

# Intermodal Service Scorecard

Spring 2023



Journal of Commerce  
by **S&P Global**

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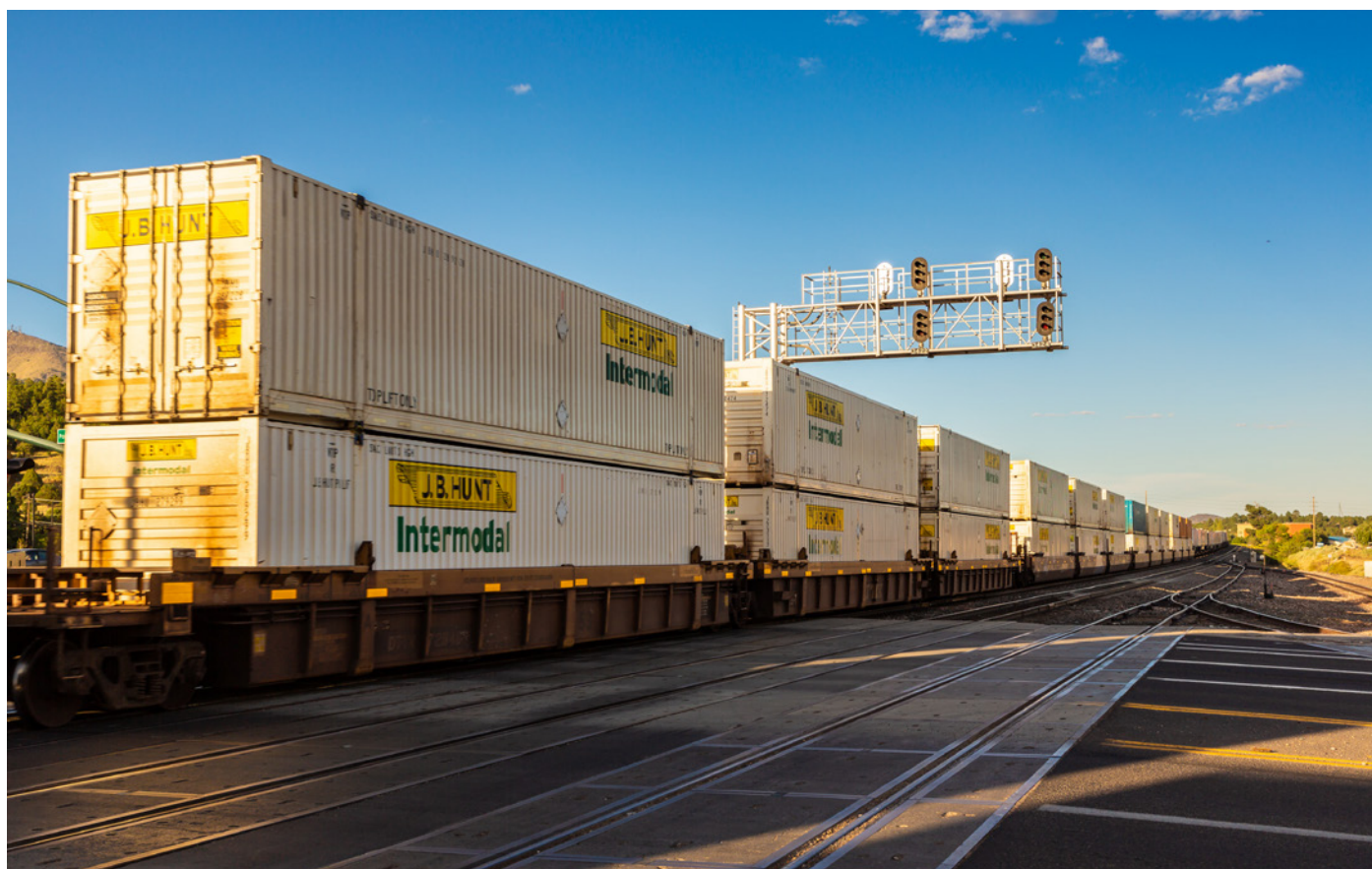
Spring 2023

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## Introduction

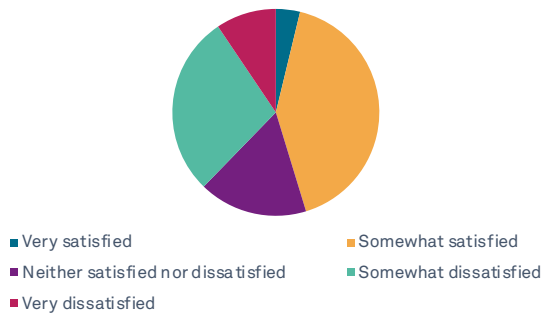
The *Journal of Commerce* in 2023 launched the first of a biannual survey to determine who supply chain stakeholders believe are the top intermodal service providers in North America. Intermodal marketing companies (IMCs) graded the six North American Class I railroads — CSX Transportation, Norfolk Southern Railway (NS), BNSF Railway, Union Pacific Railroad (UP), Canadian National Railway (CN), and Canadian Pacific Kansas City (CPKC) — on key performance indicators, while intermodal shippers graded their IMCs, using a 5-point scale, much like the consumer ratings on Amazon, Google or Angi's. The results of the survey, which was active from March 1 through April 30, 2023, also include customer satisfaction scores (CSAT) and net promoter scores (NPS) for each of the Class I railroads and IMCs. For more on those terms and how each is calculated, please see [Frequently Asked Questions \(Section XV\)](#).



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CHART 1A

Intermodal providers somewhat satisfied with railroads  
Q: How satisfied or dissatisfied are you with intermodal service in North America?



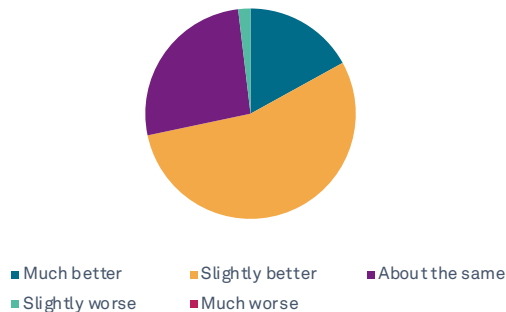
Source: Journal of Commerce survey

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CHART 1B

Intermodal providers say service has improved

Q: How would you rate domestic intermodal service today compared with in December?



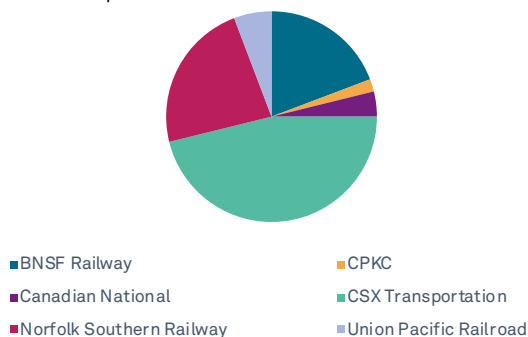
Source: Journal of Commerce survey

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CHART 1C

CSX named best-performing railroad in early 2023

Q: Which railroad provided the best intermodal service since December?



Source: Journal of Commerce survey

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## I. Grading the Railroads: Overview

**The bottom line:** Intermodal providers voted CSX and UP as the best and worst railroads, respectively, among all North America Class I, according to the inaugural Intermodal Service Scorecard survey.

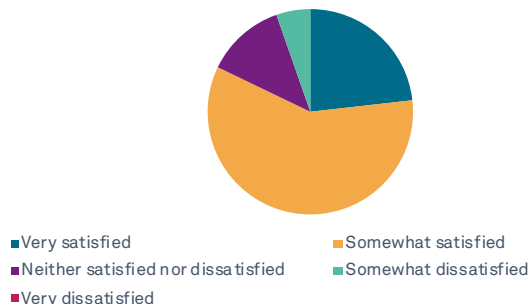
**Satisfaction not guaranteed:** The IMCs had a split opinion of the overall performance of North American Class I railroads in early 2023, with 45.3% reporting being satisfied with intermodal service, 37.7% dissatisfied, and 17% neutral (Chart 1A). Nevertheless, 71.7% said rail service was better than it was three months prior, and only 1.9% said it was worse (Chart 1B). Generally speaking, when intermodal volume decreases, service quality increases. With volumes well below 2022 levels in the first quarter, intermodal networks resembled a wide-open highway on a Sunday morning, a stark change from the last two years, which have looked more like bumper-to-bumper rush hour traffic. Between Weeks 1 and 18, the average intermodal train speed was 31.0 miles per hour, up from 29.3 miles per hour during the same period in 2022, and the fastest average speed during this period since 2020, according to data from the US Surface Transportation Board (STB).

**Top marks:** IMCs chose CSX as the best-performing intermodal provider in North America, with 46.2% of respondents selecting CSX (Chart 1C). CSX has consistently reported the highest trip-plan compliance — i.e., the percentage of intermodal trains that arrived on time or less than 24 hours behind schedule in an average week — of all the Class I railroads, hovering between 95% and 100%, according to STB data. NS came in second with 23.1%, which means nearly 70% of IMC respondents named a US East Coast railroad as the top performer. US East Coast railroads have higher on-time performance results because the average length of haul is shorter than their West Coast counterparts.

CHART 8A

## Most shippers satisfied with IMC partners

Q: How satisfied or dissatisfied are you with your intermodal providers?



Source: Journal of Commerce survey

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## VIII. Grading the IMCs: Overview

**The bottom line:** Intermodal shippers were generally pleased with the service they received from IMCs in the first quarter, but the highest grades went to J.B. Hunt thanks to its strong customer service.

**High satisfaction ratings:** IMCs received an overall customer satisfaction score of 82.1%, indicating shippers are highly confident in their intermodal service providers (Chart 8A). It was also far better than the 45.3% customer satisfaction score IMCs gave railroads. Of those shippers, 58.9% were somewhat satisfied and 23.2% were very satisfied with their IMC partners. Only 5.4% of shippers reported being dissatisfied with their IMCs.

**A diverse sample:** Responses to the survey came from a wide range of shippers, with 57.1% of respondents shipping fewer than 100 loads per week and 42.9% shipping more than 100 loads per week (Chart 8B). Those “large shippers” moving more than 100 intermodal loads per week represented 42.9% of respondents.

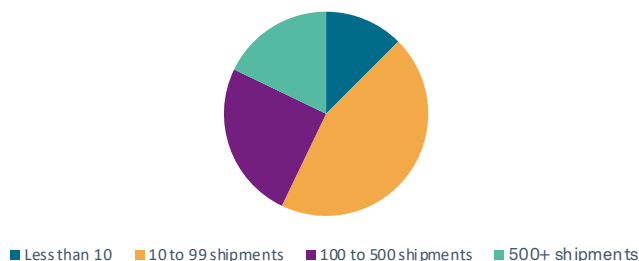
**And the winner was...:** Intermodal shippers chose J.B. Hunt as the best-performing intermodal service provider in North America during the first quarter of 2023. J.B. Hunt was named as the top provider by 43.9% of all shippers and 66.7% of large shippers (Chart 8C). Shippers praised J.B. Hunt for its hands-on service, prioritizing regular conversations with customers to gauge market conditions and resolve problems in the intermodal network. The partnership of BNSF and J.B. Hunt scored the highest, while UP's IMC partners trailed behind.

**More freight to highways:** Like the IMCs, 51.8% of shippers said they made more truckload conversions since Jan. 1, 2023, taking freight off the highways. Another 25% said they made no changes, and only 16.2% said they had converted freight to the rails.

CHART 8B

## Intermodal Scorecard Survey pulls from diverse shipper pool

Q: How many intermodal loads do you ship per week on average?



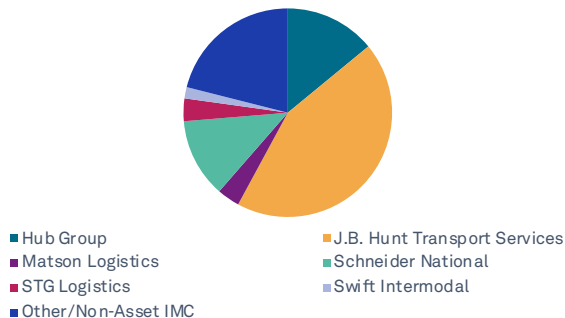
Source: Journal of Commerce survey

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CHART 8C

## Shippers name J.B. Hunt top US IMC in Q1 2023

Q: Name the best performing IMC in your network



Source: Journal of Commerce survey

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## XV. Frequently Asked Questions

*Q: How many people did you survey? Is this a scientific survey?*

**A:** In the inaugural survey, the *Journal of Commerce* received 113 total responses from IMCs and shippers. The sample pool is not necessarily large enough to be considered a scientific survey, nor is it without a margin of error. The survey is meant to measure customer sentiment toward railroads and various intermodal providers in a quantitative and qualitative manner.

*Q: What is the purpose of the survey?*

**A:** The idea behind the Intermodal Service Scorecard is to develop a customer rating system for intermodal rail service providers that is similar to what Angi's and Home Advisor do for homeowners. The Angi's/Home Advisor model is simple. People review companies that perform services around their homes on a scale of 1 to 5, and Angi's and Home Advisor aggregate that crowdsourced data to identify the best — and worst — service providers in a given region to help other homeowners make educated decisions about who they should hire. This survey is meant to identify the best domestic intermodal service providers and, in turn, help guide shippers in their decisions. The survey is also aimed at identifying the specific strengths and weaknesses of individual intermodal providers. Each company has strengths and weaknesses, and shippers don't always think alike. By providing a voice to the community, the survey can bring forward important common threads in how customers view their intermodal providers.

*Q: Explain your 5-point rating scale.*

**A:** Respondents are asked to review intermodal providers on key performance indicators on a scale from very poor (1 point) to very good (5 points). This is similar to the 5-star scale used to rate and review products on Amazon or services on Google, Angi's or Home Advisor.

*Q: What is a customer satisfaction score?*

**A:** According to Hubspot, "The Customer Satisfaction Score (CSAT) measures customer satisfaction with a business, purchase or interaction. It's one of the most straightforward ways to measure customer satisfaction, and it's obtained by asking a simple question, such as 'How satisfied were you with your experience?'" The CSAT score is a tabulation of what percentage of customers said they were "somewhat" or "very" satisfied with a service.

*Q: What is a net promoter score (NPS)?*

**A:** The NPS is an alternative to CSAT that measures customer loyalty to a given product or service. Respondents are asked on a scale of 0 to 10 how likely it is that they would recommend the product or service to a colleague. Scores of "9" or "10" are referred to as "promoters," or people highly loyal to the product or service. Scores of "7" or "8" are referred to as "passives," not extremely loyal but also not unhappy with the product or service. Scores from "0" to "6" are referred to as detractors, or customers who are displeased with the product or service and likely to use a competitor if a viable alternative is available. The NPS is the difference between promoters and detractors. Companies strive to have a positive net promoter score — i.e., more promoters than detractors. The average promoter score is the average rating between 0 to 10 of all respondents.

*Q: How can I participate in future surveys? Is it free?*

**A:** Any shipper or IMC that wishes to participate in the survey, which will be conducted biannually in the spring and fall, may do so. Please contact Ari Ashe ([ari.ashe@spglobal.com](mailto:ari.ashe@spglobal.com)) for more information on participating. The survey results and report are free to all survey respondents; non-participants must be Gold-tier *Journal of Commerce* subscribers to view the survey results and report.

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