

Rail Freight User Survey: Final Report



OFFICE OF **RAIL REGULATION**



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1 Introduction

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1 Introduction

1.1 Background

This report presents the findings of a survey of rail freight customers carried out by AECOM on behalf of the Office of Rail Regulation (ORR).

The survey covers both existing and potential rail freight customers and was conducted in order to provide ORR with information about current levels of customer satisfaction with rail freight. It is also intended to create a benchmark against which ORR can measure satisfaction in light of developments in rail freight, to enable ORR to assess the extent to which its own policies continue to be relevant to those developments and to help ORR understand how its regulatory policies and decisions are impacting on the end-user.

This is the third such survey. The results of the two previous surveys were published in 2000¹ and 2003². Where appropriate we have compared findings from the current survey with these earlier surveys.

It is anticipated that two further freight customer surveys will be carried out during the period of ORR's current corporate strategy (2009-14).

1.2 Key Findings from 2009 Survey

This section provides a summary of some of the key findings from the survey:

- **Use of modes** - respondents to the survey indicated that their use of rail increased significantly over the last five years. While the current economic climate has depressed the freight market generally, it appears from respondents that rail has been less affected than other modes and there is potential for further growth if the market can deliver against key customer requirements;
- **Service attributes** - when asked to rate different service quality attributes in terms of importance and performance, overall, price was identified as the most important service quality attribute, followed by responsiveness to customer needs and reliability of service/journey time. However, although these attributes are seen by customers as the most important, they rank relatively low in the list by performance. It is this variance between expectation and performance delivery that marks these attributes out as key areas for service improvements;
- **Satisfaction with industry** - respondents were asked to indicate the level of contact they have had with various freight industry organisations and their level satisfaction with them. Generally, there was a high level of satisfaction (around 74% on average being either very satisfied or quite satisfied) with the freight industry organisations with which respondents were in regular contact – a significant increase on the satisfaction levels recorded in the 2003 survey;
- **Satisfaction with ORR** - the level of contact that respondents had with ORR was relatively low, and tended to be in connection with specific issues or policies. However, nearly half (46%) of the survey respondents were either very satisfied or quite satisfied with ORR's performance, with a further 48% neither satisfied nor dissatisfied.

¹ National Survey of Rail Freight Users: Summary of Results, August 2000, <http://www.rail-reg.gov.uk/upload/pdf/freight2.pdf>¹

² Rail Freight Survey Report, February 2003, <http://www.rail-reg.gov.uk/upload/pdf/freight-srf.pdf>

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With regard to things that ORR has done well, respondents were supportive of ORR's role in reducing access charges through the 2008 periodic review, delivering improved capacity and safety.

When asked what ORR could do more of, or do better, respondents pointed to specific areas for improvement, such as the 'slow and ineffective' transfer of access rights. There were also a number of comments suggesting that, in the future, ORR could facilitate improvements in the rail network, such as gauge enhancements, more terminals, streamlined train pathing administration, ensuring freight operators are treated fairly, improving cost transparency and assisting with information on the use of the network.

1.3 Methodology

1.3.1 Questionnaire Development

The questionnaire was developed from discussions with ORR and AECOM's study team. The questionnaire was based on the questionnaire used in the last freight survey carried out in 2002, suitably updated. It was piloted internally within ORR and AECOM's study team and externally with key industry representatives. The questionnaire was converted to a web survey using the software package SNAP and took approximately 20 minutes to complete.

The questionnaire contained five sections:

- **A - Introduction** - contact details, type of company, industry, modes used.
- **B - Transport Modes: Current Use** - type of goods lifted, whether company takes responsibility for choice of mode, or contractor, freight volumes lifted by mode and type of commodities lifted, change in use of modes, percentage lifted by road rail by distance, perception of rail competitiveness by distance, volume, and frequency.
- **C - Trends and Influencing Factors** - domestic freight – barriers, responsiveness to changing price of rail road, International freight to/from Europe – barriers, potential future use of rail, how often freight strategy reviewed.
- **D - Industry Performance** - importance and performance of different factors in use of freight mode, perceived service gaps, freight industry organisations – contact, satisfaction with.
- **E - ORR's Role and Performance** - attitudes towards ORR, confidentiality disclosure information, any other comments.

A full copy of the questionnaire is contained in Appendix A.

1.3.2 Survey Approach

A database of potential contacts was drawn up from known freight users and non users using sources such as ORR, Rail Freight Group, Freight Transport Association and other AECOM freight industry contacts. The first stage of the process was to make phone contact with a key person in the organisation who made decisions about choice of mode for freight movements. Respondents were told about the survey and asked for their email address so that the web survey link could be sent to them. They were also reminded that £5 would be donated to the Railway Children charity for every survey completed. Potential respondents were then sent the web survey link. On completion of the survey the information was emailed directly to AECOM for analysis. The survey took place between 19th October and 11th December 2009.

The response to the survey was lower than expected and consequently we used phone surveys to boost the survey, although most of those contacted by phone still preferred to complete the survey online.

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Of our original sample it was not possible to get a positive contact with 44 of these. In total, 51 responded thus giving a response rate of 51/157 or 32%.

A response rate of 32% for this type of survey is quite good. For example, a review carried out in 2009 by www.supersurvey.com of 199 online business surveys gave a mean response rate of 26%.

Although the sample is relatively small in terms of the total number of companies taking part, it does contain a substantial proportion of freight lifted in the UK, representing about half of the volume of rail freight lifted, and is therefore a good and representative sample of current users. It also provides a good cross-section of commodities lifted. Further information on the profile of companies taking part in the survey is shown in Chapter 2.

1.4 Structure of Report

Following this introduction, the sample profile is outlined in Chapter 2. The results of the survey are contained in Chapter 3 and our conclusions are outlined in Chapter 4. The questionnaire is contained in Appendix A. Some further tabulations (providing additional detail) are contained in Appendix B.

2 Sample Profile

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2 Sample Profile

This chapter outlines the profile of companies that took part in the survey. This includes respondent type, that is, whether they are a producer, logistics company, port or terminal operator or shipping line and whether or not the currently use rail. The type of industry in which the company is involved, and hence which types of products are lifted, is also outlined.

Given the total number of respondents that took part in the survey, the amount that the sample can be segmented into sub groups is limited. This is discussed further below.

Table 2.1 shows the sample split by type of user.

Table 2.1 User Type

User Type	Frequency (n)	Percent (%)
Producer/receiver of goods/services who use rail (user)	16	31
Logistics company (user)	12	24
Port operator (user)	8	16
Rail terminal operator (user)	5	10
Logistics company (non-user)	4	8
Producer/receiver of goods/services who do not use rail (non-user)	2	4
Rail terminal operator (non-user)	2	4
Port operator (non-user)	1	2
Shipping line (user)	1	2
Total	51	100

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Table 2.2 shows the type of industries covered by the sample. Respondents could give more than one answer which is why percentages sum to over 100. This shows that a good cross section of industries are represented in the survey.

Table 2.2 What Industry/Industries would you describe yourself as being in?

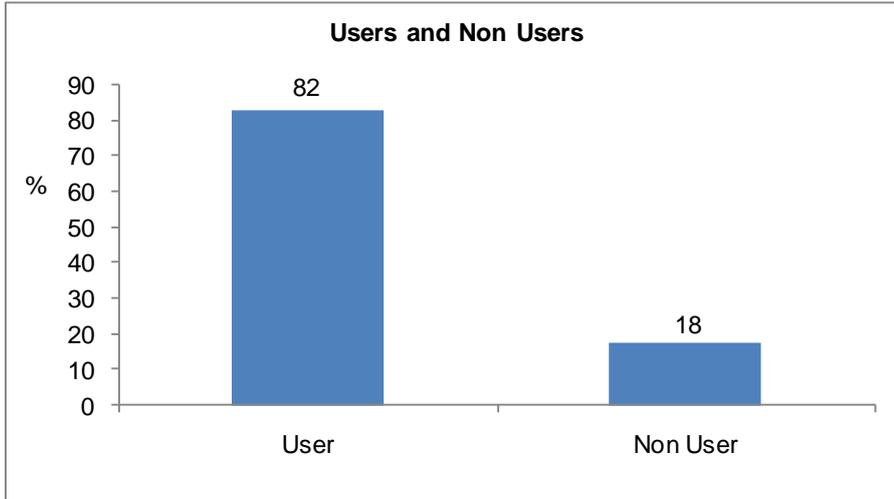
Company Industry	Percent (%)
Aggregates	33
Retail – food	33
Intermodal via Channel Tunnel and Deep Sea Container	31
General manufacturing	27
Domestic intermodal	25
Metals	24
Forest products/ timber	24
Minerals	22
Retail - non food	22
Coal	18
Chemicals	18
Scrap metals	18
Automotive – cars	18
Industrial minerals	16
Automotive – parts	16
Construction	16
Petroleum	14
Electricity (coal powered)	10
Domestic waste	6
Other	6
Electricity (nuclear powered)	2
Total (n)	51

The results in the next chapter have been broken down based on the following types of respondent, to illustrate how these may differ, although results are not significantly different:

- Use Rail - Users and Non Users. This breakdown is dominated by users, see Figure 2.1; and
- User Type – Goods Producer, Logistics Company, and Port/ Rail terminal operator. This breakdown gives an equal split between these categories, see Figure 2.2.
- Product Type – Bulk, Non Bulk and Both. This breakdown gives a relatively equal spread between these categories, see Figure 2.3.

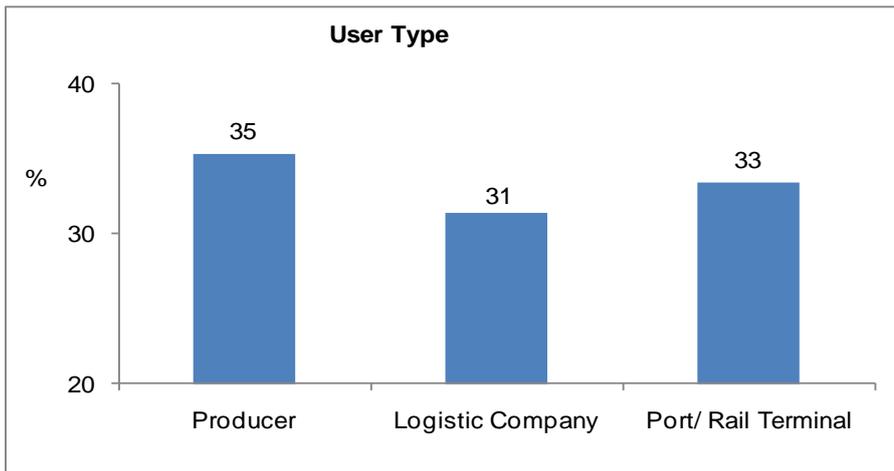
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Figure 2.1 User / Non User



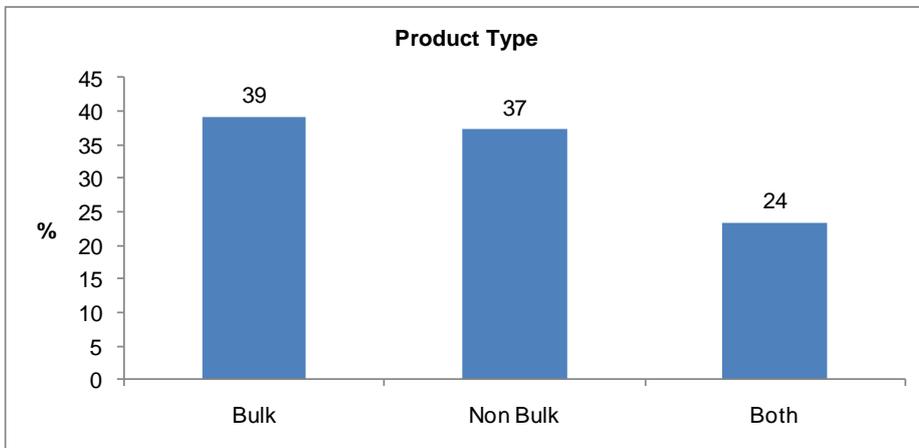
Base = 51

Figure 2.2 User Type



Base=51

Figure 2.3 Product Type



Base = 51

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Table 2.3 (below) summarises the volumes by mode used and units measured. Fuller information is contained in tables B1 through to B3 in Appendix B which show the volumes lifted by the companies surveyed.

According to this evidence, our sample represents 100 million tonnes and 1.8 million containers lifted by road, 56 million tonnes and nearly half a million containers lifted by rail, and 1.5 million tonnes and 2000 containers lifted by waterways, annually. This represents a substantial proportion of freight lifted in Great Britain, being about half of the volume of rail freight lifted, and is therefore a very good representative sample of current users.

Table 2.3 Annual Freight Lifted by Mode and Units of Measurement

Mode	Units	Total
Road	Tonnes	100 million
Road	Containers	1.8 million
Rail	Tonnes	56 million
Rail	Containers	450,000
Waterways	Tonnes	1.5 million
Waterways	Containers	2,000

In addition, our sample provides a good cross-section of commodities lifted. Table 2.4 summarises the commodities lifted by each mode (Tables B4 through to B9 in Appendix B provide further information on the range of commodities lifted by different modes).

Table 2.4 Main Commodities Lifted by Mode

Road	Rail	Air	Waterways	Pipeline	Coastal Shipping
Steel	Aggregates	Food	Aggregates	Fuel	Containers
Aggregates	Coal		Bulk Wine		Aggregates
Containers	Containers		Containers		Cement
Cars	Steel				Coal
Coal	Cars				Cars

This chapter therefore shows that, although the size of our sample is relatively small in terms of the total number of companies involved, it represents a significant proportion by volume of freight lifted in Great Britain and a good cross section of the freight industry by commodities lifted. The next section contains the key results from the survey.

3 Results

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3 Results

3.1 Introduction

As outlined in the previous chapter, in terms of the range of respondents and the amount of freight lifted, the survey provides a good representative cross-section of the rail freight industry in Great Britain today. However, differences in results between the different respondent types outlined in Chapter 2 are not statistically significant due to the small sample size. With a sample of 50 we can be 95% sure of accuracy plus or minus 14% (with a sample of 100 the 95% confidence interval would be +/-10%). This assumes a worse case response that is an answer which 50% of the sample share. Because of this we have concentrated on showing the results for the sample as a whole. Where of interest, differences by respondent type have been highlighted, even when they may not be significantly different statistically.

We have presented the results in percentage terms to facilitate ease of understanding and aid comparison with previous surveys but these must be read in the context of the size of the sample. We always show the base number of observations in each table so it is possible to calculate the actual number of observations involved. For example, in Table 3.1 below, 98% of respondent companies used road transport. This has a base of 50, so this is based on 49 observations. For some questions, respondents were able to give more than one answer. Where this is the case percentages may sum to more than 100%.

Where relevant, we have compared our results with the 2000 and 2003 surveys. The results of the 2003 survey were generally presented for different respondent types rather than for the overall sample. For comparison purposes we have calculated an overall score from the 2003 survey based on the simple average of the different segment scores.

We have also provided quotations made by survey respondents where relevant and have referenced the type of respondent as to whether they: Use Rail (User or Non User), Type of User (Producer, Logistics Company or Port/ Rail terminal operator) and Product Type (Bulk, Non Bulk or Both).

3.2 Transport Modes Used

Table 3.1 shows that the modes used by those who responded to the survey were mainly road (98%) and rail (88%). 38% used coastal shipping, 12% used waterways, 6% used air and 4% used pipeline. Again, companies may use more than one mode, which is why the percentages total more than 100%.

Table 3.1 Which of the following modes of transport do you use for your freight movements in the UK? (QA4a)

Modes of transport used for freight movements	Percent (%)
Road	98
Rail	88
Waterways	12
Coastal shipping	38
Pipeline	4
Air	6
Other	2
Total (n)	50

Multiple Response – respondents could provide more than one answer – totals sum to more than 100

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When asked about their main mode, Figure 3.1 shows that 66% of respondents use road and just under 30% use rail as their main mode of transport. This is broadly consistent with what was found in the previous surveys, the proportion using road in the 2003 survey being 65% and in the 2000 survey being 69%. Comparable information on the rail share for the 2003 survey is not available, however 25% used rail in the 2000 survey.

Figure 3.1 Which of the following modes of transport is your main mode for your freight movements in the UK? (QA4b)

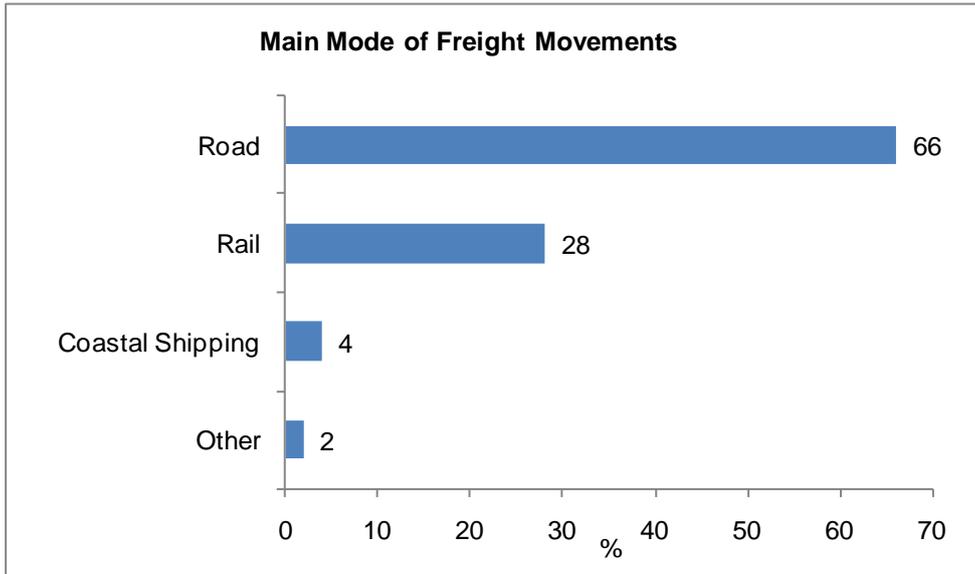
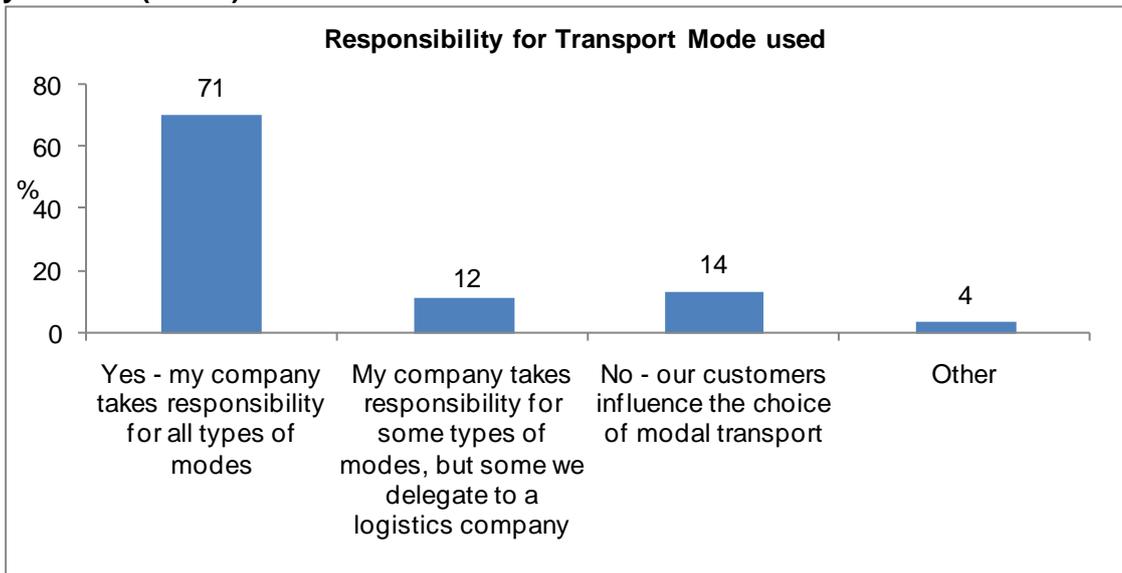


Figure 3.2 below shows that nearly three quarters (71%) of companies take full responsibility for the choice of transport mode used. A similar proportion (12% and 14%), take either some or no responsibility, respectively.

Of those companies who do not take full responsibility for all transport, 89% said their contract covered mode of transport, 78% said it covered acceptable level of reliability and only 22% said it covered returns policy. Respondents were able to give more than one response which is why the percentages total more than 100%.

Figure 3.2 Does your company take responsibility for selecting the type of transport mode that you use? (QB2A)



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3.3 Changing Use of Transport Modes

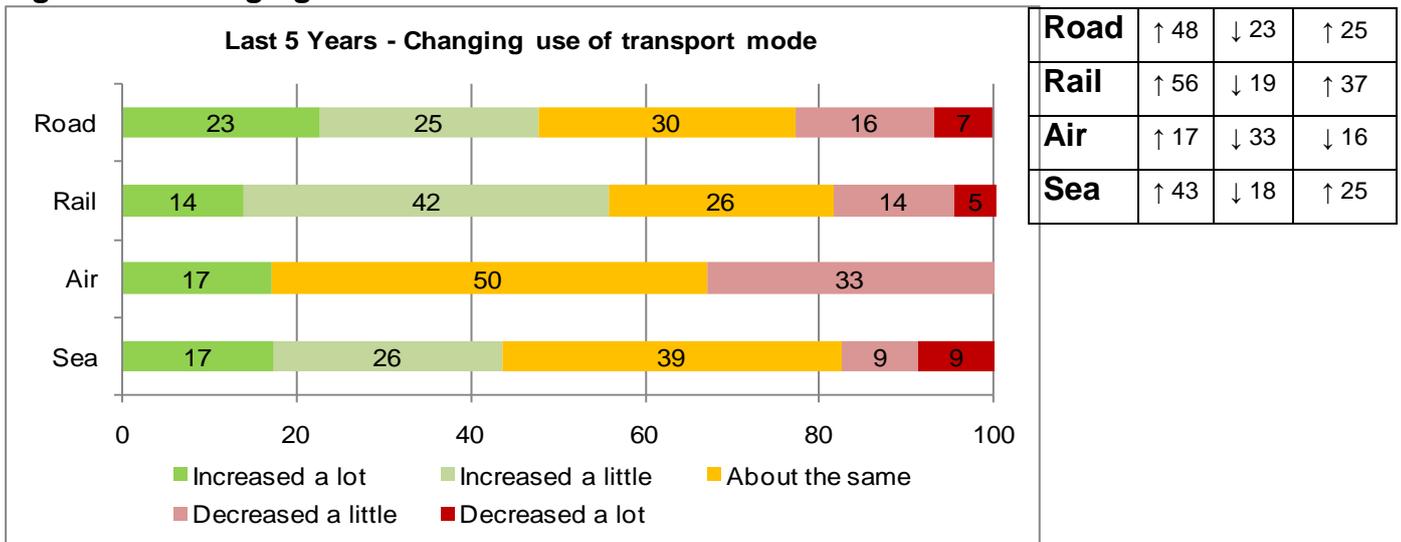
Figures 3.3 and 3.4 (below) show how respondents' use of different transport modes has changed generally over the last five years and, more specifically, in response to the recent economic climate. We have summarised the results by showing how the use of the various modes has changed in the separate table to right of the figure: the total that each has increased, the total that has decreased and the net change. For example, in Figure 3.3, road transport has increased for 48% (23+25) but reduced for 23 (16 and 7), giving a net increase of 25% (48-23).

3.3.1 Over the Last Five Years, How Much Would You Say Your Use of the Following Transport Modes Has Changed (Relative to Each Other i.e. share)? (QB4a)?

Figure 3.3 shows that over the last five years rail has seen a higher rate of growth than road. Rail has seen a net increase of 37%, road and sea have seen a net increase of 25% and air has seen a net decrease of 25%. This is consistent with the results from the 2000 and 2003 surveys.

The results for this study are much more positive than the norm for road, rail and sea but consistent for air freight. Nationally, 2008 saw a reduction in freight lifted due to the start of the "credit crunch" and high world fuel prices. As a consequence, some of the upward trends in freight lifted dropped back. So over the 5 years (2004 – 2008), rail only increased by 3%, road stayed the same, and sea (foreign and coastwise) reduced by 2% (source Transport Statistics for Great Britain, 2009, Department for Transport). Data was not available for 2009 apart from for air where a decrease of 13% was seen between 2005 and 2009 (CAA).

Figure 3.3 Changing Use of Modes over the Last Five Years



Base = 44 (Road), 43 (Rail), 6 (Air), 23 (Sea)

Respondents were asked to give reasons underlying these changes in use of mode and some of their comments are recorded below. Reasons for these changes include increasing awareness of rail as a greener mode, coupled with better rail facilities and improved rail services. For some, sea has grown because they are sourcing products internationally. Air, in particular, is perceived as not being green.

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As a business we are looking at all opportunities to move more freight onto rail where the economics allow (User_Producer_ Non Bulk)

Development of new railheads, and new contracts to service power stations. (User_Producer_ Bulk)

General increases in Road and Rail due to the growth in throughput of the port. Rail has grown very strongly due to customer demand and work done to accommodate more trains at the port. User_Port/ Rail terminal_ Bulk

Rail increased due to modal awareness User_Logistics Company_ Both

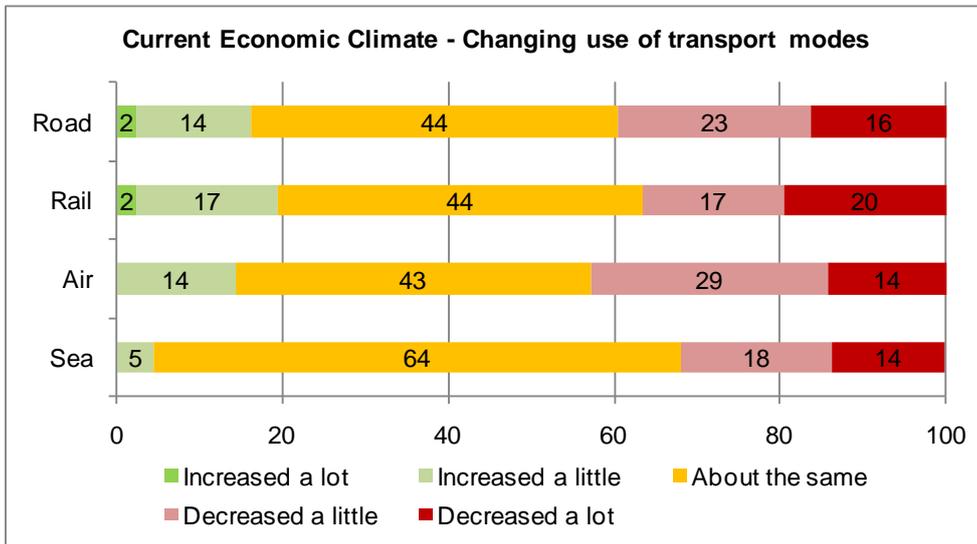
Rail, because we are constantly looking for not only the most cost effective solution, but the ecological benefit especially on the long distances such as Italy to UK. User_Producer_ Non Bulk

We continually analyse freight solutions looking for cheaper greener solutions. Cost is the driver. User_Logistics Company_ Both

3.3.2 As a Result of the Current Economic Climate, How Much Would You Say Your Use of the Following Transport Modes has Changed (Relative to Each Other i.e. share) (QB5a)

Figure 3.4 shows that the current economic climate has depressed the freight market in general and markets such as construction and car production in particular. This has had a negative impact on all modes, although rail appears to have been affected less than other modes. According to the responses to the survey, rail transport has seen a net reduction of 18%, road has seen a net reduction of 23%, sea has seen a net reduction of 27% and air has seen a net reduction of 29%.

Figure 3.4 Changing Use of Modes – Recent Economic Climate



Road	↑ 16	↓ 39	↓ 23
Rail	↑ 19	↓ 37	↓ 18
Air	↑ 14	↓ 43	↓ 29
Sea	↑ 5	↓ 32	↓ 27

Base = 43 (Road), 41 (Rail), 7 (Air), 22 (Sea)

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Again, respondents were asked to give reasons underlying these changes in use of mode and some of their comments are recorded below.

General market has deflated volumes/tonnage Rail decrease less due to additional rail outlets such as Olympic project 2009 & 2010. (User_Port/ Rail terminal_ Bulk)

Financial climate has reduced civil engineering and demand of aggregate. Also plenty of road transport to compete over shorter distances say up to 60 miles (User_Producer_ Bulk)

It is purely market driven for us, if manufacturers are selling and producing fewer cars then there is less demand for our transport services. (User_Logistics Company_ Bulk)

Road reduced due to economic climate - 10% vehicle reduction in 12 months (User_Logistics Company_ Both)

3.4 Freight Lifted Over Different Distances - Rail v Road

Figure 3.5 shows the percentage of freight lifted by road and rail for different distance bands, for the sample overall, and by bulk and non bulk.

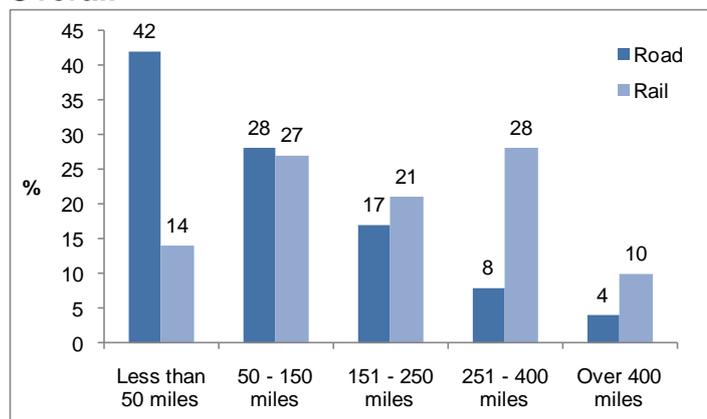
This shows that rail is used mainly for longer distances, particular those over 150 miles. A larger share of bulk freight is also lifted by rail for the 50 to 150 miles distance band as well as the over 400 miles distance band.

For short distance movements, of up to 50 miles, road has a much higher share than rail (42% compared with 14%). This is consistent with the two previous surveys. The equivalent figures in the 2003 survey were 34% compared with 14% and in 2000 they were 40% compared with 12%.

Conversely, for longer distance movements (of over 400 miles), rail has a higher share than road (10% compared with 4%). Again, this is broadly consistent with previous surveys. The equivalent figures for 2003 were 24% compared with 8% and for 2000 they were 16% compared with 8%.

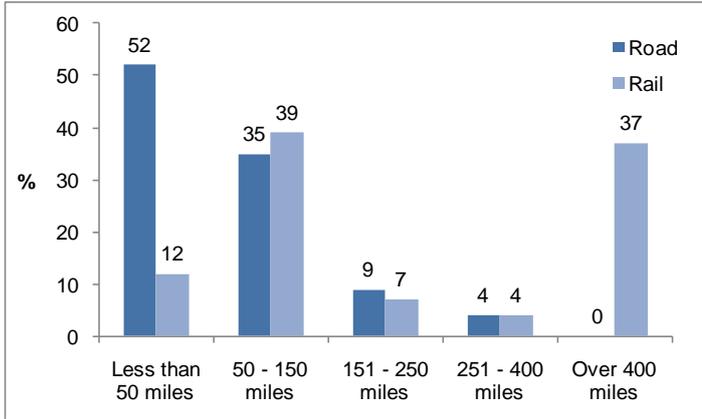
Figure 3.5 Share for Road/Rail by Distance - % of Freight Lifted by Distance Band (QB6)

Overall

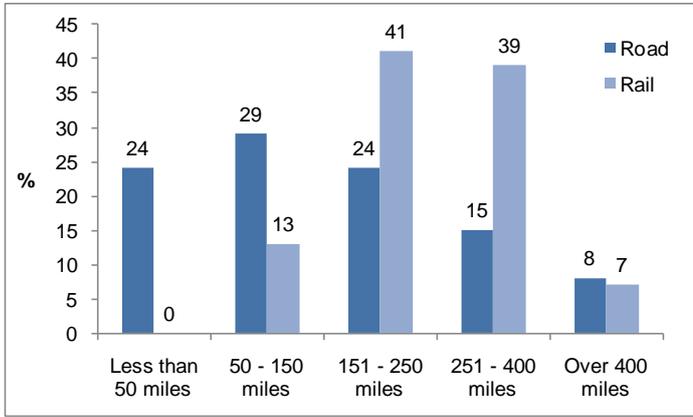


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Bulk



Non Bulk



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3.5 Competitiveness of Rail

Tables 3.3, 3.4 and 3.5 show the distance, volume and frequency at which rail was perceived to be competitive over other modes.

3.5.1 Competitiveness By Distance

Table 3.3 shows the distance at which rail was perceived to be competitive in relation to other modes. 21% of the respondents said that rail became competitive at 51-100 miles and 27% said over 251 miles. The distance at which rail becomes competitive is influenced by a range of factors including type of product lifted, the quantity being lifted, and the proximity of rail terminal facilities (if local, rail becomes competitive sooner). Bulk products tend to become competitive at shorter distances than intermodal but if rail wagons and terminals are used intensively, then non-bulk can be economic over relatively short distances. As a consequence, the distance at which rail becomes competitive may vary according to a number of other factors.

Table 3.3 Competitiveness – When Does Rail Become Competitive - Distance (Q7a)

Mileage at which competitive	Overall (%)	Bulk (%)	Non Bulk (%)
0-25 miles	11	13	11
26-50 miles	7	6	6
51-100 miles	21	50	6
101-150 miles	14	6	17
151- 200 miles	9	13	11
201-250 miles	11	13	11
>251 miles	27	0	39
Total (n)	44	16	18

The following quotations from respondents illustrate some of the reasoning behind this.

151-200 = Allows a round trip train per day using one set of wagons. Is helped by the grant systems (REPS) to compete with Road 200+ = Competes equally with road as much beyond 200 miles each way will be beyond the one day driving distance of a lorry. >251+ = Is more competitive than road (User_Port/ Rail terminal_ Non Bulk)

Dependant on the product and how it is loaded and or discharged and exactly where are the departure and arrival points, then almost any distance is possible (User_Port/ Rail terminal_ Both)

Answer varies depending upon volume, infrastructure required and whether aggregates are processed on site or just transhipped to final customer by road (User_Producer_ Bulk)

At 125 miles we think rail becomes competitive versus's road but this only works when a rail freight terminal is less than 5 miles from the start and end point of the journey (User_Producer_ Non Bulk)

For us this depends on a number of factors e.g. what are the road like for the road competition? How bigger a train can you run? How many cars will fit on the rail wagons? How much will the port charge to unload? etc. (User_Logistics Company_ Bulk)

The mileage varies dependant on whether either end is rail connected or both ends are rail connected. Both ends not connected need a distance of around 300 miles. One end connected 200 miles, both ends connected 100 miles. There are examples where the distance can be much less than above based on utilisation in both directions. (User_Logistics Company_ Both)

This is not an exact science and can also be dependent on product type carried, e.g. bulk or break bulk. (User_Port/ Rail terminal_ Bulk)

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3.5.2 Competitiveness by Volume

Table 3.4 (below) shows the volume at which rail becomes competitive compared with other modes. The largest number of respondents, 26%, said that rail becomes competitive at volumes over 2001 tonnes, although there was a wide range of views expressed. Again, the volume at which rail becomes competitive depends on a wide range of factors, such as type of goods lifted (for example, bulk products generally become competitive at a lower tonnage (201-500)), regularity of volumes, or the competing number of equivalent road movements.

Table 3.4 Competiveness – When Does Rail Become Competitive – Volume (QB7c)?

Volume at which competitive	Percent (%)	Bulk (%)	Non Bulk (%)
0-50 tonnes	17	7	25
51-100 tonnes	9	7	8
101-200 tonnes	6	0	0
201-500 tonnes	11	21	0
501-1000 tonnes	14	14	17
1001-2000 tonnes	17	21	17
> 2001 tonnes	26	29	33
Total (n)	35	12	9

Again, the following quotations illustrate some the respondents reasoning.

For intermodal it is necessary to have regular volumes of traffic to fixed destinations.

(Non-user_Port/ Rail terminal_ Non Bulk)

For our contract trains we need to aggregate volume over a route to justify running the rail service over the route. We need about 350 tonnes of freight to justify the service.

(User_Logistics Company_ Both)

It can be competitive on low load rates if the distance is sufficient and mixed trains are operating servicing a multitude of commodities such as the European multimodal services do.

(User_Producer_ Non Bulk)

At what point would we consider delivering an order by rail could be 0-50T if supply via an existing railhead. If order quantity is for tens of thousands we would look at rail opportunity for new site. (User_Producer_ Bulk)

Tonnage isn't necessarily the driving force, number of road moves is. You can have a product that bulks out before it weighs out, that has big volume.

(Non-user_Port/ Rail terminal_ Both)

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3.5.3 Competitiveness By Service Frequency

Table 3.5 (below) shows the frequency at which rail becomes competitive. Over 75% of respondents said that they required a daily service for rail to be competitive, although again this varies according to factors such as the type of goods lifted and customer expectations. Quotations illustrating these issues are given below.

Table 3.5 Competiveness – When Does Rail Become Competitive – Frequency (QB7e)

Frequency at which competitive	Percent (%)	Bulk (%)	Non Bulk (%)
3 or more times a day	13	17	11
Twice a day	3	0	0
Daily	78	75	83
Weekly	5	0	6
Monthly	3	8	0
Total (n)	40	18	10

Currently all services at the port run daily however there are people looking at weekly services now. (User_Port/ Rail terminal_ Non Bulk)

Better if several times a day but not essential. Less than daily sometimes OK if commodity not urgent/high value/short shelf life (User_Logistics Company_ Non Bulk)

For us a daily service is required to service our customer base (Non-user_Producer_ Bulk)

Have ticked daily but could be any depending on traffic pattern and customer requirements (User_Port/ Rail terminal_ Non Bulk)

We have depots supplied at all these frequencies! (User_Producer_ Bulk)

Capabilities on project:
Transportation

3.6 Main Domestic Barriers to Changing Mode to Rail

Table 3.6 shows the main barriers to using rail for domestic movements. The most cited barriers overall are access to the rail network and cost. To a lesser extent, route availability and availability of suitable rail equipment were also given as barriers. There is a general consensus about these barriers across the different market segments. Cost was by far the top rated barrier. Again, this is consistent with the 2003 and 2000 surveys.

Table 3.6 Main Barriers to Using Rail for Domestic Movements (QC8a)

	%
Overall	
Access to the rail network	71
Total costs	69
Route availability	55
Availability of suitable rail equipment (e.g. wagons)	51
Producers	
Access to Rail Network	78
Total Costs	67
Availability of Suitable Rail Equipment	50
Logistics Company	
Total Costs	69
Route Availability	69
Access to Rail Network	63
Port/Rail Terminal Operators	
Total Costs	71
Access to the rail network	71
Route availability	65
Users	
Total Costs	71
Access to Rail Network	67
Route Availability	52
Non Users	
Access to rail Network	89
Availability of Suitable Rail Equipment	78
Route Availability	67
Bulk	
Total costs	60
Access to the rail network	60
Availability of suitable rail equipment (e.g. wagons)	40
Non Bulk	
Access to the rail network	79
Route availability	79
Total costs	68
Location of logistic hubs	68

Multiple Response – respondents could provide more than one answer – totals sum to more than 100.

Capabilities on project:
Transportation

3.7 Price Sensitivity of Rail

Table 3.7 shows the impact on rail usage of different price increases for rail and for a competing mode (mainly road).

Companies were asked two questions:

- If the price of your main alternative to rail movements increased by the following amounts, how likely would you be to change to rail (QC9a); and
- If the price of your rail transport movements increased by the following amounts, how likely would you be to change your mode from rail (QC10a).

According to the responses to these questions, companies would be more sensitive to changes in the price of rail than to the price of the competing mode to rail (usually road). This indicates that the cross elasticity of the road price for rail users is lower than the own price elasticity for rail users. This is consistent with the results of the 2003 and 2000 surveys.

Table 3.7 Impact of Price Changes on Rail

Change in Price	% of Those likely to increase rail usage if price of alternative mode increases as shown	% of Those likely to reduce rail usage if price of rail increases as shown
Increase of 20%	75	82
Increase of 15%	65	83
Increase of 10%	33	75
Increase of 5%	15	43
No Change	7	3

The respondent quotations below provide some reasoning to illustrate these points.

Our transport rates have been engineered over many years to be very competitive and benchmarking shows we are industry leaders in logistics costs. Road transport prices would need to significantly increase to become uncompetitive (User_Producer_ Non Bulk)

The price increase would have to be seen as a long term increase. A large proportion of our volume is the last 10 miles to the customer, which would have to stay on road. (User_Producer_ Bulk)

The price of road freight is not the real driver in terms of moving freight onto rail but the rail infrastructure is not there to support many of our current routes and legs (User_Producer_ Non Bulk)

In response to QC10b (Which mode would you be most likely to switch to if you were to reduce the freight you transport by rail?), virtually all of the companies surveyed (97%) said that they would switch to road.

Capabilities on project:
Transportation

3.8 Transporting Goods to Europe

58% of the companies surveyed transported goods into/out of the UK from or via continental Europe (QC11a). The main modes used for this traffic are set out in table 3.8. By far the most common mode is sea (coastal shipping), which is used by 55% of the respondent companies. Just over 30% use road and a ferry crossing. Only 10% of those surveyed use road and the Le Shuttle. Rail freight through Channel Tunnel accounts for only 3%. This would appear to support a more generally held view that rail freight through the Tunnel is not currently achieving its full potential.

Table 3.8 What is the Main Mode of Transport That You Use? (QC11b)

Main mode of transport used	Overall
Sea (Coastal shipping)	55%
Road and a ferry crossing	31%
Road and use of the Le Shuttle service	10%
Rail freight through the Channel Tunnel	3%
Total (n)	29

Table 3.9 (below) shows the main factors perceived as preventing use of rail to/from continental Europe. Cost is by far the most important factor that respondents cite as preventing use of rail to/from Continental Europe, a finding that is common to the 2003 survey. Other key factors include overall service quality, location of customers, route availability and punctuality and reliability of journey. These factors are generally consistent across the different types of respondent.

Table 3.9 Main Factors Preventing use of Rail to/from Continental Europe (QC11c)

	%
Overall	
Costs	64
Overall service quality	31
Location of customers	22
Route availability	22
Punctuality and reliability of journey	22
Producers	
Costs	58
Route Availability	33
Location of Customers	25
Physical Nature of Goods	25
Logistics Companies	
Costs	69
Overall Service Quality	54
Punctuality and reliability of journey	38
Port/Rail Terminal	
Costs	64
Overall service quality	27
Punctuality and reliability of journey	27
Users	
Costs	66
Overall service quality	28
Punctuality and reliability of journey	24

Capabilities on project:
Transportation

	%
Non users	
Costs	57
Overall service quality	43
Route availability	43
Bulk	
Costs	67
Location of customers	33
Overall service quality	25
Response times	25
Non Bulk	
Costs	77
Route availability	38
Overall service quality	38
Punctuality and reliability of journey	38

Multiple Response – respondents could provide more than one answer – totals sum to more than 100

Quotations that illustrate some of these issues are provided below.

We could import material from France into Kent. Price is the only thing stopping it happening (User_Producer_ Bulk)

Lack of appropriate services (User_Producer_ Non Bulk)

Lack of suitable rail service on many routes and past poor reliability problems in France and to a lesser extent, Italy. Much better with open access operators but need more services and more routes - especially Germany and Italy (User_Logistics Company_ Non Bulk)

Rail does not have an effective common user service to/from Europe (User_Port/ Rail terminal_ Non Bulk)

We do use some rail to Italy out of Belgium and it works well because the product fits the needs- we would like to use it more but simply cannot due to quality of service required (Non-user_Logistics Company_ Non Bulk)

Capabilities on project:
Transportation

3.9 Future Use of Rail

Table 3.10 (below) shows respondents' predicted future use of rail freight based on responses to the following two questions:

- Assuming that there are no significant changes in the overall service provided by rail what percentage of your transport movements would you expect to move by rail in the future (QC12a); and
- If the overall service provided by rail is improved to meet all of your key requirements what percentage of your total transport movements would you consider moving by rail in the future? (QC13a).

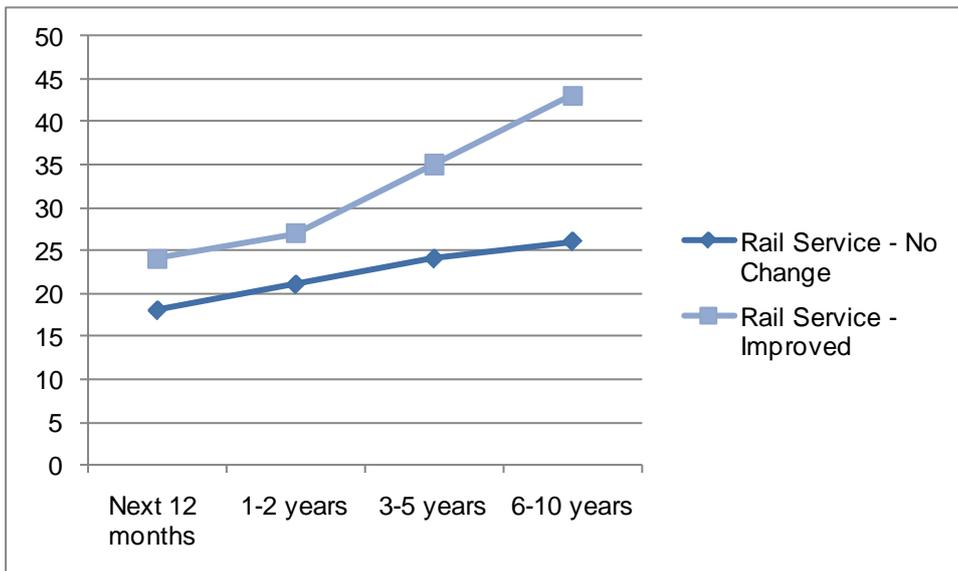
This shows that even with no increase in the rail service offer, respondents expect their use of rail to rise from 18% in the next 12 months to 26% in 6-10 years, an increase of 8%. If the rail service is improved to meet all key requirements this rises to 24% in the next 12 months and to 45% in 6 to 10 years, an increase of 21%. This represents a 27% increase over the share predicted for the next 12 months based on no improvement in the overall service provided by rail.

Table 3.10 Expected Future % Transport Movements to be Moved by Rail (QC12a & QC13a)

	Rail Service No Change Median %	Rail Service Improved Median %
Next 12 months	18	24
1 – 2 Years	21	27
3 – 5 Years	24	35
6 – 10 Years	26	45

This is shown graphically in Figure 3.6 (below) and shows that, according to the respondents, there is considerable potential to grow the rail freight share of the market. This is supported by the reasons given by respondents for this underlying growth as highlighted by the quotations presented on the next page.

Figure 3.6 Stated Future Use of Rail



Capabilities on project:
Transportation

Expected increase in rail competitiveness (User_Port/ Rail terminal_ Non Bulk)

Hope to have new rail capacity at Tilbury. Economic and environmental pressure.

(User_Port/ Rail terminal_ Non Bulk)

No reason why rail should not continue to grow but will grow faster if more competitive and better range of services (Logistics Company_ Non Bulk)

Our company only move freight by rail. We only go for volumes that would make it worthwhile moving goods by rail. (User_Logistics Company_ Bulk)

Rail access and suitability of routes is key issue, also the ability of rail to meet our demands on service and other KPIs (User_Logistics Company_ Both)

We would expect our rail share to increase over the period, in part for a reduction in environmental impact and as aggregate sources reduce closer to areas of use. (User_Producer_ Bulk)

If the correct height equipment was available at the right cost and there were route matches we would convert to rail on a number of our longer distance routes (Non-user_Producer_ Non Bulk)

More container movement by rail to strategic rail heads would make sense, once the infrastructure can cope. (User_Logistics Company_ Both)

No reason why rail should not continue to grow but will grow faster if more competitive and better range of services(User_Logistics Company_ Non Bulk)

We would be able to encourage a shift from road to rail sooner, which would be very advantageous (Non-user_Port/ Rail terminal_ Both)

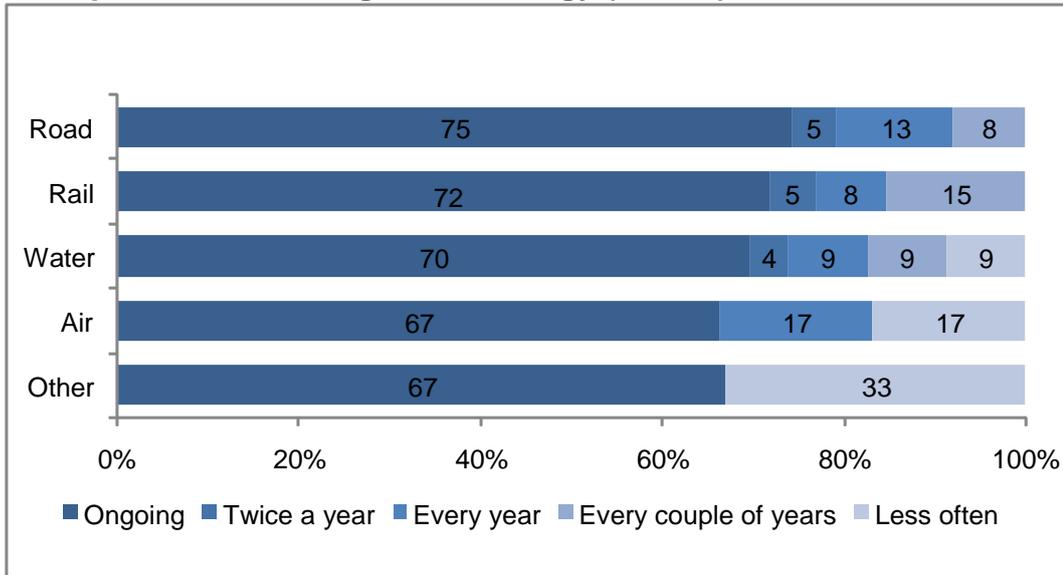
We would love to stop running trucks, if we could we would but I bet we won't. (Non-user_Logistics Company_ Non Bulk)

Capabilities on project:
Transportation

3.10 Frequency of Strategy Review

Figure 3.7 shows the frequency that respondents' freight/logistic strategy is reviewed in relation to different modes. This shows that for between two thirds and three quarters of respondent companies the strategy is reviewed on an ongoing basis. This is consistent with the findings of the 2003 survey. For road and rail this is over 75%, for other modes it is around 67%.

Figure 3.7 How Frequently Do You/Your Logistics Company Review Your Freight Transport Provision/Logistics Strategy (QC14a)



Base – 40 (Road), 39 (Rail), 23 (Water), 6 (Air), 3 (Other)

The following quotes elaborate on these results.

Third party logistics is an ever changing world, one change in the supply chain can result in a need for modal shift (User_Logistics Company_ Both)

A business requirement to continually review. (User_Logistics Company_ Bulk)

Always need to seek optimum opportunities to provide service at competitive price and with reliability (User_Producer_ Bulk)

Because the profitability is so marginal we have to continually look to find the most economic logistical mode. (User_Logistics Company_ Bulk)

The margins in our product are so slim we have to keep all options open, especially in an economical climate that sees Fuel prices escalating and exchange rates shifting against our favour. (User_Producer_ Non Bulk)

We review it daily looking for the most cost effective and reliable way to transport goods to Europe (User_Port/ Rail terminal_ Both)

We review strategy annually to generate savings and environmental plans.

(Non-user_Producer_ Non Bulk)

We set our budgets annually.(User_Producer_ Bulk)

Capabilities on project:
Transportation

3.11 Industry Performance - Perceived Importance and Performance

Respondents were asked to rate different service quality attributes in terms of importance and performance (QD15a and QD15b).

Tables 3.11 and 3.12 (below) show the most important service characteristics overall and by respondent type. These are scored on a 1 to 10 scale, where 1 is extremely unimportant and 10 is extremely important. Overall, price is the most important service characteristic, followed by responsiveness to customer needs and reliability of service/journey time. Although there is some variation in relative importance when viewed by respondent type, the same service characteristics are generally identified.

Table 3.11 Overall Importance Scores

		Mean	Valid N
1	Price	8.24	42
2	Responsiveness to customers needs	8.10	41
3	Reliability of service/ journey time	7.80	40
4	Overall service quality	7.71	41
5	On-time delivery	7.71	41
6	Available capacity on the network	7.66	38
7	Flexible service	7.45	38
8	Effective recovery strategies	7.38	39
9	Equipment quality	7.37	35
10	Ease of access to information	7.29	35
11	Security of goods in transit	7.18	38
12	Environmental considerations	7.07	40
13	Total journey time	6.87	38
14	Past track record	6.16	32
15	Rail freight experience	5.94	36
16	Added value services (e.g. tracking)	5.79	34

Capabilities on project:
Transportation

Table 3.12 Importance Scores by Respondent Type

	Importance Measured on 10 point scale: 1 Extremely Unimportant 10 Extremely Important
Producer	
Responsiveness to customer needs	8.23
Overall Service Quality	7.77
Price	7.62
On Time Delivery	7.62
Logistics Company	
Ease of Access to information	8.36
Security of goods in transit	8.36
Environmental Concerns	8.21
Reliability of Service/Journey Time	8.20
Price	8.19
Port/Rail Terminal	
Price	8.92
On Time delivery	8.33
Responsiveness to customer needs	8.31
User	
Price	8.00
Responsiveness to customer needs	7.91
Overall Service Quality	7.50
Non User	
Price	9.43
Reliability of Service/Journey Time	9.29
Responsiveness to Customer Needs	9.17
Bulk	
Responsiveness to customers needs	7.69
Price	7.44
Flexible service	7.2
Non Bulk	
Responsiveness to customers needs	8.33
Price	8.69
Flexible service	7.54

Capabilities on project:
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Table 3.13 shows the performance scores for the different service attributes. These are scored on a 1 to 10 scale where 1 is extremely poor and 10 is extremely good.

Table 3.13 Performance Scores

Performance Rank	Importance Rank		Mean	Valid N
1	12	Environmental considerations	7.65	37
2	5	On-time delivery	6.95	38
3	4	Overall service quality	6.79	38
4	11	Security of goods in transit	6.76	38
5	13	Total journey time	6.68	38
6	9	Equipment quality	6.68	37
7	3	Reliability of service/ journey time	6.67	39
8	15	Rail freight experience	6.53	38
9	14	Past track record	6.00	36
10	1	Price	5.93	40
11	6	Available capacity on the network	5.66	38
12	2	Responsiveness to customers needs	5.39	38
13	10	Ease of access to information	5.39	38
14	8	Effective recovery strategies	5.34	38
15	7	Flexible service	5.00	39
16	16	Added value services (e.g. tracking)	4.85	34

Comparing Tables 3.11 and 3.13 it is interesting that the service attributes are scored differently for importance and performance. Overall, performance scores are lower than the importance scores and the most highly scoring performance characteristics are not those viewed as being most important. For example, price is the most important service attribute yet it is ranked 10th in terms of performance. The gap between the importance and performance score gives an indication of priorities for improvement. This is discussed in the next section.

3.12 Priorities for Improvement

AECOM has developed a measure called Priority Index which compares the importance and performance scores and produces an index which identifies priorities for improvement based on the gap between these scores. It is calculated by subtracting the importance score from the performance score and multiplying this by the importance score. Because performance scores are generally lower than importance scores, this calculation gives a negative score, so this is multiplied by minus one to turn this into a positive index. The higher the Priority Index score, the bigger the priority for improvement.

Capabilities on project:
Transportation

Table 3.14 shows the top overall Priority Index scores. These scores have been calculated from importance and performance scores reported in the survey (see above). This shows responsiveness to consumer needs is perceived by respondents as having the highest priority for improvement, followed by price, flexible service, available capacity on the network, and effective recovery strategies.

Table 3.14 Overall Priorities for Improvement - Priority Index scores

	Priority Index = (Importance –Performance) * Importance *-1
Overall	
Responsiveness to Customer Needs	24.97
Price	23.44
Flexible Service	21.57
Available Capacity on the network	21.34
Effective recovery strategies	19.36

Respondents were also asked separately and independently which service quality characteristics they perceived to contain the key gaps between their expected performance and their perceived importance. The top characteristics are shown in Table 3.15 (below). This also shows the proportion of respondents giving that answer.

Table 3.15 Stated Service Quality Gaps (in terms of the rail freight industry which of the following factors have the biggest negative gap between the service delivered (ie performance) and Your Expectations (ie importance) (QD15c)

	% of Responses
Price	52
Flexible service	41
Reliability of service/ journey time	32
Responsiveness to customers needs	30
Effective recovery strategies	25
Available capacity on the network	25

Multiple Response – respondents could provide more than one answer – totals sum to more than 100

This shows a very close correspondence between the answers to QD15c and the Priority Index analysis in terms of priorities for improvement, although the results were derived using very different methods. The Priority Index scores are calculated from importance and performance scores whereas the stated quality gaps are provided directly from the survey. This provides an excellent validation of the Priority Index methodology.

Capabilities on project:
Transportation

Table 3.16 explores differences in Priority Index scores by respondent type. While there are one or two minor differences, statistically they are not significantly different.

Table 3.16 Priority Index Gaps by Respondent Type

User	Priority Index
Responsiveness to customers needs	24.67
Price	24.53
Flexible Services	21.39
Effective recovery strategies	20.55
Available capacity on the network	20.50
Non User	
Responsiveness to customers needs	27.50
Available capacity on the network	26.40
Flexible service	23.00
On-time delivery	22.50
Ease of access to information	22.25
Producer	
Responsiveness to customers needs	31.84
Flexible service	28.85
Overall service quality	19.31
Available capacity on the network	19.23
Price	17.69
Logistics Provider	
Price	23.46
Ease of access to information	22.55
Effective recovery strategies	19.25
Flexible service	15.80
Added value services (e.g. tracking)	15.38
Port/Terminal Operator	
Effective recovery strategies	29.75
Price	29.15
Available capacity on the network	28.62
Responsiveness to customers needs	27.69
Ease of access to information	20.58
Bulk	
Responsiveness to customers needs	21.53
Flexible service	21.07
Price	20.31
Available capacity on the network	13.57
Overall service quality	13.44
Non Bulk	
Price	21.92
Available capacity on the network	21.91
Effective recovery strategies	20.92
Responsiveness to customers needs	19.42

Capabilities on project:
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For producers, responsiveness to customer needs has the biggest gap, whereas price is the fifth biggest gap. Other service quality aspects such as flexible service and service quality are higher priorities for improvement.

For logistics providers, price is the most important priority for improvement with other service aspects such as information and recovery strategies also priorities for improvement.

For port operators, effective recovery strategies are the most important priority for improvement. If something goes wrong the port operators are likely to bear the brunt of operational difficulties, so an effective recovery strategy is the most important service aspect for this group.

For respondents involved in bulk industries, responsiveness to customer needs is the most important priority for improvement, followed by flexible service and price.

However, for those in non bulk industries, price is the most important area for improvement, followed by available capacity on the network and effective recovery strategies.

Below are some quotes which relate to the key priorities for improvement for rail freight.

Responsiveness to Customer Needs

The rail provider mentality is still set in the bulks side of the business and there is a failure to understand the nature of containerised traffic. (Non-user_Port/ Rail terminal_ Both)

Our customers order less than one day in advance but rail networks require plans and commitment 7-10 days ahead (User_Port/ Rail terminal_ Bulk)

Rail operators - with one or two exceptions - have still not got the message about speed of response. They miss business opportunities by taking so long - the need has passed by the time they 'get around to it'. (User_Logistics Company_ Non Bulk)

Railways are inherently not as flexible as the road industry. Expectations of what rail can do to be flexible are too high. (Non-user_Port/ Rail terminal_ Non Bulk)

The overriding thing is that we are very much "service driven". Our customers expect deliveries on time. There are often hold-ups/failures using rail freight. (User_Logistics Company_ Both)

The whole system is too rigid in its operation to respond in line with rapidly changing needs (User_Producer_ Bulk)

Price

The total price for rail includes so many factors and they are not controlled by one body and there is always the hidden extra in land rental or fuel surcharges for example, or trains have to run at odd hours which means we staff to suit passenger railway (User_Producer_ Bulk)

All businesses compare the rail cost to road and regardless of any other factor will not pay more than road that is used as the standard. (User_Port/ Rail terminal_ Both)

Bulk movement of goods together from A to B must be greatly more cost effective, although the double handling from Road to Rail and Rail to Road is inevitably going to cost more. (User_Producer_ Non Bulk)

European vehicles delivering in the UK will deliver goods back into Europe for the price of their ferry and fuel costs (User_Port/ Rail terminal_ Both)

Capabilities on project:
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In most cases of requesting prices, the rail price has exceeded our road price (Non-user_Producer_ Non Bulk)

It is our experience when costing various ways that the combined service is too dear as opposed to road. None of our customers are rail connected. (User_Producer_ Bulk)

Often the price quoted for rail movements is greater than current road price (User_Producer_ Non Bulk)

People expect bulk movement of traffic to be cheaper by rail but the margin is actually very small as rail users' road pricing as its leader. (Non-user_Port/ Rail terminal_ Non Bulk)

Rail needs to be more price competitive to win significant share of general haulage business under 200 miles (User_Logistics Company_ Non Bulk)

The ability of rail to compete with road, taking into account transshipping and local delivery costs constrains rail use. (User_Producer_ Bulk)

The overall price is what secures getting traffic moved on to the rail network. Very much price sensitive. The road delivery element at each end of the journey can make all the difference. (User_Logistics Company_ Bulk)

Flexible Service

As a retailer we need a 7 day service (User_Producer_ Non Bulk)

By its very nature rail is less flexible than road. For road access to the network is not controlled people just turn up and go as they please this will never be possible for rail. Plus for us building via trains requires 150-200 units for a single destination whereas you need just 10 cars for a viable truck load. (User_Logistics Company_ Bulk)

Difficult to match flexibility of road (User_Port/ Rail terminal_ Non Bulk)

Have to book 10 days in advance and can't really recover within 3-5 days. Road instantaneous and much more flex. (User_Port/ Rail terminal_ Bulk)

Must be 7 day regular service (User_Logistics Company_ Non Bulk)

Planning and programming of trains, securing wagon resources, learning load securing guidelines, meeting fixed timetables, suffering from engineering delays, track repairs, equipment failure, all makes for a pretty inflexible service compared to road transport (User_Producer_ Bulk)

Road is ultimately flexible. Rail services operators inevitably less so - but strive to get closer to road hauliers (User_Logistics Company_ Non Bulk)

There is very little flexibility with rail. Once on the train little opportunity to change until arrival. If wagon has a failure difficult to recover. If route has an issue alternatives are difficult due to varied gauge ability on diversion options. (User_Logistics Company_ Both)

Transit times are not as fast as required (User_Port/ Rail terminal_ Non Bulk)

We are partly in a winter supply business where one day is vastly different to the next and demand is extreme for short periods. Rail does not have the ability to respond either pathing or equipment i.e. wagons (User_Producer_ Bulk)

We operate in a changing market. Rail likes the same thing to happen week after week. (User_Producer_ Bulk)

Capabilities on project:
Transportation

Available Capacity on the Network

At times can be issue with capacity of Network out of Immingham, however none of the above are major impediments (User_Port/ Rail terminal_ Bulk)

Increased passenger services and therefore more weekend and night maintenance affecting routes (User_Producer_ Bulk)

Insufficient rail freight terminals to load and unload (User_Producer_ Non Bulk)

Loading opportunities are limited. (User_Producer_ Bulk)

More capacity is required on the network for Freight - If the capacity was there across the network it would be used. (User_Port/ Rail terminal_ Non Bulk)

No route capacity at short notice.(User_Producer_ Bulk)

Paths are limited at certain times of the day (User_Port/ Rail terminal_ Non Bulk)

There are pinch points on the network that are concerning regarding ability to cope with growth. (User_Logistics Company_ Both)

Very frustrated with lack of Gauge clearance for HCD container equipment considering this is the de facto equipment type for F/E trade!!! Nonsense! (User_Port/ Rail terminal_ Non Bulk)

Effective Recovery Strategies

Alternative routes are not always available when lines are blocked User_Port/ Rail terminal_ Non Bulk

For example if a train breaks down you will need to wait for a suitable path once the train has been repaired. If the same happened to a truck once it is repaired you can continue your journey straight away. (User_Logistics Company_ Bulk)

The volume of material delivered on a single train makes rail more sensitive and therefore more difficult to recover from a single failure to supply. (User_Producer_ Bulk)

There does not appear to be contingency plans for failure, and there is still the expectation that the customer will pay for failure (Non-user_Port/ Rail terminal_ Both)

Things will go wrong for all of us at times not easy to recover from a train that has been cancelled (User_Producer_ Bulk)

When things go wrong, it is very difficult to correct. (User_Producer_ Bulk)

3.13 Contact and Satisfaction with Freight Industry Organisations

Table 3.17 below shows the level of contact that respondents have had with different freight industry organisations and shows that most (82%) have had regular contact with road based logistics companies, 60% with Trade Associations (eg RFG, FTA, BIFA) , 55% with Port Operators and 50% with Terminal Operators. Of the rail freight operating companies, DB Schenker is the company with which respondents have had the most contact, followed by Freightliner Heavy Haul, GBRF, Freightliner Ltd, DRS, Victa Railfreight, Fastline Freight and Colas. Only 23% of respondents have had regular contact with ORR and 45% have had no contact at all with ORR.

Capabilities on project:
Transportation

Table 3.17 In the last 12 months or so, how much contact have you had with each of the following organisations/ types of organisation in connection with issues related to the transport of freight? (QD16)

Organisation	Level of contact (%)			Total (n)
	Regular contact	Single/ occasional contact	No contact at all	
DB Schenker Rail	69	19	13	48
Direct Rail Services	18	23	59	39
Fastline Freight	5	24	71	38
Freightliner Ltd	21	26	54	39
Freightliner Heavy Haul	33	15	51	39
GB Railfreight Ltd (GBRF)	27	37	37	41
Victa Railfreight	15	18	67	39
Colas	3	26	72	39
Advenza	3	8	89	36
Aggregators	8	11	81	37
Freight forwarders	40	19	42	43
Terminal operators	50	17	33	42
Road based logistics companies	82	4	13	45
Port operators	55	30	16	44
Trade associations (eg RFG, FTA, BIFA)	60	17	23	47
Central government (e.g. DfT)	33	42	26	43
ORR	23	33	45	40
Network Rail (NR)	42	31	27	45

3.14 Satisfaction with Freight Industry Organisations

Table 3.18 shows the level of satisfaction that respondents have with freight industry organisations. Generally, there is a high level of satisfaction with the freight industry organisations with which respondents are in regular contact. For example, the proportion of companies that are either very satisfied or quite satisfied with the following organisations are:

- Road based logistics companies, 84%;
- Rail freight operators, 73%;
- Trade Associations, 66%;
- Port Operators, 66%; and
- Terminal Operators, 74%.

For ORR, where respondents had had relatively low levels of contact, the proportion of respondents that are satisfied or very satisfied was 43%. A further 43% expressed no view and 15% are dissatisfied.

Capabilities on project:
Transportation

Table 3.18 For Those Organisations/Types of Organisation that you have had either Regular or Single/Occasional Contact with, Please Indicate how Satisfied (overall) you have been with their Performance (QD17a)

	Satisfaction Level (%)					Total (n)
	Very satisfied	Quite satisfied	Neither satisfied nor dissatisfied	Quite dissatisfied	Very dissatisfied	
Trade associations	24	42	33	0	0	33
Rail Freight Operator	23	50	23	2	2	44
Terminal operators	22	52	22	4	0	27
Road based logistics companies	21	63	16	0	0	38
Port operators	17	49	29	6	0	35
ORR	10	33	43	10	5	21
The road freight industry overall	9	64	25	2	0	44
The rail freight industry overall	5	51	30	12	2	43
Freight forwarders	5	41	55	0	0	22
Network Rail	3	55	42	0	0	31
Central Government	3	39	58	0	0	31
Aggregators	0	67	33	0	0	6

3.15 ORR's Role and Performance

Respondents were asked four questions relating specifically to ORR's role and performance.

3.15.1 In the Last Twelve Months or so, What Contact Have you had With ORR in Connection With Issues Related to the Transport of Rail Freight? (QE18)

In general, the level of contact that respondents had had with ORR was relatively low and tends to be associated with specific issues. There was a sense that the majority of the contact was for negative reasons rather than for positive proactive change.

The most frequently identified issues related to track access, being raised in 5 out of the 13 specific responses. The second largest area for comment was in relation to disputes, such as port surcharges and possibly unfair train path allocations by Network Rail. The third area was in connection with data collection surveys and recent consultations, which have taken place on safety issues, the value of time and customer service.

3.15.2 Things ORR That Have Done Well (QE19)

Respondents identified several things that ORR has done well and these were supported by 14 favourable comments.

The main thrust of comments, were in the area of challenging Network Rail's efficiency and cost base. This is recognised as having had a positive influence on Network Rail's access charges, bringing down charges and giving freight users a "fairer" deal (8 comments).

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The second area recognised the good work that ORR has done on regulating the industry to ensure there is capacity on the network for freight (4 comments). Other areas that were specifically recognised ORR's role in improving the quality, standard and performance of rail freight (2 comments) and in safety matters, for example, the quality of ORR's recommendations in response to incidents (2 comments). Finally, one respondent recognised the role ORR has played in increasing publicity and awareness of rail within manufacturing companies.

3.15.3 What ORR Should do More/Less of in the Future to Increase the use of and/or Improve the Quality of Rail Freight? (QE20)

There were 25 answers given in response to the question, what should ORR do more/ less of in the future to increase the use of and/ or improve the quality of rail freight?

We identified the following 8 broad themes from these responses:

Access Charges

Improve access and cost to access rail network (User_Port/Rail terminal_Bulk)

Need cheaper prices and wagon load capability (User_Port/Rail terminal_Both)

There is still more efficiency to be achieved by NR which should reflect in reduced access charges. The ORR can provide the transparency to end customers in relation to costs of Track Access, this is clouded by penalty charges. Allocation and charging of Railway land is poorly regulated and rules are being made by vested interests. (User_Producer-Bulk)

Ensure that Network Rail Operates Effectively & Efficiently

Ensure that Network Rail operates effectively & efficiently. Keep Network Rail "honest" and get them to act less like a monopoly and more like a real commercial business. Cut the bureaucracy! (Non-User_Port/Rail terminal_Non Bulk)

Install KPI's and compare them with other countries within Europe (User_Port/Rail Terminal_Both)

Train Path Availability and Utilisation

Need to realise that whilst passenger service patterns are largely set by population density freight services and path requirements are at the mercy of markets and change frequently (User_Port/Rail Terminal_Non Bulk)

Do something about, the utilisation of freight trains and freight paths on the network, (User_Port/Rail Terminal_Non Bulk)

Need to resolve the issues round protecting unused paths and the unnecessary use of a path when alternatives may suit the use thus resulting in freight not being able to use rail when the opportunity exists (User_Logistics Company_Both)

Seriously address the slow and ineffective 'section J' process i.e. speed up the process of transferring/freeing paths between operators. (User_Port/Rail Terminal_Non Bulk)

Why not ring fence current freight paths to prevent further erosion of slot availability. (User_Producer_Bulk)

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Push for Funding to Develop the Rail Network Especially in Relation to Gauge and Capacity

Provide funding for the improvement of efficiency and capacity whilst ensuring that any improvements are part of a joint road and rail solution and not a competing one (User_Port/Rail Terminal_Both)

Recognise that freight is a real commercial business with strong competition from road haulage. It can't wait for long drawn out consultations and deliberations – it needs confidence on long term capacity allocation for freight and priority over lesser passenger services (i.e. off peak. Secondary routes) ORR need to press NR on gauge and capacity enhancement and ensure that there is a radical improvement in responses on gauging issues – NR still doesn't know what the gauge is through all its structures and often asks the customer to pay for re-gauging this is not acceptable – it's their railway. (User_Logistics Company+Non Bulk)

Treat Freight as well as the Passenger Railway is Treated

Starting treating freight as an equal of passenger traffic (User_Producer_Bulk)

ORR should continue oversee passengers and rail freight (User_Port/Rail Terminal_Both)

More Terminals Operating More Efficiently

Need to focus more on making ex-BR sites available to all operators (User_Logistics Company_Bulk)

The gradual demise of the former EWS' Enterprise network is a concern. With DBS' gradual withdrawal from wagon-load services this leaves the UK with purely 'hook and haul' operators for full trains. Could closed yards such as Washwood Heath be taken back by Network Rail to act as open access hubs for all operators such as DBS, FLR, GBRf etc (User_Logistics Company_Bulk)

Talking to Industry

Get direct feedback from customers & users of rail (User_Logistics Company_Non Bulk)

Takes less side with Freight Operating Companies (User_Port/Rail terminal_Bulk)

Be more accessible (User_Port/Rail terminal_Non Bulk)

Talk to the logistics providers (User_Logistics Company_Both)

Make Rail Easier to Use

Ensure rail is easier to use than it is especially to non regular users (User_Producer_Bulk)

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3.15.4 What could ORR do, or do better, to increase the use of and/ or improve the quality of rail freight? (QE21)

In answer to the question what could ORR do, or do better, to increase the use of and/ or improve the equality of rail freight, there were 22 responses, which raised the following issues:

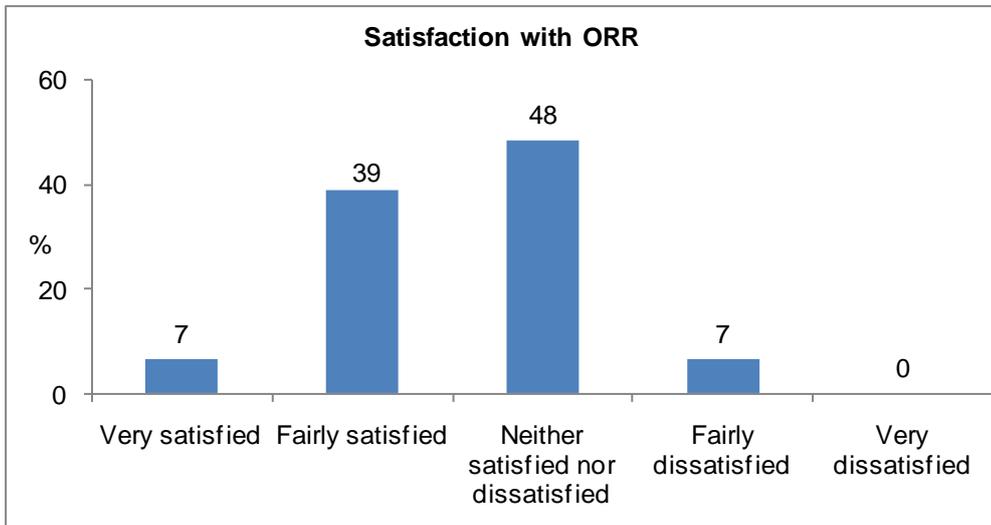
- Gauge clearance – this was the most frequently raised issue in response to this question, with three responses wanting the network to handle high-cube containers;
- Work with Network Rail towards meeting several freight operators request for a 7 day railway;
- Encourage investment and assist Network Rail in improving third party investment processes;
- Push for improved freight links across the UK and the planned Strategic Freight Network (SFN) will help with this;
- Freight Facility Grants (FFGs) are available for up to 50% of certain costs when constructing a new rail freight terminal and some potential investors are not aware of this, others are seeking additional funding for railheads;
- The more customers that are connected to rail the easier it is to run viable services but there are certain parts of the country without easy access to an “open user” terminal. Work with Network Rail, the various planning authorities, the Infrastructure Planning Commission and other interested parties in improving strategic provision of rail terminals;
- Better access to freight train paths and a speedier response on network access and available site location issues is required. There is also recognition that a freight operator may need to mothball paths but this should not be abused;
- In seeking to encourage rail freight to have a higher market share of port related traffic work with port operators on port charges;
- The environmental and social benefits of rail freight versus road are undervalued and the ORR could help with this;
- Work to remove the perception that passenger services are given priority over rail freight;
- Listen more to customers, lobby groups and engage with the end user for a better understanding of the freight industry.

3.15.5 Satisfaction with ORR Meeting Needs of Rail Freight Customers

Figure 3.8 on the next page shows the satisfaction with ORR in meeting the needs of rail freight customers. This shows that nearly half, 46%, are either very or fairly satisfied, while 48% most are neither satisfied nor dissatisfied with ORR. Only 7% of respondents said they were fairly dissatisfied. None said they were very dissatisfied.

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Figure 3.8 Satisfaction with ORR’s performance with regard to meeting the needs of rail freight customers? (QE22)

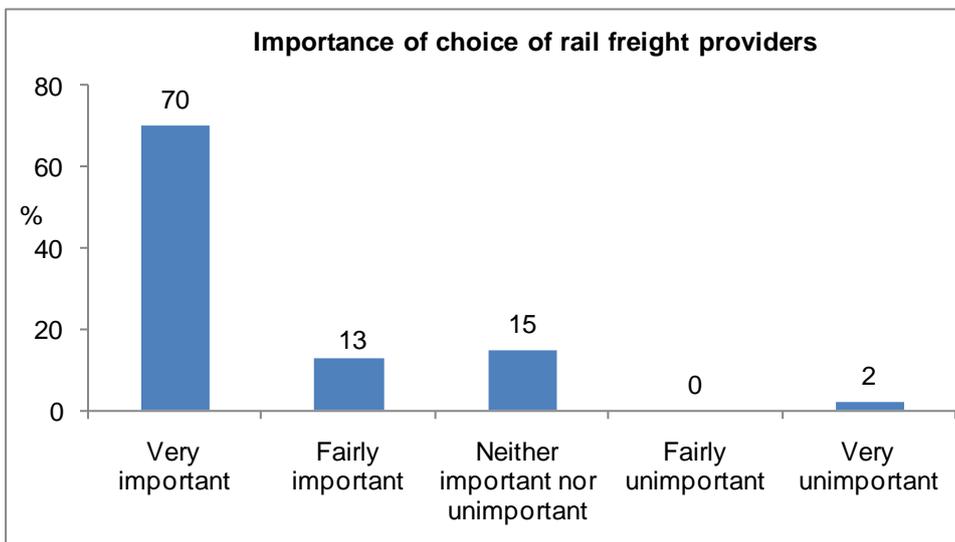


Base = 31

3.15.6 Promotion of Competition

One of the duties of the ORR is to promote competition in the provision of railway services. Table 3.19 shows that 83% think it is very or fairly important to have a choice of rail freight service providers.

Table 3.19 How Important is it to you to have a Choice of Rail Freight Service Providers? (QE23a)



Base = 47

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Most recognised that competition leads to efficiency, lower prices, innovation and choice, as outlined by the following quotes.

Competition is healthy and this is proven in the growth of intermodal trains following open access changes. (User_Port/ Rail terminal_ Non Bulk)

Competition is healthy for a thriving economy (User_Port/ Rail terminal_ Bulk)

Competition means economic pricing and improves service. (User_Port/ Rail terminal_ Bulk)

Very important to have a choice of service providers to ensure service and costs are always high in the organisations priorities to their customers. (Non-user_Producer_ Non Bulk)

What we need to have is competitive operators and good access v passengers, plus increase in terminal operations (User_Producer_ Bulk)

Without competition we all stagnate and assume it's all ok and rail freight misses many opportunities because of arrogance (User_Producer_ Bulk)

3.15.7 Preferred Methods for Testing ORR Policies

Table 3.20 below shows that nearly two thirds think the most appropriate method of testing ORR's policies is to engage directly with a panel of customers. Nearly half say customer surveys are appropriate.

Table 3.20 What do you think is the most appropriate means of testing ORR's policies against the freight customer perspective? (QE24)

	%
Direct engagement with a panel of customers	61%
Surveys of customer satisfaction to test effect	46 %
Published open consultations	41%

Multiple Response – respondents could provide more than one answer – totals sum to more than 100

3.16 Further Contact

Half the sample said they would be willing to take part in further surveys and three quarters wanted to receive a copy of the report.

4 Conclusions

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4 Conclusions

This survey was carried out in order to gauge freight customers' views on how well the industry is performing and to give their perspectives on ORR's policies and actions. It sets the baseline for customers' views on how well the industry is meeting their needs and identifies priorities for improvements. ORR will use this to inform its work and measure improvements over the course of its 2009-14 corporate strategy.

As mentioned in the introduction to this report, although the number of companies that responded to the survey was relatively low in absolute numbers, in terms of types of company and quantity of freight they represent a good cross-section of the industry. It is important to read these findings in the context of the sample size.

With regard to use of modes, respondents to the survey indicated that their use of rail increased significantly over the last five years. While the current economic climate has depressed the freight market generally, it appears from respondents that rail has been less affected than other modes. Responses indicate that there are opportunities for significant further growth if the market can deliver against key customer requirements (see below) such as: price; responsiveness to customers needs; flexible services; and effective recovery strategies, and this potential increases still further if available capacity on the network can be increased.

As with the 2000 and 2003 surveys, the majority of respondents said that they review their choice of mode on an on-going basis. Also consistent with the two previous surveys, the main barrier identified to using rail, both for domestic movements and movements to/from continental Europe, is price.

When asked to rate different service quality attributes in terms of importance and performance, overall, price was identified as the most important service quality attribute, followed by responsiveness to customer needs and reliability of service/journey time. However, Table 3.13 shows that although these attributes are seen by customers as the most important, they rank relatively low in the list by performance. It is this variance between expectation and performance delivery that marks these attributes out as key areas for service improvements.

Respondents were asked to indicate the level of contact they have had with various freight industry organisations and their level satisfaction with them. Generally, there was a high level of satisfaction (around 74% on average being either very satisfied or quite satisfied) with the freight industry organisations with which respondents were in regular contact – a significant increase on the satisfaction levels recorded in the 2003 survey.

The level of contact that respondents had with ORR was relatively low, and tended to be in connection with specific issues or policies. However, nearly half (46%) of the survey respondents were either very satisfied or quite satisfied with ORR's performance, with a further 48% neither satisfied nor dissatisfied.

With regard to things that ORR has done well, respondents were supportive of ORR's role in reducing access charges through the 2008 periodic review, delivering improved capacity and safety.

When asked what ORR could do more of, or do better, respondents pointed to specific areas for improvement, such as the 'slow and ineffective' transfer of access rights. There were also a number of comments suggesting that, in the future, ORR could facilitate improvements in the rail network, such as gauge enhancements, more terminals, streamlined train pathing administration, ensuring freight operators are treated fairly, improving cost transparency and assisting with information on the use of the network.

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With regard to competition, more than four fifths (83%) of respondents thought that it is very or fairly important to have a choice of rail freight service provider, recognising the importance of this in driving down prices and improving service quality.

Finally, respondents were asked what they thought was the most appropriate means for testing ORR's policies against the freight customer perspective. There was significant support for open consultations and a survey of customer satisfaction and nearly two thirds of respondents thought that the most appropriate method was to engage directly with a panel of customers.

Appendix A - Questionnaire

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Appendix A - Questionnaire

Freight Customer Survey – Final – Implemented as a Web Survey

Section A: Introduction and Background

Thank you for agreeing to take part in this survey, commissioned by the Office of Rail Regulation (ORR).

ORR is the independent safety and economic regulator, promoting safety and value in Britain's railways. It regulates Network Rail and aims to promote continuous improvement in safety, performance and efficiency of the railways so that it better meets the needs of users and taxpayers. It is a competition authority for all services relating to the railways. It has a range of functions and responsibilities to keep railway markets under review and to take appropriate measures where markets are not working to the benefit of users or funders. It fulfils these responsibilities to keep markets under review through a programme of market studies; this survey is one of these studies.

ORR would be grateful if you would spare some of your time to answer some questions about how well you think the rail freight industry is performing and importantly give your perspective on ORR's policies and actions. This is your opportunity, as an existing or potential rail freight customer, to highlight issues that are important to you. If you are willing, ORR would like to contact you again in the future to monitor how well we are doing on meeting customer requirements. Your views will be helpful in shaping the regulatory agenda over the coming years.

The survey covers both existing and potential rail freight customers and is being conducted in order to provide ORR with information about current levels of customer satisfaction with rail freight. It will create a benchmark against which ORR can measure customer satisfaction in light of developments in rail freight, and enable ORR to assess the extent to which its own policies continue to be relevant to those developments. It will help ORR understand how its regulatory policies and decisions are impacting on the end-user, and it will, therefore, help ORR to respond accordingly.

This survey will be administered by a weblink and will take about 20 minutes to complete. **As a thank you we will donate £5 to the Railway Children charity for all completed questionnaires.** The Railway Children is a Charity working for the runaway and abandoned children who live in or around the world's railway stations (www.railwaychildren.org.uk).

This survey is being carried out by AECOM, an independent research company. The findings from this survey will be treated as strictly confidential. You will be asked at the end of the questionnaire how much of the detail of your answers you are content to be revealed. Please be assured that we operate within the guidelines of the Market Research Society and your wishes will be respected.

If you have any questions, or would like to discuss either the questionnaire or issues that it raises, please contact AECOM, in the first instance, Katherine Soane 0161 927 8396, katherine.soane@aecom.com

ORR is also separately seeking input from the industry on a range of other initiatives to move forward rail freight regulation.

These are work in relation to freight value of time, third party access contracts for rail freight and an access exemptions policy for rail freight facilities. Details of this work will be available on ORR's website: www.rail-reg.gov.uk

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A1		
	Name:	
	Job title:	
	Organisation:	
	Address:	
	Telephone number:	
	Email:	

A1a	Please provide a brief description of your role, including the extent to which you are responsible for making transport decisions on behalf of your company (write in)

A2	Are you: Please ✓ one box only		
	Producer/receiver of goods/services who use rail (user)	<input type="checkbox"/>	₁
	Producer/receiver of goods/services who <u>do not</u> use rail (non-user)	<input type="checkbox"/>	₂
	Logistics company (user)	<input type="checkbox"/>	₃
	Logistics company (non-user)	<input type="checkbox"/>	₄
	Port operator (user)	<input type="checkbox"/>	₅
	Port operator (non-user)	<input type="checkbox"/>	₆
	Rail terminal operator (user)	<input type="checkbox"/>	₇
	Rail terminal operator (non-user)	<input type="checkbox"/>	₈
	Shipping line (user)	<input type="checkbox"/>	₉
	Shipping line (non-user)	<input type="checkbox"/>	₁₀

A3	What industry/industries would you describe yourself as being in? (Please ✓ all that apply)								
	Coal	<input type="checkbox"/>	₁	Domestic waste	<input type="checkbox"/>	₉	Electricity (coal powered)	<input type="checkbox"/>	₁₇
	Aggregates	<input type="checkbox"/>	₂	Forest products / timber	<input type="checkbox"/>	₁₀	Electricity (nuclear powered)	<input type="checkbox"/>	₁₈
	Petroleum	<input type="checkbox"/>	₃	Automotive – cars	<input type="checkbox"/>	₁₁	Construction	<input type="checkbox"/>	₁₉
	Chemicals	<input type="checkbox"/>	₄	Automotive – parts	<input type="checkbox"/>	₁₂	General manufacturing	<input type="checkbox"/>	₂₀
	Metals	<input type="checkbox"/>	₅	Domestic intermodal	<input type="checkbox"/>	₁₃	Other (write in)	<input type="checkbox"/>	₂₁
	Scrap metals	<input type="checkbox"/>	₆	Intermodal via Channel Tunnel and Deep Sea Container	<input type="checkbox"/>	₁₄			
	Minerals	<input type="checkbox"/>	₇	Retail - food	<input type="checkbox"/>	₁₅			
	Industrial minerals	<input type="checkbox"/>	₈	Retail – non food	<input type="checkbox"/>	₁₆			

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A4a	Which of the following modes of transport do you use for your freight movements in the UK? (Please ✓ all that apply)	
	Road	<input type="checkbox"/> ₁
	Rail	<input type="checkbox"/> ₂
	Waterways	<input type="checkbox"/> ₃
	Coastal shipping	<input type="checkbox"/> ₄
	Pipeline	<input type="checkbox"/> ₅
	Air	<input type="checkbox"/> ₆
	Other (please specify) _____	<input type="checkbox"/> ₇

A4b	Which of the following modes of transport is your <u>main</u> mode for your freight movements in the UK? (Please ✓ one only)	
	Road	<input type="checkbox"/> ₁
	Rail	<input type="checkbox"/> ₂
	Waterways	<input type="checkbox"/> ₃
	Coastal shipping	<input type="checkbox"/> ₄
	Pipeline	<input type="checkbox"/> ₅
	Air	<input type="checkbox"/> ₆
	Other (please specify) _____	<input type="checkbox"/> ₇

Section B: Transport Modes – Current Use

Q1	Can you please describe what types of goods your company/organisation transports: (Please select all that apply)	
	Bulk	
	Coal	<input type="checkbox"/> ₁
	Aggregates	<input type="checkbox"/> ₂
	Industrial minerals	<input type="checkbox"/> ₃
	Petro/chemical	<input type="checkbox"/> ₄
	Waste	<input type="checkbox"/> ₅
	Semi-bulk	
	Steel and other Metal	<input type="checkbox"/> ₆
	Timber and forest products	<input type="checkbox"/> ₇
	Intermodal	
	Containers	<input type="checkbox"/> ₈
	Swap bodies	<input type="checkbox"/> ₉
	Other	
	Nuclear	<input type="checkbox"/> ₁₀
	Automotive	<input type="checkbox"/> ₁₁
Other (please specify) _____	<input type="checkbox"/> ₁₂	

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Q2a	Does your company take responsibility for selecting the type of transport mode that you use?	
	Yes – my company takes responsibility for <u>all</u> types of modes	<input type="checkbox"/> ₁
	My company takes responsibility for <u>some</u> types of modes, but some we delegate to a logistics company	<input type="checkbox"/> ₂
	No – we delegate all of this to a logistics company	<input type="checkbox"/> ₃
	No – our customers influence the choice of modal transport	<input type="checkbox"/> ₄
	Other – please specify	<input type="checkbox"/> ₅

Q2b	Which of the following characteristics do you include in your contract with them?	
	Choice of mode	<input type="checkbox"/> ₁
	Returns policy	<input type="checkbox"/> ₂
	Acceptable level of reliability	<input type="checkbox"/> ₃
	Other (please specify) _____	<input type="checkbox"/> ₄

Q2c	If you 'delegate' to a logistics company: please specify which logistic company you delegate this to? Can you provide a contact? (write in)	

Q3	Please indicate how much freight you are currently transporting within the UK – In Tonnes/containers per year (lifted) (we appreciate that this may be approximate)		
		Per year	Please indicate the types of commodities you transport by the different transport modes: (write in)
	Road	_____Tonnes/containers	
	Rail	_____Tonnes/containers	
	Waterways	_____Tonnes/containers	
	Pipeline	_____Tonnes	
	Air	_____Tonnes/containers	
	Coastal shipping	_____Tonnes/containers	
	Other (please specify)	_____Tonnes/containers	

Q4a	Over the last five years, how much would you say your use of the following transport modes has changed (relative to each other i.e. share)?					
	Has Share of	Increased a lot	Increased a little	About the same	Decreased a little	Decreased a lot
	Road	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅
	Rail	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅
	Air	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅
	Sea	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅

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Q4b	If Question 4a=increased/decreased: Please give the key reasons behind any increases / decreases in the use of modes.

Q5a	As a result of the current economic climate, how much would you say your use of the following transport modes has changed (relative to each other i.e. share)?					
	Has Share of	Increased a lot	Increased a little	About the same	Decreased a little	Decreased a lot
	Road	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅
	Rail	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅
	Air	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅
	Sea	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅

Q5b	If Question 5a=increased/decreased: Please give the key reasons behind any increases / decreases in the use of modes.

Q6	Approximately what percentage of your freight is carried over the following distances?		
		Road	Rail
	Less than 50 miles (80km)	___%	___%
	50-150 miles (81 – 240km)	___%	___%
	151-250 miles (241 – 400km)	___%	___%
	251-400 miles (401 – 640km)	___%	___%
	Over 400 miles (641km)	___%	___%
<i>Total</i>	<i>100%</i>	<i>100%</i>	

Q7a	At what <u>mileage</u> do you think rail freight is competitive (against other modes)?	
	0-25 miles	<input type="checkbox"/> ₁
	26-50 miles	<input type="checkbox"/> ₂
	51-100 miles	<input type="checkbox"/> ₃
	101-150 miles	<input type="checkbox"/> ₄
	151-200 miles	<input type="checkbox"/> ₅
	201-250 miles	<input type="checkbox"/> ₆
	>251 miles	<input type="checkbox"/> ₇

Q7b	Please explain why:

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Q7c At what <u>volume</u> do you think rail freight is competitive (against other modes)?		
0-50 tonnes	<input type="checkbox"/>	1
51-100 tonnes	<input type="checkbox"/>	2
101-200 tonnes	<input type="checkbox"/>	3
201-500 tonnes	<input type="checkbox"/>	4
501-1000 tonnes	<input type="checkbox"/>	5
1001-2000 tonnes	<input type="checkbox"/>	6
> 2001 tonnes	<input type="checkbox"/>	7

Q7d Please explain why:	

Q7e At what <u>frequency</u> do you think rail freight is competitive (against other modes)?		
3 or more times a day	<input type="checkbox"/>	1
Twice a day	<input type="checkbox"/>	2
Daily	<input type="checkbox"/>	3
Weekly	<input type="checkbox"/>	4
Monthly	<input type="checkbox"/>	5
Occasional	<input type="checkbox"/>	6

Q7f Please explain why:	

Section C: Trends and influencing factors

Q8 Domestic Freight		
<p>a) Which of the following factors do you consider to be the main barriers to changing mode of transport from main non rail mode to rail? (please tick all those you consider to be a factor)</p> <p>b) Please rank the 5 most important barriers in order of importance (i.e. 1, 2, 3, 4, 5 – where 1 is the most important barrier)</p>		
	Q8a	Q8b
Costs	X	1,2,3,4,5
Total costs	<input type="checkbox"/>	1
Direct costs	<input type="checkbox"/>	2
Indirect costs	<input type="checkbox"/>	3
Investment cycles e.g. cost of working capital	<input type="checkbox"/>	4
Fixed capital investment	<input type="checkbox"/>	5
Cost of land/access to land	<input type="checkbox"/>	6
Location		

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Access to the rail network	<input type="checkbox"/>	7	
Location of raw materials	<input type="checkbox"/>	8	
Location of logistic hubs	<input type="checkbox"/>	9	
Location of manufacturing/production sites	<input type="checkbox"/>	10	
Location of customers	<input type="checkbox"/>	11	
Physical factors			
The physical nature of the goods	<input type="checkbox"/>	12	
The handling capabilities of suppliers	<input type="checkbox"/>	13	
The handling capabilities of manufacturing sites	<input type="checkbox"/>	14	
The handling capabilities of our customers	<input type="checkbox"/>	15	
Availability of suitable rail equipment (e.g. wagons)	<input type="checkbox"/>	16	
Distance travelled	<input type="checkbox"/>	17	
Route availability	<input type="checkbox"/>	18	
Overall service quality	<input type="checkbox"/>	19	
Time			
Lead times	<input type="checkbox"/>	20	
Response times	<input type="checkbox"/>	21	
Duration of journey times	<input type="checkbox"/>	22	
Punctuality and reliability of journey	<input type="checkbox"/>	23	
Other considerations			
Environmental considerations	<input type="checkbox"/>	24	
Social considerations	<input type="checkbox"/>	25	
Long term contracts	<input type="checkbox"/>	26	
Long term relationships	<input type="checkbox"/>	27	
Local planning restrictions	<input type="checkbox"/>	28	
Resilience of supply chain	<input type="checkbox"/>	29	
Lack of information	<input type="checkbox"/>	30	
Extent to which the rail freight industry integrates with other modes of transport	<input type="checkbox"/>	31	
Regulatory barriers (please specify)	<input type="checkbox"/>	32	
Previous rail experience (please specify)	<input type="checkbox"/>	33	
Other (please specify)	<input type="checkbox"/>	34	

Q9a	If the price of your main alternative mode (to rail) movements <u>increased</u> by the following amounts, how likely would you be to change to rail:					
	Changes in price of road transport	Very likely	Quite likely	May not consider change	Quite unlikely	Very unlikely
	+20%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	+15%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	+10%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	+5%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	No change	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Q9b	Please explain why:

Q10a	If the price of your rail transport movements increased by the following amounts, how likely would you be to change your mode choice from rail:					
	Changes in price of rail transport	Very likely	Quite likely	May not consider change	Quite unlikely	Very unlikely
	+20%	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅
	+15%	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅
	+10%	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅
	+5%	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅
	No change	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅

Q10b	Which mode would you be most likely to switch to if you were to reduce the freight you transport by rail?		
	Road	<input type="checkbox"/> ₁	
	Waterways	<input type="checkbox"/> ₂	
	Air	<input type="checkbox"/> ₃	
	Other (please specify)	<input type="checkbox"/> ₄	

Q10c	Please explain why:

Q11a	Do you transport goods into/out of the UK from or via continental Europe? <i>(Please ✓ one box only)</i>				
	Yes	<input type="checkbox"/> ₁	<i>Continue</i>	No	<input type="checkbox"/> ₂

Q11b	What is the main mode of transport that you use? (Please ✓ one only)	
	Sea (Coastal shipping)	<input type="checkbox"/> ₁
	Air	<input type="checkbox"/> ₂
	Rail freight through the Channel Tunnel	<input type="checkbox"/> ₃
	Road and a ferry crossing	<input type="checkbox"/> ₄
	Road and use of the Le Shuttle service	<input type="checkbox"/> ₅

Q11c	International Freight			
	What factors prevent you from using rail for traffic to or from continental Europe? <i>(please tick all those you consider to be a factor)</i>			
	Costs	<input type="checkbox"/> ₁	Response times	<input type="checkbox"/> ₁₃
	Access to the European rail network	<input type="checkbox"/> ₂	Duration of journey times	<input type="checkbox"/> ₁₄
	Location of raw materials	<input type="checkbox"/> ₃	Punctuality and reliability of journey	<input type="checkbox"/> ₁₅

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	Location of logistic hubs	<input type="checkbox"/> 4		Long term contracts	<input type="checkbox"/> 16	
	Location of manufacturing/production sites	<input type="checkbox"/> 5		Long term relationships	<input type="checkbox"/> 17	
	Location of customers	<input type="checkbox"/> 6		Resilience of supply chain	<input type="checkbox"/> 18	
	The physical nature of the goods	<input type="checkbox"/> 7		Lack of information	<input type="checkbox"/> 19	
	Availability of suitable rail equipment (e.g. wagons) or type of loco	<input type="checkbox"/> 8		Extent to which the rail freight industry integrates with other modes of transport	<input type="checkbox"/> 20	
	Distance travelled	<input type="checkbox"/> 9		Regulatory barriers	<input type="checkbox"/> 21	
	Route availability	<input type="checkbox"/> 10		Other (please specify)	<input type="checkbox"/> 22	
	Overall service quality	<input type="checkbox"/> 11				
	Booking paths through tunnel	<input type="checkbox"/> 12				

Q11d	Please rank the 5 most important barriers, in order of importance, to using rail for traffic to or from continental Europe? (i.e. 1, 2, 3, 4, 5 – where 1 is the most important barrier)					
	Costs			Response times		
	Access to the European rail network			Duration of journey times		
	Location of raw materials			Punctuality and reliability of journey		
	Location of logistic hubs			Long term contracts		
	Location of manufacturing/production sites			Long term relationships		
	Location of customers			Resilience of supply chain		
	The physical nature of the goods			Lack of information		
	Availability of suitable rail equipment (e.g. wagons) or type of loco			Extent to which the rail freight industry integrates with other modes of transport		
	Distance travelled			Regulatory barriers		
	Route availability			Other (please specify)		
	Overall service quality					
	Booking paths through tunnel					

Q11e	Please add any further comments:					

Q12a	Assuming that there are no significant changes in the overall service provided by rail what percentage of your transport movements would you expect to move by rail in the future?				
		Please write in percentage			
	Next 12 months	_____	%		
	1-2 years	_____	%		
	3-5 years	_____	%		
	6-10 years	_____	%		

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Q12b	Please explain why:

Q13a	If the overall service provided by rail is improved to meet all of your key requirements, what percentage of your total transport movements would you consider moving by rail, in the future?	
		Please write in percentage
	Next 12 months	_____ %
	1-2 years	_____ %
	3-5 years	_____ %
	6-10 years	_____ %

Q13b	Please explain why:

Q14a	How frequently do you/your logistics company review your freight transport provision / logistics strategy?						
		Ongoing	Twice a year	Every year	Every couple of years	Less often	I do not review
	Road	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	<input type="checkbox"/> ₆
	Rail	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	<input type="checkbox"/> ₆
	Water	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	<input type="checkbox"/> ₆
	Air	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	<input type="checkbox"/> ₆
	Other (please specify)	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅	<input type="checkbox"/> ₆

Q14b	Please explain why:

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Section D: Industry performance

Q15a	<p>a) When choosing a transport mode, how <u>important</u> are each of the following factors? Please give an importance score between 1 and 10 for <u>each</u> of these factors, where 10 means extremely important, and 1 means extremely unimportant.</p> <p>b) And now, please give a <u>performance</u> score for the Rail Freight Industry for each of the following factors, between 1 and 10, where 10 is extremely good, and 1 is extremely poor.</p>		
		<p>a) Importance of factors</p> <p>Please write in a score from 1 to 10 for each factor, where 10 means extremely important, and 1 means extremely unimportant</p>	<p>b) Performance of rail freight industry</p> <p>Please write in a score from 1 to 10 for each factor, where 10 is extremely good, and 1 is extremely poor</p>
	A: Price		
	B: Overall service quality		
	C: On-time delivery		
	D: Rail freight experience		
	E: Reliability of service/journey time		
	F: Total journey time		
	G: Flexible service		
	H: Responsiveness to customers needs		
	I: Effective recovery strategies		
	J: Available capacity on the network		
	K: Ease of access to information		
	L: Added value services (e.g. tracking)		
	M: Security of goods in transit		
	N: Equipment quality		
O: Environmental considerations			
P: Past track record			
Q: Other (please specify)			

Capabilities on project:
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Q15c In terms of the Rail Freight Industry, which of the following factors have the biggest negative gap between the service delivered (i.e. performance) and your expectations (e.g. importance)? Please select up to 5 categories only.					
A: Price	<input type="checkbox"/>	1	J: Available capacity on the network	<input type="checkbox"/>	10
B: Overall service quality	<input type="checkbox"/>	2	K: Ease of access to information	<input type="checkbox"/>	11
C: On-time delivery	<input type="checkbox"/>	3	L: Added value services (e.g. tracking)	<input type="checkbox"/>	12
D: Rail freight experience	<input type="checkbox"/>	4	M: Security of goods in transit	<input type="checkbox"/>	13
E: Reliability of service/journey time	<input type="checkbox"/>	5	N: Equipment quality	<input type="checkbox"/>	14
F: Total journey time	<input type="checkbox"/>	6	O: Environmental considerations	<input type="checkbox"/>	15
G: Flexible service	<input type="checkbox"/>	7	P: Past track record	<input type="checkbox"/>	16
H: Responsiveness to customers needs	<input type="checkbox"/>	8	Q: Other (please specify)	<input type="checkbox"/>	17
I: Effective recovery strategies	<input type="checkbox"/>	9			

Q15d Please explain why:	

Q16 In the last twelve months or so, how much contact have you had with each of the following organisations / types of organisation in connection with issues related to the transport of freight?			
	Regular contact	Single/ occasional contact	No contact at all
DB Schenker Rail	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Direct Rail Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fastline Freight	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Freightliner Ltd	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Freightliner Heavy Haul	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GB Railfreight Ltd (GBRF)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Victa Railfreight	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Colas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advenza	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Aggregators	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Freight forwarders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Terminal operators	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Road based logistics companies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Port operators	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Trade associations (e.g. RFG, FTA, BIFA)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Central Government (e.g. DfT)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ORR	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Network Rail (NR)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Capabilities on project:
Transportation

Q17a For those organisations / types of organisation that you have had either regular or single / occasional contact with, please indicate how <u>satisfied</u> (overall) you have been with their performance: * For these questions, please answer in relation to the company with which you currently place the most freight business					
	Very satisfied	Quite satisfied	Neither satisfied nor dissatisfied	Quite dissatisfied	Very dissatisfied
Rail Freight Operator	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅
Aggregators*	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅
Freight forwarders*	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅
Terminal operators*	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅
Road based logistics companies*	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅
Port operators	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅
Trade associations (e.g. RFG, FTA, BIFA)	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅
Central Government	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅
ORR	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅
Network Rail (NR)	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅
The rail freight industry overall	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅
The road freight industry overall	<input type="checkbox"/> ₁	<input type="checkbox"/> ₂	<input type="checkbox"/> ₃	<input type="checkbox"/> ₄	<input type="checkbox"/> ₅

Q17b Please add any further comments in relation to these performance ratings:	

Capabilities on project:
Transportation

Section E: ORR's role and performance

Q18	In the last twelve months or so, what contact have you had with ORR in connection with issues related to the transport of rail freight?

ORR is responsible for setting Network Rail's funding and outputs as the monopoly operator of the network, and enforcing delivery and ensuring fair access to that network. Our goal for 2009-14 is that passengers and freight customers benefit from improved safety, performance, efficiency and capacity.

This year we are, or will be, looking at the relative values of passenger and freight traffic for use in capacity allocation decisions, developing an access exemptions policy for freight facilities at ports and terminals and consulting on a suitable model for a freight customer access contract (see – <http://www.rail-reg.gov.uk/upload/pdf/400.pdf>).

In the context of the above, and the answers you gave to some of the earlier questions in this survey:

Q19	What do you think has ORR done well in the past to increase the use of and/or improve the quality of rail freight?

Q20	What do you think ORR should do more/less of in the future to increase the use of and/or improve the quality of rail freight?

Q21	What do you think ORR could do, or do better, to increase the use of and/or improve the quality of rail freight?

Q22	Overall, how satisfied are you with ORR's performance with regard to meeting the needs of rail freight customers? (Please ✓ one only)	
	Very satisfied	<input type="checkbox"/> 1
	Fairly satisfied	<input type="checkbox"/> 2
	Neither satisfied nor dissatisfied	<input type="checkbox"/> 3
	Fairly dissatisfied	<input type="checkbox"/> 4
	Very dissatisfied	<input type="checkbox"/> 5
	Don't know	<input type="checkbox"/> 6

Capabilities on project:
Transportation

Q23a	One of ORR’s duties is to promote competition in the provision of railway services. How important is it to you to have a choice of rail freight service providers? (Please ✓ one only)	
	Very important	<input type="checkbox"/> ₁
	Fairly important	<input type="checkbox"/> ₂
	Neither important nor unimportant	<input type="checkbox"/> ₃
	Fairly unimportant	<input type="checkbox"/> ₄
	Very unimportant	<input type="checkbox"/> ₅

Q23b	Please explain why?

Q24	What do you think is the most appropriate means of testing ORR’s policies against the freight customer perspective? Please ✓ all that apply	
	Published open consultations	<input type="checkbox"/> ₁
	Direct engagement with a panel of customers	<input type="checkbox"/> ₂
	Surveys of customer satisfaction to test effect	<input type="checkbox"/> ₃
	Other (please specify)	<input type="checkbox"/> ₄

Section F: Confidentiality

Q25	ORR are compiling a panel of potential contacts that will be called upon another couple of times over the life of their corporate strategy, to help shape their rail freight regulatory agenda and test our effectiveness in delivering against our corporate strategy. Would you be interested in taking part in this research? (Please ✓)	
	Yes	<input type="checkbox"/> ₁

Q26	Thank you for completing this questionnaire. Your views will help ORR to ensure its regulation is responsive to market developments. Your participation in the survey and the information you have given will be treated strictly in accordance with the following instructions. Please ✓ as appropriate	
	I will allow the questionnaire to be seen by the ORR	<input type="checkbox"/> ₁
	I wish the contents of this questionnaire to remain entirely confidential (they will be used for analysis purposes only)	<input type="checkbox"/> ₂
	I will allow my organisation to be listed in the report as a survey participant (but no other individual mention will be published)	<input type="checkbox"/> ₃
	I do not want my organisation to be listed as a survey participant	<input type="checkbox"/> ₄

Q27	The findings from this survey will be published on our website and will be available in ORR’s library. As a participant in the study, we would be pleased to send you a copy via email as soon as it is published. If you like us to do so, please highlight below.	
	I would like to be sent a copy via email	<input type="checkbox"/> ₁

Capabilities on project:
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Q28	Is there anything you would like to add on whether the rail freight industry is meeting customer requirements and the role of ORR?

Thank you for taking the time to participate in the study

Appendix B – Other Tabulations

Capabilities on project:
Transportation

Appendix B – Other Tabulations

Q3a - Please indicate how much freight you are currently transporting within the UK – in tonnes/ containers per year

B1 Transport Mode – ROAD

Quantity of Freight transported per year (tonnes)	Frequency (n)
10 million or over	5
5-10 million	4
1-5 million	6
0.5-1 million	5
500,000 or less	7
Total	27
TOTAL	100MILLION

Quantity of Freight transported per year (containers)	Frequency (n)
500,000 or more	2
100,000-500,000	3
Less than 100,000	2
Total	7
TOTAL	1.8 MILLION

B2 Transport Mode – RAIL

Quantity of Freight transported per year (tonnes)	Frequency (n)
10 million or over	2
5-10 million	2
1-5 million	6
0.5-1 million	5
500,000 or less	9
Total	24
TOTAL	56MILLION

Quantity of Freight transported per year (containers)	Frequency (n)
500,000 or more	0
100,000-500,000	1
Less than 100,000	5
Total	6
TOTAL	450,000

B3 Transport Mode - WATERWAYS

Quantity of Freight Transported per year	Frequency (n)
1,000,000 tonnes	1
500,000 tonnes	1
TOTAL	1.5MILLION
2,000 TEUs	1
Total	3

Those who transported freight in the UK by pipeline or air did not provide an approximate amount transported.

Capabilities on project:
Transportation

Q3b - Please indicate the types of commodities you transport by the different transport modes

B4Transport Mode - ROAD

Commodity	Frequency (n)
Steel	6
Aggregates	5
Containers	5
All/ various commodities	3
Cars	3
Coal	3
Food	3
Auto parts	2
Cement - bulk and packed	2
Concrete	2
Generals	2
Paper	2
Alcoholic beverages	1
Alloys	1
Ambient grocery	1
Asphalt	1
Bags	1
Biomass	1
Bottled water	1
Building materials	1
Chemicals	1
Chipboard	1
Clay	1
Clothing	1
Co-products	1
Finished goods	1
Fluxes	1
Forest products	1
Fresh grocery	1
Glass	1
Industrial minerals	1
Lime	1
Logs	1
Non food GM	1
Petroleum	1
Potash	1
Raw materials	1
Recycling products	1
Refractories	1
Retail	1
Roofing felt	1
Salt	1
Sawn timber	1
Scrap	1
Stores items	1
Waste products	1
Wine	1

Capabilities on project:
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Total	37
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B5 Transport Mode - RAIL

Commodity	Frequency (n)
Aggregates	7
Coal	5
Containers	4
Steel	4
All/ various	3
Cars	3
Auto parts	2
Cement	2
Retail	2
Alcoholic beverages	1
Ambient food	1
Bottled water	1
Building materials	1
Clay	1
Food	1
Fresh food	1
Glass	1
Gypsum	1
Industrial minerals	1
Iron ore	1
Limestone	1
Non-food	1
Olivine	1
Paper	1
Petroleum	1
Potash	1
Recycling products	1
Salt	1
Timber	1
Waste products	1
Total	36

B6 Transport Mode - WATERWAYS

Commodity	Frequency (n)
Aggregates	2
Bulk Wine	1
Containers	1
Total	4

B7 Transport Mode - PIPELINE

Commodity	Frequency (n)
Fuel	1
Total	1

Capabilities on project:
Transportation

B8 Transport Mode – AIR

Commodity	Frequency (n)
Food	1
Total	1

B9 Transport Mode – COASTAL SHIPPING

Commodity	Frequency (n)
Containers	3
Aggregates	2
Cement	1
Coal	1
Cars	1
Automotive parts	1
Grain	1
Logs	1
Wine	1
Various	1
Waste products	1
Recycling products	1
Steel	1
Bags	1
Offshore	1
Heavy lifts	1
Non food	1
Salt	1
Potash	1
Total	14