



## User Survey 2013

**November, 2013**

Prepared for



Prepared by:

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# Background And Objectives

- International Registry of Mobile Assets launched March 2006.
- Once established, it was decided to conduct a User Establishment Survey during May 2007, the objectives of which were:
  - ❖ To understand how different features and usability levels were rated, and relative importance of each.
  - ❖ To understand Users' priorities for updating the Registry features.
  - ❖ To understand what the perception was as to the cost of usage versus its worth to their organisation.
  - ❖ To initiate a repeatable annual benchmark survey.
- Having addressed the key issues emerging from the 2007 exercise, decided to repeat the survey in 2008 and again in 2009, 2010, 2011, 2012 and 2013 with a view to assessing the state of play year on year.

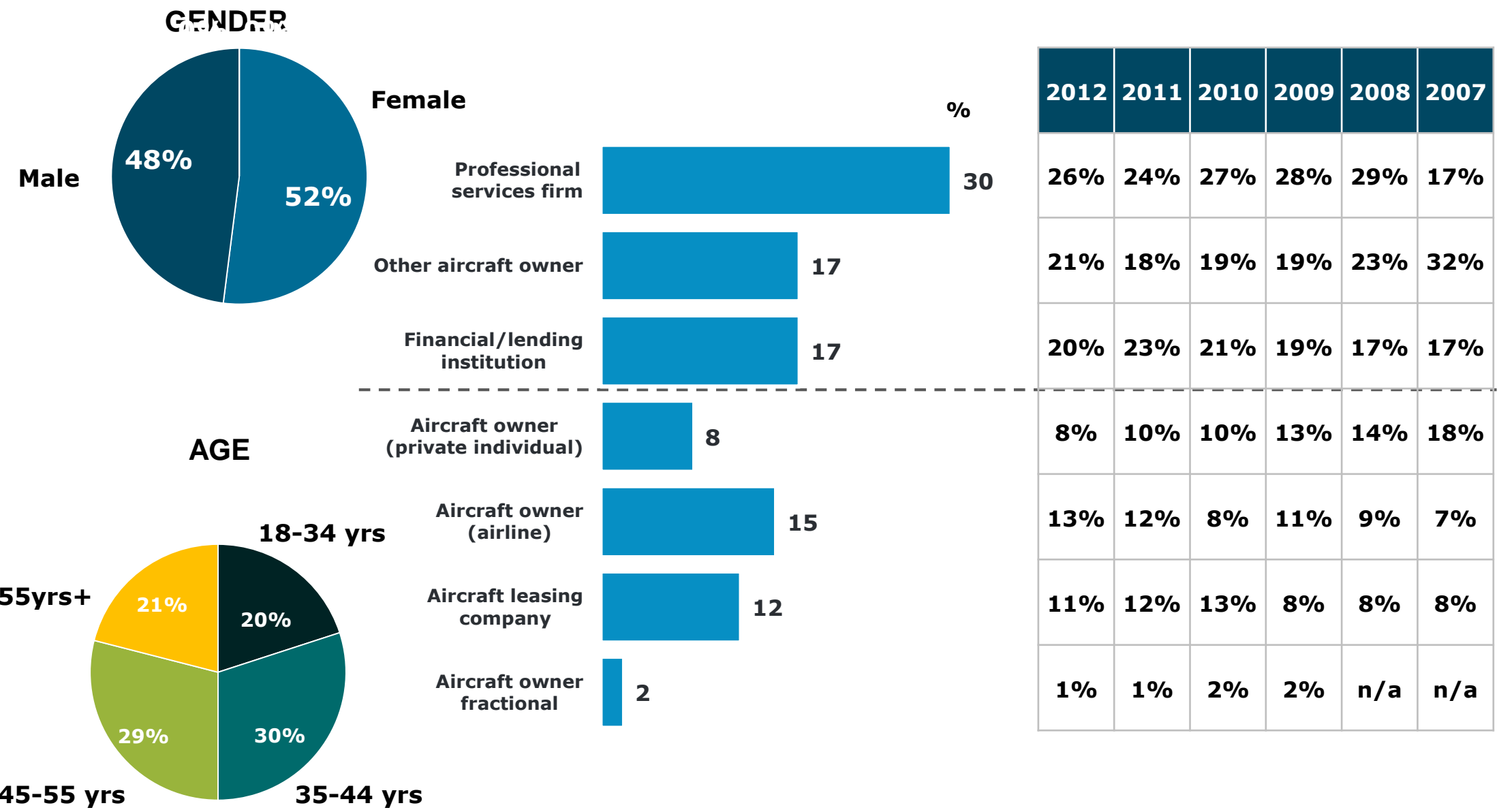


# Methodology

- Online survey of Registry users, by way of structured questionnaire.
- Potential respondents initially contacted by Aviareto, with survey rationale explained.
- Questionnaire mailed to total contact sample of 2,468 users.
- Total achieved sample of 349 users (402 users in 2011, 356 users in 2010, 371 in 2009, 308 in 2008; 339 in 2007), representing a response rate of 14% - at the upper end of response rates for a survey of this nature.
- The interviews were completed in English, Spanish and French.
- Fieldwork took place between 24th Oct - 12th November. Incentive offered for the first time in 2009 (3 x draws for \$250 Amazon voucher), and each year since then.
- N.B., in 2012, "Montreal Helpdesk Staff" attributes were amended to read simply "Helpdesk Staff" in all instances.



# Sample Profile 2013



The demographic and organisation type profile of the Registry user in 2013 is very similar to that prevailing in previous years.

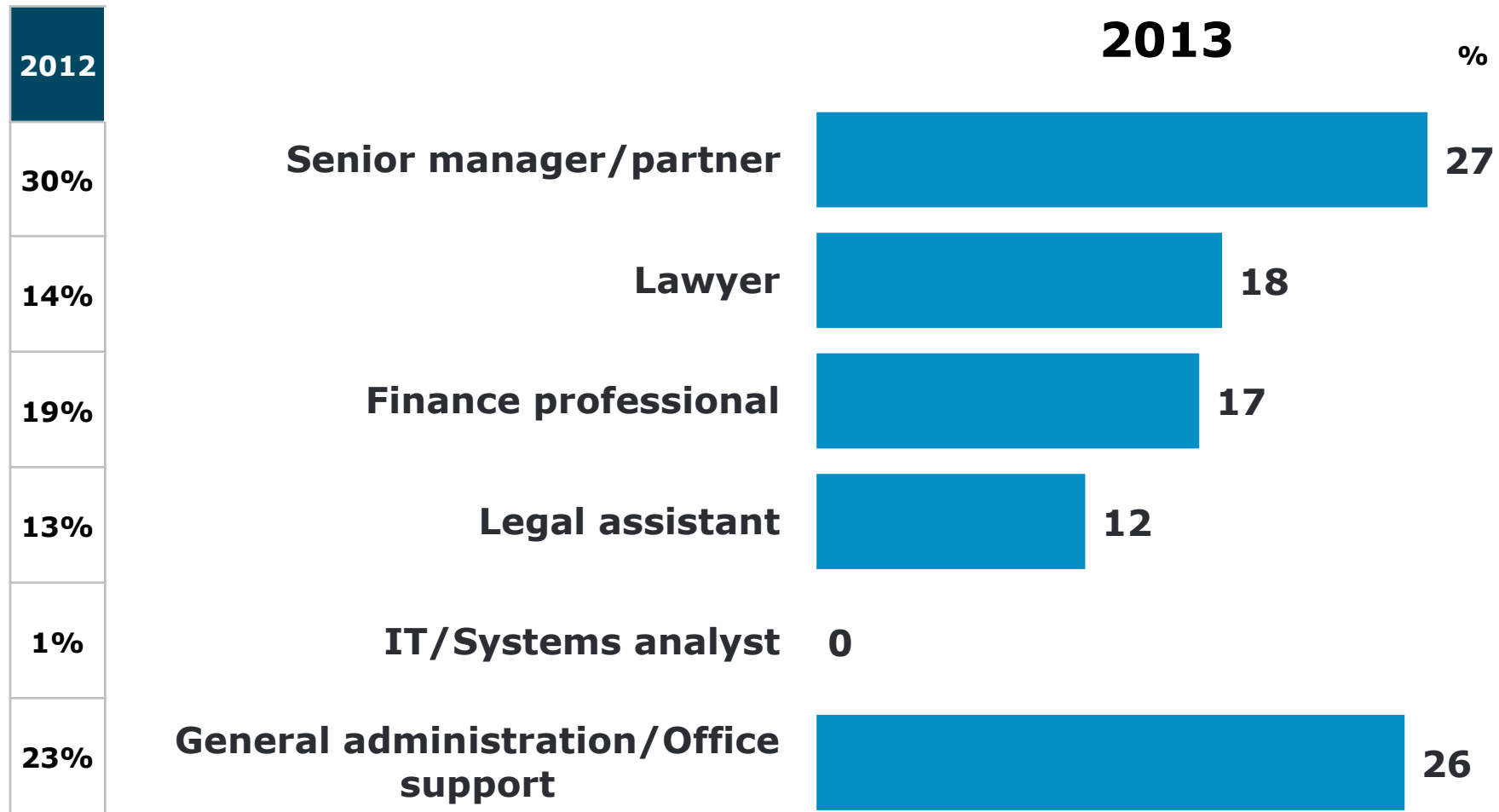
# Sample Profile 2013

	2007	2008	2009	2010	2011	2012	2013
<b>Gender</b>	%	%	%	%	%	%	%
<b>Male</b>	63	44	47	50	50	50	48
<b>Female</b>	37	55	53	50	50	50	52
<b>Age</b>	%	%	%	%	%	%	%
<b>18-34</b>	13	17	19	20	20	19	20
<b>35-44</b>	22	24	29	28	28	30	30
<b>45-55</b>	39	32	32	31	31	29	29
<b>55+</b>	26	26	21	22	22	22	21



With users evenly split by gender, and spread across all age groups from 18-34 yrs to 55 yrs+.

# Sample Profile 2013



Marginally more lawyers emerge in the user base this year (18%) compared with last year (14%).

# Sample Profile 2013

## Social Media Usage

		2013					
	Total		Gender		Age		
	2013	2012	Male	Female	18-44	45-54	55+
<b>Base:</b>	<b>345</b>	<b>349</b>	<b>166</b>	<b>179</b>	<b>173</b>	<b>100</b>	<b>72</b>
	%	%	%	%	%	%	%
Facebook	57	52	51	62	71	52	31
Linkedin	48	43	54	42	53	48	35
Twitter	18	16	17	18	25	11	10
Other	4	4	4	3	2	6	4
None	27	32	27	26	18	26	47
<b>Any Facebook/Linkedin</b>	<b>70</b>	<b>66</b>	<b>70</b>	<b>70</b>	<b>80</b>	<b>69</b>	<b>49</b>
<b>Any Facebook/Linkedin/ Twitter</b>	<b>73</b>	<b>68</b>	<b>73</b>	<b>74</b>	<b>82</b>	<b>74</b>	<b>53</b>



Three quarters of all users now use social media of any type, a practice which is most prevalent amongst users aged up to their mid-fifties.

# Sample Profile 2013

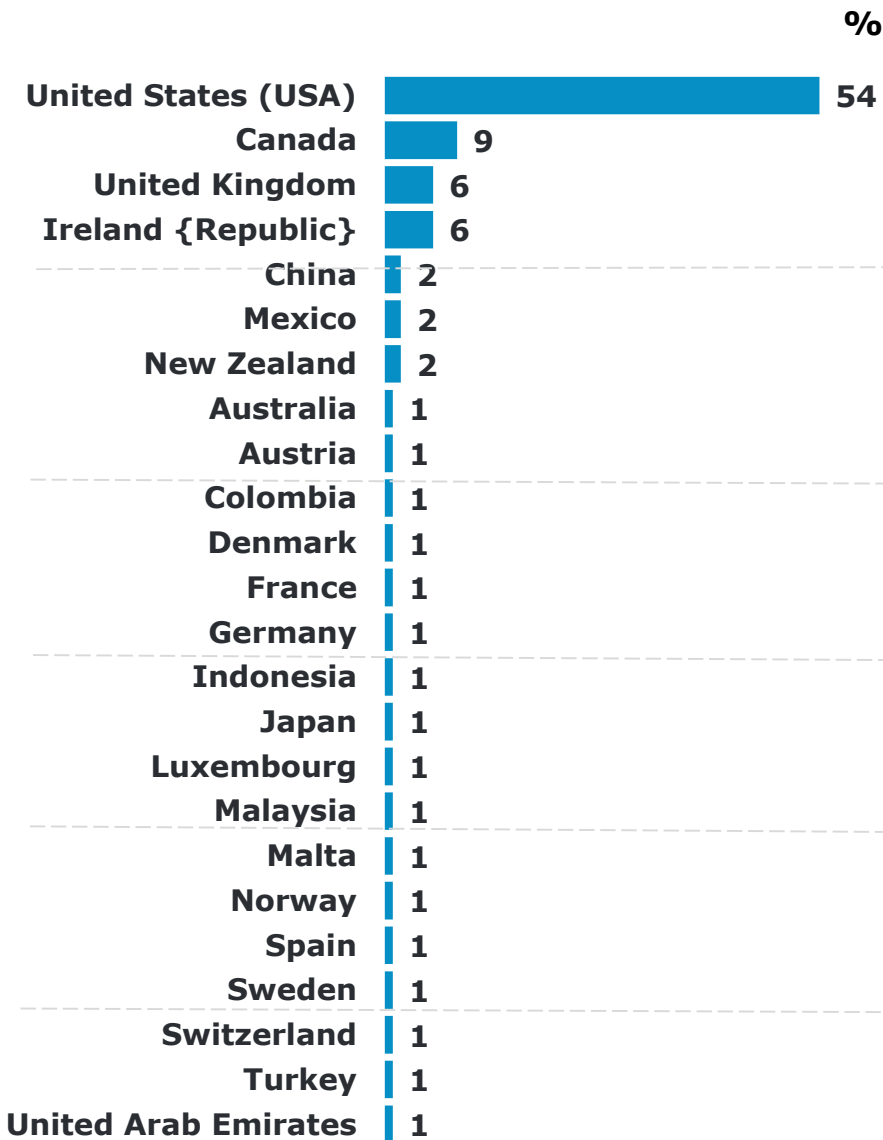
## Social Media Usage

	Total	Organisation						Role in the organisation			
		Airline	Private	Owner	Lease company	Fin inst.	Prof firm	Senior manager/partner	Law	Finance professional	General
Base:	349	52	27	63	41	59	103	92	105	58	90
	%	%	%	%	%	%	%	%	%	%	%
Facebook	57	<b>65</b>	52	48	56	58	59	47	<b>63</b>	<b>66</b>	54
Linkedin	48	<b>52</b>	33	48	51	44	50	50	<b>51</b>	<b>59</b>	34
Twitter	18	<b>19</b>	7	16	17	12	25	15	<b>25</b>	<b>17</b>	13
Other	4	2	4	2	-	5	7	2	6	2	4
None	27	25	37	27	39	24	21	30	21	21	33



# Sample Profile 2013

## COUNTRY

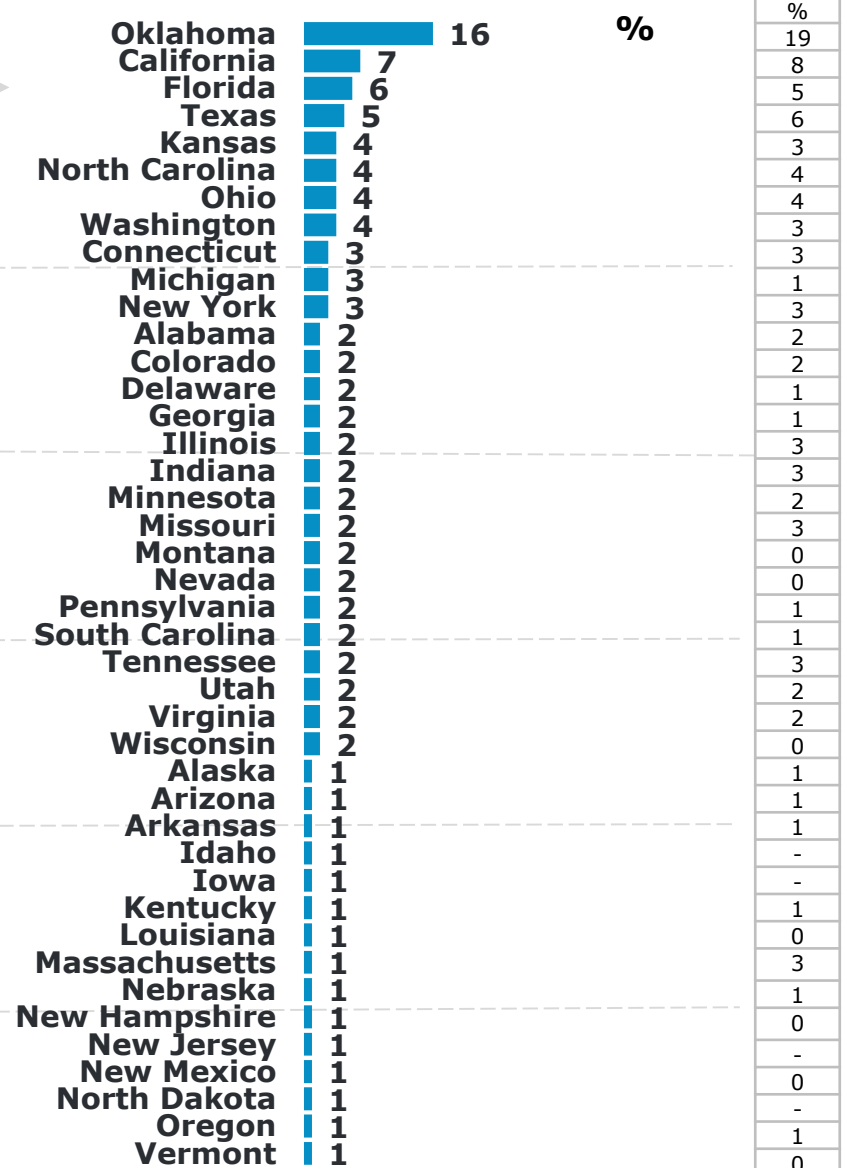


2012

%
63
3
4
4
1
2
2
1
0
1
0
1
2
-
1
1
1
0
1
1
1
2

## US STATES

Base: USA respondents - 185



2012

%
19
8
5
6
3
4
4
3
3
1
3
2
2
1
1
3
3
2
3
0
0
1
1
3
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2
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0



The proportion of users based in the USA has dropped from 63% to 54% year-on-year, with users in Canada rising from 3% to 9%.

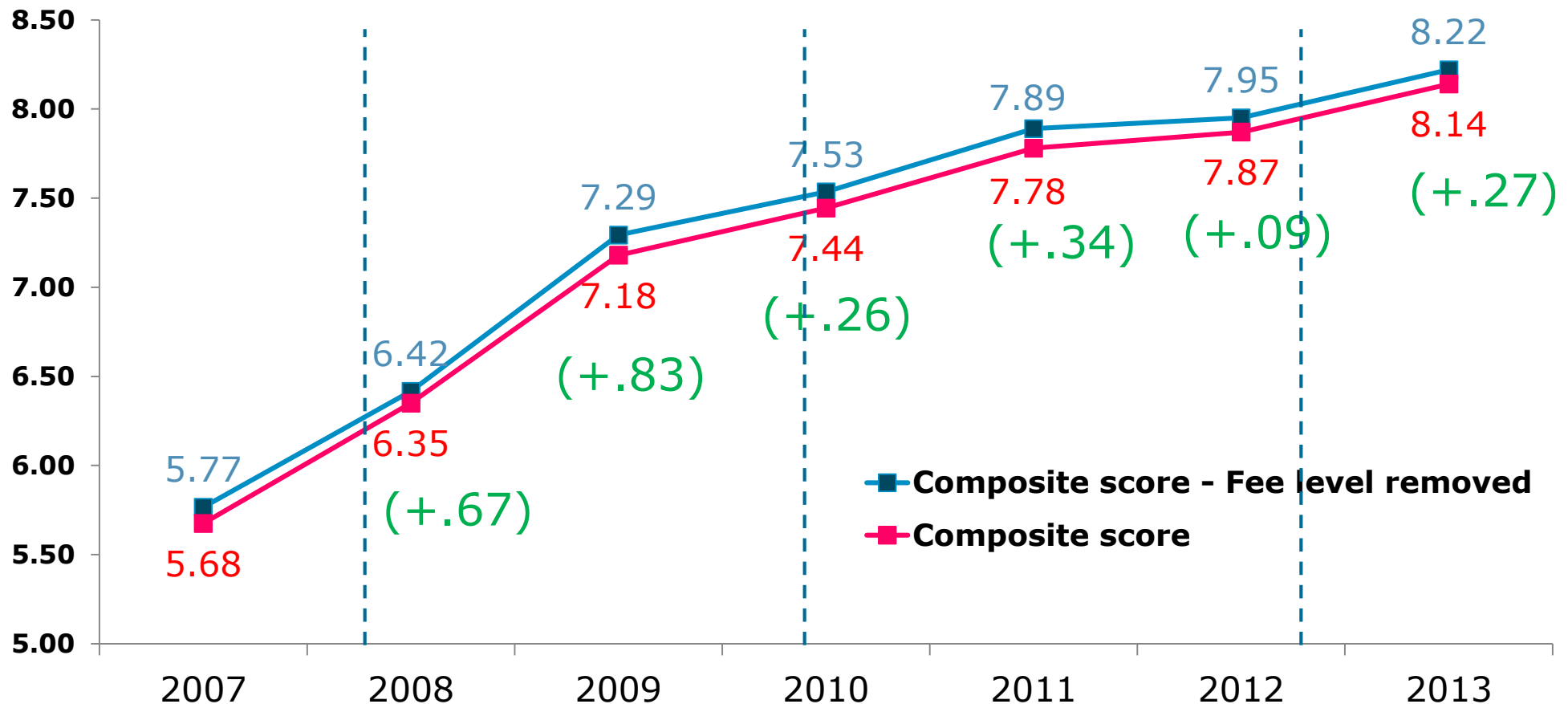
# Key Service Aspects: Relative Contribution Towards Worth Of Registry To Business (Pearson's Correlations) 2012

		2012	2011	2010	2009	2008	2007
Fit of Registry and business functionality	0.75	0.81	0.76	0.78	0.83	0.8	n/a
Overall ease of use of the Registry	0.64	0.73	0.64	0.73	0.67	0.67	0.71
Level of fee charged	0.63	0.65	0.39	0.51	0.56	0.48	0.47
*Availability of Registry Officials	0.60	0.64	0.6	0.69	0.74	0.7	0.67
Quality of information sent to you from the Registry Officials	0.59	0.56	0.55	0.51	0.38	0.52	0.55
Technical knowledge of Registry Officials regarding the Registry.	0.57	0.47	0.5	0.64	0.58	0.52	0.59
**Efficiency of resolution of queries by Registry Officials	0.57	0.56	0.42	0.53	0.45	0.59	0.49
Speed of refunds	0.57	0.66	0.45	0.59	0.56	0.56	0.57
Reliability of technical aspects of the Registry	0.56	0.64	0.47	0.45	0.44	0.53	0.48
Efficiency of resolution of queries by help desk staff	0.55	0.52	0.47	0.62	0.48	0.56	0.52
Speed of Registry during use.	0.54	0.62	0.55	0.62	0.57	0.52	0.56
Technical knowledge of help desk staff regarding the Registry	0.51	0.58	0.44	0.61	0.49	0.6	0.58
Efficiency of credit card transactions.	0.50	0.49	0.47	0.4	0.36	0.47	0.49
Availability of help desk staff	0.50	0.6	0.42	0.44	0.36	0.35	0.36
Registry Officials' language skills	0.49	0.49	0.37	0.45	0.5	0.42	0.37
Speed of approval for new Administrators/Users	0.48	0.64	0.47	0.34	0.34	0.45	0.51
Helpdesk language skills	0.47	0.43	0.38	0.27	0.34	0.32	n/a

\*NB 2011-2009 refers to Registry Officials in Dublin \*\*N.B. 2011-2009 refers to Montreal Helpdesk staff

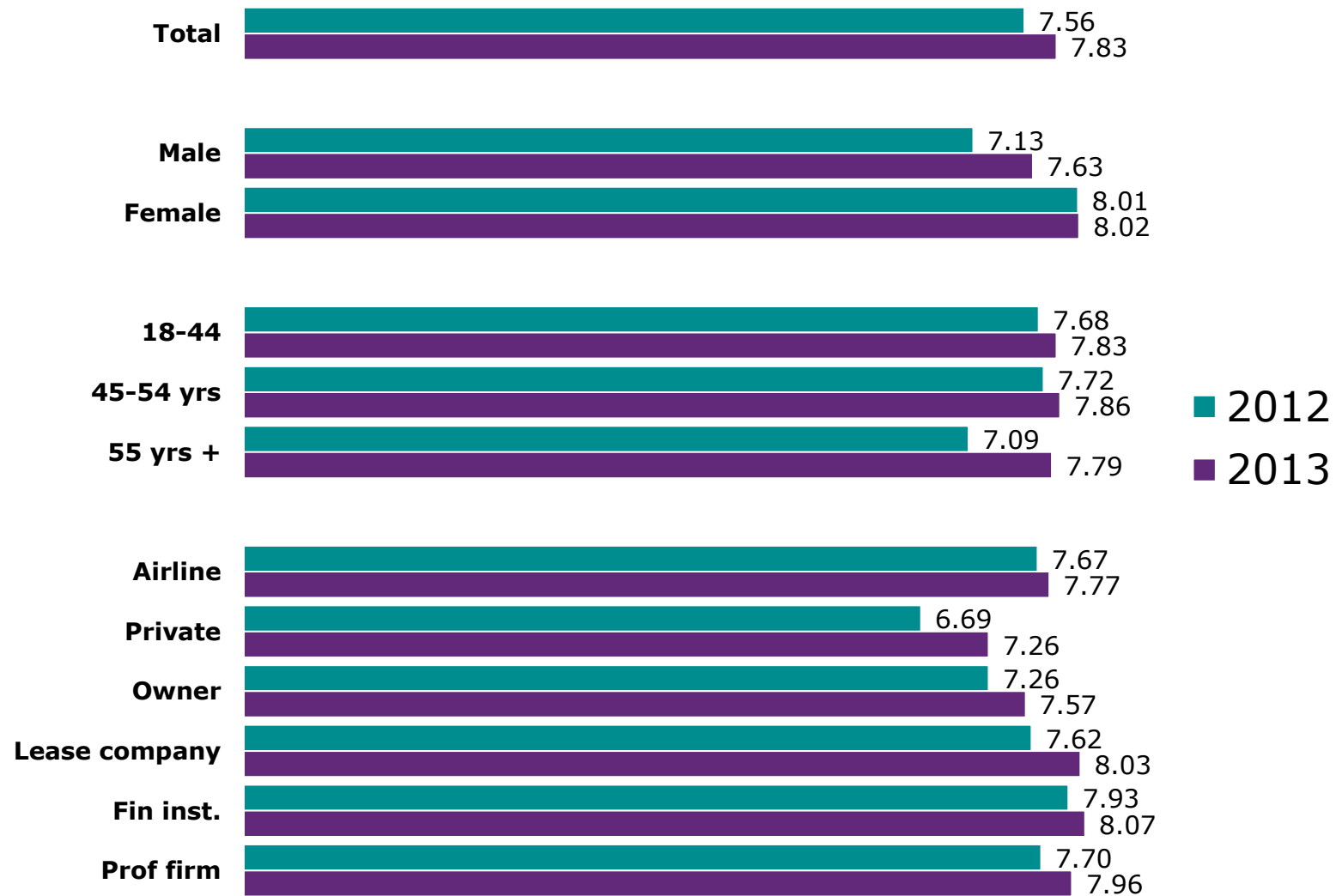
The fit of Registry functionality with business functionality remains the single most important definer of the perceived worth of the Register, followed by its Ease of Use and Fee Charged. Aspects which have declined notably in importance include Speed of Registry, Speed of Approval of New Users, Technical Reliability and Ease of Use.

# Overall Weighted Registry Experience Rating



Historical data trends would suggest that the overall experience rating has reached, or has all but reached, its peak.

# Overall Satisfaction with the Registry - Summary

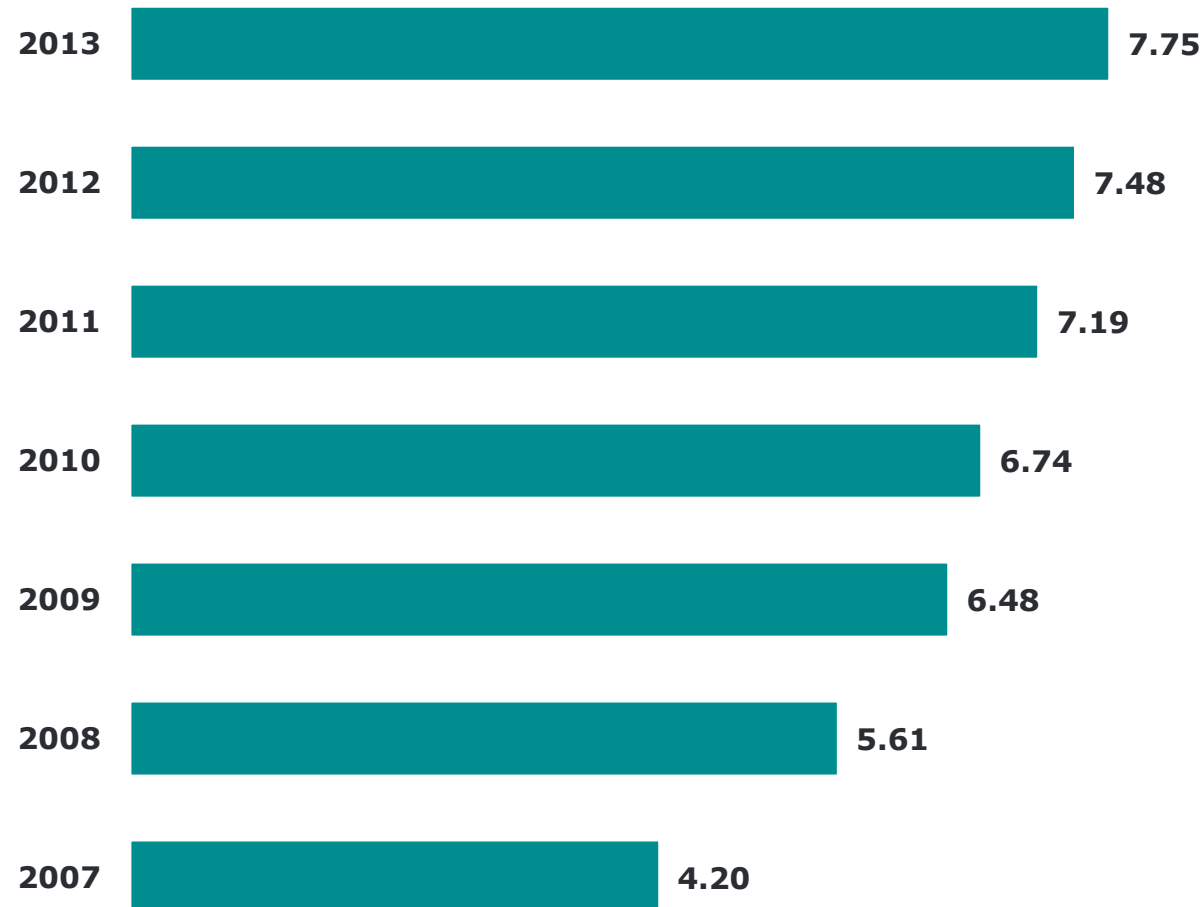


**\*New question 2012**



With an overall satisfaction rating of 8.0 extremely difficult to reach on any such survey.

# Overall worth of registry to business: Ten point Rating Scale



# Key Service Aspects:

## Overall Performance Rating (10 Point Scale)


\*NB 2011-2009 refers to Registry Officials in Dublin


\*\*N.B. 2011-2009 refers to Montreal Helpdesk staff


	Mean Performance Rating				
	2013	2012	2011	2010	2009
The degree to which the functionality of the Registry fits with the way your business functions.	<b>7.46</b>	7.18	7.12	6.7	6.42
Overall ease of use of the Registry.	<b>7.26</b>	6.89	7.01	6.64	6.52
Level of fee charged.	<b>7.15</b>	6.79	6.64	5.51	6.18
*Availability of Registry Officials	<b>8.38</b>	8.02	8.08	7.64	7.41
Quality of information sent to you from the Registry Officials	<b>8.47</b>	8.29	8.32	8.11	7.93
Technical knowledge of Registry Officials regarding the Registry	<b>8.57</b>	8.38	8.40	8.20	7.86
Efficiency of resolution of queries by Registry Officials	<b>8.44</b>	8.23	8.06	7.82	7.61
Speed of refunds	<b>8.17</b>	7.74	8.14	7.01	6.69
Reliability of technical aspects of the Registry.	<b>7.79</b>	7.79	7.89	7.30	7.22
**Efficiency of resolution of queries by help desk staff	<b>8.41</b>	8.04	7.34	7.01	6.23
Speed of Registry during use.	<b>7.90</b>	7.59	7.73	7.17	7.10
**Technical knowledge of help desk staff regarding the Registry	<b>8.42</b>	8.10	7.62	7.12	6.27
Efficiency of credit card transactions.	<b>8.77</b>	8.32	8.48	8.22	8.28
**Availability of help desk staff	<b>8.41</b>	8.16	7.62	7.46	7.08
Registry Officials' language skills	<b>8.95</b>	8.91	8.96	8.76	8.73
Speed of approval for new Administrators/Users	<b>8.36</b>	8.17	8.27	8.09	7.92
**Helpdesk language skills	<b>8.89</b>	8.87	8.54	8.36	7.98



 Significant increase: 2012-2013

 Significant increase: 2011-2012

 Significant increase: 2010-2011

 Significant increase: 2009-2010

 Significant increase: 2008-2009

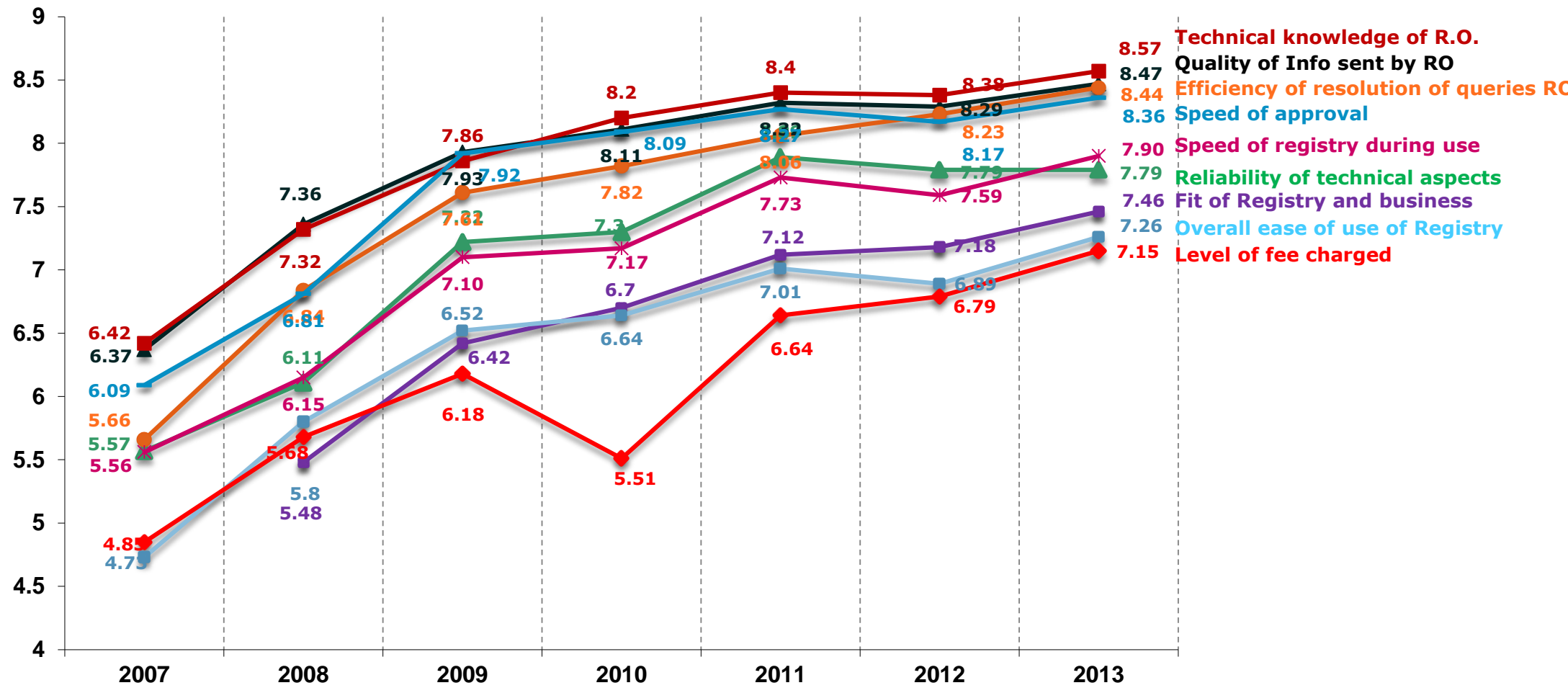
# Key Service Aspects:

## Overall Performance Rating (10 Point Scale)

	MOST IMPORTANT							*NB 2011-2009 refers to Registry Officials in Dublin **N.B. 2011-2009 refers to Montreal Helpdesk staff																					
	Mean Performance Rating							% Scoring 1-2							% Scoring 9-10							% of No Opinion							YOY CHANGE 2013 vs 2012
	2013	2012	2011	2010	2009	2008	2013	2012	2011	2010	2009	2008	2013	2012	2011	2010	2009	2008	2013	2012	2011	2010	2009	2008					
Fit of Registry and business functionality	7.46	7.18	7.12	6.7	6.42	5.48	4	7	7	11	13	24	38	36	33	29	28	28	3	3	2	4	6	6	0.28				
Overall ease of use of the Registry	7.26	6.89	7.01	6.64	6.52	5.8	4	9	6	12	12	20	37	33	27	27	27	19	0	1	1	2	1	4	0.37				
Level of fee charged	7.15	6.79	6.64	5.51	6.18	5.68	5	8	8	6	11	19	32	25	24	25	20	18	6	9	6	7	7	10	0.36				
*Availability of Registry Officials	8.38	8.02	8.08	7.64	7.41	6.61	2	2	2	3	5	10	43	38	41	35	32	25	24	22	17	23	22	23	0.36				
Quality of information sent to you by the Registry Officials	8.47	8.29	8.32	8.11	7.93	7.36	2	2	1	1	3	7	54	54	53	50	48	37	8	6	5	6	6	9	0.18				
Technical knowledge of Registry Officials regarding the Registry	8.57	8.38	8.4	8.2	7.86	7.32	0	2	1	2	3	7	46	45	46	41	37	31	24	21	14	24	25	23	0.19				
Efficiency of resolution of queries by Registry Officials	8.44	8.23	8.06	7.82	7.61	6.84	2	2	3	3	10	10	46	47	44	40	15	31	20	16	11	17	48	19	0.21				
Speed of refunds	8.17	7.74	8.14	7.01	6.69	5.03	1	2	1	3	3	7	18	19	21	12	13	4	65	60	61	66	67	68	0.43				
Reliability of technical aspects of the Registry	7.79	7.79	7.89	7.3	7.22	6.11	2	5	2	6	5	14	43	43	39	33	30	22	8	9	7	12	15	16	=				
**Efficiency of resolution of queries by help desk staff	8.41	8.04	7.34	7.01	6.23	5.02	1	2	4	6	10	18	52	46	19	20	15	12	8	11	49	49	48	44	0.37				
Speed of registry during use	7.9	7.59	7.73	7.17	7.1	6.15	2	5	2	7	7	15	49	41	43	34	32	25	1	2	2	23	4	4	0.31				
**Technical knowledge of help desk staff regarding the Registry	8.42	8.1	7.62	7.12	6.27	5.11	1	3	3	3	9	15	51	44	19	20	16	10	10	14	52	54	49	47	0.32				
Efficiency of credit card transactions	8.77	8.32	8.48	8.22	8.28	7.52	0	3	1	2	1	5	59	49	53	50	49	41	11	13	10	12	15	15	0.45				
**Availability of helpdesk staff	8.41	8.16	7.62	7.46	7.08	5.92	2	1	2	22	4	10	54	45	21	20	18	13	8	11	52	36	49	44	0.25				
Registry Officials language skills	8.95	8.91	8.96	8.76	8.73	8.36	0	1	0	1	1	2	52	52	62	55	51	46	27	26	14	20	21	21	0.04				
Speed of approval for new Administrators/Users	8.36	8.17	8.27	8.09	7.92	6.81	2	3	2	2	4	10	49	49	45	46	46	31	15	11	11	12	14	12	0.19				
**Helpdesk language skills	8.89	8.87	8.54	8.36	7.98	7.35	0	1	0	1	1	4	58	54	28	27	22	23	15	22	55	55	54	48	0.02				
	LEAST IMPORTANT																												

Five of the ten most important service aspects have registered ratings improvements of .3 or more on a ten point scale, with Speed of Refunds improving from 7.74 to 8.17

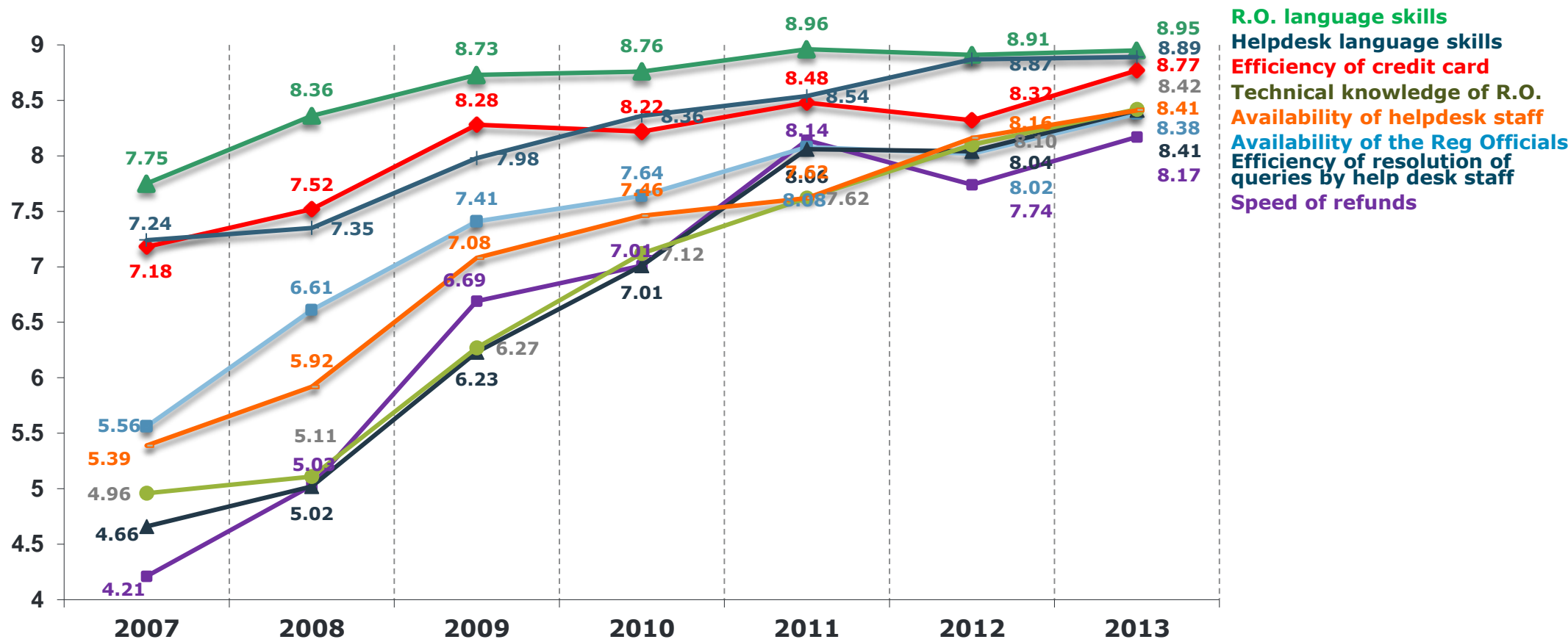
# Key Service Aspects: Overall Performance Rating (Ten Point Scale)



Satisfaction with 9 of the 10 most important aspects has in fact improved to at least some degree since last year.



# Key Service Aspects: Overall Performance Rating (Ten Point Scale)



With solid improvements in satisfaction on most 'second tier' aspects also.

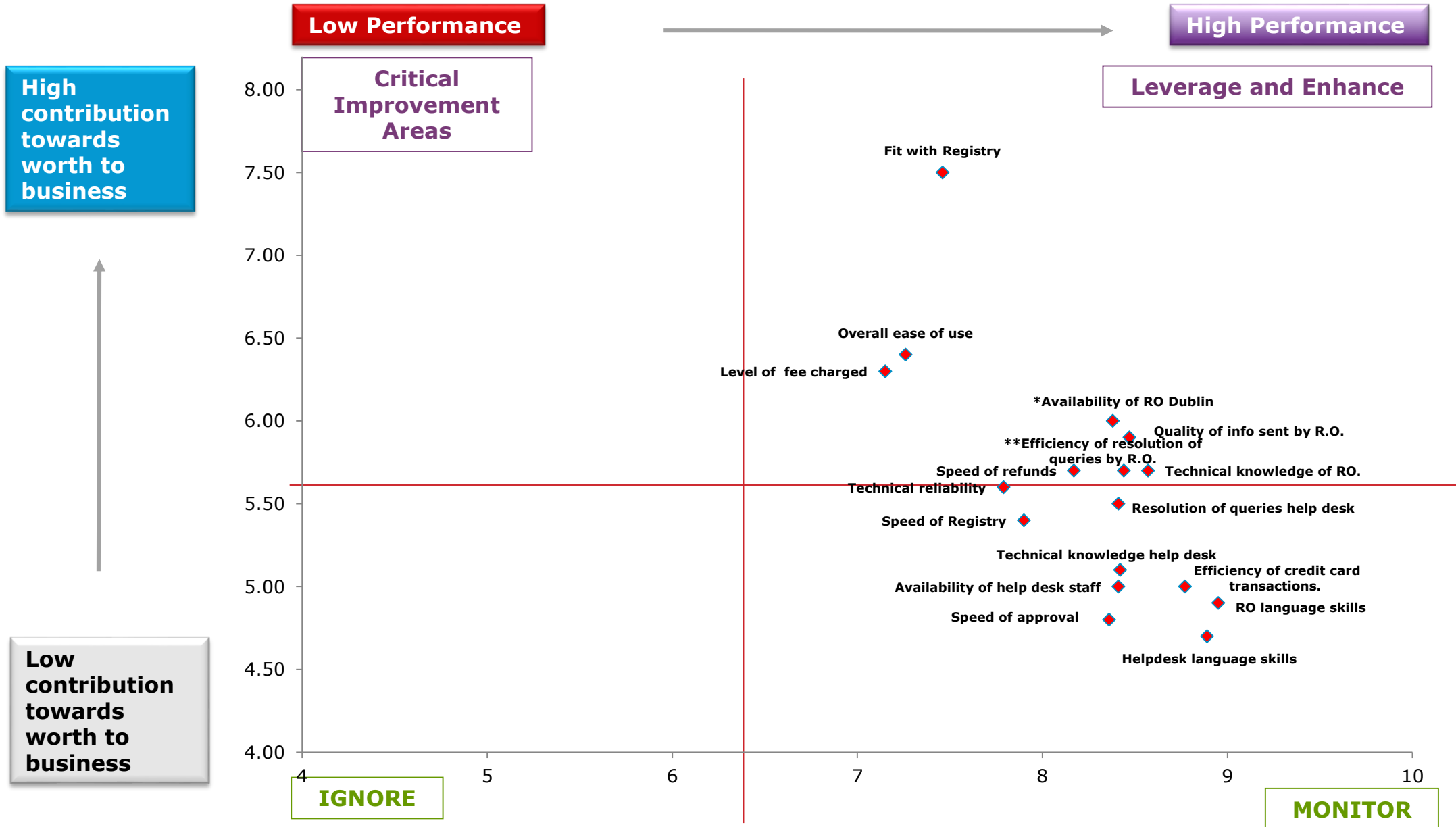
# Satisfaction With The Registry X Key User

## Groupings: Ten Point Rating Scale

	Total	Gender		Age			Organisation					
		Male	Female	18-44	45-54 yrs	55 yrs +	Airline	Private	Owner	Lease company	Fin inst.	Prof firm
Fit of Registry and business functionality	7.46	7.10	7.80	7.37	7.74	7.28	7.14	6.64	7.46	7.50	7.67	7.68
Overall ease of use of the Registry.	7.26	7.04	7.48	7.32	7.39	6.96	6.92	6.44	7.13	7.32	7.54	7.56
Level of fee charged.	7.15	6.68	7.63	7.06	7.16	7.35	6.90	7.28	7.24	6.45	7.29	7.40
Availability of the Registry Officials	8.38	8.25	8.52	8.45	8.19	8.49	8.26	7.95	8.14	8.90	8.24	8.58
Quality of information sent to you by the Registry Officials	8.47	8.20	8.72	8.63	8.26	8.38	8.46	8.12	8.39	8.43	8.57	8.56
Technical knowledge of Registry Officials regarding the Registry	8.57	8.43	8.72	8.53	8.49	8.81	8.54	8.11	8.55	8.85	8.62	8.60
Efficiency of resolution of queries by Registry Officials	8.44	8.25	8.63	8.41	8.40	8.58	8.58	8.15	8.41	8.85	8.53	8.23
Speed of refunds	8.17	7.89	8.40	8.22	8.10	8.13	8.00	8.00	8.24	8.33	8.63	8.02
Reliability of technical aspects of the Registry.	7.79	7.61	7.97	7.72	7.94	7.77	7.67	7.80	7.79	8.26	7.76	7.68
Efficiency of resolution of queries by help desk staff	8.41	8.24	8.56	8.37	8.34	8.57	8.61	8.40	8.34	8.63	8.56	8.15
Speed of Registry during use.	7.90	7.70	8.08	7.80	8.20	7.73	7.84	7.78	7.82	8.17	8.05	7.81
Technical knowledge of help desk staff regarding the Registry	8.42	8.31	8.53	8.28	8.49	8.64	8.51	8.44	8.45	8.82	8.49	8.15
Efficiency of credit card transactions.	8.77	8.65	8.88	8.86	8.66	8.68	8.85	8.36	8.71	8.61	8.88	8.88
Availability of help desk staff	8.41	8.35	8.46	8.43	8.25	8.56	8.49	8.29	8.17	8.65	8.48	8.38
Registry Officials' language skills	8.95	8.63	9.29	8.95	8.80	9.21	8.65	8.63	9.00	8.93	8.95	9.20
Speed of approval for new Administrators/Users	8.36	8.00	8.68	8.29	8.39	8.49	8.45	8.70	8.30	8.67	8.47	8.07
Helpdesk language skills	8.89	8.59	9.18	8.90	8.80	9.00	8.72	8.35	8.96	9.18	8.88	9.00

# Aviareto: Strategic Performance Matrix 2013

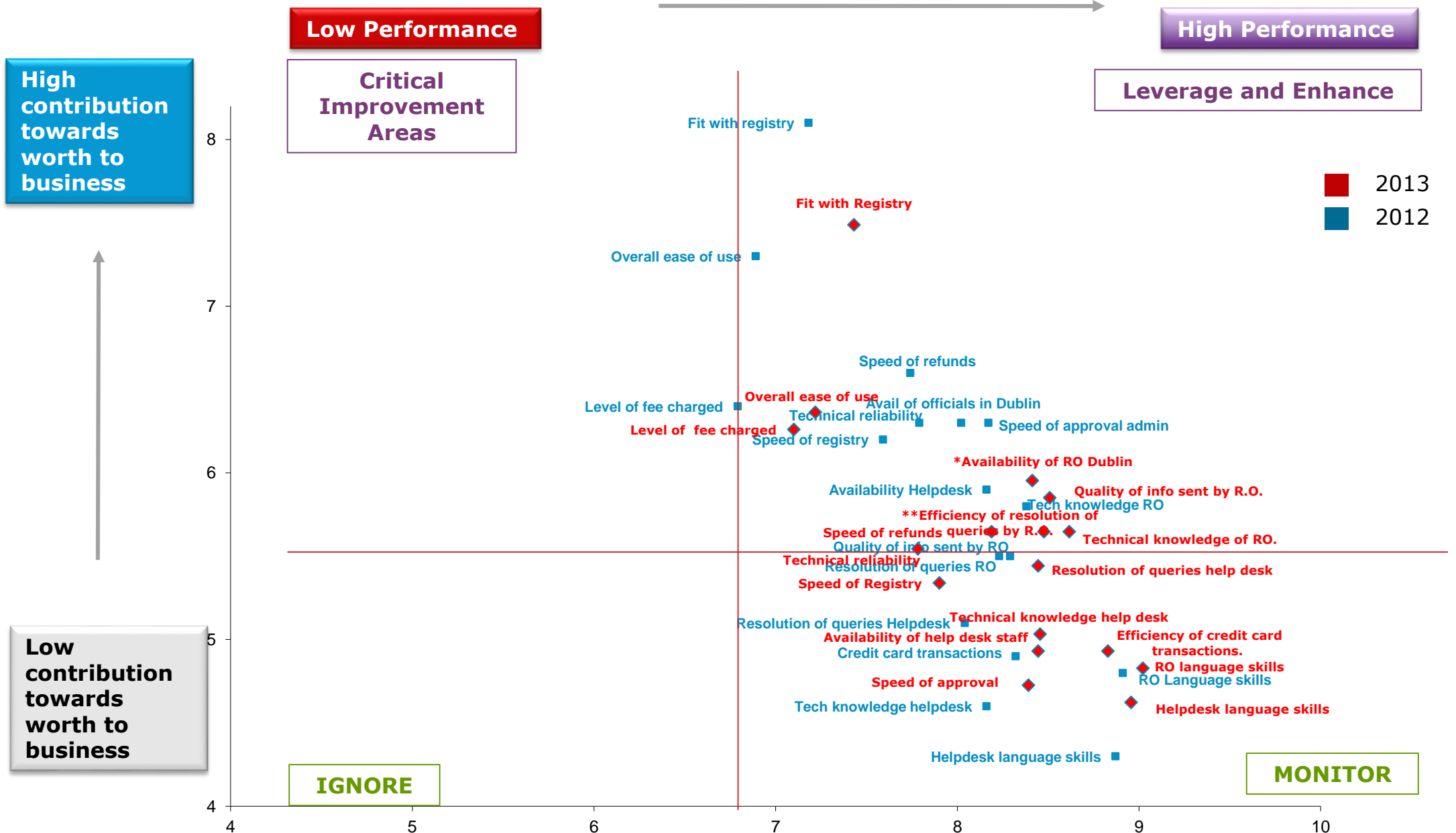
Base: All users



There is still some latitude for marginal improvements in terms of fees charged and ease of use of Registry.

# Aviareto: Strategic Performance Matrix 2012 vs 2011

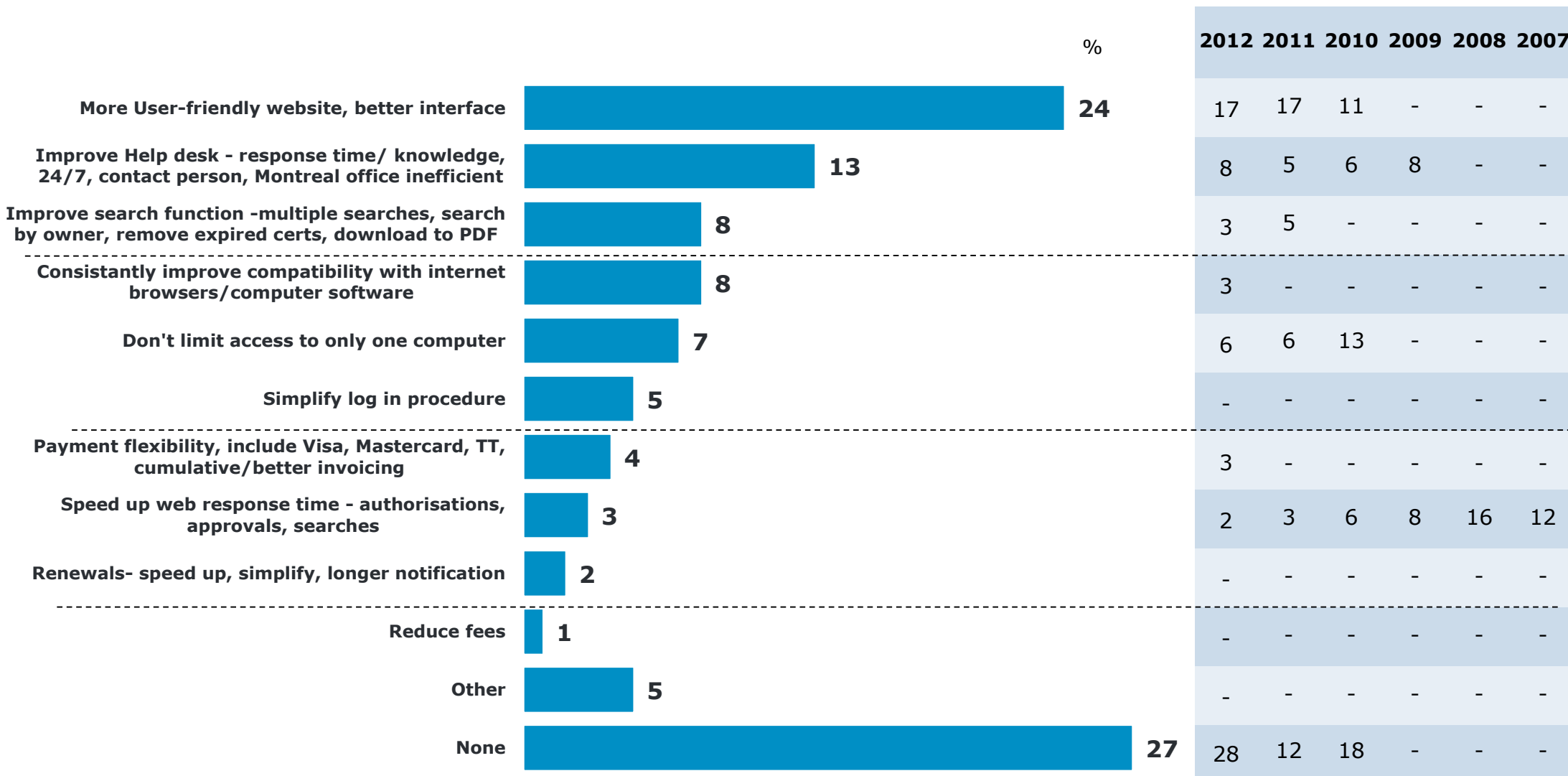
Base: All users



Although as scores on Ease of Use and Fees Charged improve yet again, users become less exercised by them.

# Changes Or Improvements Should Be Made To The Functionality, Service or Support Of The Registry To Make It Easier To Use 2013

Base: All respondents



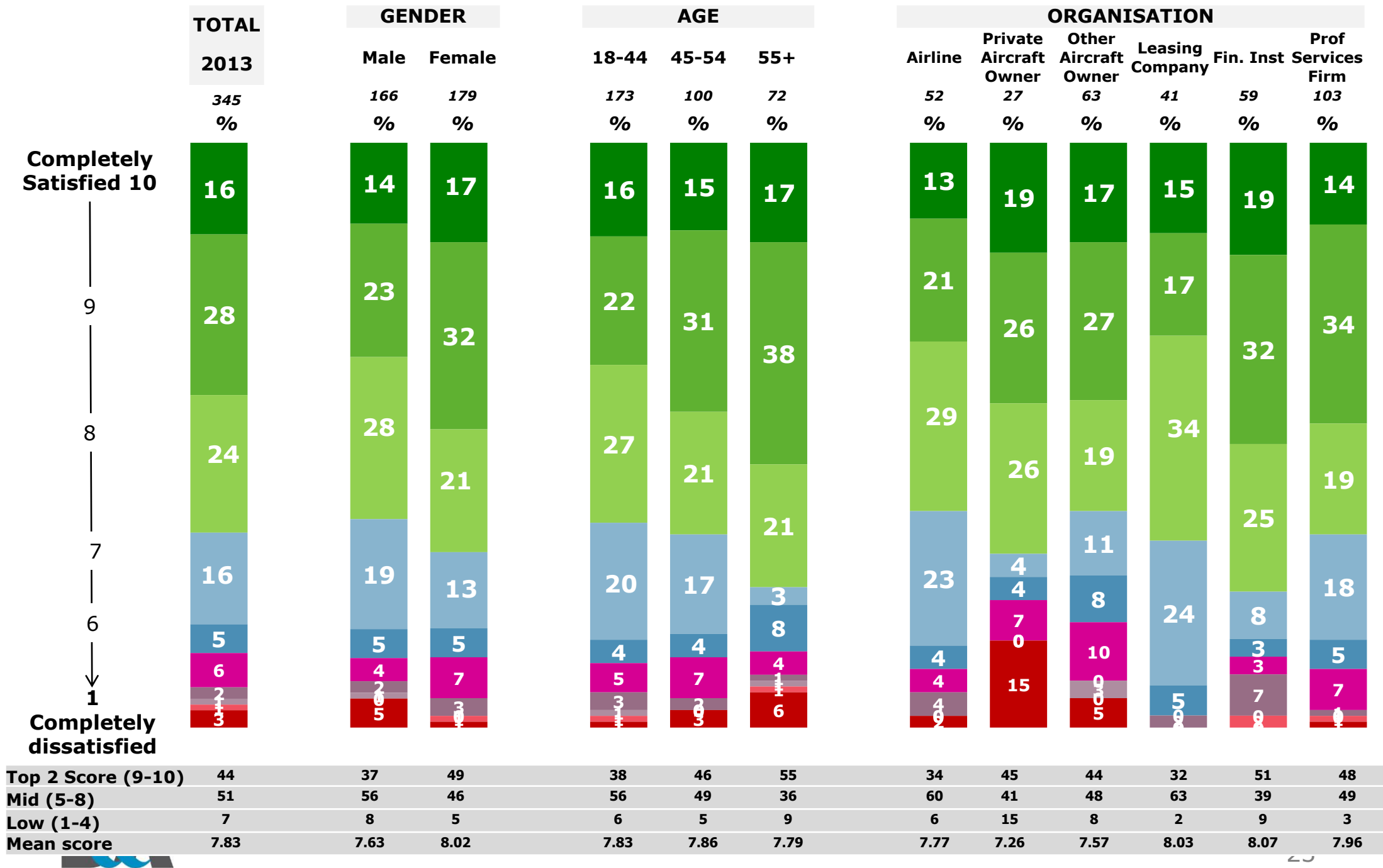
**Users continue to request a more user-friendly/intuitive website, and improvements to the Help Desk function.**

# Changes Or Improvements Should Be Made To The Functionality, Service or Support Of The Registry To Make It Easier To Use 2013

Base: All respondents

	Total	Gender		Age			Organisation					
		Male	Female	18-44	45-54 yrs	55 yrs +	Airline	Private	Owner	Lease company	Fin inst.	Prof firm
<b>UNWTD</b>	<b>345</b>	<b>166</b>	<b>179</b>	<b>173</b>	<b>100</b>	<b>72</b>	<b>52</b>	<b>27</b>	<b>63</b>	<b>41</b>	<b>59</b>	<b>103</b>
	%	%	%	%	%	%	%	%	%	%	%	%
More user-friendly website, better interface	24	28	21	24	24	24	33	33	21	29	19	20
Improve help desk - response time/ knowledge, 24/7, contact person, Montreal office inefficient	13	14	12	12	14	15	4	22	16	10	14	15
Improve search function -multiple searches, search by owner, remove expired certs, download to PDF	8	4	12	12	5	4	4	4	3	5	7	17
Consistently improve compatibility with internet browsers/computer software	8	10	6	8	9	7	10	19	10	7	8	3
Don't limit access to only one computer	7	6	7	7	7	6	12	4	13	2	3	5
Simplify log in procedure	5	6	4	6	3	6	4	4	3	2	7	7
Payment flexibility, include visa, Mastercard, TT, cumulative/better invoicing	4	4	4	5	2	4	4	-	-	12	3	4
Speed up web response time - authorisations, approvals, searches	3	2	5	5	3	-	4	-	2	2	7	4
Renewals- speed up, simplify, longer notification	2	2	2	1	4	1	-	4	5	-	2	2
Reduce fees	1	2	1	2	1	-	4	-	-	5	-	1
Other	5	5	5	4	9	1	6	4	2	-	3	10
None	27	23	30	21	29	36	27	19	38	24	37	17

# Overall Satisfaction Ratings with the Registry



# USA Versus Other Regions: Comparative Analysis

	2009		2010		2011		2012		2013	
	USA	Other	USA	Other	USA	Other	USA	Other	USA	Other
The degree to which the functionality of the register fits with the way your business functions	6.2	7.07	6.62	6.91	7.07	7.21	7.29	6.99	7.46	7.45
Overall ease of use of the Registry	6.5	6.62	6.56	6.86	6.84	7.28	7	6.69	7.22	7.32
Level of fee charged	6.1	6.53	6.46	6.64	6.7	6.54	7.11	6.23	7.37	6.89
*Availability of Registry Officials	7.2	7.86	7.44	8.11	8.17	7.95	8.09	7.91	8.35	8.43
Quality of information sent to you by the Registry Officials	7.9	8.09	8.1	8.15	8.38	8.22	8.46	8.01	8.56	8.36
**Technical knowledge of registry staff regarding the Registry	7.9	7.87	8.25	8.05	8.55	8.16	8.54	8.11	8.55	8.61
**Efficiency of resolution queries by Registry officials	7.5	7.89	7.82	7.8	8.1	7.99	8.37	8	8.44	8.44
Speed of refunds	6.7	6.72	7.01	7	8.13	8.15	7.99	7.3	8.22	8.09
Reliability of technical aspects of the Registry	7.2	7.19	7.19	7.58	7.93	7.83	8.05	7.33	7.9	7.67
Efficiency of resolution queries by help desk staff	6	6.98	6.78	7.65	7.24	7.52	8.1	7.96	8.37	8.45
Speed of registry during use	7.1	7.16	7.1	7.34	7.79	7.63	7.8	7.22	7.91	7.89
Technical knowledge of helpdesk staff regarding the Registry	6	7.18	6.86	7.81	7.65	7.55	8.17	7.98	8.43	8.41
Efficiency of credit card transactions	8.2	8.49	8.3	8.02	8.59	8.3	8.56	7.93	8.82	8.71
**Availability of helpdesk staff	7.1	7.17	7.21	8.12	7.6	7.66	8.2	8.1	8.32	8.5
Registry official's language skills	8.6	8.99	8.8	8.65	9.01	8.88	9	8.76	9.11	8.77
Speed of approval for new administrators/users	7.8	8.15	8	8.31	8.37	8.12	8.31	7.95	8.44	8.27
**Helpdesk staff language skills	7.9	8.17	8.27	8.6	8.53	8.56	8.93	8.77	9.01	8.76
Overall worth of the registry to my organisation/business	6.2	7.29	6.52	7.31	6.94	7.58	7.44	7.56	7.65	7.86



**\*NB 2011-2009 refers to Registry Officials in Dublin**

**\*\*N.B. 2011-2009 refers to Montreal Helpdesk staff**





# Summary



# Summary

- The demographic and organisation type profile of the Registry user in 2013 is very similar to that prevailing in previous years.
- With users evenly split by gender, and spread across all age groups from 18-34 yrs to 55 yrs+.
- Marginally more lawyers emerge in the user base this year (18%) compared with last year (14%).
- Three quarters of all users now use social media of any type, a practice which is most prevalent amongst users aged up to their mid-fifties.
- The use of social media is higher within the legal and financial sector, and amongst airline registry users.
- The proportion of users based in the USA has dropped from 63% to 54% year-on-year, with users in Canada rising from 3% to 9%.
- The fit of Registry functionality with business functionality remains the single most important definer of the perceived worth of the Register, followed by its Ease of Use and Fee Charged. Aspects which have declined notably in importance include Speed of Registry, Speed of Approval of New Users, Technical Reliability and Ease of Use.

# Summary

- Historical data trends would suggest that the overall experience rating has reached, or has all but reached, its peak.
- With an overall satisfaction rating of 8.0 extremely difficult to reach on any such survey.
- Last year it was noted that the perceived worth to business rating is likely to settle in at close to 7.7, and the indications are that there is very limited scope for further significant improvements in future years.
- Five of the ten most important service aspects have registered ratings improvements of .3 or more on a ten point scale, with Speed of Refunds improving from 7.74 to 8.17.
- Satisfaction with 9 of the 10 most important aspects has in fact improved to at least some degree since last year.
- With solid improvements in satisfaction on most 'second tier' aspects also.
- There is still some latitude for marginal improvements in terms of fees charged and ease of use of Registry.
- Although as scores on Ease of Use and Fees Charged improve yet again, users become less exercised by them.
- Users continue to request a more user-friendly/intuitive website, and improvements to the Help Desk function.

# Thank You



**BEHAVIOUR & ATTITUDES**

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