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## **Drewry-ESC survey of shippers on container shipping service quality**

### **Selected results for survey participants**

Dear colleagues,

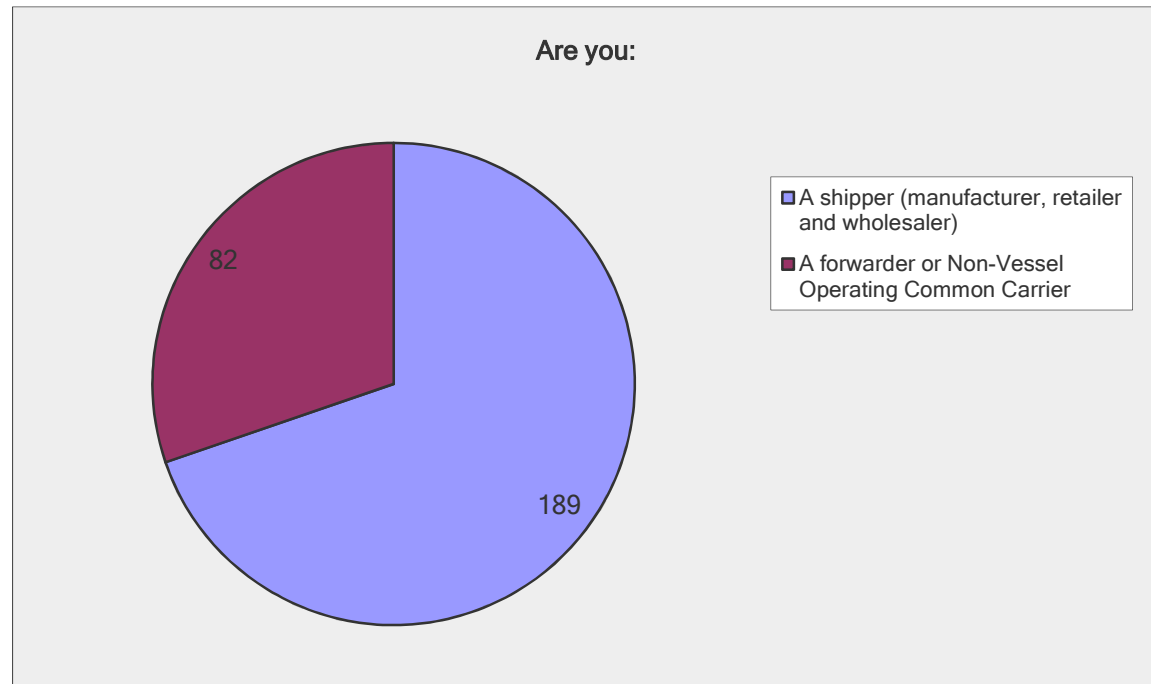
Here are the selected survey results from last year's Drewry-ESC survey of shippers on container shipping service quality.

We hope that you can participate in this year's Drewry-ESC survey.

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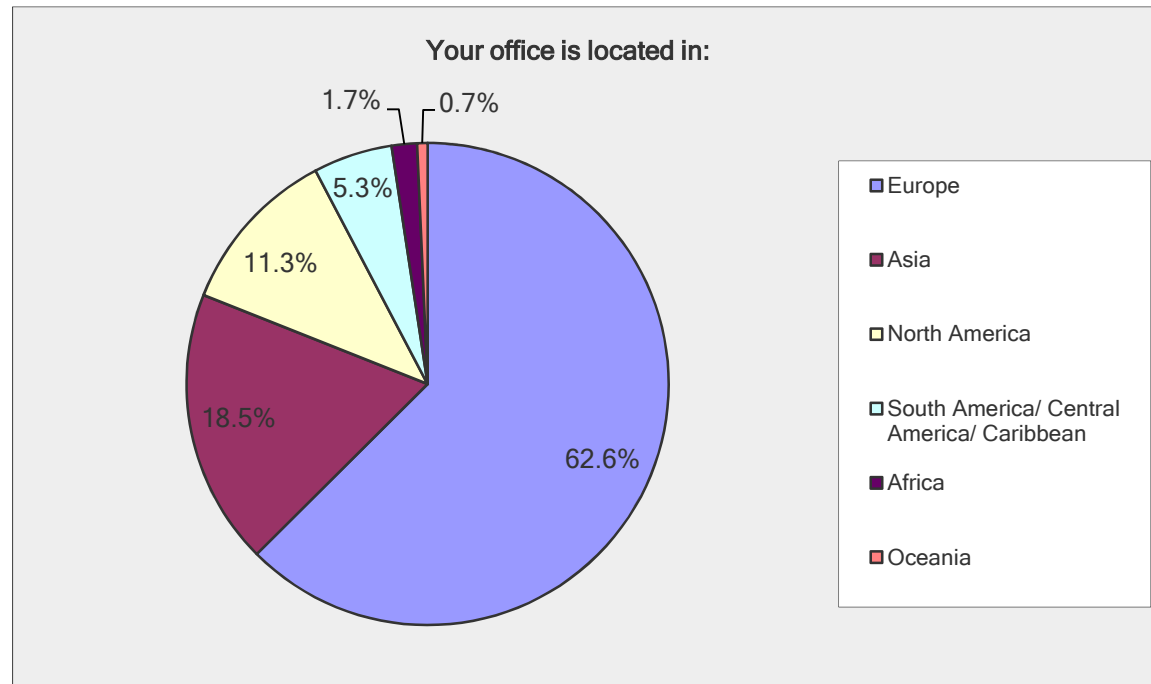
March 2018

# The ESC and Drewry conducted a survey of 271 shippers and forwarders in March 2017



Drewry-ESC global shipper survey 2017

# Most of the respondents had their office located in Europe, with about 40% located on other continents

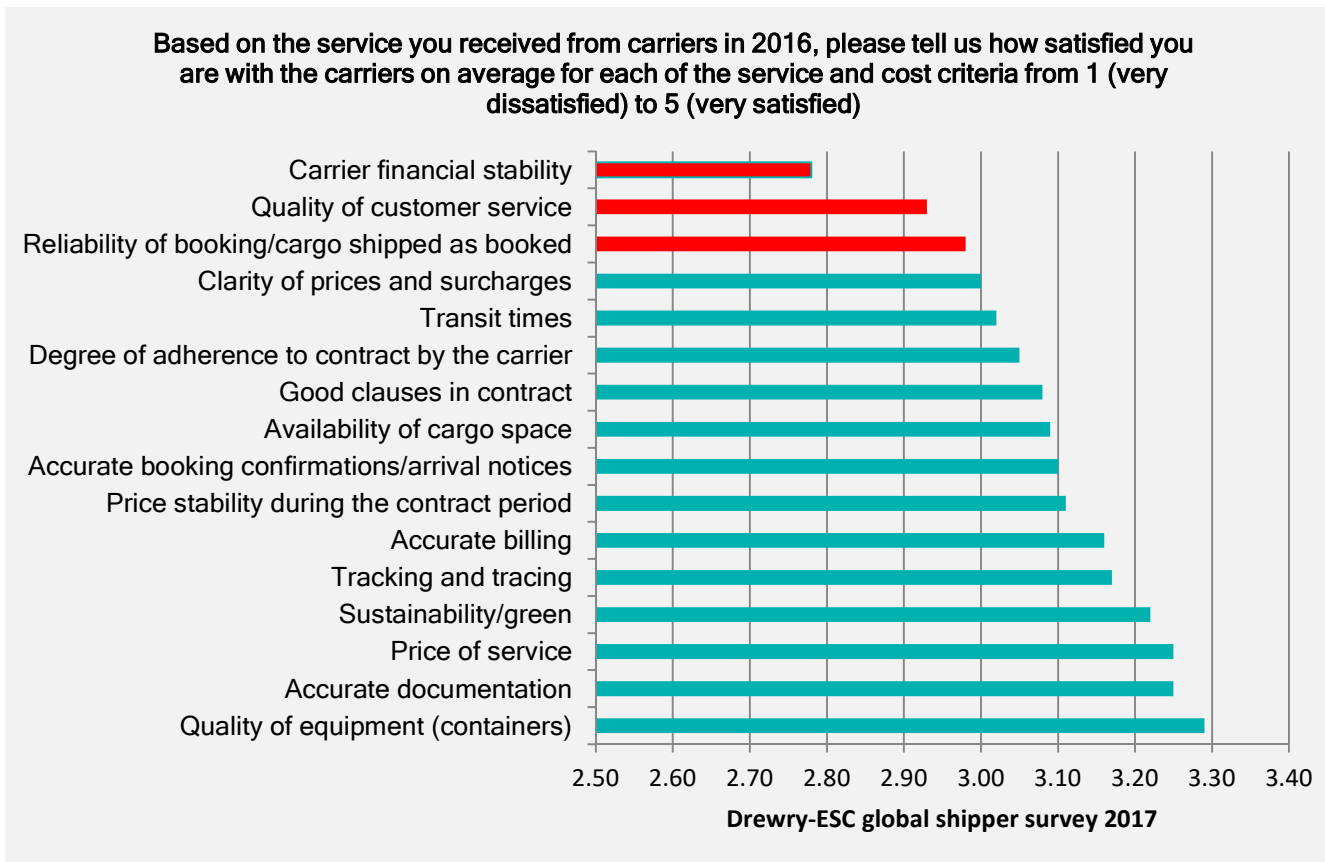


Drewry-ESC global shipper survey 2017

# Customers were dissatisfied with carriers' services, particularly regarding financial stability and customer service



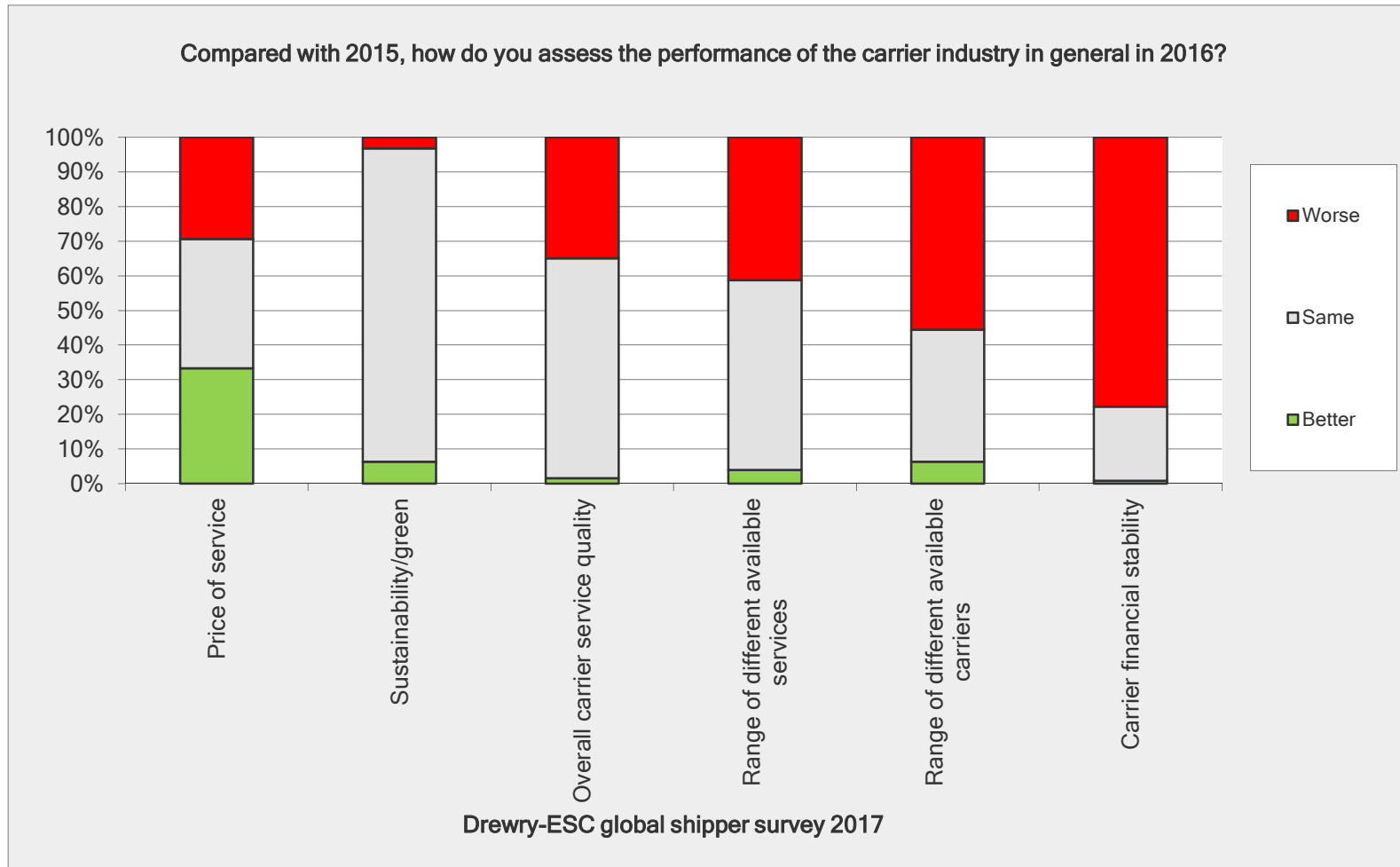
On a scale of 1 (very dissatisfied) to 5 (very satisfied), customers on average did not give carriers more than 3.3 on average for any of the service attributes.



# Customers said that the service performance of carriers has deteriorated in several areas between 2015 and 2016



Customers are more satisfied with carriers' prices, saw no change in their sustainability performance and said carrier service quality and other service features have worsened.



## The survey data was insufficient to publish scores by ocean carrier – we will review the survey sample next year



When we circulated the survey last year, Drewry and the ESC said that the results of this survey will be broadly publicised and selected information on the results of the survey will also be sent to survey participants. Please rest assured that your anonymity and confidentiality of your answers will remain a top priority for us, and no sensitive data has been / will be disclosed to any third party or used for purposes other than those of conducting this survey.

We also cautioned that the results of the survey will be used to track the service quality of the container carrier industry, to quantify differences in quality over time and between carriers and, if sufficient replies are received, to provide a ranking of all providers against important service and cost criteria.

For the first annual survey last year, the maximum number of respondents per country was only 35 (for France). The maximum number of respondents per carrier was only about 20. This meant, unfortunately, that we just did not have enough replies to provide meaningful, different analyses by country or by carrier this year.

We aim to increase the level of participation in the second annual survey, this year, and aim to provide different analyses by country or by carrier. We hope that we can count on your continued participation!