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**RFC7**  
Orient/East-Med

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# RFC User Satisfaction Survey 2018

## Summary

[www.rfc7.com](http://www.rfc7.com) | [www.rfc7.eu](http://www.rfc7.eu) | [www.corridor7.eu](http://www.corridor7.eu) | [coss@rfc7.com](mailto:coss@rfc7.com) | [secretariat@rfc7.com](mailto:secretariat@rfc7.com)

- 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 RFC OEM decided to join RNE RFC User Satisfaction Survey Common Platform in first year (2014).

## 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 becoming competitive in duration time, 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.

## 2018

- Main aims: to create a solid research base and to keep stability, therefore the fundamental conception was not changed
- GDPR 2016/679 EU (General Data Protection Regulation): those, who did not consent to forwarding of their contact data, cannot be included even in the field status report either (earlier we could list them detaching/separating from their answers). This made the follow-up calling process more cumbersome.
- There was only one (IT) among other planned RNE surveys which could have riskier cross coverage on target population and fieldwork timing with RNE RFC CSS, but its questionnaire was too short to mean serious jeopardy.
- The fieldwork of the fifth wave was conducted between 13<sup>th</sup> September and 12<sup>th</sup> October, 2018.

# 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 RFC OEM picture described by customer satisfaction.
- Presently 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 reflected real market phenomena, which validate the survey, thus it provides a good basis to reveal the main changes in RFC OEM's developmental path.

# Interview statistics

	Overall								
<b>Total interviews</b> (user + non user)	<b>68 (-8)</b>	<b>19 (-3)</b>	<b>19 (-2)</b>	<b>10 (-2)</b>	<b>10 (-4)</b>	<b>12 (-1)</b>	<b>21 (-6)</b>	<b>19 (+2)</b>	<b>15 (+/-0)</b>
Full interviews	65 (-7)	17 (-4)	17 (-3)	9 (+/-0)	10 (-3)	11 (-2)	21 (-5)	18 (+1)	13 (-1)
Partial interviews	3 (-1)	2 (+1)	2 (+1)	1 (-2)	0 (-1)	1 (+1)	0 (-1)	1 (+1)	2 (+1)

Only RFC OEM could increase both the number of interviews, and the response rate among corridor users: 65%\* (+3%).

**Our committed clientele is an important virtue.**

2018 (change from 2017)

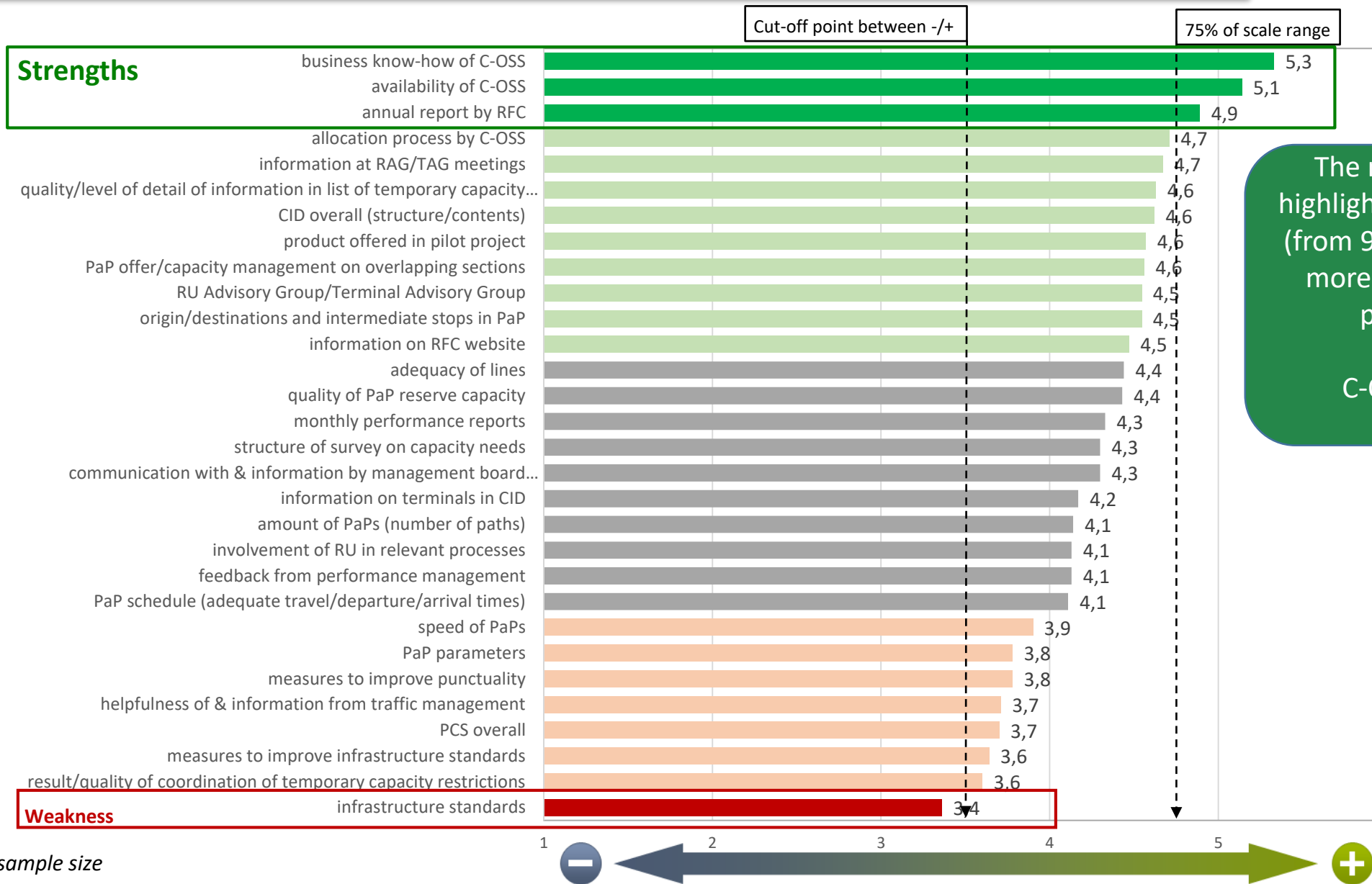
Respondents having evaluated more than one RFC are counted multiple times: 68 Total interviews ⇒ 125 evaluations

Source: marketmind RFC User Satisfaction Survey 2018 reports

RFC 7 additional analysis

\*Number of respondents who ordered capacity via C-OSS=11 / Total number of corridor users in 2018=17

# Summary - Satisfaction Rating



The number of RFC OEM's highlighted strengths decreased (from 9 to 3), but still there are more areas with favourable performance, than unfavourable. C-OSS performance is outstanding.

**Different interpretation**  
 (instead of top/bottom 10):

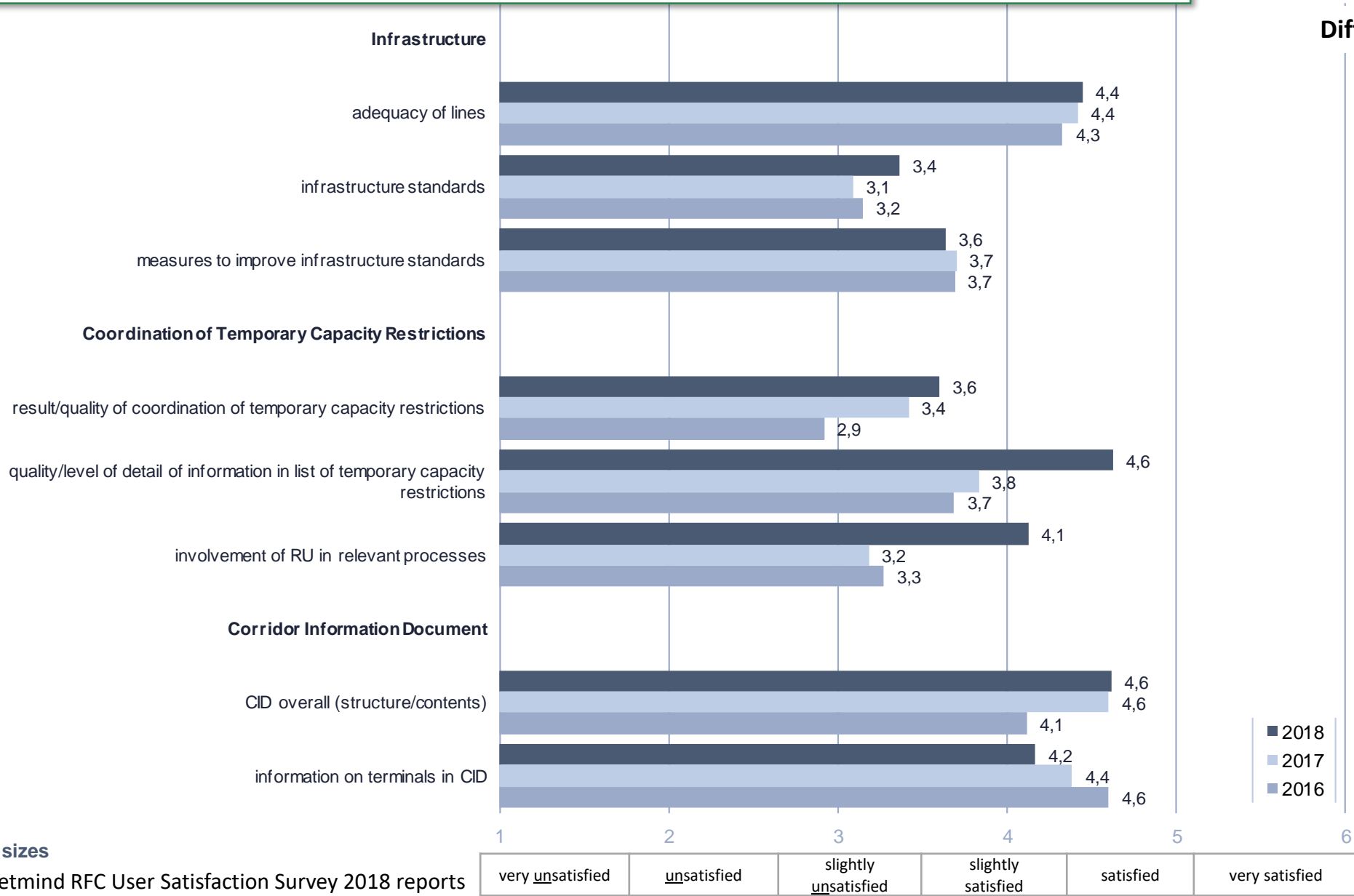
- Scale quartering in which the items in top quarter (above 75% of the scale) are the highlighted strengths
- Middle of the scale (3,5): substantial, turning point between dissatisfied and satisfied areas
- TB10 implies that we have 10 weaknesses ever – no development possibility
- TB10 implies that the number of our strengths and weaknesses are the same – it is not necessary

Small sample size

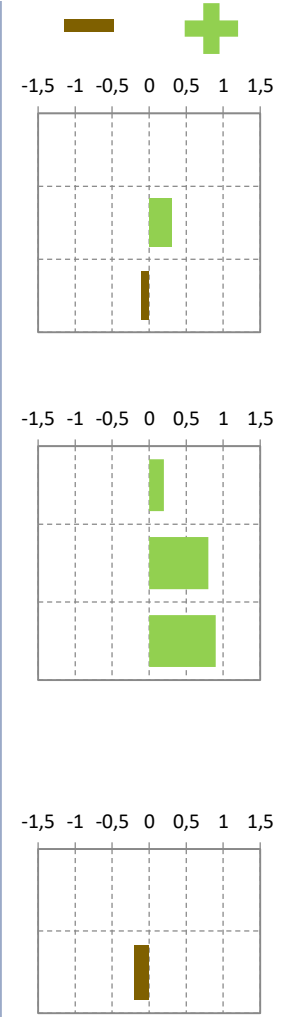
Source: marketmind RFC User Satisfaction Survey 2018 reports  
 RFC 7 additional analysis



# Summary - Satisfaction Rating - Comparison to 2017 (1)



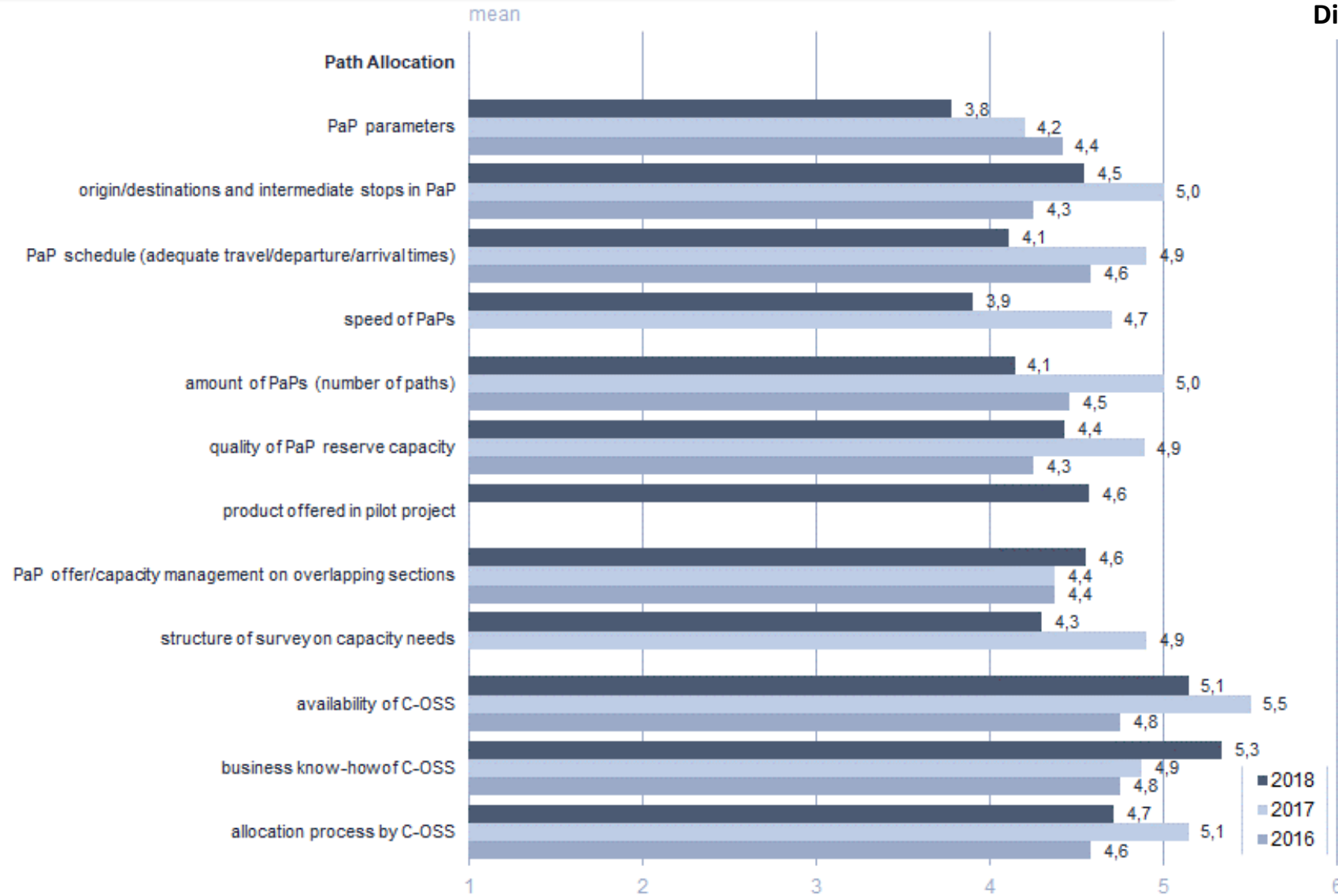
Difference: 2018 - 2017



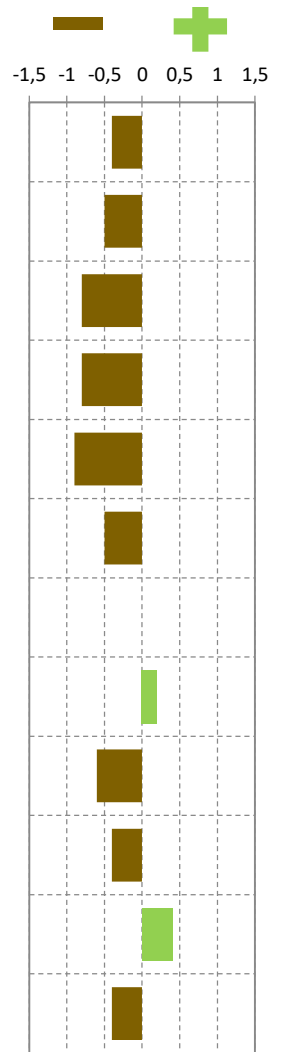
Small sample sizes

Source: marketmind RFC User Satisfaction Survey 2018 reports  
 RFC 7 additional analysis

# Summary - Satisfaction Rating - Comparison to 2017 (2)



Difference: 2018 - 2017



Small sample sizes

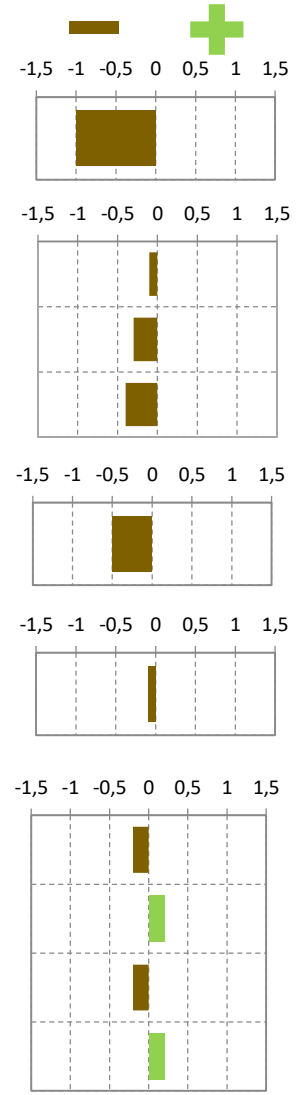
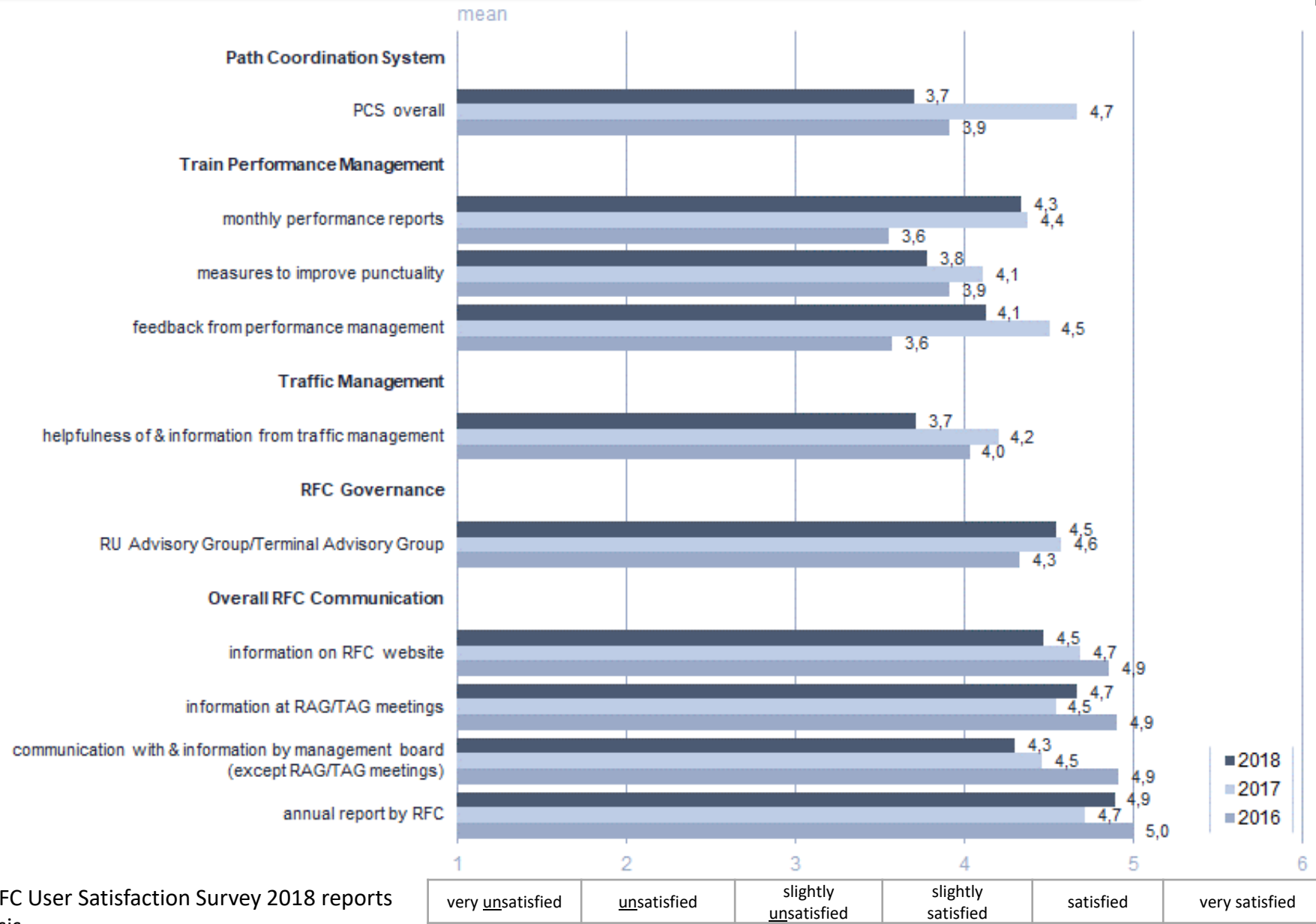
Source: marketmind RFC User Satisfaction Survey 2018 reports  
RFC 7 additional analysis

very <u>uns</u> atisfied	<u>uns</u> atisfied	slightly <u>uns</u> atisfied	slightly satisfied	satisfied	very satisfied
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# Summary - Satisfaction Rating - Comparison to 2017 (3)

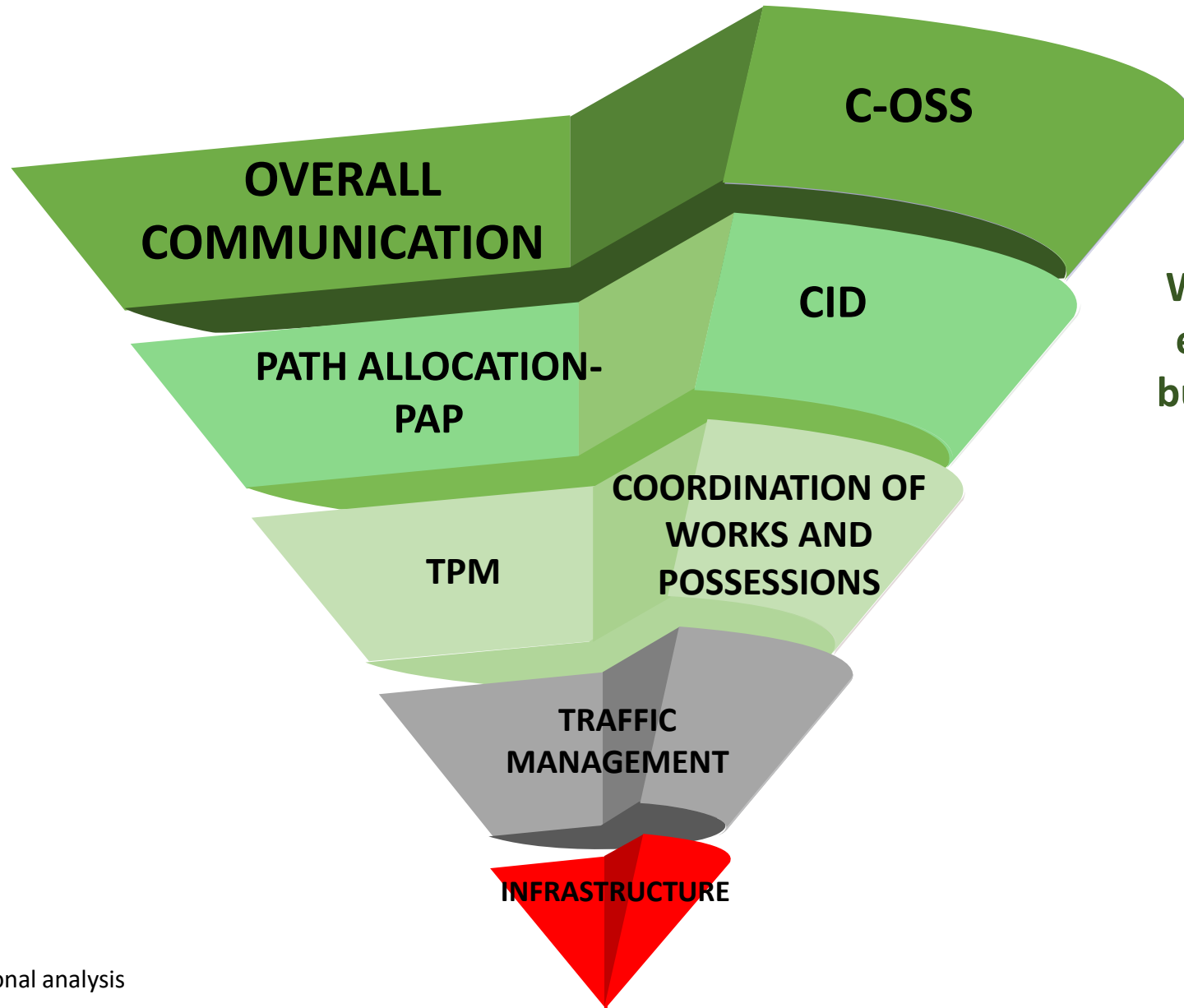
Difference: 2018 - 2017



Small sample sizes

Source: marketmind RFC User Satisfaction Survey 2018 reports  
 RFC 7 additional analysis

1	2	3	4	5	6
very <u>uns</u> atisfied	<u>uns</u> atisfied	slightly <u>uns</u> atisfied	slightly satisfied	satisfied	very satisfied



We have areas which keep its excellent performance level, but they cannot make stability without the good performance of other activities.



## Orient/East-Med Corridor 2018

- The positive tendency slightly has been changed, although even just keeping an outstandingly high performance level requires lots of efforts
- RFC OEM is still better than the Corridors Overall, however, Overall could be more improving
- RFC OEM performance did not decrease significantly, but it is very important signal for the operative corridor management to tackle with the outcome of the survey
- The effect of the hampering factors on south axis of the corridor can be perceived, RFC OEM has a wide range of feasible solutions
- RFC OEM is ready to act
- 2019: should be the year of more real tangible advantages

**Thank you for your attention**

**Any remarks, feedbacks, suggestions  
are very welcomed**

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