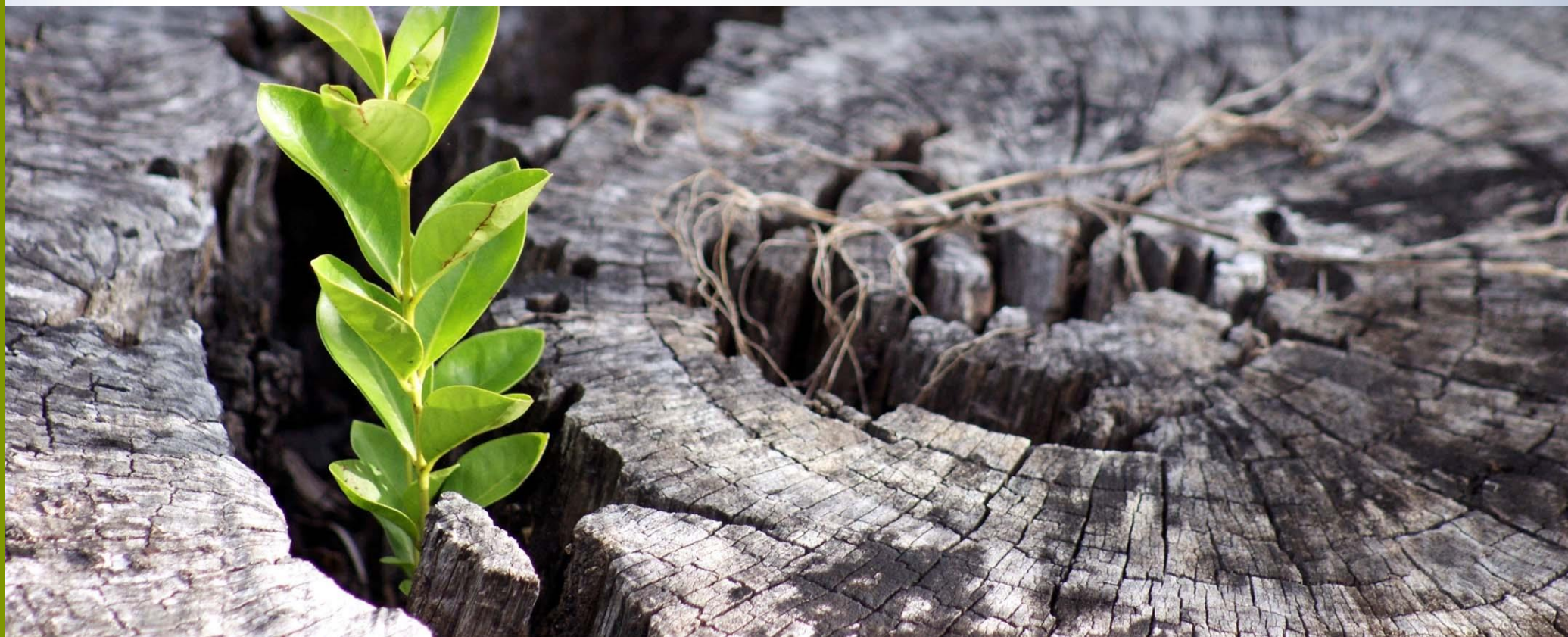
3 Sample Description

one respondent is counted multiple times, if his/her organisation uses multiple corridors

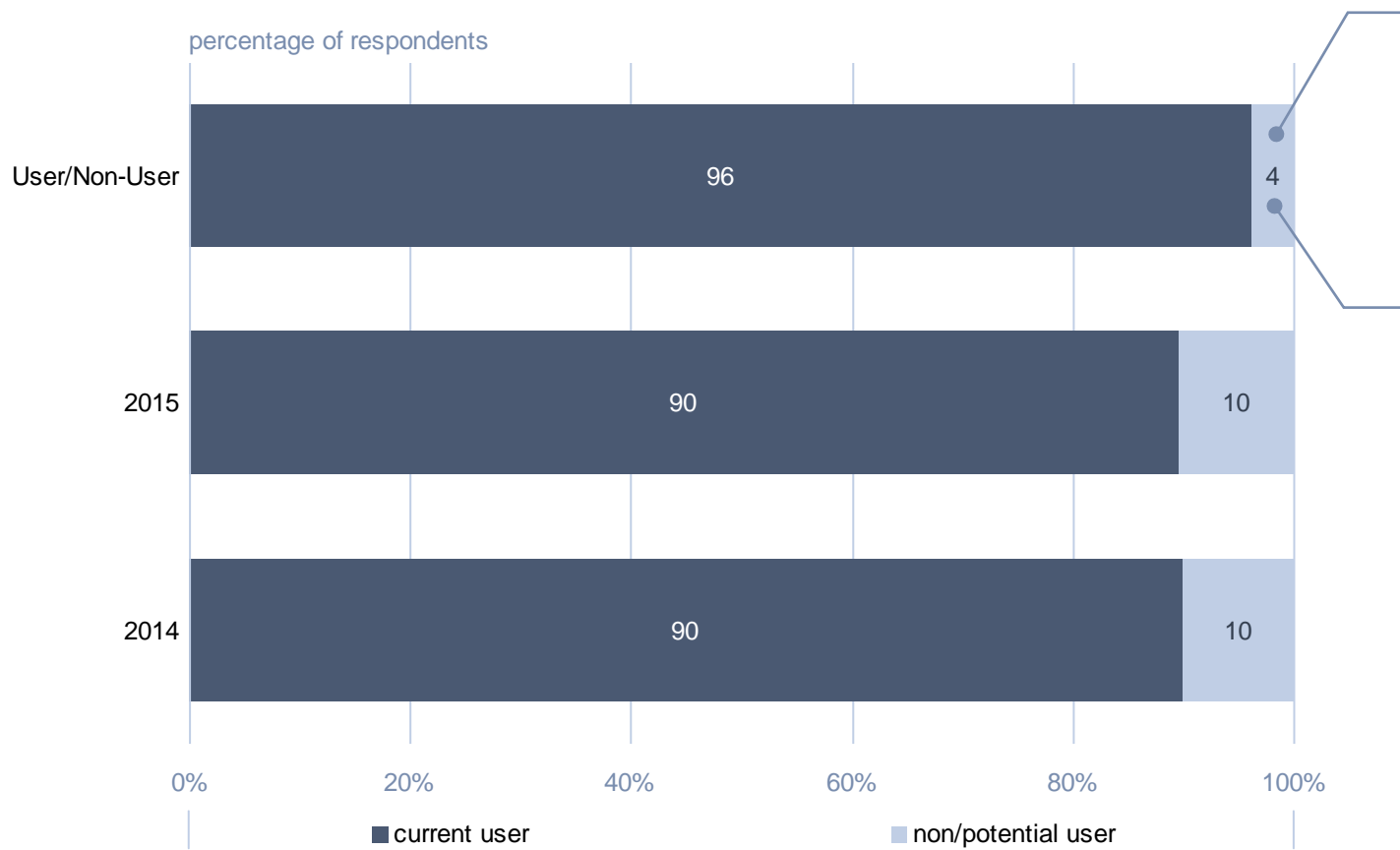


"To which of the following types of target groups does your company belong?"

n = 136; 75 non/potential users included



4 Non/potential users



reasons for no current usage (but usage planned):

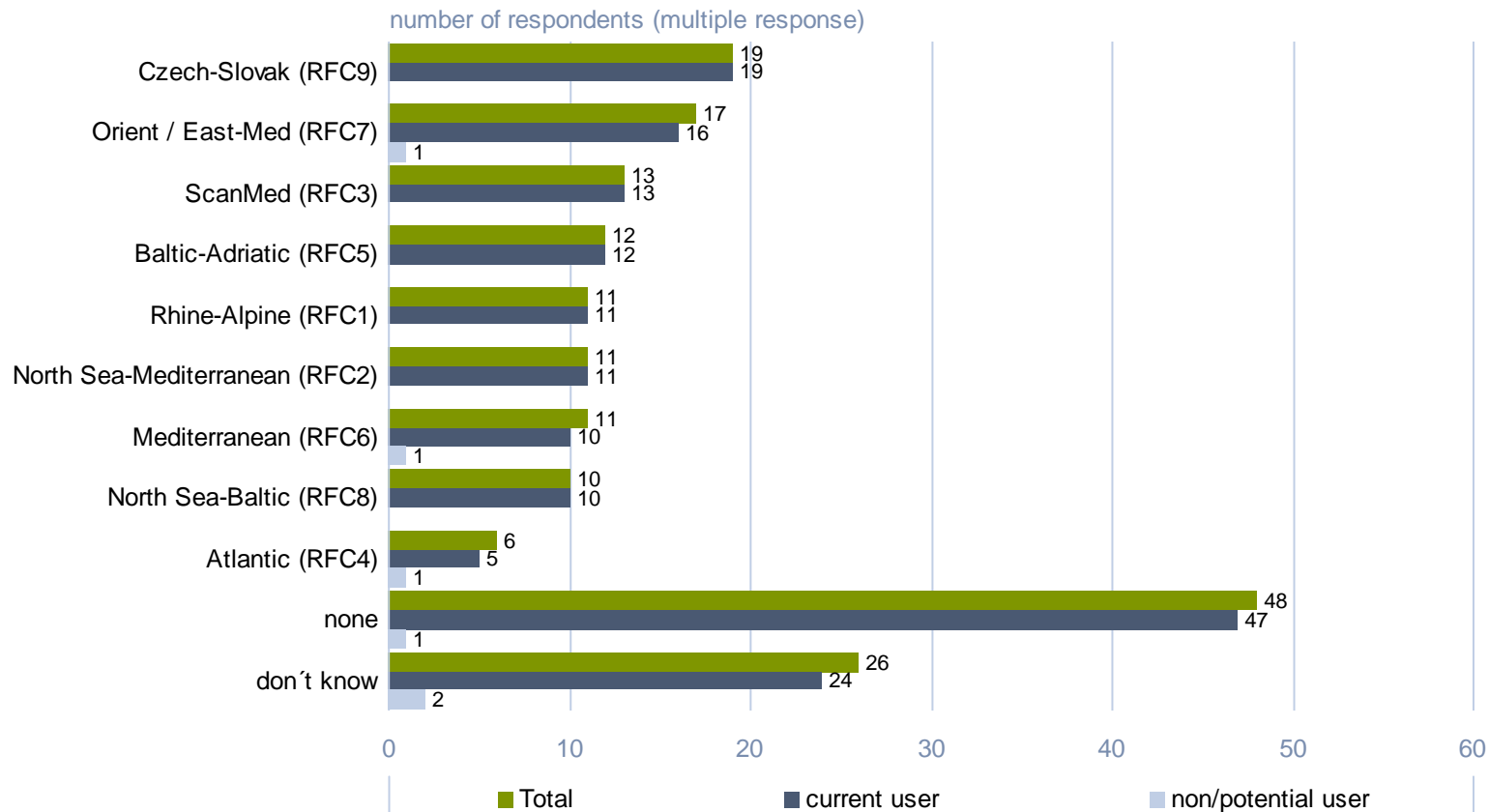
We are a new railway undertaking in Hungary and we don't run trains yet we manage terminals

reasons for no usage planned:

in the short-term we don't have planned to start up new international services.

the Management Board of the Port is the owner of port infrastructure, including intermodal terminal, whose exploitation leads BCT (Baltic Container Terminal)

according to the statute our company can not conduct operations

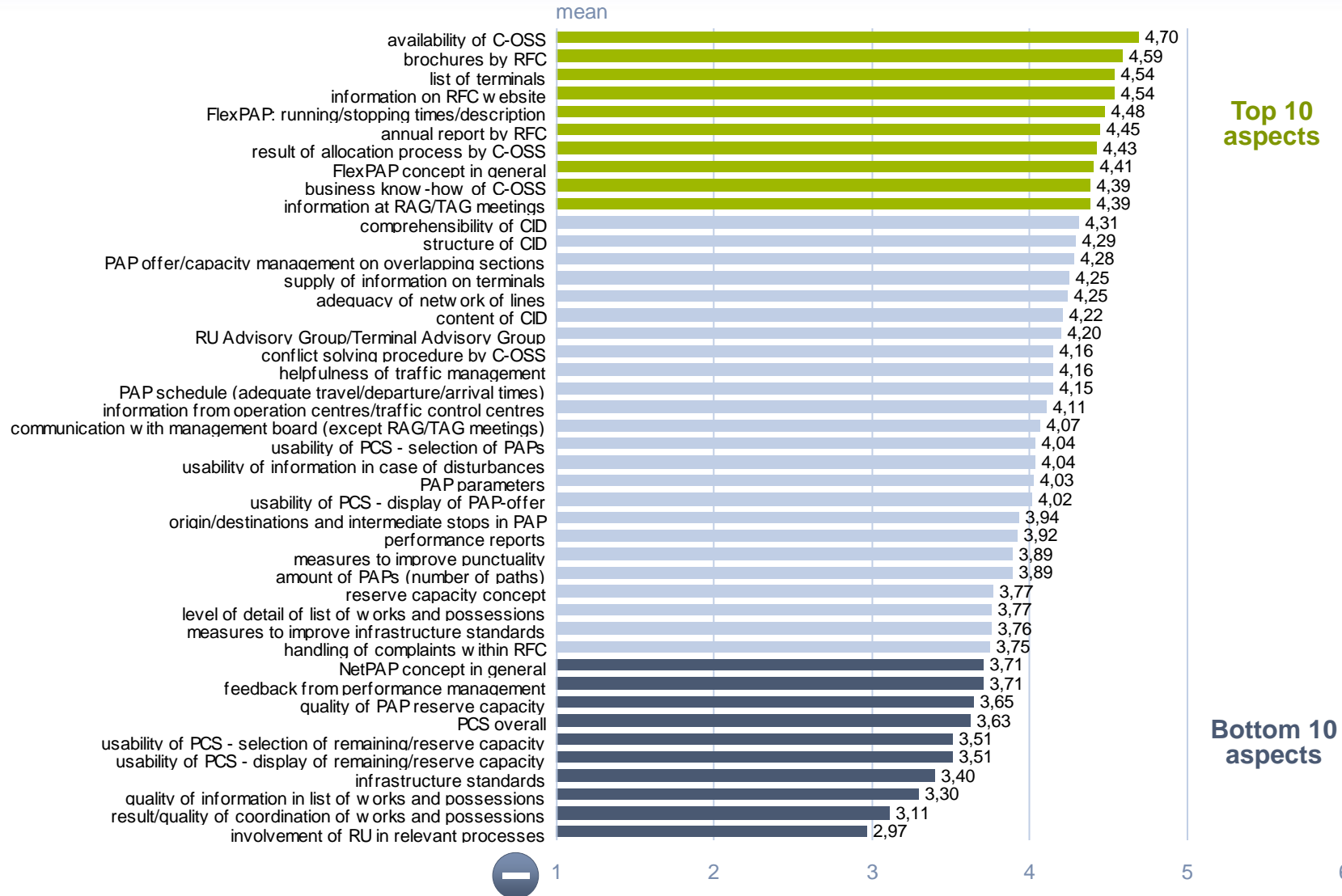


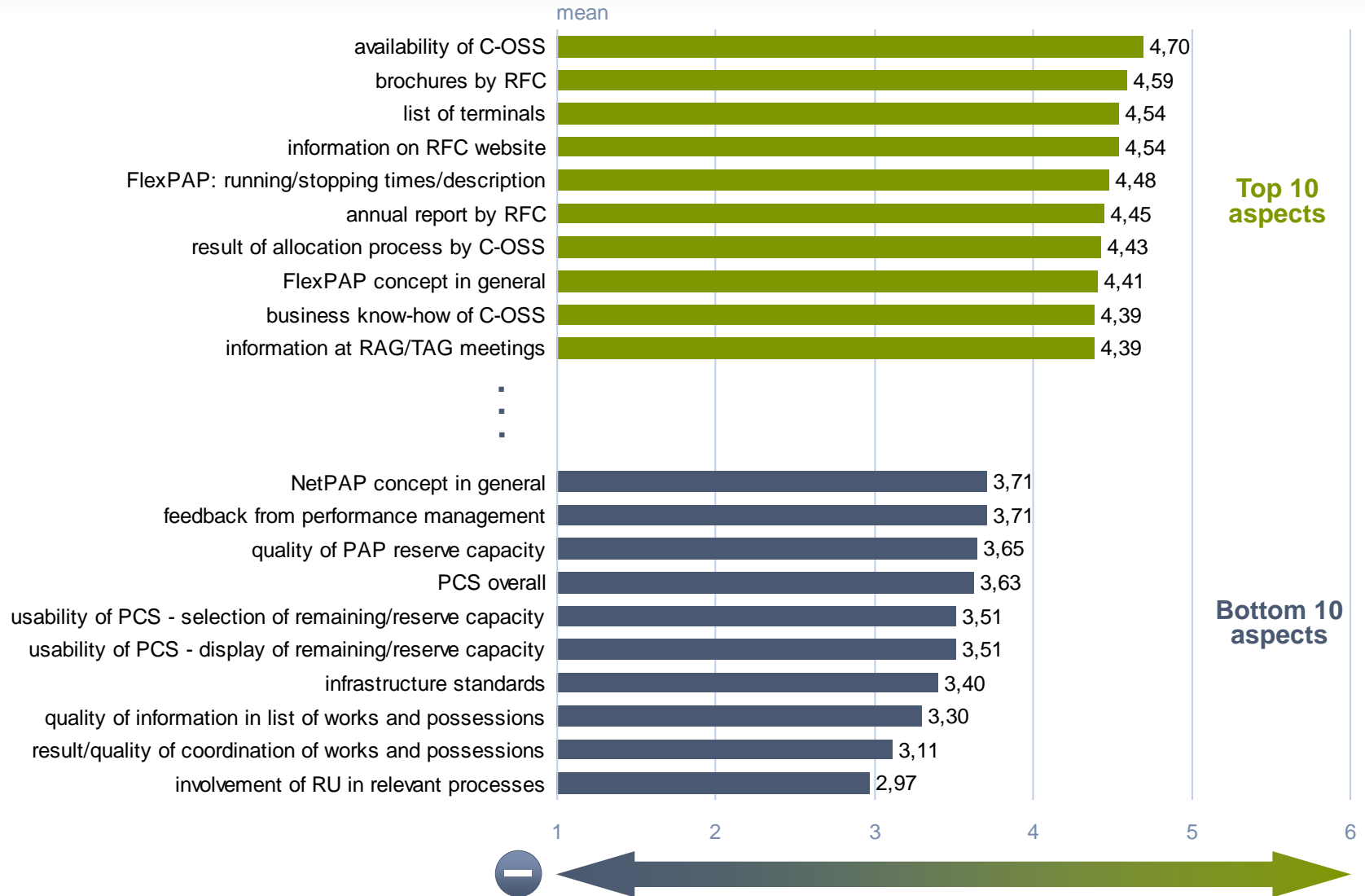
"Which RFCs / which additional RFCs are you planning to operate/run your services on?"

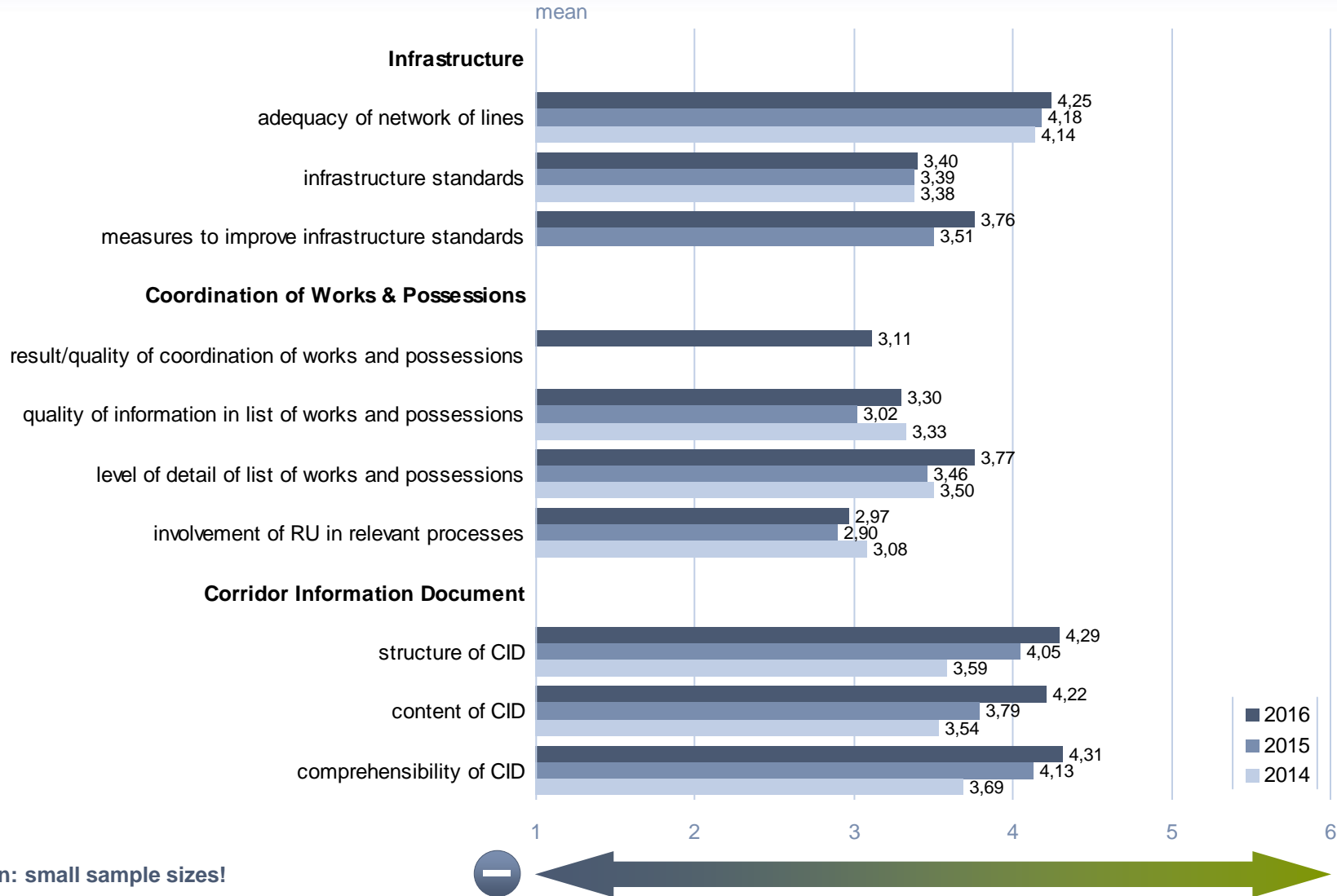
n = 136 (131/5)

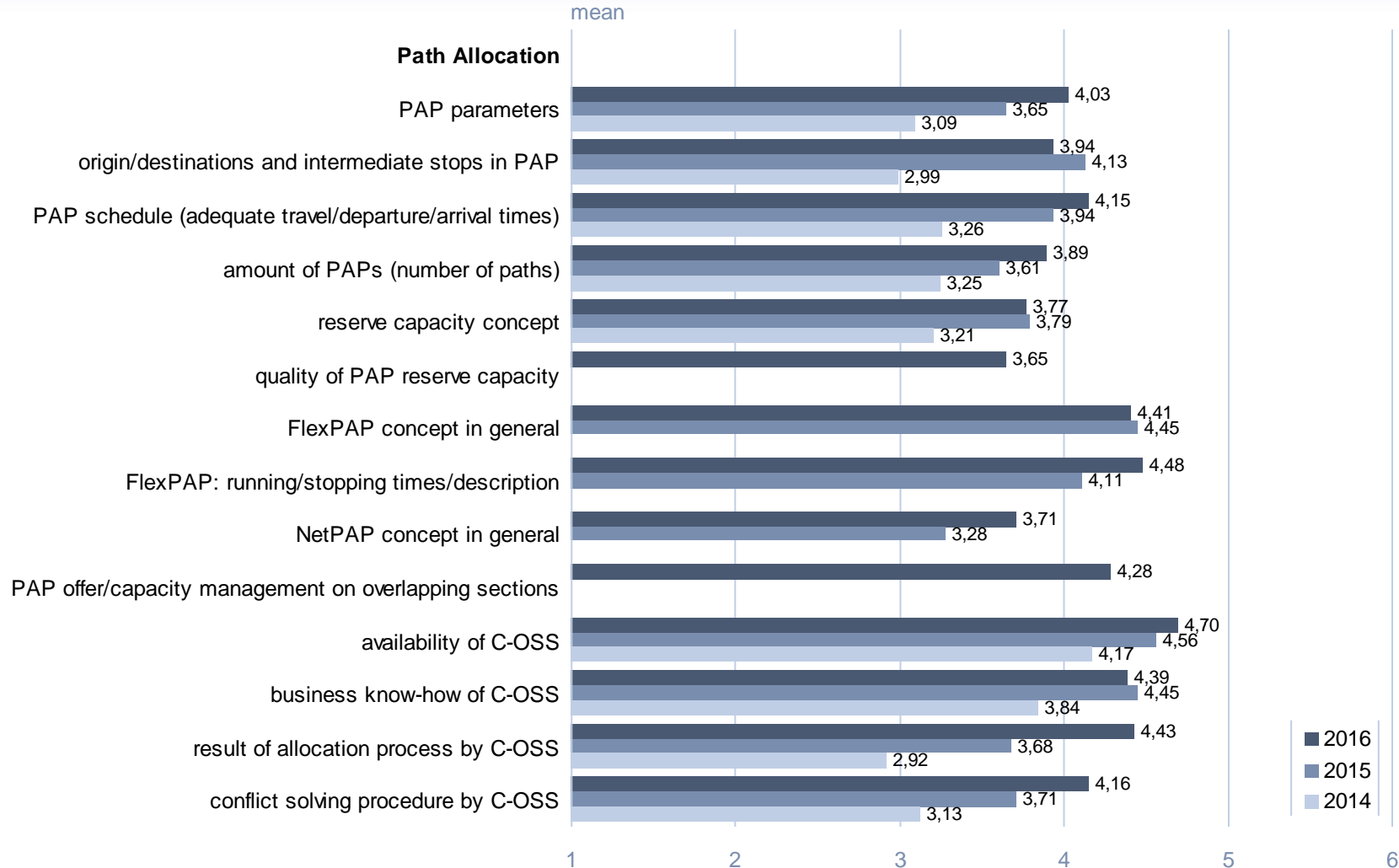


5 Summary



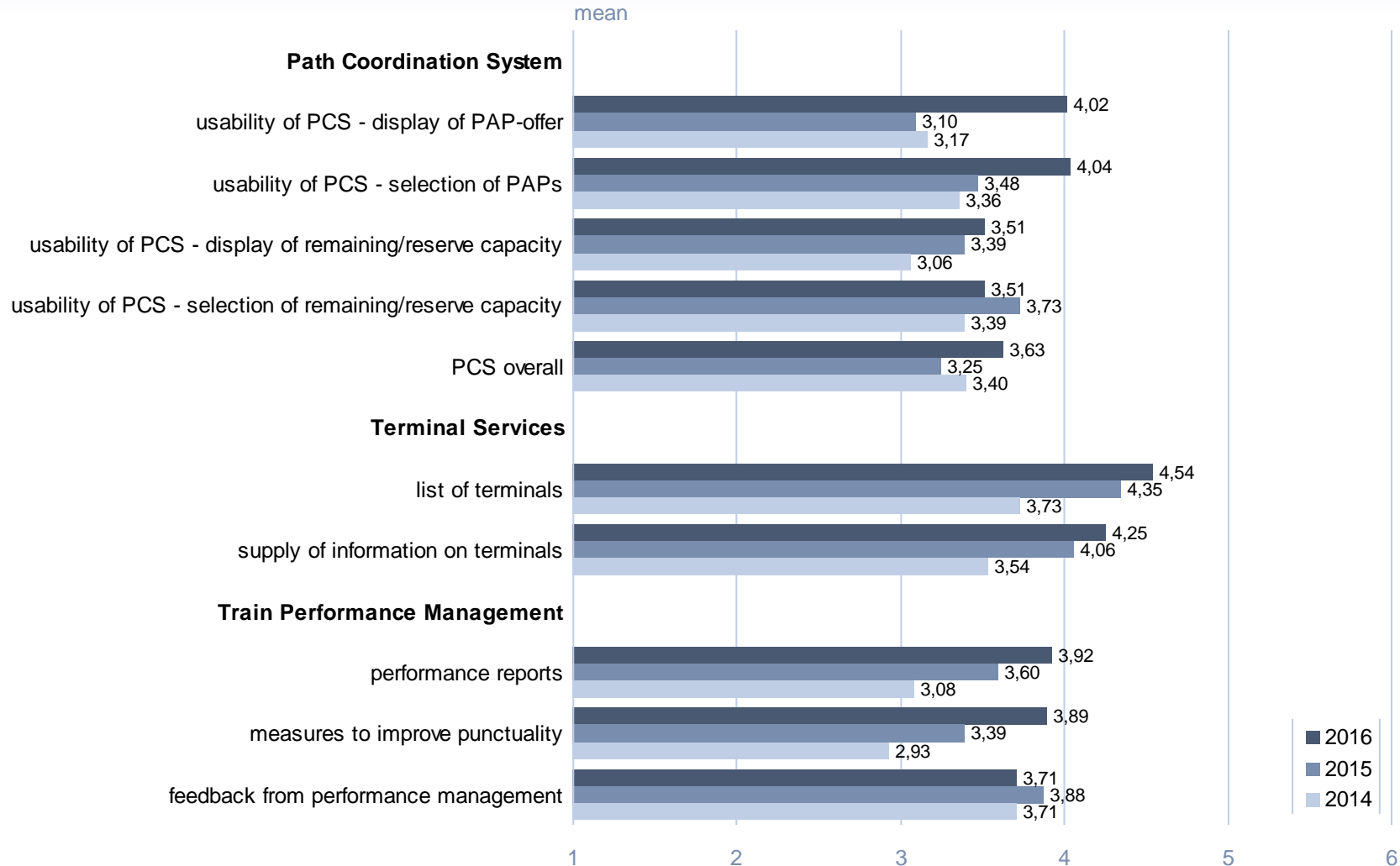






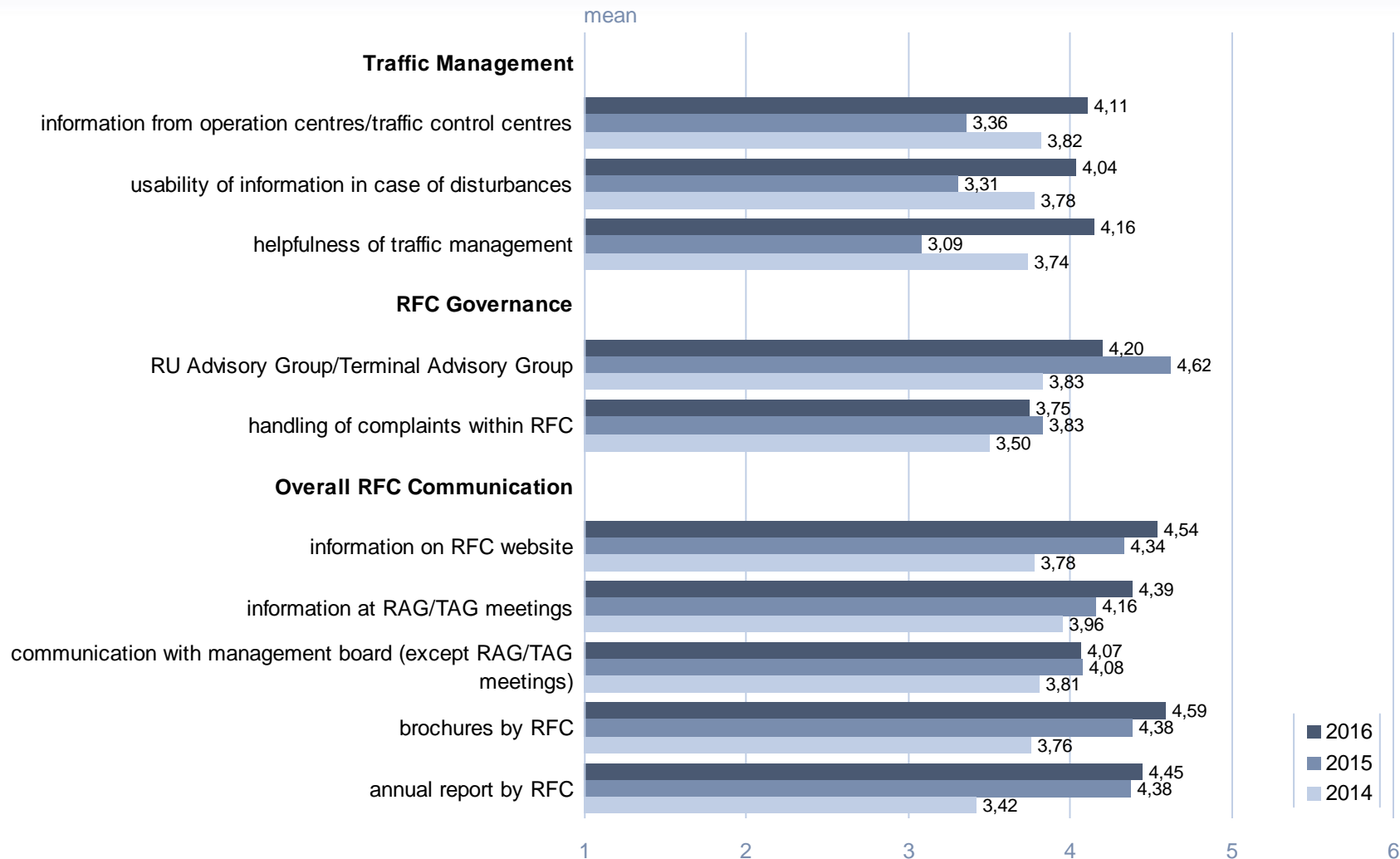
Attention: small sample sizes!





Attention: small sample sizes!





Attention: small sample sizes!



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