

Crew communication survey reveals interesting results

A recent Crew Communications survey for the maritime industry has found that 68 per cent of crews are now connected, and that 70 per cent are willing to pay for access, writes Roger Adamson, Stark Moore Macmillan

For many years the safety of ships and crews drove developments in maritime satellite communications.

The huge investments in satellite infrastructure required by organisations such as Inmarsat, and the complex nature of the technology, translated into costly terminals and airtime for ship owners and operators.

Until recently, traditional L-band services dominated and there was little choice when it came to the type of communications system fitted, but the advent of VSAT networks and Inmarsat FleetBroadband has ushered in a new era of higher-bandwidth – and with it, new opportunity.

Ships are now becoming highly functional remote offices, integrated with corporate networks and other applications, including those to improve vessel management, and importantly, extend the communications infrastructure to personnel on board.

Crew welfare and communications has been a consistent driver in the development of satellite communication products and services for some years. The significant upswing in web and social network usage means that the expectations of the new generation of seafarers are markedly different than those of their predecessors.

However, whilst ship owners and operators are focussed on communications as a key plank of their crew retention strategy, actual qualitative and quantitative research among crew themselves is comparatively rare, and certainly unavailable on any significant scale.

Crew survey

Astrium Services' new Business Communications division was created following the acquisition of the Vizada

Group by Astrium in December 2011. In the second quarter of 2012, keen to address the lack of real data from seafarers, Astrium Services set out to undertake a comprehensive survey of officers' and ratings' usage of, and requirements for, crew communication solutions in the commercial shipping sector.

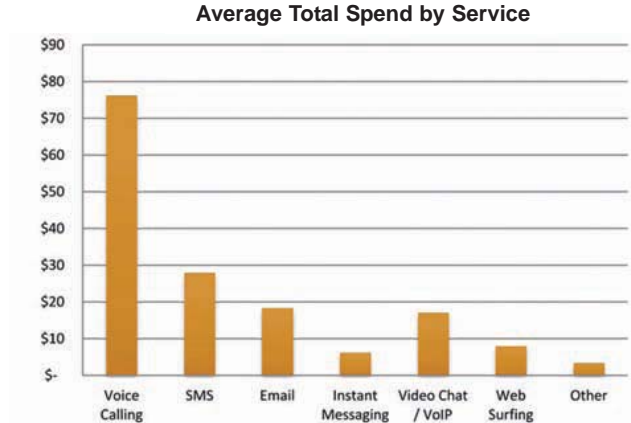
"The objective was to establish a clear picture of current crew communications requirements, the level of access to communications, what crew paid for these services and how they paid for them," says Tilmann Michalke, senior product manager crew communications at Astrium Services.

"Many shipping companies face staff retention issues and these solutions can represent an attractive incentive to crew members."

"Astrium currently provides the most advanced pre-paid and crew communications solutions portfolio on the market. The only way we can ensure it remains so is by understanding today's and tomorrow's needs of crew and ship-owners, and building propositions for their different requirements and budgets."

To undertake the ambitious study, Astrium Services turned to my company, Stark Moore Macmillan, based on our experience in data collection and interpretation, having previously undertaken studies, both independently and in association with industry partners, to address gaps in understanding and identify trends within the maritime sector.

In order to deliver the volume of seafarer responses necessary we worked in conjunction with two major Philippine crewing agents, Philippine Transmarine



Carriers Inc. and CF Sharp Crew Management Inc.

These two companies handle the arrival and departure of approximately 47,000 crew per annum, providing officers and ratings to over 1,000 vessels in the Tanker, Gas, Bulk, General Cargo, Container, Offshore, Car Carrier and Passenger sectors.

We were fortunate to be working with two such respected companies who were extremely keen themselves to understand the crew communications landscape, and the quality and volume of the data from respondents was unprecedented.

The survey was completed by 960 Filipino officers and ratings departing the Philippines to commercial vessels during 2012.

The sample group consisted of 12 per cent officers and 88 per cent ratings who

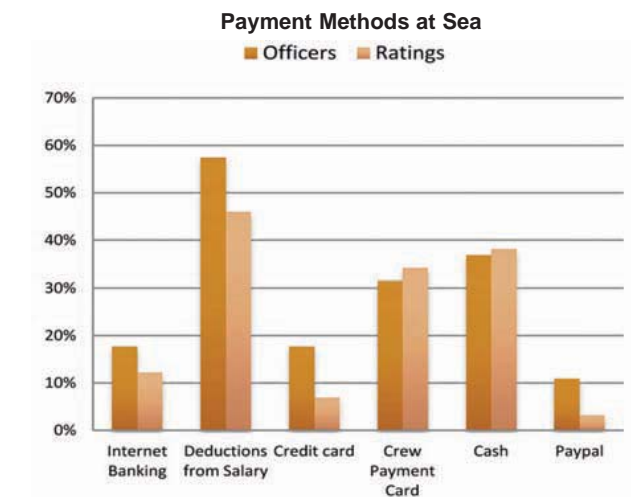
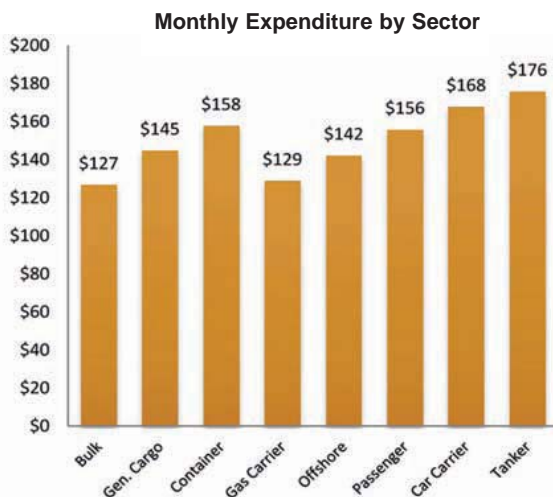
sailed on commercial vessels in the Dry Bulk, General Cargo, Container, Gas / Car Carrier, Offshore, Passenger and Tanker sectors.

62 per cent of the respondents served on commercial cargo carrying vessels whilst 38 per cent of respondents served on Passenger vessels.

The majority of respondents (75 per cent) were aged between 25 and 44 with only 6 per cent less than 24 years in age. This latter group also had the lowest percentage of officers of any age group. The largest concentration of officers (43 per cent) was in the 35-44 year age range.

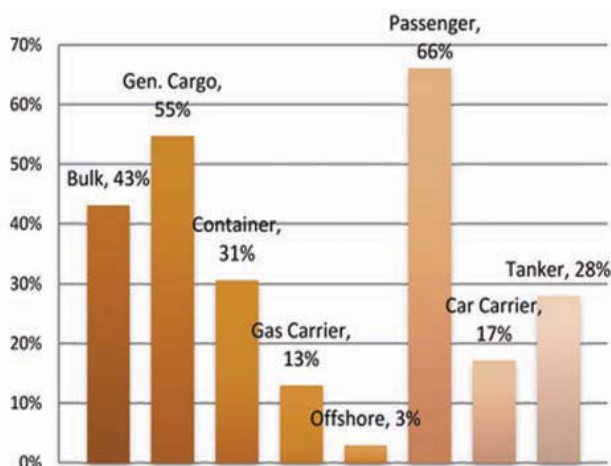
Findings

Chief amongst the findings is that access to communications equipment onboard shows an improving picture, with 68 per cent of all respondents stating that they

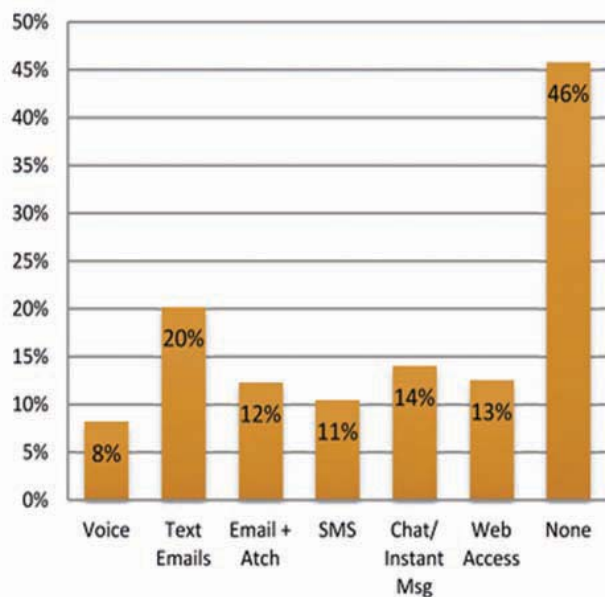


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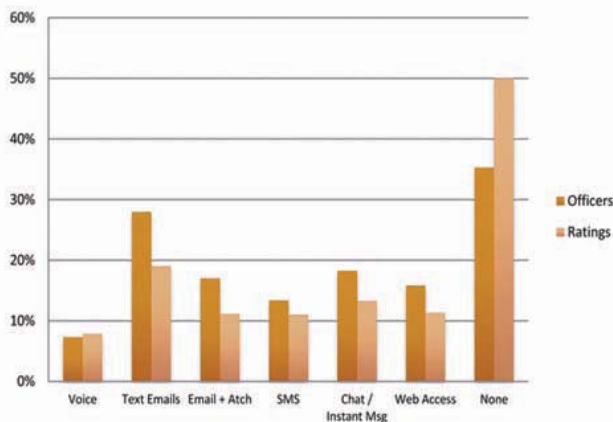
Percentage of Seafarers with no Access to Free Communications - by Sector



Percentage of Services Provided Free to Crew



Provision of Free Services: Officers vs Ratings



had access to communications equipment most or all of the time they were at sea.

30 per cent of respondents said that they had access only sometimes, and just 2 per cent indicated that they were never provided access.

In terms of communications services generally provided onboard for crew, it is those sectors with high data requirements that provide the greatest level of onboard communications.

Probably as a result of its widespread use of VSAT technology, the Passenger sector provides crew with the highest levels of communications equipment, whilst those sectors with lower data requirements and less advanced communications infrastructure had fewest services available to crew.

Despite having access to these services whilst at sea, 46 per cent of respondents were not provided with any form of free communications services by ship operators.

The service most often provided free of charge to seafarers was text-only e-mails, with no attachments. However, this was only available to 20 per cent of respondents. Other services were typically available free to less than 15 per cent of respondents.

This lack of free communications whilst at sea is further reinforced by responses by sector. Ironically, it is the Passenger sector, with the greatest range of service provision, that provides the least free of charge access to crew.

66 per cent of respondents from the Passenger sector were not provided with any free communications services at all, and crew in many major commercial sectors also fared badly.

Only in the Offshore sector, where qualified crew are in short supply and charterer requirements dictate high bandwidth satellite solutions, are crew communications widely available free of charge.

Crew were questioned as to their preferred method of access to crew communications and the answer across all vessel types, ages and ranks, was clear: via the use of a laptop with a Wi-Fi connection.

Call quality was rated the most important element of service delivery, followed by price, security and privacy.

However, when questioned about their spend on communications both at sea and in coastal waters, there was a strong divergence between officers and ratings.

Respondents' average actual spend was \$150/month, which, as a fraction of disposable income, represents approximately 17 per cent of officers' disposable income and 40 per cent of ratings' disposable income - but in reality, officers' spend was approximately twice that of ratings'.

The highest levels of expenditure on crew communications were made in the Passenger, Tanker and Car Carrier sectors.

There was no discernible difference between levels of access to communications services granted to officers compared to ratings, which indicates that company policy on access is being applied evenly between the groups.

There were, however, significant differences in the provision of free services, with officers being provided with more free communications services in general than ratings. Overall, 50 per cent of ratings

had access to free services compared with 65 per cent of officers.

Access to credit cards was significantly more widespread amongst officers than ratings and officers had a greater tendency to use online payment methods such as online banking and PayPal. This suggests that they not only had access to a wider range of payment methods but could also access these online services readily whilst at sea.

However, in general the overall picture is similar for officers and ratings, with deductions from salary, cash and crew payment cards still favoured onboard.

When it came to their appetite for internet whilst at sea, overall 68 per cent of the group answered that they would be prepared to pay to access internet content, increasing to 80 per cent for the officer subset.

Perhaps less surprisingly, when asked to identify the top websites they would visit if access were granted, Facebook was the most popular and the first choice of nearly half of all respondents.

In addition, just under half of all respondents said that they would be prepared to pay to access on-demand media services consisting of video and audio podcasts, but there were marked differences between ages and ranks, both in their appetite and willingness to pay for such services.

Officers were more prepared to pay than ratings, with 61 per cent indicating they would pay, compared to 47 per cent for ratings. Ironically, it would seem that it is the older, higher-ranking seafarers who have the money and inclination to spend on services who are being provided the most access free of charge.

Spread the word

For any ship owner, operator or maritime satcom supplier the full data offers a timely and fascinating level of detail about the requirements of seafarers in an environment rapidly being transformed by digital technology and expectations.

Astrium believes that, with the advent of new high throughput satellite networks including IridiumNEXT, Inmarsat's Global Xpress and Intelsat's EPIC, the results offer the type of insight required to develop the solutions and the crew retention strategies of the future.

"Clearly this data is extremely valuable, but it's key that the voice of seafarers is heard by ship operators and solution providers," points out Tilmann Michalke.

"That's why we took the decision to share some of the key findings with the maritime industry as a free whitepaper. By doing so we hope to give those who took part in the survey the best chance of seeing a real benefit from it."

About the Author

Roger Adamson is CEO of maritime marketing company **Stark Moor Macmillan**. This article is based a whitepaper commissioned by satcom service provider **Astrium Services**, and produced by **Stark Moore Macmillan**.

You can download the full **Research Whitepaper free of charge** at: <http://goo.gl/9Q4WB>