The ITF Seafarers' Trust Port-based Welfare Services 2016 Survey

Summary Report[1]

Introduction

This report presents the findings of a research project conducted by the ITF Seafarers' Trust between July 2015 and February 2016.

Access to shore-based welfare facilities is a key component under the Maritime Labour Convention of 2006 (Regulation 4.4). Whilst surveys were undertaken before the ratification of the MLC welfare provisions, this survey report seeks to update findings of a 2006 survey undertaken the Seafarers' Trust - in conjunction with the Seafarers International Research Centre - measuring the quality of shore-based welfare services.

This report summarises key findings of the 2016 survey. Objectives include:

- To document the frequency of use of services by seafarers
- To measure trends between the 1996, 2006 and 2016 survey results[2,3,4]
- To understand the importance, priorities, and concerns of seafarers as to the provision of port-based welfare services
- To note seafarers' degree of satisfaction with the quality of these services
- To understand any notable associations between respondents' age, rank, and type of ship

We wish to thank all the seafarers who responded to our questionnaires, to the ITF and its affiliates, Crewtoo, InterManager, ISWAN, the International Chamber of Shipping and Anglo Eastern for assisting in the dissemination of the survey.

Demographics

A total of 957 seafarers responded to this survey with 97% of the respondents being male. Deck officers are the largest response group totalling 36% of the respondent answers. This was followed by Engine officers (19%), deck ratings (12%), Engine room ratings (4%), Deck cadets (3%) and Engine room cadets (1%). Officer level positions therefore constitute the largest group totalling 55% of respondents. In terms of age, 56% of the respondents are in the 21-39 age bracket followed by the 40-49 age bracket (22%). In terms of vessel-type, seafarers employed on bulk carriers constitute 24% of responses followed by tankers (20%), container vessel (17%), general cargo (11%), cruise ship (7%), off-shore supply (4%), ro-ro (3%), tug boat (2%) and ferries (1%). Put together, the respondent population is predominantly male, of higher rank and in their early thirties.

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[1] Prepared by Alex Mellbye and Henry Norman.

[2] Kahveci, E. 2007. *Port Based Welfare Services for Seafarers*. SIRC.

[3] ITF/MORI. 1996. *Seafarers' Living Conditions Survey.* ITF. London.

[4] ITF Seafarers' Trust. 2016. *Port Based Welfare Services for Seafarers.* ITF Seafarers' Trust. London.

Section 1 | How important are port based welfare services?

When asked to rate the relative importance of port-based welfare services we combined together the percentage of respondents who reported values between 4 and 5 (the two values with testify the most towards perceived importance). The results from the 2016 survey are presented alongside the results from both the 1996 Mori and 2006 SIRC surveys together with the observed change from the 2006 SIRC survey (Figure 1).

90% of the respondents consider access to internet to be the most important port-based service, followed by transport services which average out across destinations at 74%. These results are consistent with the findings of the Merchant Navy Welfare Board's Seafarers' Centres and Port Welfare Services Study which found that internet access, sim cards and reliable port transport to be the most important port-based services.

90% of the respondents consider access to internet to be the most important port-based service

With regards to the trend, money exchange, onshore accommodation and organised sightseeing are now considered more important than they were ten years ago by quite some margin. Interestingly, when looking at their importance over the last twenty years, it becomes apparent that the response rate has fluctuated quite considerably. Recorded responses in the 2006 survey are markedly down across a number of categories as compared to the 1996 survey. These figures subsequently return to their pre-2006 levels in the 2016 Seafarers' Trust survey. In contrast, the most popular services (apart from international phone calls) have consistently increased in perceived importance over the past twenty years. We should note that of the total responses recorded in 2006, 51% were recorded as ratings. Compare this to the 2016 survey where just 16% of respondents were recorded as ratings.

Fig. 1 | Importance of port-based welfare services

Services	ITF/MORI 1996	ST/SIRC 2006	ST 2016	Change past 10 years
Internet access	n/a	68	90	+22
Transport to shops and town	70	85	85	0
Transport to seafarers' centre	n/a	72	82	+10
International phone calls	79	81	73	-8
Port-based medical clinic	70	44	72	+28
Money exchange	66	9	61	+52
Organised sightseeing	48	13	56	+43
Transport to place of worship	48	53	54	+1
Money remittance	n/a	n/a	54	n/a
Onshore accommodation	44	9	53	+44
Sports facilities	51	10	52	+42
Book/film exchange	50	15	48	+33

Section 2 | How do seafarers' rate the quality of port-based welfare services?

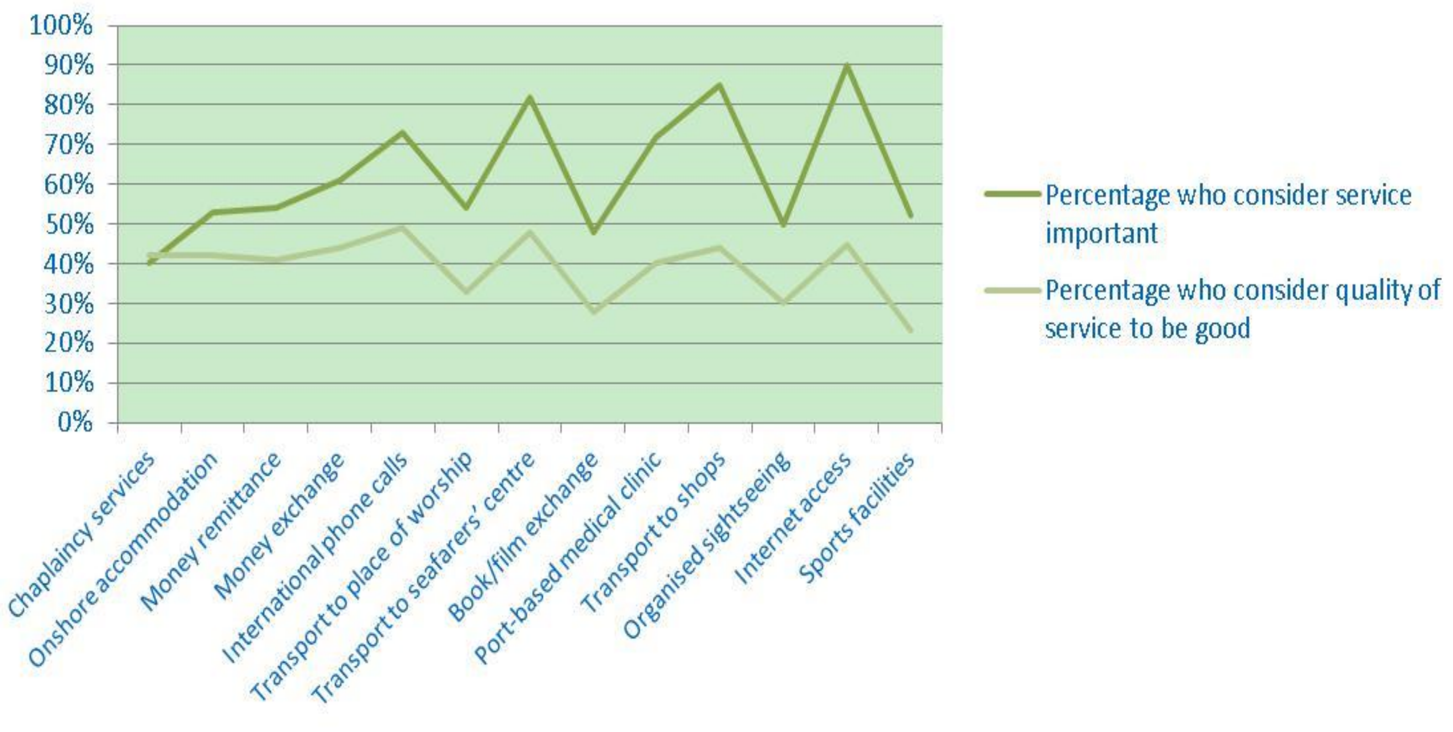
When asked to rate the quality of port-based welfare services, respondents were asked to record either 'poor', 'fair', 'good', or 'excellent' responses. For the purposes of this report, the percentages given in Figure 2 combine both the categories 'good' and 'excellent'.

When looking at the percentages recorded for perceived quality of services it is unavoidable to note that services tend to score low marks. In fact, none of the services score a favourable rating of 50% or more indicating that most respondents consider the services to be poor or inadequate. In the case of internet provision, 45% of all respondents reported the quality of the service to be good or excellent.

It is unavoidable to note that the services tend to score low marks in terms of quality

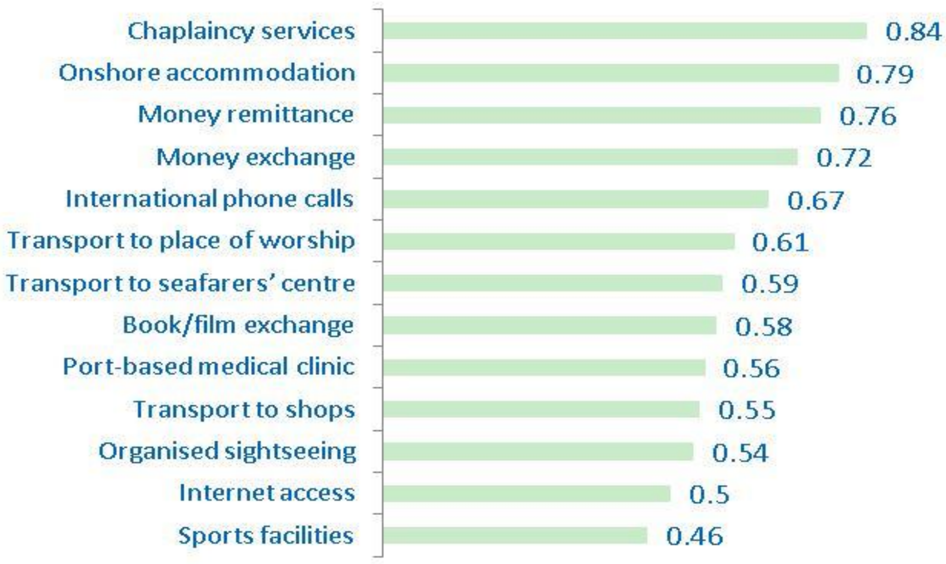
The first observation to note in Figure 2 is the variance between perceived quality and importance. Out of the services, ten score between 40-49%. For the importance scores, however, there is a much wider spread of scores. This suggests that while seafarers' priorities in port differ, their experience of the quality of services is fairly uniform.

Fig.2 | Quality and importance of services



If looking to the proportional score a service receives, however, we can measure the satisfaction rate of a service based on those who have rated it of high importance in the first place (Figure 3). Scores closer to a value of 'one' will indicate a greater satisfaction with the quality of a service. Unexpectedly, all the estimates are below zero yet the degree to which they fall differ. Starting with the most important service, internet access, we observe a 0.50 proportional score indicating that 50% of the respondents who view the service as important, are also satisfied with its quality. Transportation services generally score between the values of 0.54–0.59 suggesting that slightly above 50% of all the respondents who find these services important are also satisfied with the service. Chaplaincy is a service worth taking another look at. As can be seen from its assigned importance score, it is the second least prioritised of all the services with only 50% of all respondents considering it important, yet when seen in proportion to its quality it scores the highest with a proportional score of 0.84. This indicates that the users of the chaplaincy service are the user-group most satisfied with the quality of their service. As for the lowest, sport facilities score a 0.46 which means that only 46% of those who prioritise sports find the service adequate, thus making it the least satisfied user-group.

Fig.3 | Proportion of quality to importance of port-based welfare services

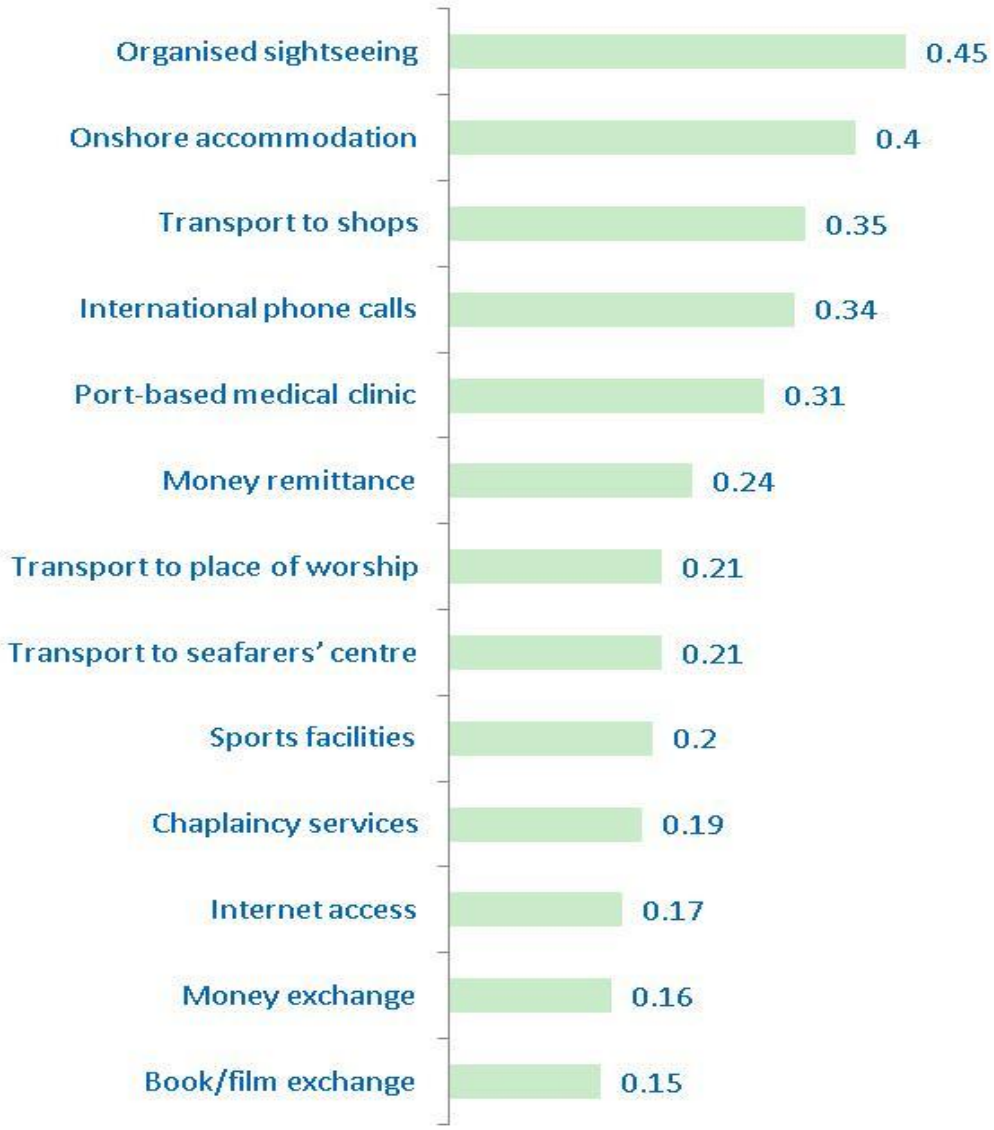


Section 3 | Willingness to pay for services

When asked to rate the willingness to pay for a specific service we grouped together respondents who were willing to pay US$10 or more for the service. Internet, being the most highly rated service in terms of importance, correspondingly scores just 17% for those willing to pay USD$10 or more for the service. This is similar for chaplaincy services and access to sport facilities which scores 19% and 20% respectively.

Sightseeing and onshore accommodation are the two services that score the highest in terms of willingness to pay (Figure 4).

Fig.4 | Willingness to pay US$10 or more for services



Section 4 | Communication and on-board internet access

In response to the question, 'how do you communicate with people at home, while you are away at sea?' personal phone subscriptions and instant messaging services were the most frequent responses recorded (Figure 5).

When asked if respondents had access to internet on-board their ship 46% reported 'Yes – but limited (text email only – no attachments)', 28% reported 'No' and 26% reported 'Yes – unlimited'. Since such instant messaging services like Facebook and WhatsApp are the most popular communication method, it is understandable that the provision of internet access in ports is so important (Figure 6).

This result also marks an improvement in the provision of internet on board ships if we consider response data from the earlier SIRC report of 2006. Only 16% of respondents reported 'yes' to a question of whether they had access to email facilities on board.

Fig.5 | Communication methods

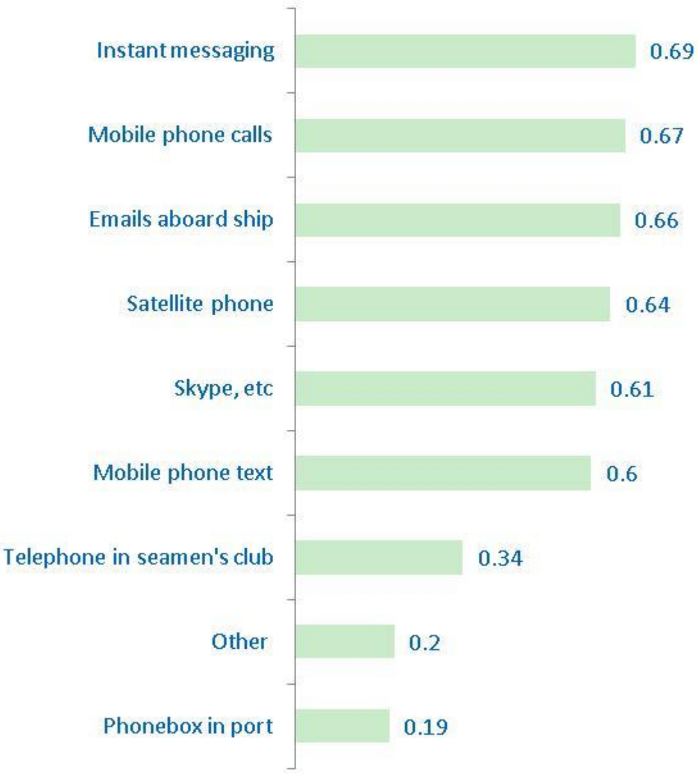
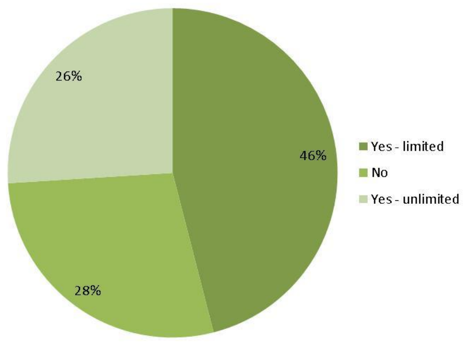
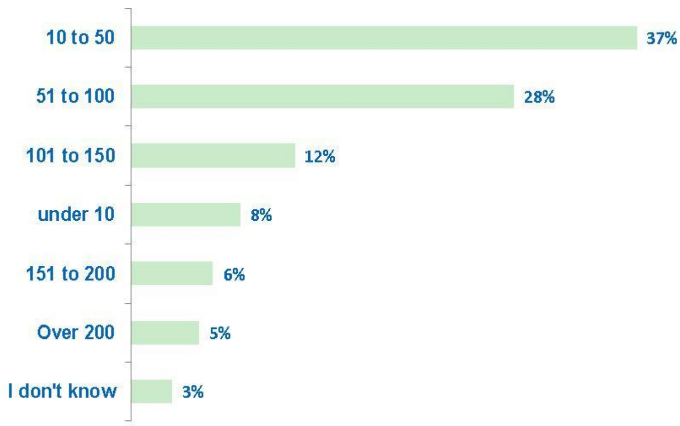


Fig.6 | Do you have access to internet on-board?



In terms of monthly communications expenditure while away at sea, 37% of respondents reported spending between $10 - $50 USD per month. This is followed by 28% who report monthly expenditure between $51 - $100 USD on communication costs (Figure 7). Comparing these figures to the 2015 Futurenautics research does reveal, however, a divergence in the data.[5] Indeed, the Futernautics survey reports average expenditure on crew communications to be $152 USD; an increase of nearly $18 USD from the previous year.

Fig.7 | Monthly Communications Expenditure ($USD)



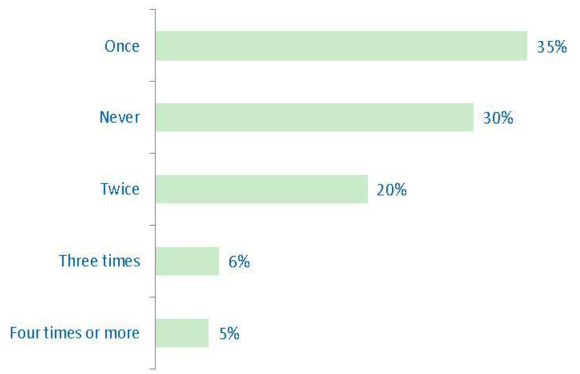
[5] *Futurenautics Research: The Crew Communications Survey*. 2014. Futurenautics.

Section 6 | Shore leave and turnaround times

Respondents reported few instances of shore leave. When asked how much shore leave they had over the past 4 weeks, 30% reported 'never', while 35% reported 'once' and 20% 'twice' (Figure 8).

Although these results testify to low levels of shore leave among the respondents, they do mark an improvement from the 2006 SIRC survey in which 67% of respondents reported no instance of shore leave in the past eight weeks.

Fig. 8 | Shore leave access past 4 weeks



When asked to provide the reasons for the lack of shore leave respondents 60% reported work on board as the principle reason for lack of access. This was followed by fast turnaround times (41%) and limited expenditures to go ashore (33%) as limiting factors (respondents could tick as many answers to the question as they wished). These results are consistent with the findings of the 2006 SIRC survey (Figure 9).

Respondents were also asked to report the average turnaround time in port for their ship. A total of 29% of respondents reported turnaround times of less than six hours. All in all, two-thirds of respondents reported turnaround times of twenty-four hours or less thereby limiting access to shore leave if considered alongside on board work commitments and expenditure (Figure 10).

When asked 'given a choice, while on shore leave, what would you prefer to do?' 53% of respondents indicated that they would prefer to visit a seamen's club with free Wi-Fi over and beyond visiting a shopping mall or café (Figure 11).

Fig.9 | Reasons for lack of shore leave access

Fig.10 | Vessel turnaround times

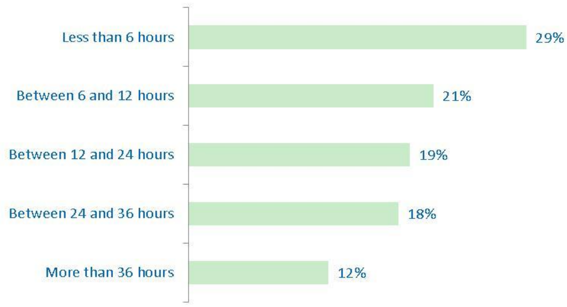
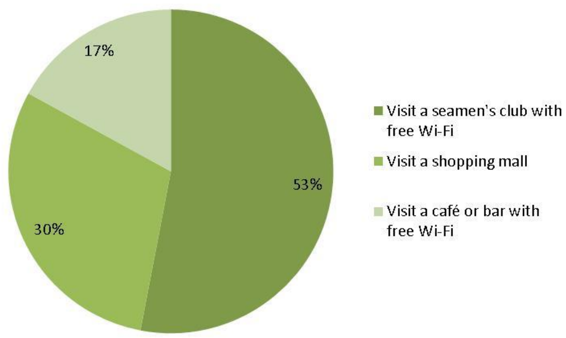


Fig.11 | Preferences for shore leave activities



Section 7 | Welfare workers

The survey provided respondents with an opportunity to rate their interactions with welfare workers. A majority of 58% reported satisfaction with the services provided by welfare workers (Figure 12). An additional 67% regarded the visits as important (Figure 13).

A majority of 67% report to not knowing the name of the organisation the welfare worker represents. When respondents did provide a welfare organisation name, there were repeated instances of respondents confusing one organisagiton with another. In terms of interaction with welfare workers, 42% report seeing a welfare worker once in the last six month period and 40% report not seeing a welfare worker at all during their current contract (Figure 14).

Fig.12 | Were you satisfied with the visit?

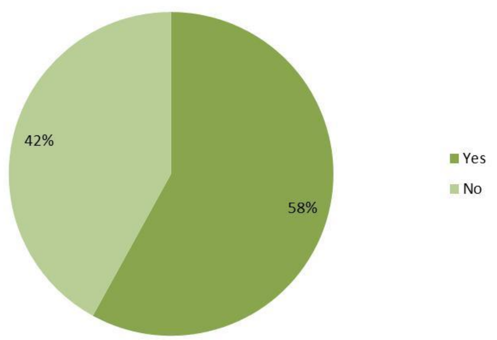


Fig.13 | Are the visist important?

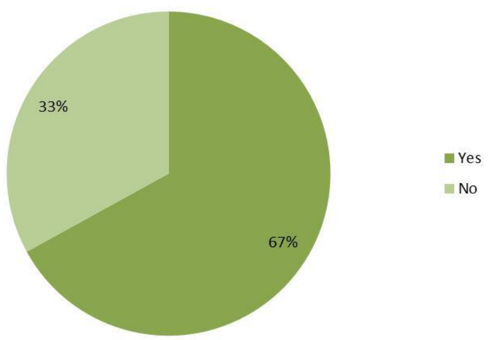
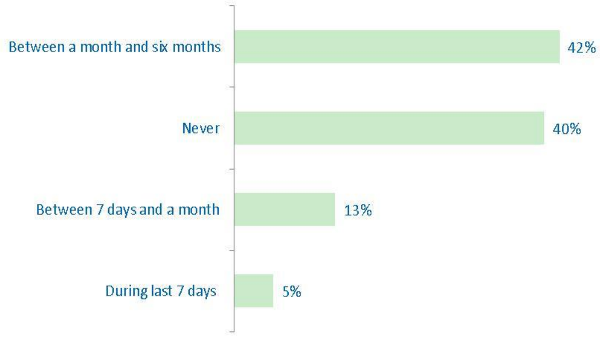


Fig.14 | When did you last see a welfare worker in your current contract?



Concluding remarks

Internet

Internet provision emerges as the most important port-based welfare service with the survey demonstrating a steady improvement in the provision of internet services on board. At the same time seafarers remain dissatisfied the accessibility of internet services with 74% of repondents reporting that their internet access is either limited to emails and texts only or not available at all. This fact pertains particularly to seafarers employed on bulk ships where the survey indicates higher importance levels ascribed to port-based internet provision most likely as a result of lower levels of VSAT connectivity aboard the ship.

> ***74% of respondents report that their internet access is either limited to emails and text only or not available at all***

The fact that the 2016 survey finds no association between age and percived importance of internet services does indicate less of a generational gap than evidenced in other surveys.

Shore leave

Access to shore leave is another welfare service that has seen big changes over the years. As found in the 2006 SIRC survey, 67% of respondents reported not having had any shore leave for the past eight weeks. In this survey 64% reported having had either no access or one instance of shore leave over the last 4 weeks of their current contract thus marking a slight improvement. Most interestingly, 53% of respondents would prefer to visit a Seamen's Club as opposed to a café, bar or shopping mall, when on shore leave to access Wi-Fi and services.

Access to shore leave does not appear to be associated with either rank or age but with ship-type. Indeed respondents from bulk and tanker ships report less shore leave access than those from container vessels. With 60% reporting on board work commitments, and a further 41% reporting fast turnaround times, these findings indicate similar obstacles prevalent in the 2006 survey persist 10 years on. This could also explain why satisfaction with on board visits from welfare workers scores a lower satisfaction rating as compared to their importance; a finding mirrored in the 2010 welfare worker's survey undertaken by SIRC.

Limitations of the survey

It is important to consider the various methodological limitations of the survey design. As the survey required an internet connection in order to access the Survey Monkey platform, respondents without access to an internet connection were not able to take part. As a result, the survey does not take into consideration the most isolated and disconnected seafarers.

Secondly, demographic analysis of the survey reveals a higher proportion of respondents serving at the rank of officer (55%). Future surveys should aim to reach out to a wider cross-section of seafarers, from ratings, to cooks and cadets.

Finally, whilst online surveys are relatively inexpensive to administer and logistically simple, they cannot be a replacement for on-the-ground interaction and engagement with seafarers via interview-based research designs .

END

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