



**CLUSTER
FOR
LOGISTICS**

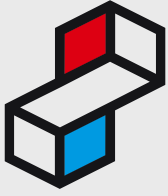
LUXEMBOURG
ADDING VALUE IS THE KEY.

Membership Satisfaction Survey 2020

Cluster for Logistics Luxembourg

ADDING VALUE IS THE KEY.

SINCE 2009



Membership Satisfaction Survey 2020

General information about the survey

Purpose of the survey:

In an effort to continuously improve the services of the Cluster for Logistics Luxembourg, this study aims to gain insights about the satisfaction of the cluster's members and to get feedback on the activities of the association.

Participation of the survey:

The Cluster for Logistics Luxembourg currently counts around 100 members. From this base of 95 members, 31 have participated in the underlying survey. This corresponds to a participation rate of 33%. The survey was conducted over a period of 3 weeks starting the 13th September 2020 and ending the 1st October 2020.

Outline of the survey:

The survey was structured according to three main parts:

Part 1: Cluster for Logistics – Overall Feedback

Part 2: Cluster for Logistics – Business Activities Feedback

Part 3: Cluster for Logistics – COVID-19 Business Development Feedback

Results of the survey:

The results of the survey are presented on the following pages.





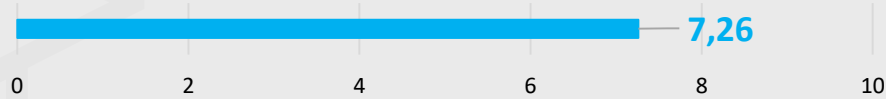
Membership Satisfaction Survey 2020

Part 1: General Feedback

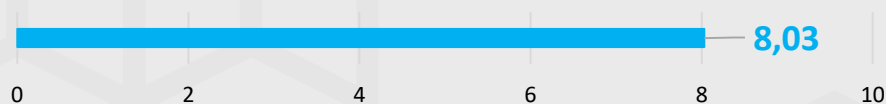
1. On a scale from 1 (low) to 10 (high), how would you **rate the external appearance** of the Cluster for Logistics Luxembourg?



2. On a scale from 1 (low) to 10 (high), how would you **rate the Cluster for Logistics Luxembourg compared to other sectorial associations?**



3. On a scale from 1 (unlikely) to 10 (likely), how likely is it that you would **recommend a Cluster for Logistics Luxembourg membership** to another company of the logistics industry?



4. On a scale from 1 (unlikely) to 10 (likely), how likely is it that you would **recommend a Cluster for Logistics Luxembourg event** to another company of the logistics industry?

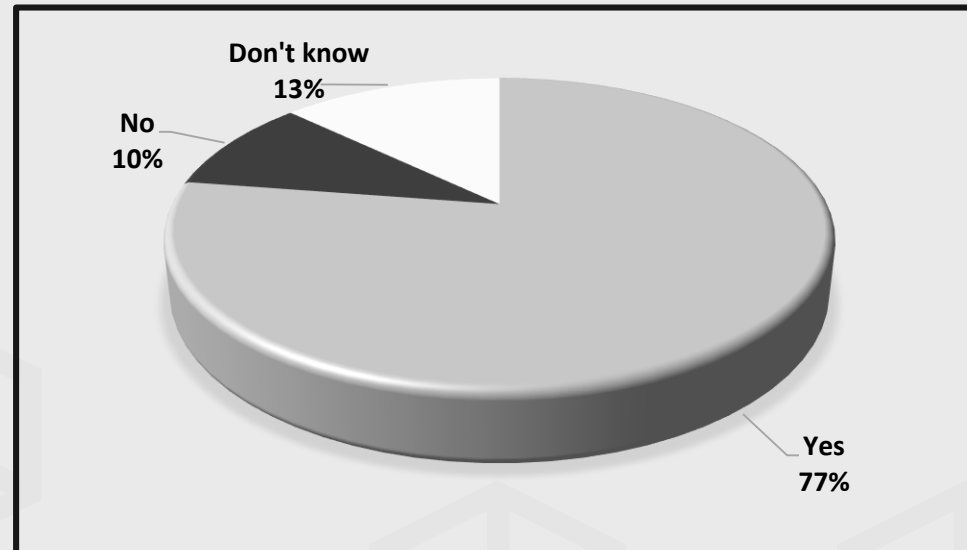




Membership Satisfaction Survey 2020

Part 1: General Feedback

5. Are the **employees of your company** aware about the services and events offered by the Cluster for Logistics Luxembourg?





Membership Satisfaction Survey 2020

Management Summary – Part 1: General Feedback

In the general part of the study, which refers to the external presentation of the Cluster for Logistics (C4L), the C4L achieved good to very good results, ranging between 7.26 and 8.61 out of 10 points. This section included the external appearance of the Cluster, comparing it to other sectorial associations and recommendation towards membership and events. It is based on the concept of the Net Promoter Score (NPS) concept around the simple question “Would you recommend us?”. Those are encouraging scores that the C4L will track further and even try to improve in future.

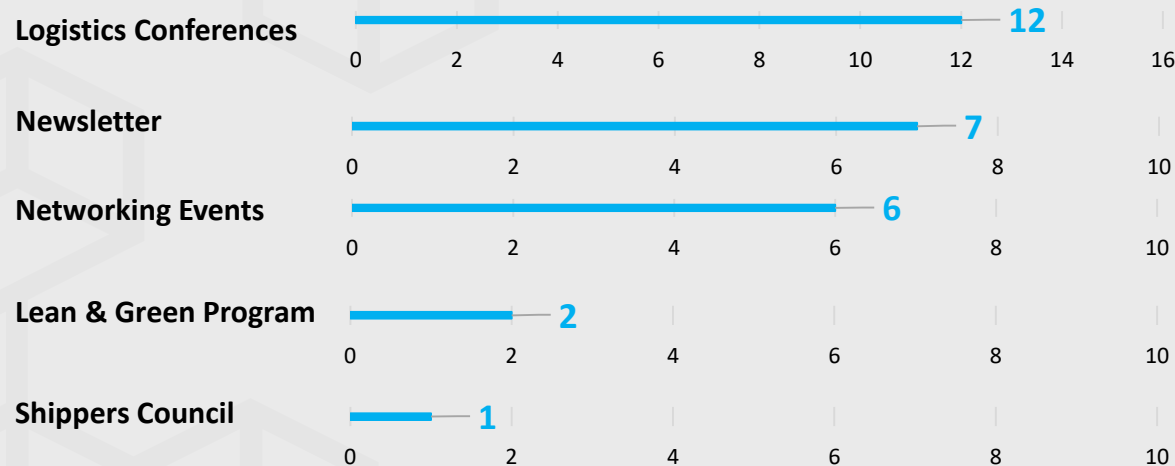
Additionally, astonishing 77% of the respondents thought that the employees of the companies seem to be aware about the services and events offered by the Cluster for Logistics. While this is a positive result, almost a fourth are likely unaware about the C4L and its activities. The C4L therefore suggests further promoting C4L events to company member employees including the extensive use of new means of communication such as social media.



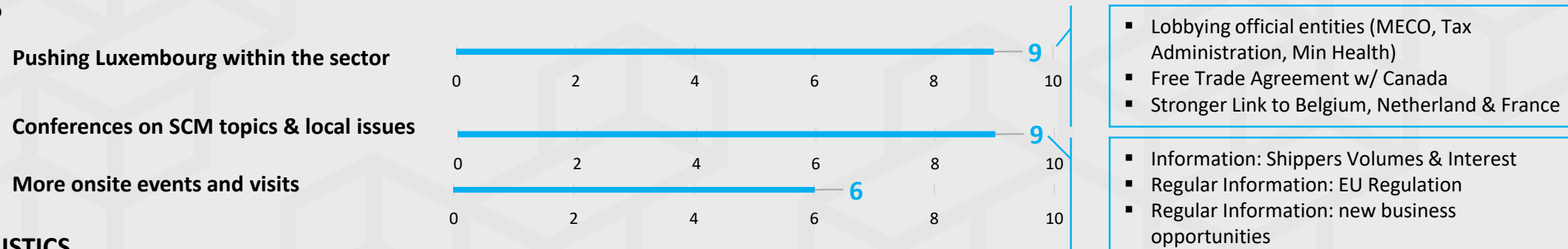
Membership Satisfaction Survey 2020

Part 2: Business Activities Feedback

1. Which **services** offered by the Cluster for Logistics Luxembourg, within the past 24 months, have you **preferred the most**?



2. Which **services** would you have liked that the Cluster for Logistics Luxembourg had offered during the past 24 months?

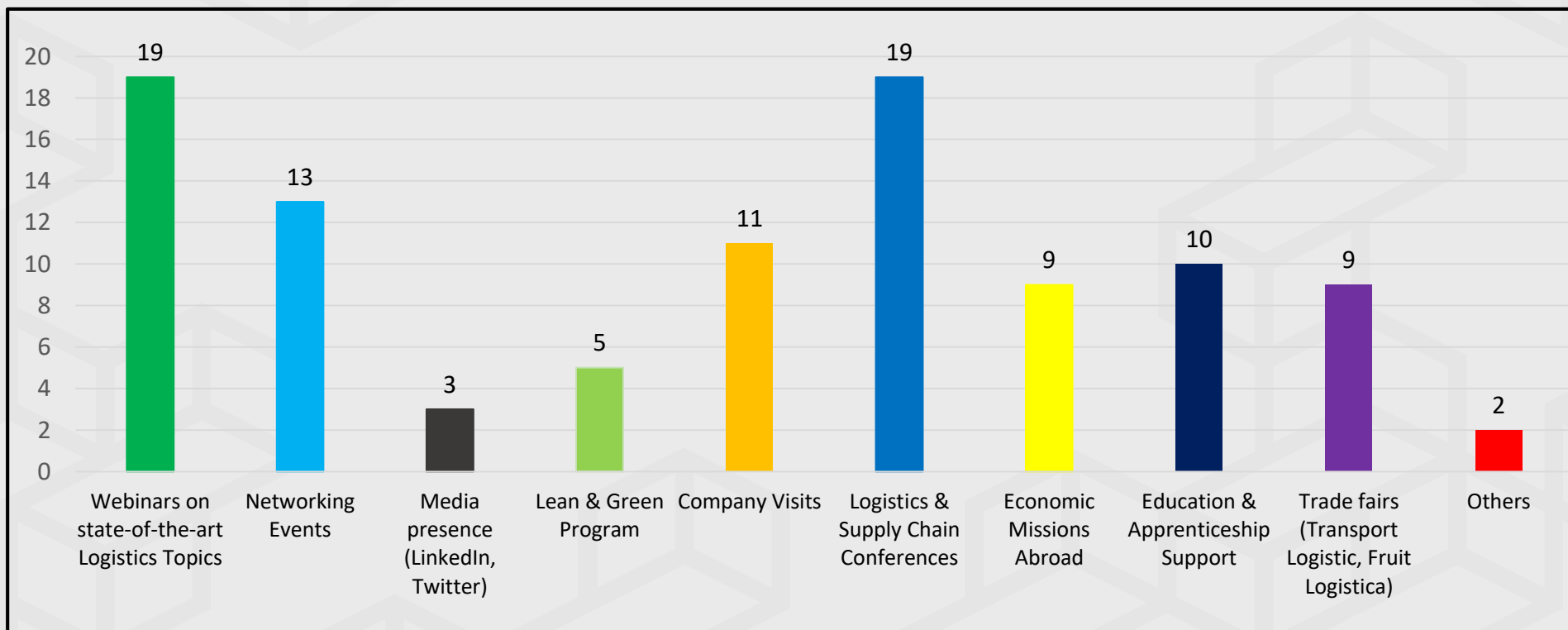




Membership Satisfaction Survey 2020

Part 2: Business Activities Feedback

3. Which services or events should the Cluster for Logistics Luxembourg **focus on within the upcoming months?**





Membership Satisfaction Survey 2020

Part 2: Business Activities Feedback

7. Regarding the organization of a **Webinar** which topics would be of interest to your company?

- Business Aspects**
- Foreign Trade (Asia, South America, etc)
 - Evaluation of business opportunities in various Transport Modes
 - Future changes in customer behaviour
 - Truck driver shortages
 - Customs clearance

- Sustainable Logistics**
- Green Transport Developments (Air, Sea, Land and Rail)
 - Energy Efficiency Regulations



- Macroeconomic Aspects**
- Brexit Regulations
 - EU Mobility package
 - Emerging Markets in Logistics
 - New Trends & Needs in Logistics (During & after COVID-19)

- Digitalization**
- E-CMR
 - Cyber security: Vulnerability of classical supply chains to cyber attacks
 - Modern analytical logistics tools: Tracing & Visibility of Supply Chains
 - Freight Market intelligence
 - Artificial Intelligence solutions for supply chains



Membership Satisfaction Survey 2020

Management Summary - Part 2: Business Activities Feedback

The second part of the study identified which activities and services C4L members have most preferred in the past and how the Cluster for Logistics should position itself in the future. The logistics conferences alongside the networking events and the news briefing gained the most traction over the past two years. Looking ahead, the respondents expect further lobbying actions, conferences on supply chain management and more company visits.

Additionally, several respondents request support on Education and Apprenticeship. The list of recommendations for future business activities to address is long from truck driver shortage, via monitoring of Brexit, EU mobility package, new business opportunities and energy efficiency regulations to digital transformation with E-CMR, modern analytical or AI tools for logistics and cyber security. In this respect, the C4L plans to rethink current offers and to focus consistently on the proposals of its members in the future.



Membership Satisfaction Survey 2020

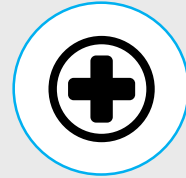
Part 3: COVID-19 Business Development Feedback

2. What are the **biggest challenges** your company faces during the current sanitary crisis?



Resilience

- Sales decrease & uncertainty
- Reduction in Demand & Volumes
- Drop in revenue & uncertainty of the evolution
- Maintain Visibility
- Manage Volatility
- Maintain Liquidity
- Risk of unavailable staff & of missing transport capacities
- Full performance with 50% of employees remote
- Keep international business and supply chains running



Security & Healthcare

- Guarantee staff security (Availability of PPE)
- Availability of employees to manage daily business
- Guarantee compliance of current COVID-19 rules



Communication

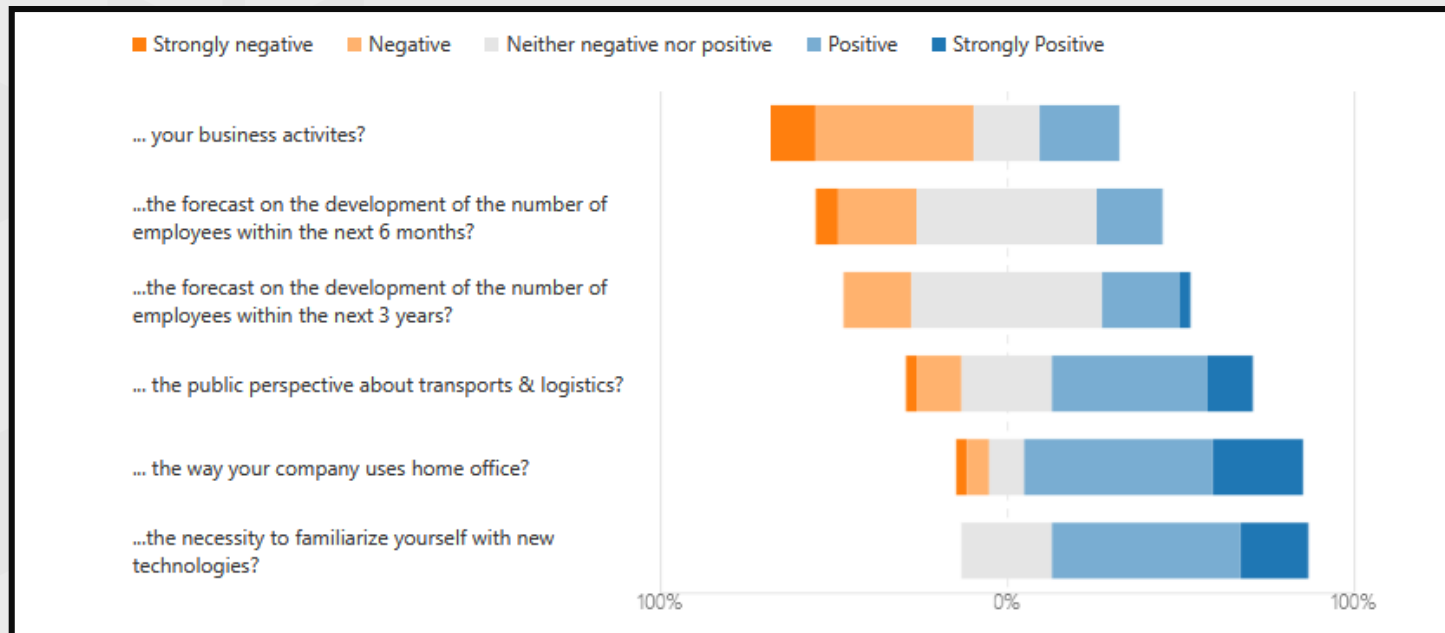
- No European Vision (Border Restrictions)
- Fast changing regulations on state-level: communication & coordination across several players
- Keep information updated as soon as procedures in one administration change
- Lack of personal meetings with producers (Trade fairs/shows)
- Ban of physical contact & travel



Membership Satisfaction Survey 2020

Part 3: COVID-19 Business Development Feedback

4. The current COVID-19 crisis changed...

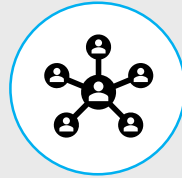




Membership Satisfaction Survey 2020

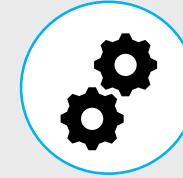
Part 3: COVID-19 Business Development Feedback

5. Regarding the COVID-19 pandemic, which **services would you expect from the Cluster for Logistics Luxembourg** in order to cope better with the current crisis?



Knowledge Sharing

- PPE supply chain summit
- Share information about new regulations in Luxembourg
- Support of hospital & healthcare sector
- Organize webinars with logistics companies
- Focus on digitalization & innovation topics
- Focus on actual topics around the local market



Organizational Aspects

- More flexibility in the technology used for meetings



Membership Satisfaction Survey 2020

Management Summary - Part 3: Business Development Feedback

The survey included a query on the COVID-19 impact. At that point in time (before the 2nd wave) it principally impacted the key business activities of the members and forecasts on future employee numbers were mostly neutral or slightly negative. Beside car & worry for the workers' health and how to protect them, resentment about border restrictions in March, the C4L obtained a long list of challenges the companies were having to address due to volatility, 20-30% lower revenues with negative impact on liquidity.

On the upside, the participants felt that public perspective had shifted towards a more positive view on transport & logistics after the highlighted media interest during the lockdown. COVID-19 forced companies to increasingly use home office which resulted in the necessity to familiarize employees with new technologies. For future events, members expressed more knowledge sharing about PPE, new regulations in Luxembourg, support of hospital & healthcare sector and a stronger focus on digitalization & innovation topics.



A big thank you to our partners



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