Report “Intermodal Transport Survey 2025: Unlocking Rail's Competitive Potential”

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Executive Summary

Many assumptions on Intermodal Transport are just Fairy-Tales. New perspectives are needed to make a change. This survey of 51 European logistics stakeholders' shippers, LSPs, rail operators, and infrastructure managers reveals that many perceived barriers to rail adoption are based on outdated assumptions rather than current realities. While challenges exist, the data shows clear pathways to enhance intermodal competitiveness and accelerate modal shift.

Key Findings:

- Rail Transit Times are more competitive than believed. 60% of respondents confirm intermodal transit times can equal or even beat road transport in running intermodal corridors, contradicting the persistent myth that intermodal freight is always slower.
- Performance gaps exist and the route cause is in most cases the first and last mile, not the rail leg. One-third of LSPs report that terminal on-time performance is better than final performance at destination and 43% acknowledge that last-mile truck planning whether intentionally or accidentally causes delays frequently. 40% of delay cases, the root cause lies outside the rail segment.
- Responsibility is shared, and so are solutions. Every stakeholder sees problems in other actors' domains, but this also means every actor has opportunities to contribute to solutions.
- Expectations can be aligned Main barriers are perceptions and assumptions due to lack of transparency and common understanding across stakeholders' groups and not fundamental capability. This is addressable through cross-stakeholders' collaborative ecosystems and communities, better communication and a drastically improved data sharing culture.

Bottom line: Intermodal freight has untapped competitive potential. High complexity, combined with low transparency, appears as a combination which scares many shippers off. By addressing transparency, aligning expectations, and focusing on collaborative improvements, the industry can unlock significant intermodal increase opportunities.

Alliance for Logistics Innovation through Collaboration in Europe

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Findings: Challenging Misconceptions

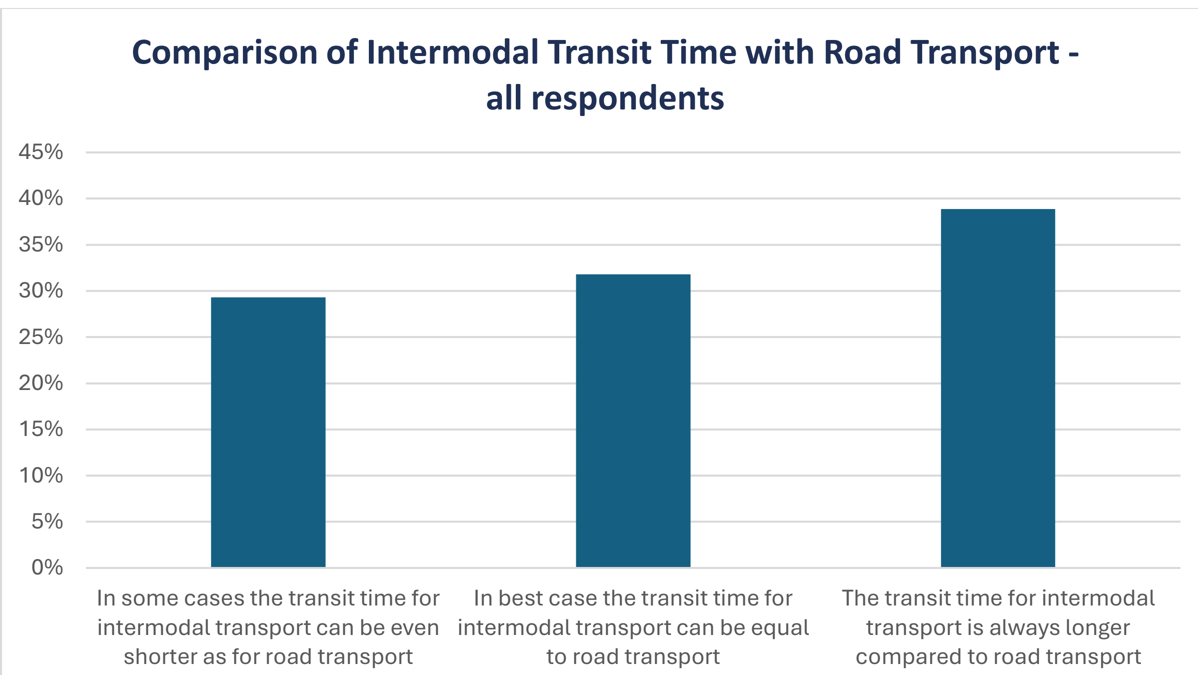
Finding 1: Rail Transit Times are more competitive than believed

THE MYTH: "Intermodal transport always takes longer than road." 70% of the shippers believe in this.

THE REALITY: 60% of all respondents, and almost every second LSP in particular, confirm that intermodal transit times can be equal to and sometimes be shorter than road freight.

These findings challenge one of the most persistent barriers to the increase of use of rail. The competitive transit times are real, but they remain unknown to many potential users of intermodal solutions.

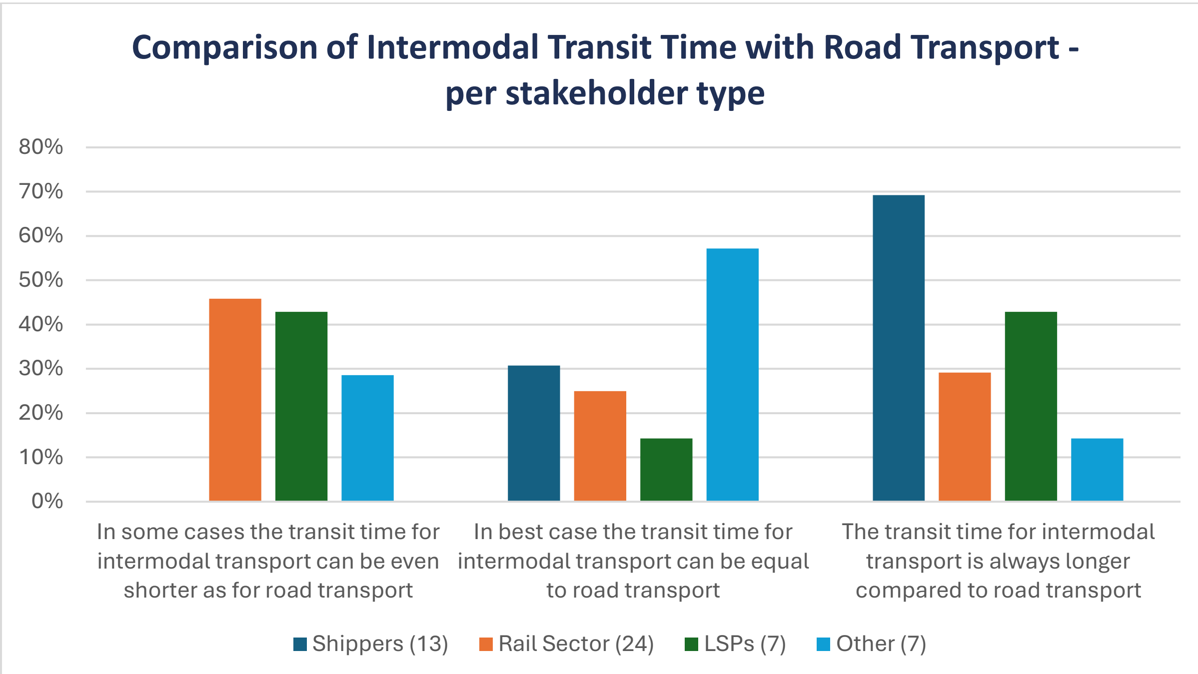
This can be explained by the fact that shippers evaluate the transit time end to end and not only of the rail leg of the intermodal journey. Therefore, data may reveal that the issue is actually in the first and last mile of an intermodal journey.



Graph 1 Comparison of Intermodal Transit Time with Road Transport - All Respondents

Key Insight: If 60% of the industry acknowledges equal or better transit times in running corridors, the barrier to adoption is not capability it's communication and/or other segments of an intermodal journey.

Breakdown by Stakeholder



Graph 2 Comparison of Intermodal Transit Time with Road Transport - By Stakeholder

Shippers: While 70% (9 of 13) still believe intermodal is always slower, this represents a perception problem, not a performance reality. The opportunity lies in demonstrating actual corridor performance data.

LSPs: Show moderate skepticism with 43% viewing intermodal as always slower. However, the majority (57%) recognize competitive potential on certain routes.

Rail Sector: The most optimistic group, with many respondents' confirming intermodal can match or surpass road performance. This insider knowledge needs to be made transparent (based on actuals) and shared externally.

Key Insight: While truck transit times are limited by drivers' maximum daily driving times when trains can keep running and profit from the so-called "night-jump" accordingly. Intermodal freight can be even faster if transport is going over the weekend where trucks are immobilized by compulsory weekend breaks1. The extent to which intermodal transports profit from these effects is impacted by the individual train schedule (departure time, arrival time, frequency of departures).

[1] 24 or 48 hours

What this mean for the Increase of intermodal: Operational performance exists; we just need to make it visible. Rail operators and intermodal service providers should:

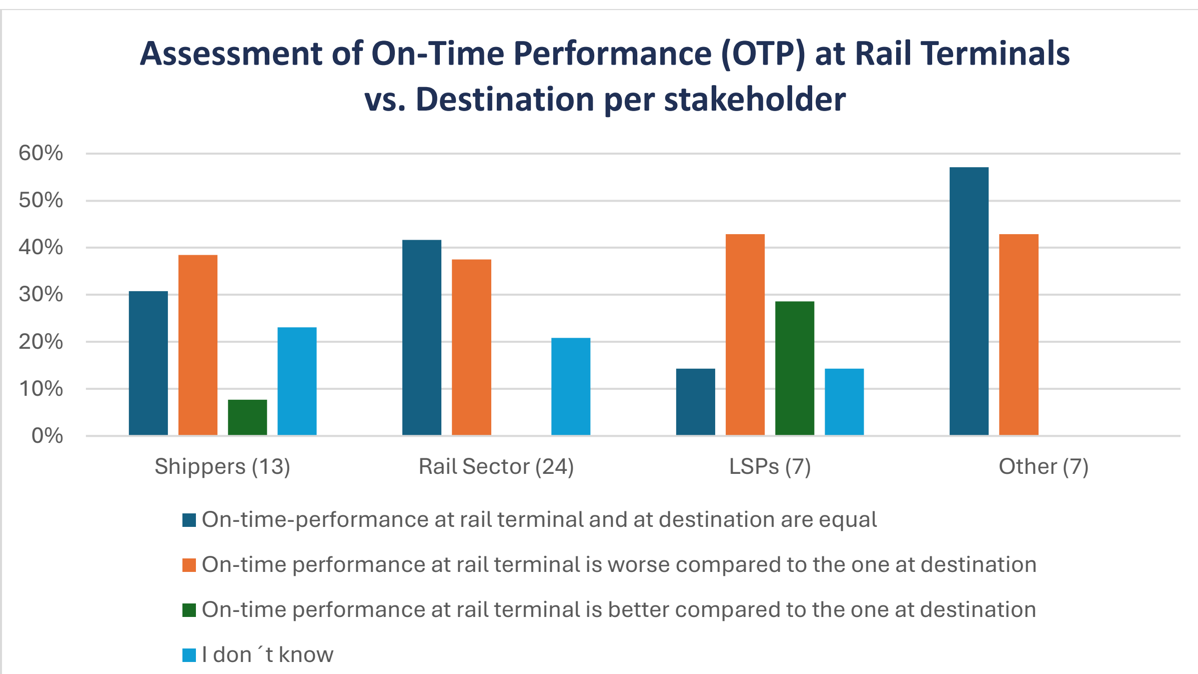
- Publish and intensify communication on corridor-specific, empiric transit-time data.
- Prioritize robust train schedules (late departure, night-jump, early-morning arrivals absorbing minor train delays without impacting the last-mile transport)
- Demonstrate competitiveness on key routes and corridors.
- Challenge outdated assumptions with current performance metrics.

Finding 2: Performance gaps exist and the route cause is in most cases the first and last mile, not the rail leg.

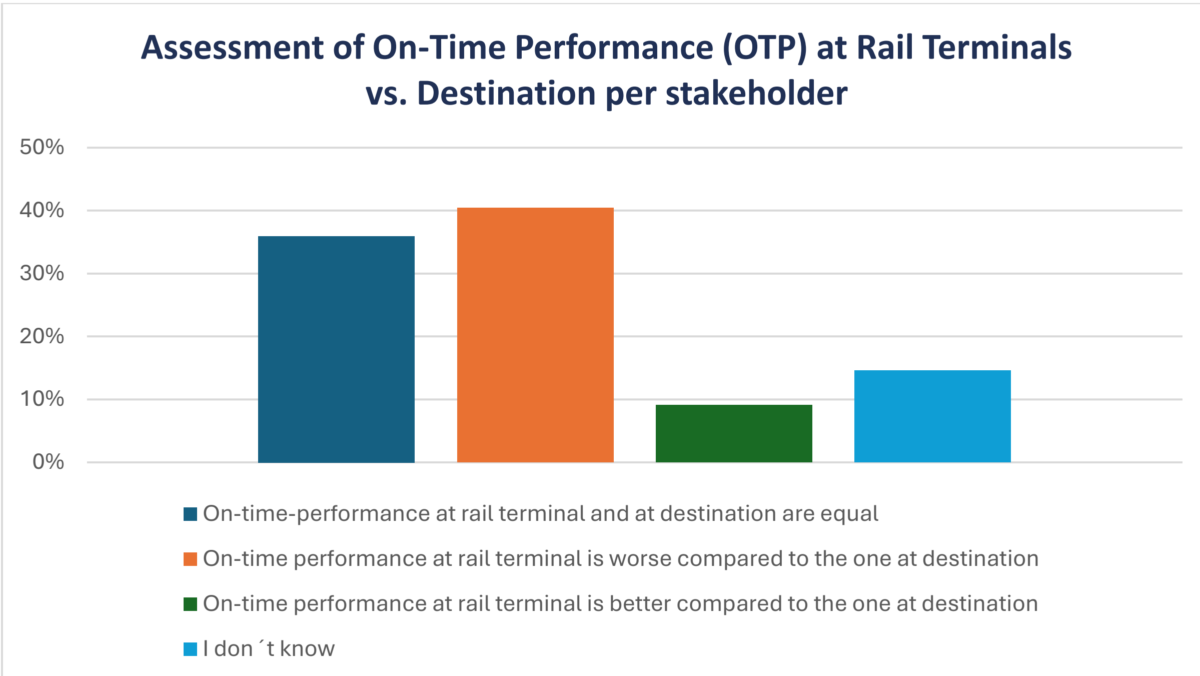
THE MYTH: “Rail unreliability is the primary cause of intermodal performance issues”.

THE REALITY: One-third of LSPs report that terminal on-time performance is better than final performance at destination and 43% acknowledge that last-mile truck planning whether intentionally or accidentally causes delays frequently.

These finding shifts focus from exclusively blaming rail to recognizing that the entire intermodal chain, last-mile operations included, needs focus and optimization.



Graph 3 Assessment of On-Time Performance (OTP) at Rail Terminals vs. Destination - By stakeholder



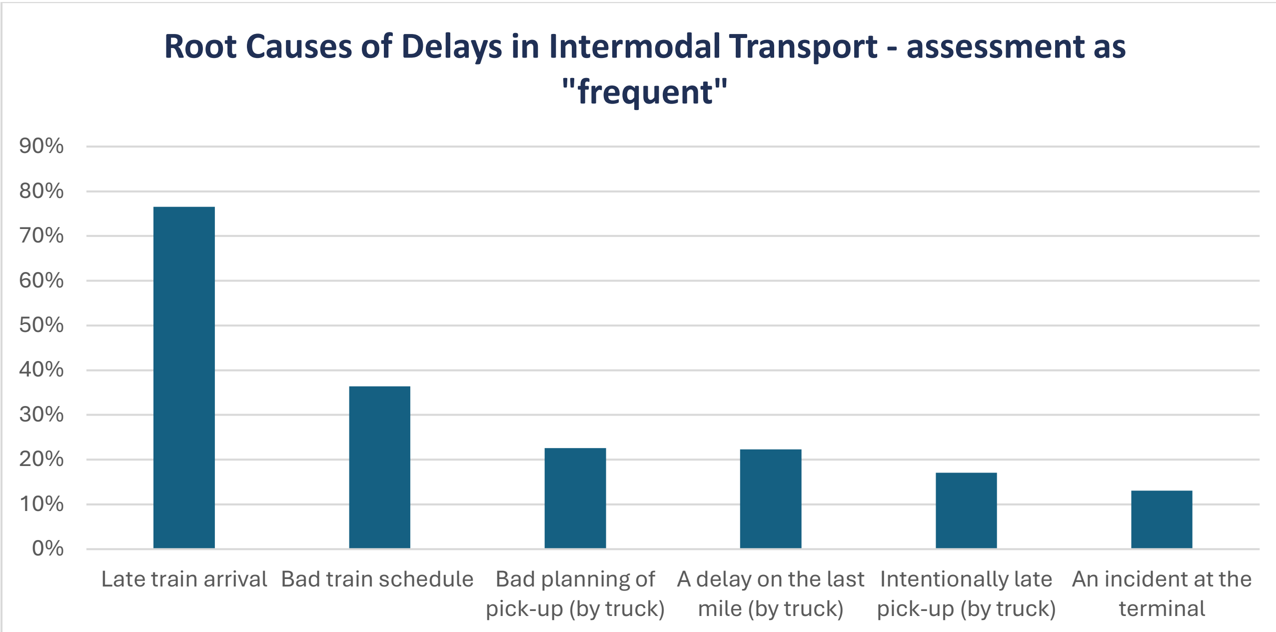
Graph 4 Assessment of On-Time Performance (OTP) at Rail Terminals vs. Destination - All Respondents

Key Insights: A significant portion of delays stems from factors outside the rail segment. These are solvable operational challenges, not fundamental flaws in the intermodal model.

What this mean for the Increase of intermodal. When examining what causes delays, "late train arrival" is indeed the most cited factor but it's far from the only one. A train arriving late at the destination terminal is just one of many different incidents which can trigger such a risk.

For the last-mile operator limiting empty trips is more important compared to cross-border transport, e.g. Picking up a loading unit at a terminal may result in an empty mile ration ratio- of up to 50%, if there is no realistic chance to have a return load for the truck which brings it back to the terminal the same day. Every last-mile operator or LSP will try to avoid such an event and may prefer to delay pick-up by one or two days accordingly.

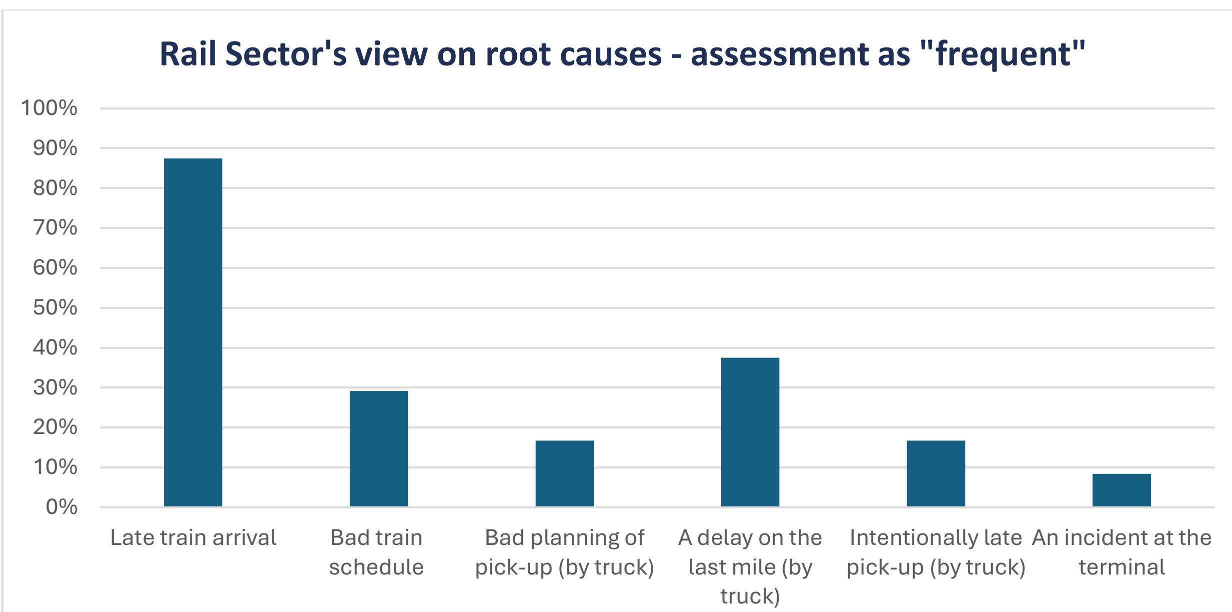
The data reveals that bad train scheduling, poor pickup planning, and last-mile delays all contribute significantly. Importantly, terminal incidents and intentionally delayed pickups are rarely systemic issues.



Graph 5 Root Causes of Delays - All Respondents (Ranked)]

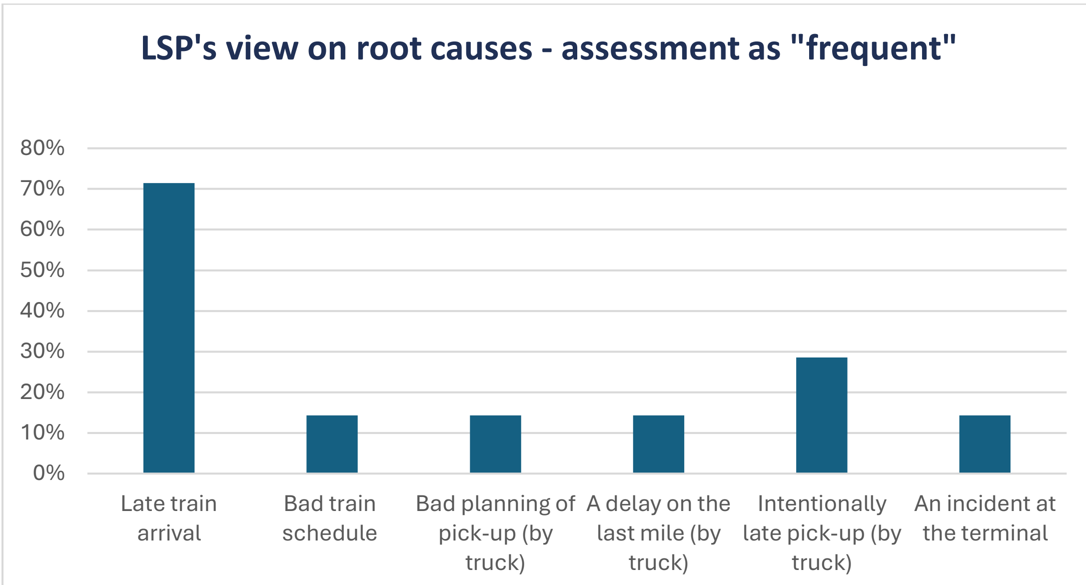
Breakdown by Stakeholder

Rail Sector: Acknowledges internal challenges while also highlighting coordination issues with other supply chain actors.



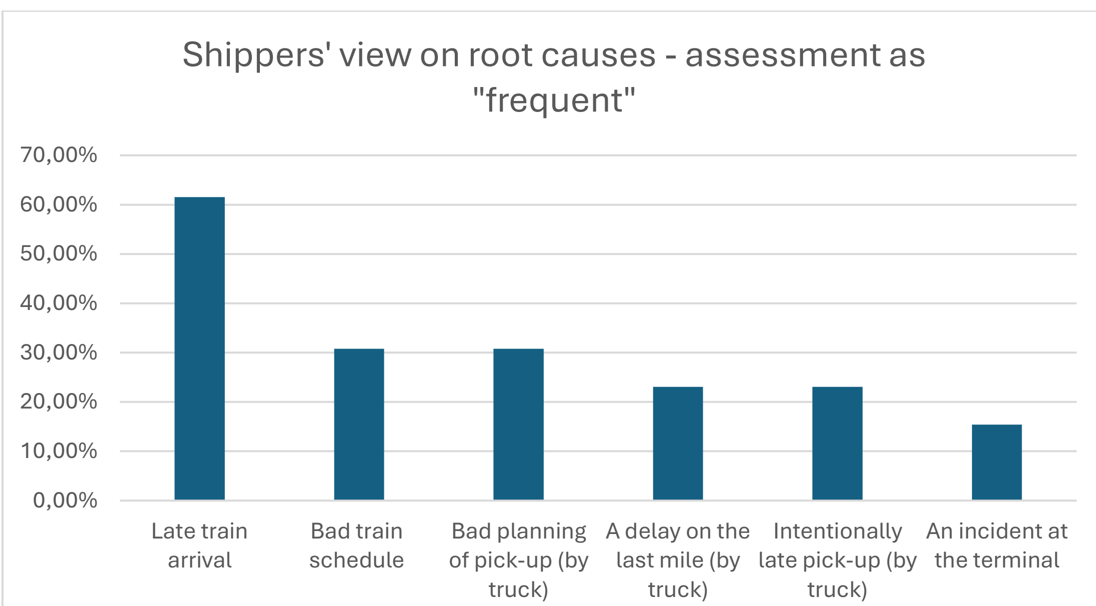
Graph 6 Root Causes of Delays – Rail sector

LSPs: Uniquely positioned to see the full chain, LSPs identify coordination gaps as significant contributors to delays. More than 40% (accumulated) of all LSPs admit that bad last-mile planning frequently causes on-time defects.



Graph 7 Root Causes of Delays – LSP

Shippers: Experience the cumulative effect of delays across all segments, reinforcing the need for end-to-end optimization.



Graph 8 Root Causes of Delays – Shippers

What this mean for the Increase of intermodal: We've identified the problems and they're addressable. Improving coordination and planning across the full chain can deliver rapid performance gains without requiring massive infrastructure investments.

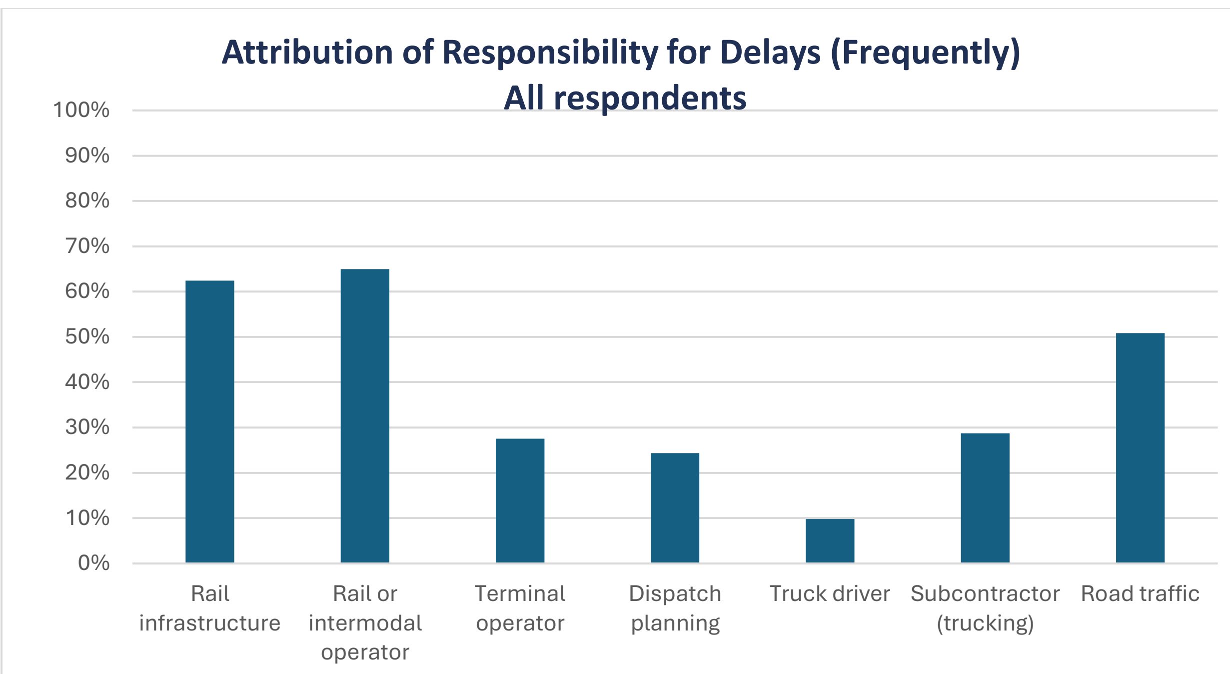
The ultimate prerequisite to achieve these gains are visibility and data-sharing within all supply-chain actors.

Finding 3: Responsibility is shared, and so are solutions

THE MYTH: “My stakeholder group is not responsible of any intermodal performance issues”

REALITY: Every stakeholder sees problems in other actors' domains, but this also means every actor has opportunities to contribute to solutions.

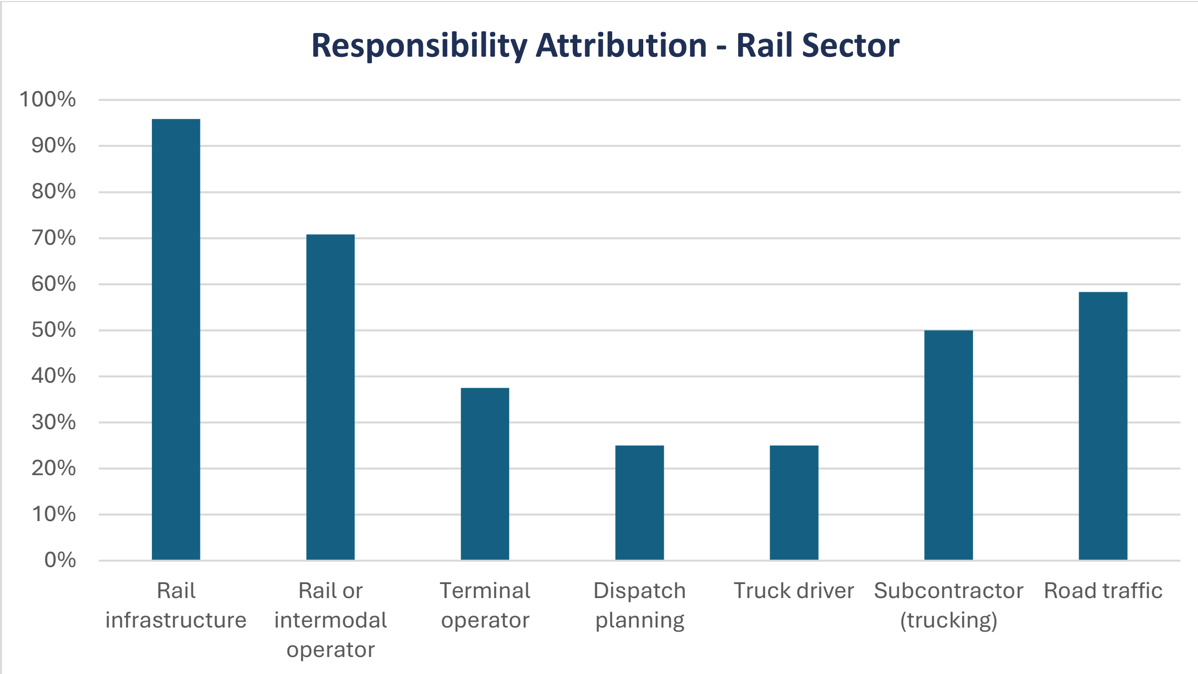
Rather than viewing differing perspectives as a problem, we should see this as an invitation for collaborative improvement. To achieve this, each supply chain actor is well advised to focus on improving what is in his own scope rather than blaming the other actors. And again, increased transparency would foster this move.



Graph 9 Attribution of Responsibility for Delays - All Respondents

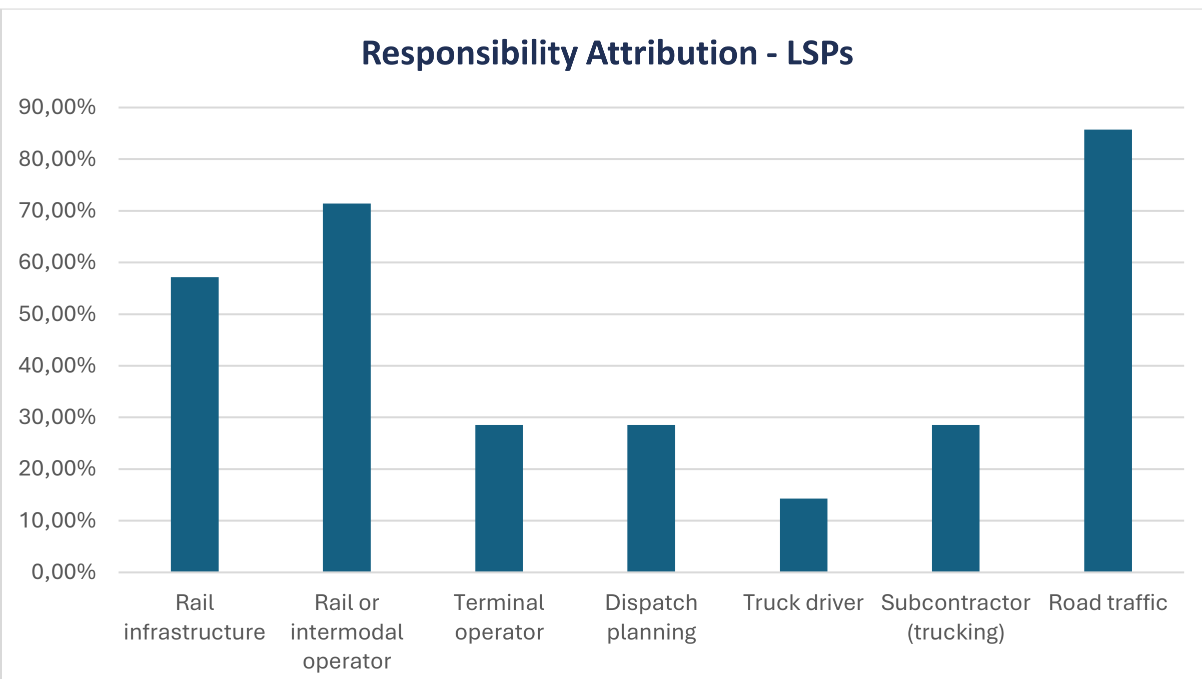
Breakdown by Stakeholder

Rail Sector: Points to infrastructure (96% cite as frequent cause) and trucking/driver issues (75%) while acknowledging operator responsibilities.



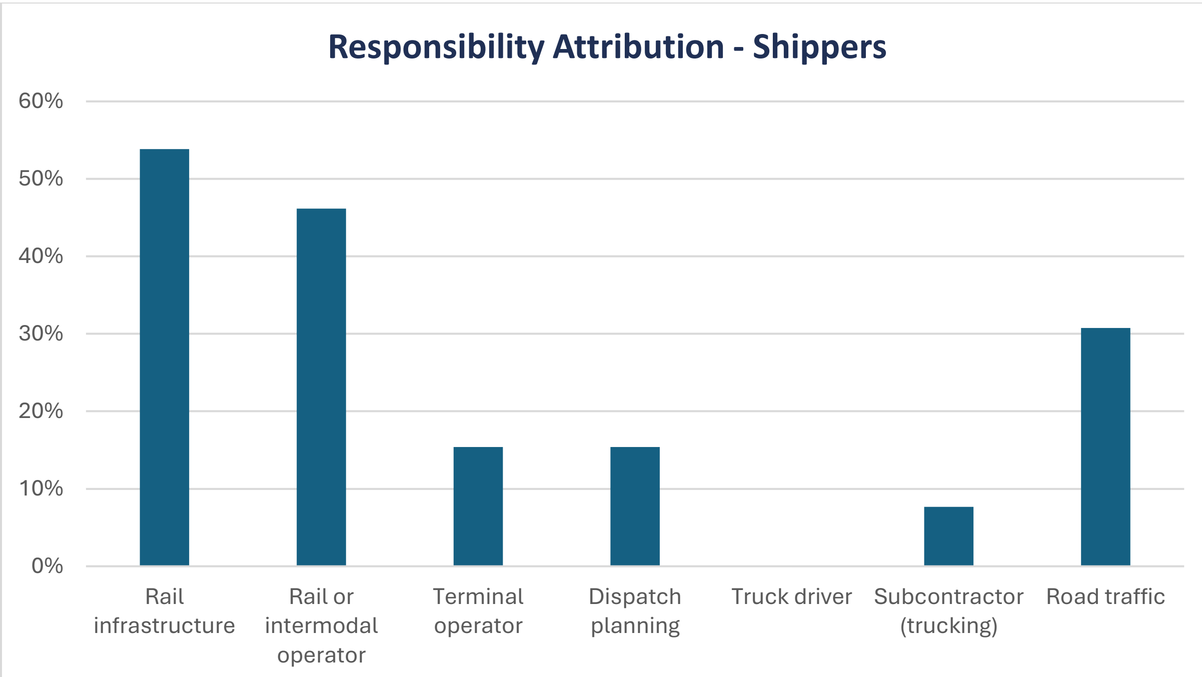
Graph 10 Responsibility Attribution - Rail Sector

LSPs: More balanced view, with 57% citing infrastructure and 71% citing operators, but also acknowledging dispatch planning issues (29%).



Graph 11 Responsibility Attribution - LSPs

Shippers: Focus on infrastructure (54%) and operators (46%) as primary sources of delays, with less emphasis on trucking issues.



Graph 12 Responsibility Attribution - Shippers

Key Insight: Each actor has identified improvement areas in their own domain they just don't always acknowledge them. Backed by a lack of data sharing culture turning performance issues against other parties seems to be a low-hanging fruit. But as we see these backfires twice, as the entire transport mode is perceived as unreliable.

The fact that perspectives differ shows there are multiple levers for improvement, not just one bottleneck.

What this mean for increasing the use of intermodal: The industry agrees problems exist and each stakeholder controls part of the solution. This creates multiple pathways to improvement rather than a single, difficult-to-solve bottleneck. Cross-stakeholder dialogue can unlock solutions that no single actor can achieve alone. Transparency would help to better address the actual issues and focus on improvements. However, the incumbent intransparency seems to provide more comfort for the actors, at the expense of the entire transport mode.

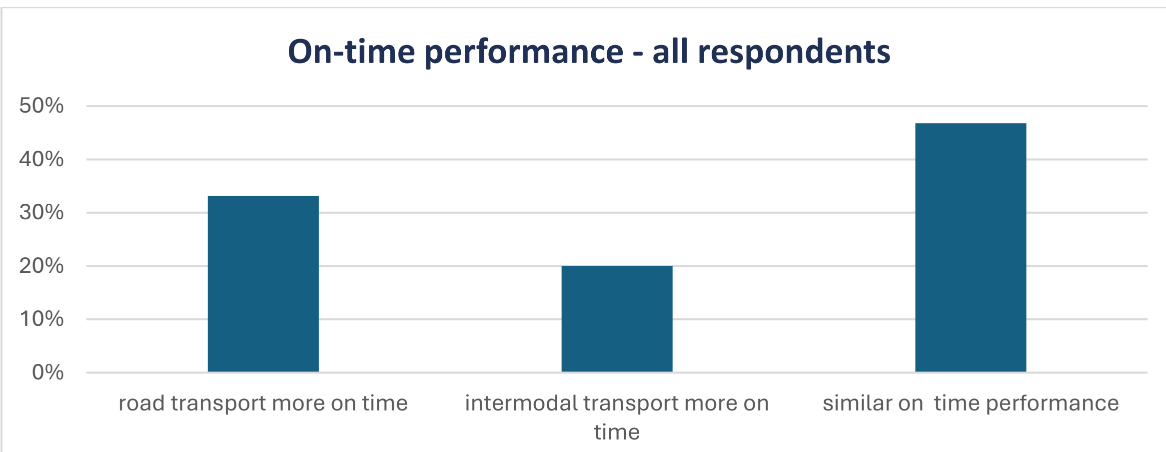
Finding 4: Expectations can be aligned

THE MYTH: "Intermodal can never meet shipper expectations for on-time performance".

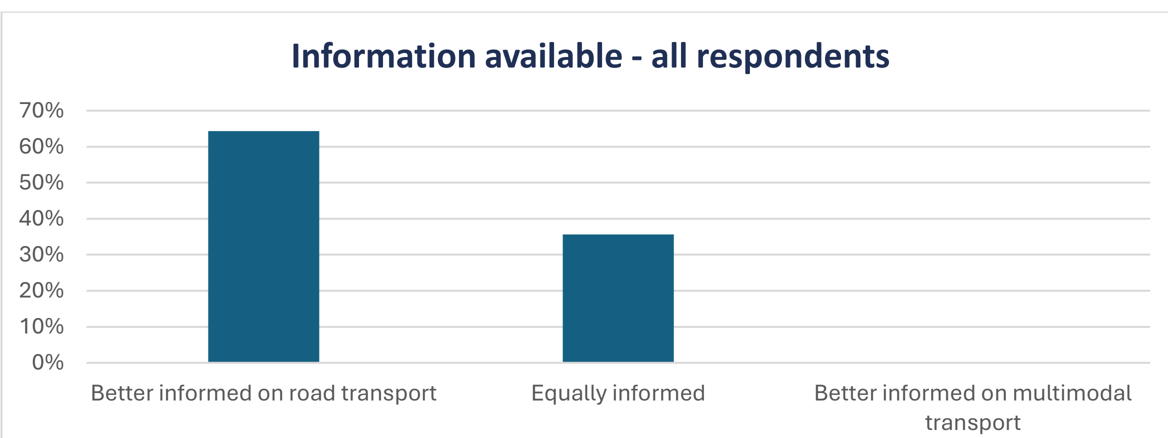
THE REALITY: On-time expectations are completely misaligned among the different stakeholders, not impossible and closing the expectation gap is achievable. Information Transparency and cross-stakeholder collaboration: Key enablers.

One major factor in the expectation gap is information quality. When delays occur, stakeholders consistently report better information flow during road transport than intermodal, towards the owner of the goods.

As an additional hurdle, for most actors in the intermodal supply chain the goods owner (shipper) isn't the customer, it´s the LSP which booked the other parties. Therefore, any information shared within intermodal transport tends to end at the LSP and it´s on the LSP what to do with it.



Graph 13 On-time performance - All respondents

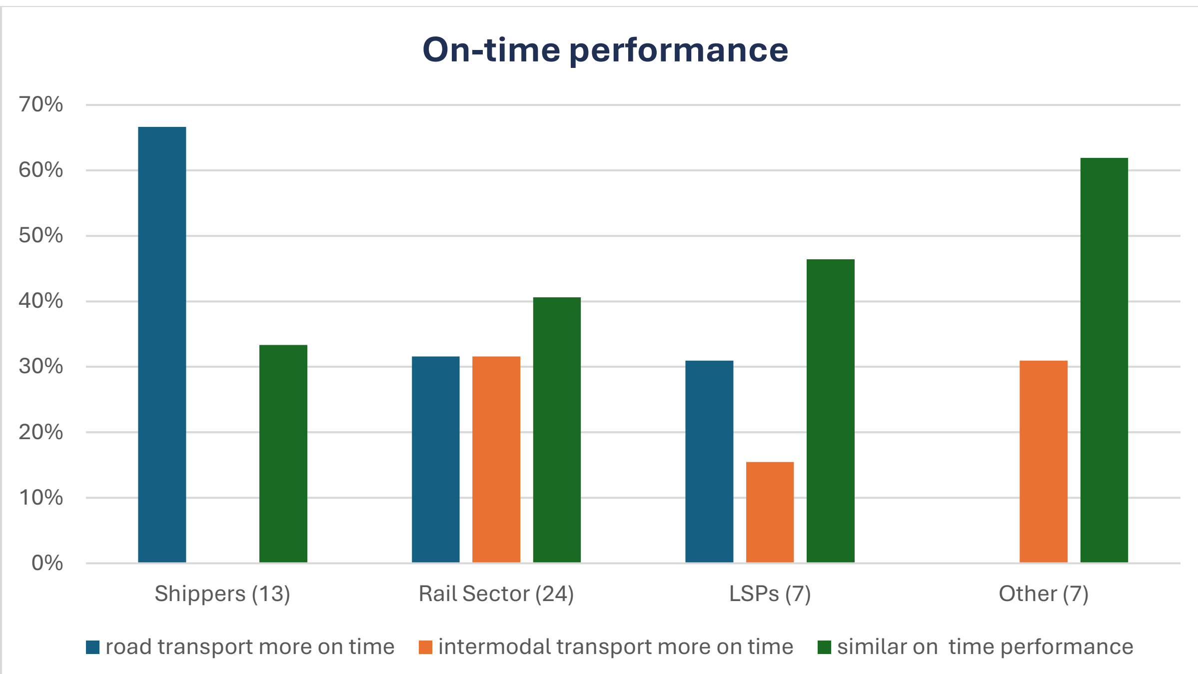


Graph 14 Information available - All respondents

The Opportunity: Better real-time information would build trust and allow for realistic expectation-setting. Transparency is achievable through digital platforms and better communication protocols.

Today some information is shared among railway undertakings, terminals, intermodal operators, LSPs and providers of road transport for the first-/last-mile. Where information is shared it´s mostly status messages which are entered by employees of an operator into any system and then shared further. This information is rarely accurate and various data points show inconsistency with other data on the same shipment. The cargo owner (shipper) has either no access or must undertake unreasonable efforts to access such information. Where shippers are given access to data on intermodal freight it´s usually the LSP who decides on the content.

Breakdown by Stakeholder



Graph 15 On-time performance - By stakeholder

Rail Sector: Even 29% of rail stakeholders acknowledge road provides better disruption information, showing awareness of the transparency gap.

LSPs: Report significant information gaps, which hampers their ability to manage customer expectations effectively.

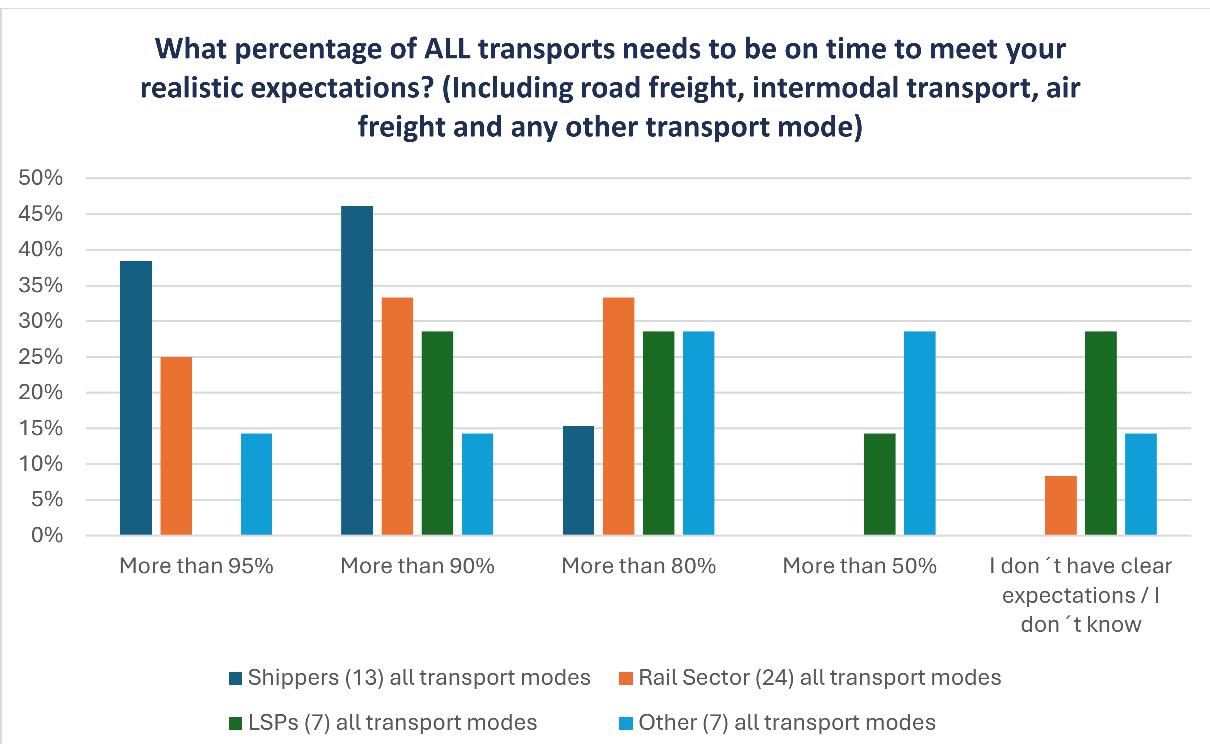
Shippers: 38% feel better informed about road transport, directly impacting their confidence in intermodal services.

Shippers assume that they have direct access to the status of their goods in transit by talking to their LSP in charge. However, with an European average of 3-level subcontracting there are usually 4 actors involved. Still there are fewer actors compared to intermodal transport, where the minimum is 7 if the infrastructure managers are not counted into (LSP, first and last mile operations, two terminals, a railway undertaking and an intermodal operator).

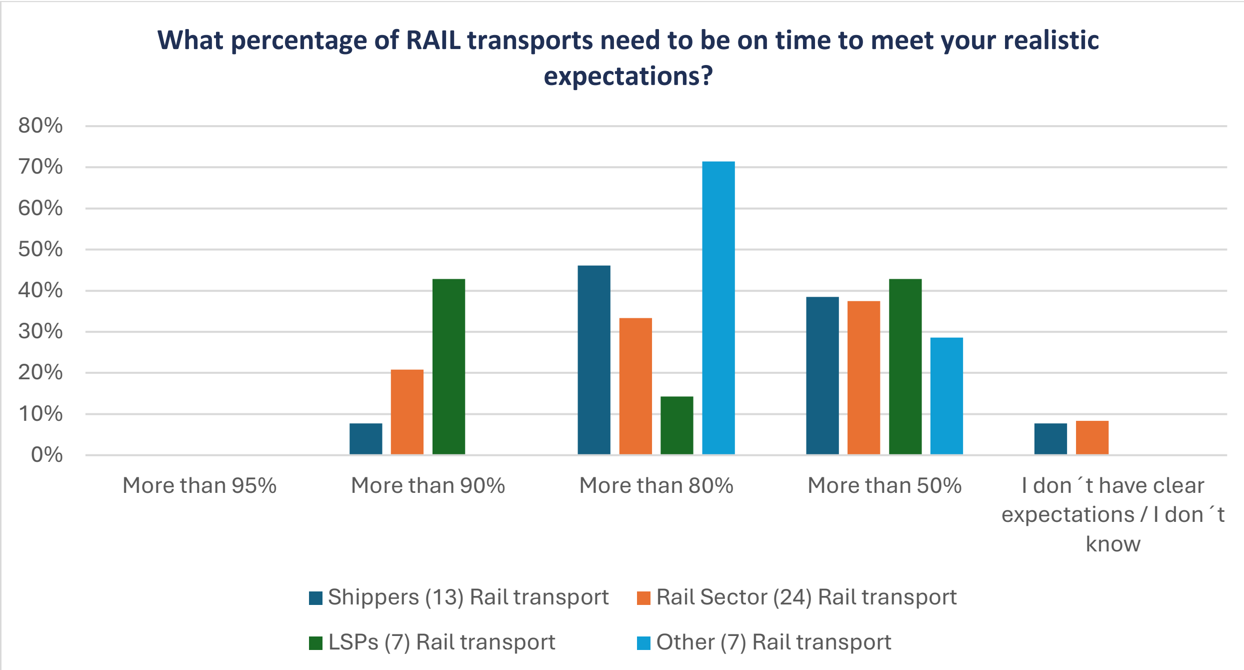
On-Time Performance Expectations

ATTENTION: In the following section we deal with on-time expectations referring to DIFFERENT scenarios: First over-all on-time performance is referred to, which includes road freight, intermodal transport, air freight and any other transport mode. Later we refer to road and intermodal freight expectations in particular. It shall be understood that many respondents often have completely different expectations from specific modes.

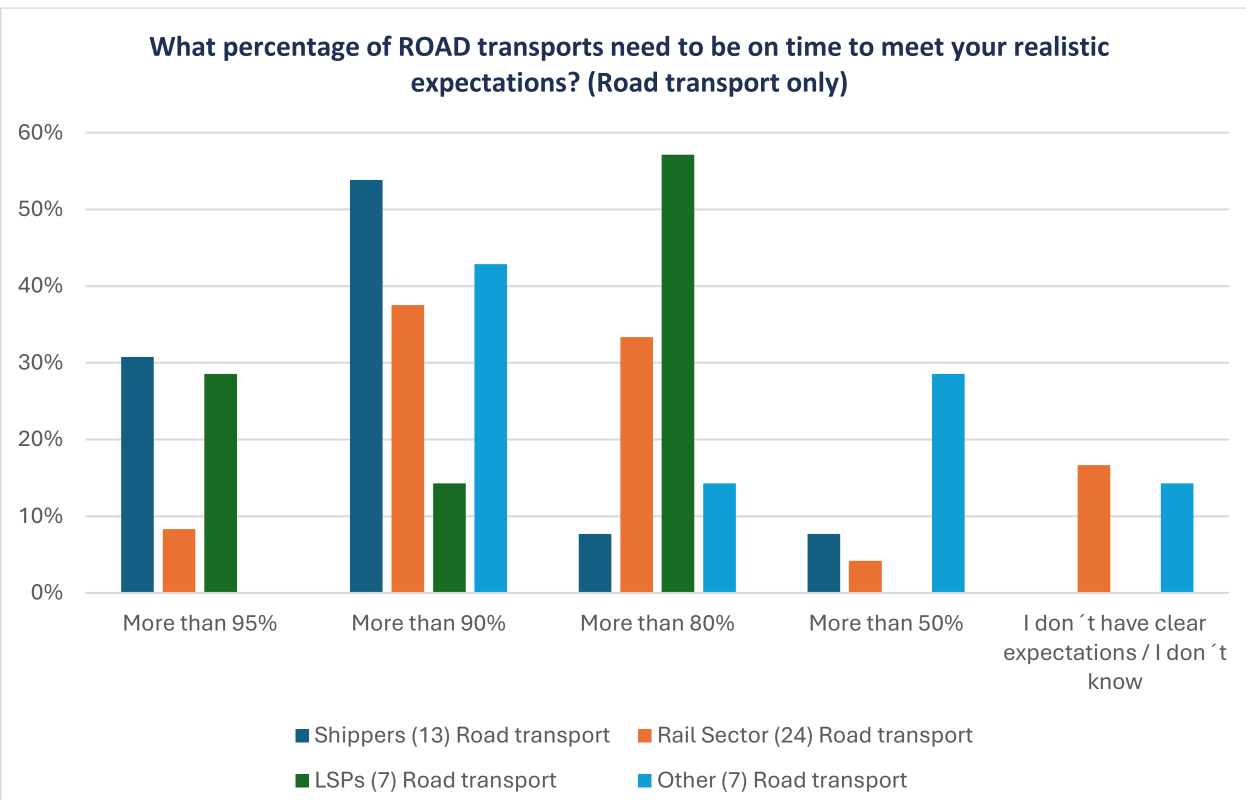
The current expectation mismatch is substantial but addressable. Below are three graphs asking What percentage of transport needs to be on time to meet your realistic expectations? First one all modes of transport, second one only rail, third one only road.



Graph 16. What percentage of transports needs to be on time to meet your realistic expectations?



Graph 17 What percentage of transports need to be on time to meet your realistic expectations? (Rail transport only)

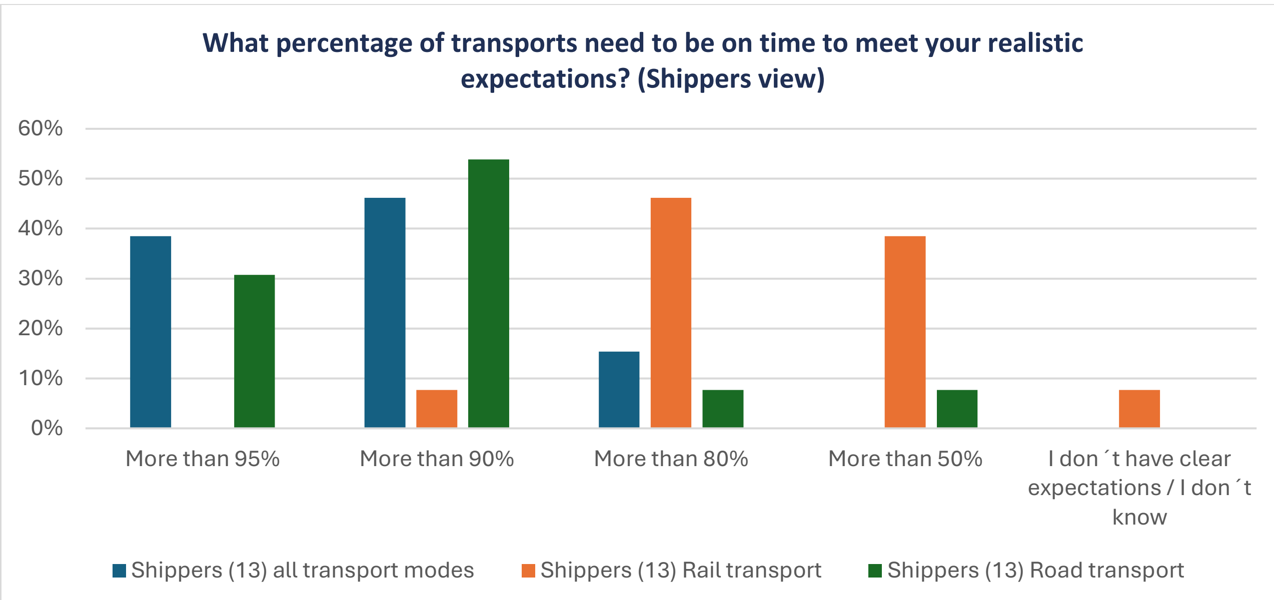


Graph 18 What percentage of transports need to be on time to meet your realistic expectations? (Road transport only)

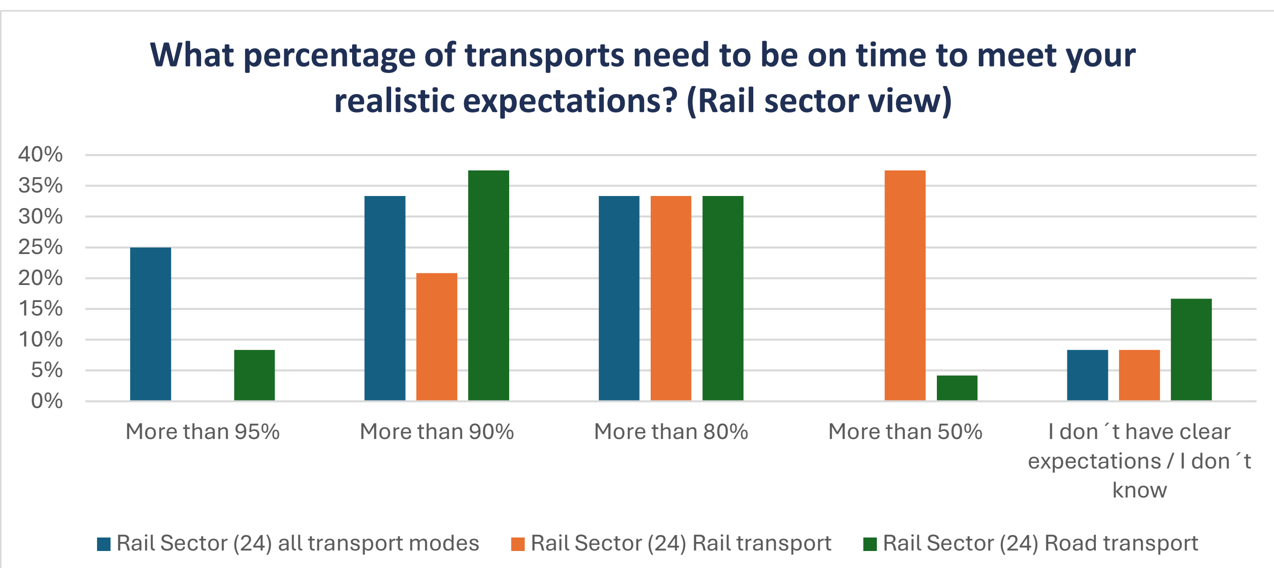
Current Reality:

- **Road:** 82.4% of respondents expect >80% OTP
- **Intermodal:** Only 56.9% expect >80% OTP

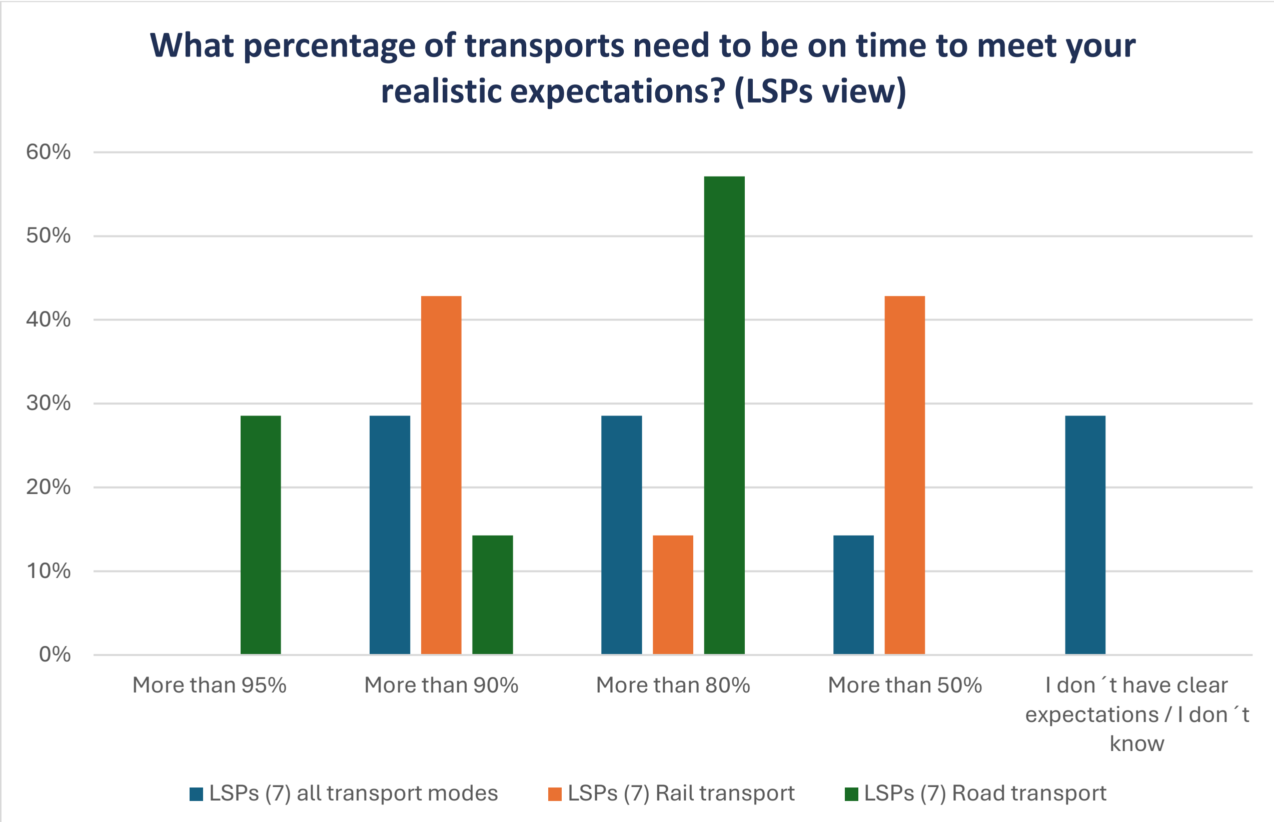
Below three graphs ask: What percentage of transports need to be on time to meet your shipper realistic expectations?



Graph 19 What percentage of transports need to be on time to meet your realistic expectations? (Shippers view)



Graph 20 What percentage of transports need to be on time to meet your realistic expectations? (Rail Sector view)



Graph 21 What percentage of transports need to be on time to meet your realistic expectations? (LSPs view)

Breakdown by Stakeholder

Rail Sector: Shows interesting internal contradiction—58% expect 90%+ OTP generally, but only 21% for intermodal specifically.

LSPs: Hold surprisingly low expectations for both modes (only 29% expect 90%+ OTP), suggesting industry-wide need for honest performance conversations. LSPs the on-time-expectations on road freight and intermodal transport don´t differ that much as we might expect.

Shippers: High expectations for road (85% expect 90%+ OTP) but dramatically lowered expectations for intermodal (only 8% expect 90%+ OTP).

At first sight this appears as positive for intermodal freight, as the expectations are not as high. However, this is just the better side of the medal. On the downside we see shippers refrain from intermodal transport due to on-time expectations, which are unreasonably low, much lower than the LSPs would expect.

What this means for increase of use of intermodal:

Stakeholders are ready to accept realistic expectations if they're honest and transparent. The performance gap is real but not insurmountable. More importantly, corridor-specific Service Level Agreements can align expectations with achievable performance levels, reducing friction and building confidence.

Independent from intermodal freight and road freight is clear that the different supply chain actors are completely misaligned and have very different on-time performance expectations. In this situation it is unavoidable that the lack collaboration bears a high potential for frustration. The different players should better talk to each other more realistic and honestly in parallel.

The Path Forward: Opportunities for Modal Shift

Five Reasons for Optimism

1. Forget the fairy tale that intermodal transport always takes longer

The data proves it: 60% of respondents confirm competitive transit times. **The capability exists - we just need to market it better and make it visible to shippers.**

Action: Create corridor-specific transit-time scorecards based on empiric, real-time data, that demonstrate competitive performance on key routes.

2. Intermodal on-time performance is closer to road freight than it appears

Yes, there's a gap but it's narrower than perceptions suggest. More importantly, **in 40% of cases, delays are caused outside the rail segment,** meaning improvements don't require massive rail infrastructure investments.

Action: Focus improvement efforts on the full intermodal chain terminals, dispatch planning, and last-mile coordination not just rail punctuality.

3. Higher transparency would unlock rapid improvements

Better real-time information about transport execution would:

- Help identify actual root causes of delays
- Enable targeted improvements
- Build trust with shippers
- Reduce the blame game between stakeholders

A data sharing culture which allows to identify areas which require improvements: "You cannot manage what you cannot measure " [Peter Drucker]

Action: Improve, use and connect to digital platforms that provide end-to-end visibility across the intermodal chain. Replace individual status messages with objective, sensor-based real-time data. And give access to the cargo owners to data on their good´s shipments, without unreasonable hurdles.

4. Every stakeholder controls part of the solution

Instead of watching for others to fix problems, **every supply chain actor should focus on improvements within their control:**

- **Rail operators:** Improve scheduling and communication
- **Terminal operators:** Optimize capacity and operating hours
- **LSPs:** Enhance dispatch planning and truck coordination
- **Shippers:** Set realistic expectations based on corridor-specific data

Action: Launch cross-stakeholder working groups focused on specific improvement areas (e.g., "Last-Mile Coordination Task Force").

5. The industry should talk honestly about OTIF expectations

The current mismatch in expectations creates unnecessary friction. Honest, data-driven conversations about achievable performance levels will:

- Reduce disappointment and disputes
- Allow for realistic SLAs
- Enable better planning across the supply chain
- Apply equally to road and intermodal transport

Action: Develop industry-standard OTIF benchmarks by corridor type and publish transparent performance data.

Why this matters for increasing the use of rail/intermodal

The Fundamental Insight: It's Not as bad as we think

This survey proves that **the** biggest barriers to intermodal adoption are perception and lack of transparency, not fundamental capability.

What this means:

- We don't need *to wait* for massive infrastructure investments to improve competitiveness.
- Quick wins are available through better communication, coordination, and transparency.
- The industry is ready for change stakeholders recognize problems and opportunities.

The Competitive advantages are real

When we strip away misconceptions, intermodal freight offers:

- **Comparable or better transit times** on many corridors (confirmed by 60% of respondents)
- **Environmental benefits** that will become increasingly valuable
- **Cost competitiveness** on longer distances
- **Capacity** to handle growing freight volumes
- **Clear improvement pathways** that don't require decades-long infrastructure programs

Concrete Action Plan

As a result of the report, this is a potential Action Plan moving forward

Short-term actions (0-12 months):

1. Launch transparency initiatives: publish corridor-specific performance data based on actual data (instead of hopes and promises)
2. Create cross-stakeholder dialogue forums to address the "blame game"
3. Pilot and connect to end-to-end visibility platforms on key corridors
4. Develop realistic, data-driven OTIF benchmarks by corridor

Medium-term actions (1-3 years):

1. Standardize performance reporting across the industry
2. Implement coordinated improvement programs targeting specific delay causes
3. Expand digital integration across intermodal chains
4. Build marketing campaigns that challenge shipper misconceptions with data

Long-term actions (3+ years):

1. Continue infrastructure investments (they're still needed, but aren't the only solution)
2. Pursue further market liberalization
3. Develop EU-wide intermodal performance standards
4. Build institutional knowledge-sharing mechanisms

Most importantly, the rail and intermodal sector is more afraid of its direct competitors (in rail and intermodal freight) than of road transport. This appears to be a strategic error: By jointly extending capabilities and transparency the intermodal could win and strengthen it´s position against other transport modes. Unfortunately, this would require a shift in mentality, which is harder to achieve than any long-term investment.

Why This Survey Matters

Unlike many industry reports that focus exclusively on problems, this survey reveals:

- Hidden competitive strengths in intermodal transport
- Specific, actionable improvement opportunities
- Stakeholder readiness for collaborative solutions
- Clear pathways to accelerate modal shift

The data challenges conventional wisdom and provides a roadmap for unlocking rail freight's potential in European logistics.

Detailed Data Tables

[*All detailed data tables from the original Annexes would be included here, including:*]

- Table: Comparison of Intermodal Transit Time with Road Transport by Stakeholder
- Table: Assessment of OTP at Rail Terminals vs. Destination by Stakeholder
- Table: Late train arrival frequency by Stakeholder
- Table: Bad train schedule frequency by Stakeholder
- Table: An incident at the terminal frequency by Stakeholder
- Table: Bad planning of pick-up frequency by Stakeholder
- Table: Intentionally late pick-up frequency by Stakeholder
- Table: Delay on last mile frequency by Stakeholder
- Table: Rail infrastructure responsibility by Stakeholder
- Table: Rail or intermodal operator responsibility by Stakeholder
- Table: Terminal operator responsibility by Stakeholder
- Table: Dispatch planning responsibility by Stakeholder
- Table: Truck driver responsibility by Stakeholder
- Table: Subcontractor (trucking) responsibility by Stakeholder
- Table: Road traffic responsibility by Stakeholder
- Table: Information Flow Comparison by Stakeholder
- Table: OTP Expectations - Intermodal Transport by Stakeholder
- Table: OTP Expectations - Road Transport by Stakeholder

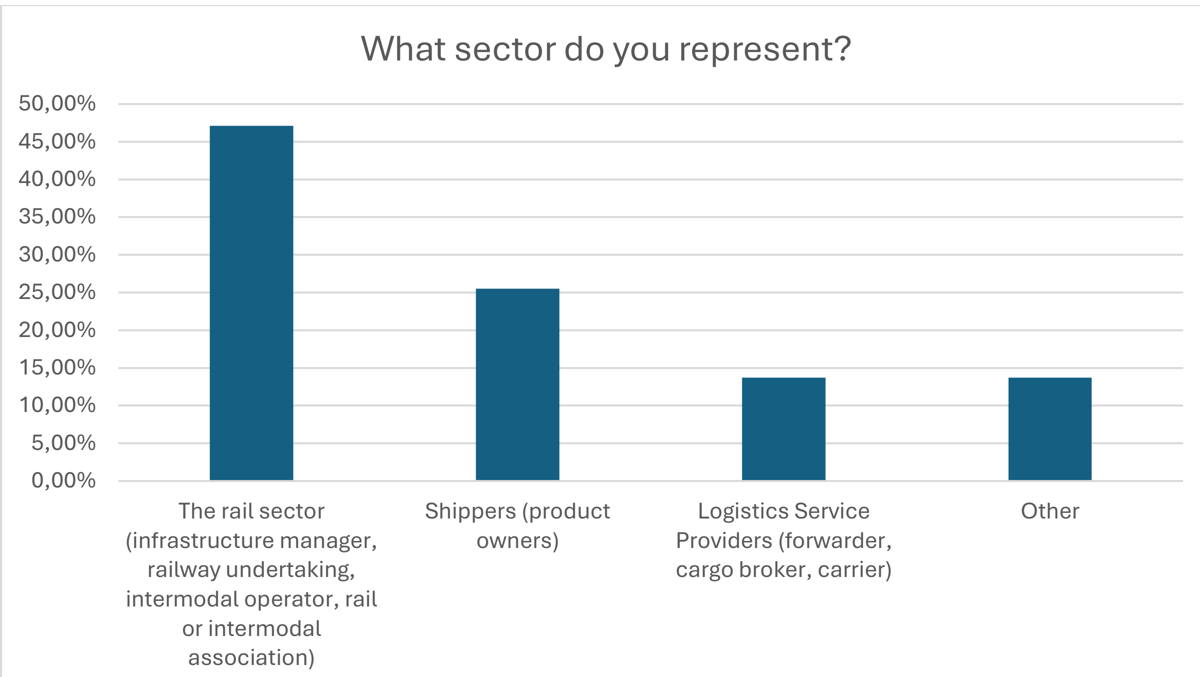
Annex 1. Demographics and Data

Survey Participants

Total Respondents: 51 stakeholders across the European intermodal transport ecosystem

Composition:

- **Rail Sector** (infrastructure managers, railway undertakings, intermodal operators, associations): 24 respondents (47.1%)
- **Shippers** (product owners): 13 respondents (25.5%)
- **Logistics Service Providers** (forwarders, cargo brokers, carriers): 7 respondents (13.7%)
- **Other**: 7 respondents (13.7%)

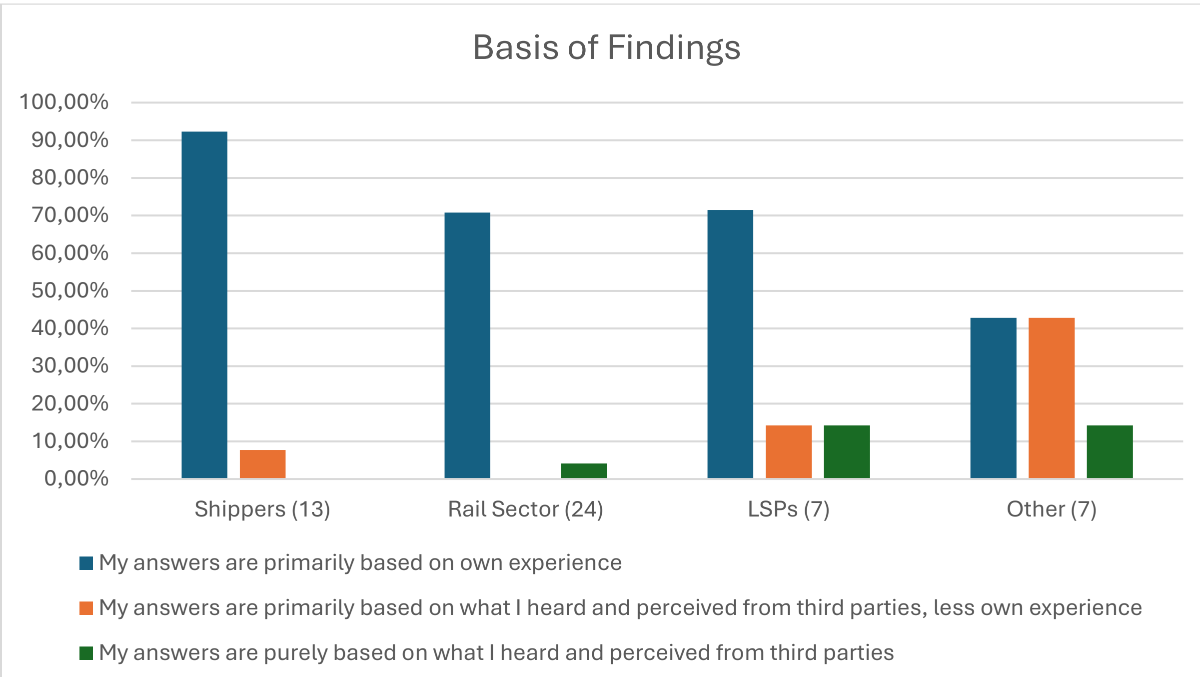


Graph 22 Respondent Demographics

Credibility and Reliability

Basis of Responses:

- **72.5%** (37 of 51) based answers on direct operational experience
- High consistency across all stakeholder groups
- Findings reflect real-world conditions, not theoretical perspectives



Graph 23 Basis of Findings by Stakeholder

This experience-based foundation ensures the insights are actionable and grounded in current market realities.

Annex 2. Respondent Demographics and Basis of Findings

Category	Count	Percentage
What sector do you represent?		
The rail sector (infrastructure manager, railway undertaking, intermodal operator, rail or intermodal association)	24	47.1%
Shippers (product owners)	13	25.5%
Logistics Service Providers (forwarder, cargo broker, carrier)	7	13.7%
Other	7	13.7%

Table 1 What sector do you represent?

Basis of Findings	Shippers (13)	Rail Sector (24)	LSPs (7)	Other (7)
My answers are primarily based on own experience	92.31%	70.83%	71.43%	42.86%
My answers are primarily based on what I heard and perceived from third parties, less own experience	7.69%	25.0%	14.29%	42.86%
My answers are purely based on what I heard and perceived from third parties	0%	4.17%	14.29%	14.29%

Table 2 Basis of Findings by Stakeholder Category 1

Annex 3. Perceptions of Intermodal Transit Time and On-Time Performance

Response	Shippers (13)	Rail Sector (24)	LSPs (7)	Other (7)
In best case the transit time for intermodal transport can be equal to road transport	30.77%	25%	14.28%	57.15%
The transit time for intermodal transport is always longer compared to road transport	69.23%	29.17%	42.86%	14.28%
In some cases the transit time for intermodal transport can be even shorter as for road transport	0%	45.83%	42.86%	28.57%

Table 3 Comparison of Intermodal Transit Time with Road Transport by Stakeholder 1

Response	Shippers (13)	Rail Sector (24)	LSPs (7)	Other (7)
On-time-performance at rail terminal and at destination are equal	30.77%	41.66%	14.29%	57.14%
On-time performance at rail terminal is worse compared to the one at destination	38.46%	37,5%	42.86%	42.86%
On-time performance at rail terminal is better compared to the one at destination	7.69%	0%	28.57%	0%
I don´t know	23.08%	20.83%	14.29%	0%

Table 4 Assessment of On-Time Performance (OTP) at Rail Terminals vs. Destination by Stakeholder 1

Annex 4. Root Causes of Delays in Intermodal Transport

Frequency	Shippers (13)	Rail Sector (24)	LSPs (7)	Other (7)
Frequently	61.54%	87.50%	71.43%	85.71%
Rarely	23.08%	8.33%	28.57%	14.29%
I don’t know	15.38%	4.17%	0%	0%

Table 5 Late train arrival

Frequency	Shippers (13)	Rail Sector (24)	LSPs (7)	Other (7)
Frequently	30.77%	29.17%	14.29%	71.43%
Rarely	53.85%	62.50%	85.72%	28.57%
I don't know	15.38%	8.33%	0%	0%

Table 6 Bad train schedule (if train is slightly late then the pick-up makes no more sense that day)

Frequency	Shippers (13)	Rail Sector (24)	LSPs (7)	Other (7)
Frequently	15.38%	8.33%	14.29%	14.29%
Rarely	69.23%	83.34%	85.71%	85.71%
I don't know	15.38%	8.33%	0%	0%

Table 7 An incident at the terminal

Frequency	Shippers (13)	Rail Sector (24)	LSPs (7)	Other (7)
Frequently	30.77%	16.67%	14.29%	28.57%
Rarely	61.54%	70.84%	85.71%	71.43%
I don’t know	7.69%	12.50%	0%	0%

Table 8 Bad planning of pick-up (by truck)

Frequency	Shippers (13)	Rail Sector (24)	LSPs (7)	Other (7)
Frequently	23.08%	16.67%	28.57%	0%
Rarely	69.23%	70.83%	71.43%	100%
I don't know	7.69%	12.50%	0%	0%

Table 9 Intentionally late pick-up (by truck)

Frequency	Shippers (13)	Rail Sector (24)	LSPs (7)	Other (7)
Frequently	23.08%	37.50%	14.29%	14.29%
Rarely	69.23%	50.00%	85.71%	85.71%
I don’t know	7.69%	12.50%	0%	0%

Table 10 A delay on the last mile (by truck)

Annex 5. Attribution of Responsibility for Delays

Frequency	Shippers (13)	Rail Sector (24)	LSPs (7)	Other (7)
Frequently	53.85%	95.83%	57.14%	42.86%
Rarely	15.38%	4.17%	42.86%	57.14%
I don't know	30.77%	0%%	0%%	0%%

Table 11 Rail infrastructure

Frequency	Shippers (13)	Rail Sector (24)	LSPs (7)	Other (7)
Frequently	46.15%	70.83%	71.43%	71.43%
Rarely	23.08%	29.17%	28.57%	28.57%
I don’t know	30.77%	0%	0%	0%

Table 12 Rail or intermodal operator

Frequency	Shippers (13)	Rail Sector (24)	LSPs (7)	Other (7)
Frequently	15.38%	37.50%	28.57%	28.57%
Rarely	61.54%	62.50%	71.43%	71.43%
I don’t know	23.08%	0%	0%	0%

Table 13 Terminal operator

Frequency	Shippers (13)	Rail Sector (24)	LSPs (7)	Other (7)
Frequently	15.38%	25%	28.57%	28.57%
Rarely	69.23%	75.00%	57.14%	71.43%
I don't know	15.38%	0%	14.29%	0%

Table 14 Dispatch planning

Frequency	Shippers (13)	Rail Sector (24)	LSPs (7)	Other (7)
Frequently	0%	25%	14.29%	0%
Rarely	84.62%	62.50%	85.71%	100.00%
I don't know	15.38%	12.50%	0%	0%

Table 15 Truck driver

Frequency	Shippers (13)	Rail Sector (24)	LSPs (7)	Other (7)
Frequently	7.69%	50.00%	28.57%	28.57%
Rarely	76.92%	41.67%	71.43%	71.43%
I don’t know	15.38%	8.33%	0%	0%

Table 16 Subcontractor (trucking)

Frequency	Shippers (13)	Rail Sector (24)	LSPs (7)	Other (7)
Frequently	30.77%	58.33%	85.71%	28.57%
Rarely	53.85%	33.33%	14.29%	71.43%
I don’t know	15.38%	8.33%	0%	0%

Table 17 Road traffic

Annex 6. Intermodal vs. Road Transport: Comparative Performance and Information Flow

Finding	Shippers (13)	Rail Sector (24)	LSPs (7)	Other (7)
On average road transport is more likely on time compared to intermodal transport; In case of delays on road transport I feel better informed compared to intermodal;	30.77%	4.17%	0%	0%
On average road and intermodal transport have a similar on-time-performance; In case of delays on road transport I feel better informed compared to intermodal;	0%	4.17%	14.29%	14.29%
In case of delays the information provided by road or intermodal transport is on a similar level;	0%	4.17%	14.29%	14.29%
On average road and intermodal transport have a similar on-time-performance;	23.08%	12.5%	14.29%	28.57%
On average road transport is more likely on time compared to intermodal transport;	30.77%	25.0%%	28.57%	0%
In case of delays on road transport I feel better informed compared to intermodal; On average road and intermodal transport have a similar on-time-performance;	7.69%	4.17%	0%	0%
Other;	7.69%	0%	0%	0%
In case of delays the information provided by road or intermodal transport is on a similar level; On average road and intermodal transport have a similar on-time-performance;	0%	4.17%	0%	0%
In case of delays on road transport I feel better informed compared to intermodal;	0%	25.0%	14.29%	28.57%

Finding	Shippers (13)	Rail Sector (24)	LSPs (7)	Other (7)
In case of delays on road transport I feel better informed compared to intermodal; In case of delays the information provided by road or intermodal transport is on a similar level;	0%	4.17%	0%	0%
On average road and intermodal transport have a similar on-time-performance; In case of delays the information provided by road or intermodal transport is on a similar level;	0%	12.5%	14.29%	14.29%

Table 18 Intermodal vs. Road Transport: Comparative Performance and Information Flow

Annex 7. On-Time Performance Expectations

Percentage Range	Shippers (13)	Rail Sector (24)	LSPs (7)	Other (7)
More than 95%	38.46%	25.00%	0%	14.29%
More than 90%	46.15%	33.33%	28.57%	14.29%
More than 80%	15.38%	33.33%	28.57%	28.57%
More than 50%	0%	0%	14.29%	28.57%
I don´t have clear expectations / I don´t know	0%	8.33%	28.57%	14.29%

Table 19 What percentage of transports need to be on time to meet your realistic expectations?

Percentage Range	Shippers (13)	Rail Sector (24)	LSPs (7)	Other (7)
More than 95%	0%	0%	0%	0%
More than 90%	7.69%	20.83%	42.86%	0%
More than 80%	46.15%	33.33%	14.29%	71.43%
More than 50%	38.46%	37.50%	42.86%	28.57%
I don´t have clear expectations / I don´t know	7.69%	8.33%	0%	0%

Table 20 Intermodal transport

Percentage Range	Shippers (13)	Rail Sector (24)	LSPs (7)	Other (7)
100%	7.69%	0%	0%	0%
More than 95%	23.08%	8.33%	28.57%	0%
More than 90%	53.85%	37.50%	14.29%	42.86%

Percentage Range	Shippers (13)	Rail Sector (24)	LSPs (7)	Other (7)
More than 80%	7.69%	33.33%	57.14%	14.29%
More than 50%	7.69%	4.17%	0%	28.57%
I don´t have clear expectations / I don´t know	0%	16.67%	0%	14.29%

Table 21 Road transport

Why this report and authors

This report is based on a survey, the 2nd one out of a series on intermodal transport. The aim of the survey and the report is to focus on transit-time and on-time performance, separating perceptions from actuals, with an eye on the different views by stakeholder group.

We identified several areas worth demystifying and hope you enjoy reading.