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# eMAR

## eMAR Survey – draft report

Prepared by Ipsos MORI for the eMAR consortium

**Internal use only**

03/12/12

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# Background



- The eMAR consortium required primary market research to build a better understanding of:
  - the level and type of information technology needs within the maritime sector
  - awareness of the e-Maritime platform
  - potential uptake and areas where e-Maritime is possibly most needed
- Specifically, a survey was required to:
  - understand current system usage
  - identify problems with current systems
  - explore how e-Maritime might answer current needs
  - gauge current levels of awareness
  - understand who e-Maritime might appeal to
  - understand how e-Maritime might be used

- A consultative, open-link online survey was considered the best data collection methodology in preference to a quota sample survey given:
  - the absence of a single sampling frame (or sampling frames which could be easily consolidated) adequately covering the maritime sector across Europe and containing sufficient contact information to allow for targeting to avoid the need for extensive screening; and
  - budget and timescale constraints
- Ipsos MORI designed the survey questionnaire with input from the consortium managed by BMT who also sought advice from Canterbury Christchurch University Business School.
- Invitations to complete the survey (containing a link to the eMAR Survey website) were sent out by consortium members via BMT
- An invitation to take part was also published on the eMAR website
- Ipsos MORI hosted the survey which was open between 13<sup>th</sup> September and 31<sup>st</sup> October 2012
- Reminder invitations were sent by consortium members
- The survey was available in English and no other language
- 85 respondents completed the survey
- We recorded 237 unique visits to the site, meaning a 36% response rate on this basis

- The respondents to this survey are only a sample of the total "population" of those involved in the maritime sector across Europe, so we cannot be certain that the figures obtained are exactly those that would have been reached were everyone to have responded
- The small base sizes involved mean that caution has to be exercised when using these findings to draw conclusions
- With this in mind, we have expressed findings in terms of absolute numbers rather than percentages. We have also signposted where disaggregation is based on small sub-samples and, again, findings derived from such analysis can only be indicative rather than having any statistical basis
- The data is unweighted
- Given the small numbers it is important to understand the profile of respondents which is summarised in the slides that follow

## Q1. Which of these, best describes the organisation/company you work for?

- Responses were gathered from a variety of organisations involved in the maritime sector, reflecting a cross-section of the target audience for the survey
- A majority of the respondents were from transport organisations of some form
- The figures below are greater than the sum of responses because some organisations are engaged in multiple activities
  - For example, a number of those involved in sea and/or land transport also operated in other related areas such as shipping/receiving

Activities organisation is engaged in	n
Sea transport operations	31
Port operations	25
Land transport operations	15
Administrations/other institutions	14
Shipping operations	9
Other	10

Includes respondents who coded their organisation as:

- Consultant
- Research – industrial/ maritime
- IT/ IT Support

Base: 85 responses to Q1, total sample is 85 online interviews, September-October 2012, N.B. Small base sizes

## Q2. Which areas does your organisation operate in?

Location	n
Global	47
European Union/European short-sea region	28
Out of European Union/European short-sea region	10

- As with the types of organisations involved, responses were gathered from organisations with a wide scope of operation in geographic terms
- A majority of the respondents represent or work for organisations that operate globally
- Some work exclusively in the European Union or European short-sea region
- A minority operate out of the EU area in other regions, but not globally (for example in the Asia-Pacific region). These respondents were mostly involved in wider shipping operations and are operations managers

Base: 85 responses to Q2, total sample is 85 online interviews, September-October 2012, N.B. Small base sizes

## Q3. Which of these best describes your role?

Role	
Managing operations (e.g. a Transport Operations Manager)	34
IT Management and Support	12
Directing/ Making decisions (e.g. a CEO)	11
Other	33

<i>Includes:</i>	
Research/ R&D	7
Branch manager	4
Agency/ Agent	3
Port operations/ Port operations manager	3
Director/ Manager	3
Consultant	3



- Respondents from a variety of positions completed the survey, with the majority from the main target audience; i.e. key decision makers or those involved in decision making
- A large number of those involved in managing operations were involved in sea transport (20 in total)

Base: 85 responses to Q3, total sample is 85 online interviews, September-October 2012, N.B. Small base sizes

# Current information sharing and system usage



# Types of information being sourced/shared

**Q4. Which of these, if any, do you do on a regular basis? By regular we mean at least once a month or so.**

## Shipping Operations

- Obtain up-to-date technical information for the equipment and systems used on-board the ship
- Access information about suppliers and/or repair workshops for the equipment, systems and spare parts used on-board the ship
- Access information about the next survey and/or condition of the class of the ship
- Access technical information about the ship (e.g. engine performance, energy efficiency, levels of emissions, etc; and compliance with regional, national and port regulations)
- Submit information to regulatory bodies (e.g. for port compliance)
- Manage HR operations such as provision of training
- Benchmark/ compare the performance of shipping companies, terminals, ports and other maritime service providers
- Communicate with others in the maritime industry on a day-to-day basis

## Port and terminal operations/intermodal transport

- Enter /obtain data into/from Port Community Systems
- Communicate with clients (shippers, etc) regarding freight transport planning and status
- Obtain information for real-time hinterland transportation planning (e.g. ship ETA may determine mode and service provider)
- Obtain information on Bill of Lading for terminal operations and hinterland transport scheduling
- Obtain updates to port/ terminal/ berth services and restrictions
- Obtain information on port/ terminal/ berth performance levels (KPIs and benchmarks)
- Obtain information on canal/ port/ terminal/ berth performance status (e.g. waiting time, incidents, equipment outage, labour disruptions, public holidays, etc)
- Obtain information for extended gateway services

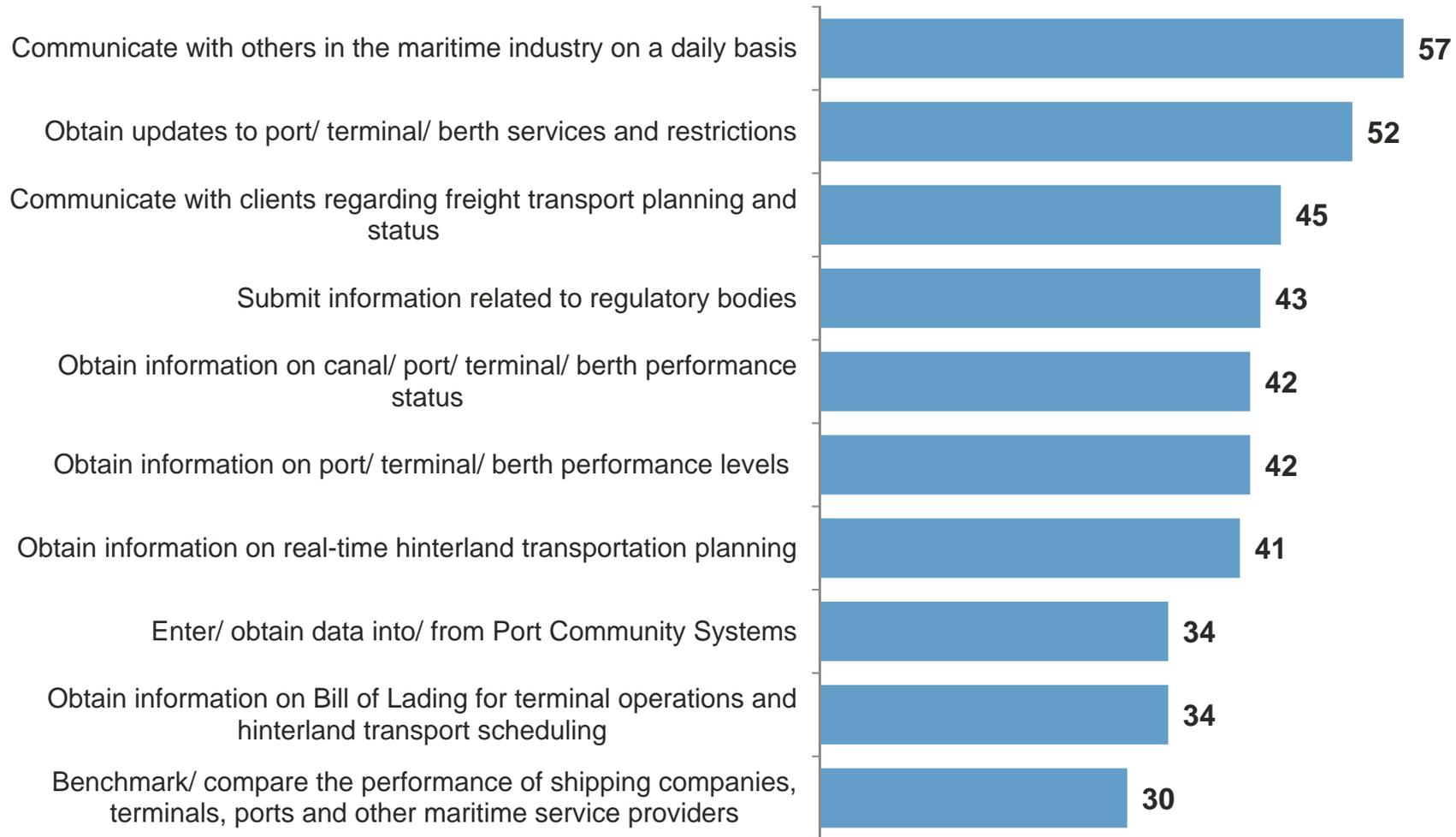
**Q4. Which of these, if any, do you do on a regular basis? By regular we mean at least once a month or so.**

- Respondents were asked about a wide variety of common activities related to Shipping and Port operations
- The majority reported being involved in activities relating to both types of operation: **68** of the **85** selected at least one activity related to **Shipping operations** that they do on a regular basis, and **71** at least one activity related to related to **Port and Terminal operations/ Intermodal transport**
- **Communication** with clients/ others in maritime industry was the most commonly selected activity across both sets of operations
- Aside from communication, **obtaining information** related to planning and scheduling was the most frequently selected activity in relation to port and terminal operations
- Submitting information to **regulatory bodies** and **obtaining benchmarking data** were the most commonly selected activities relating to shipping operations
- A minority (8) claimed not to regularly engage in any of these activities, and one claimed not to know

Base: 85 responses to Q4, total sample is 85 online interviews, September-October 2012, N.B. Small base sizes

# Types of information being sourced/shared

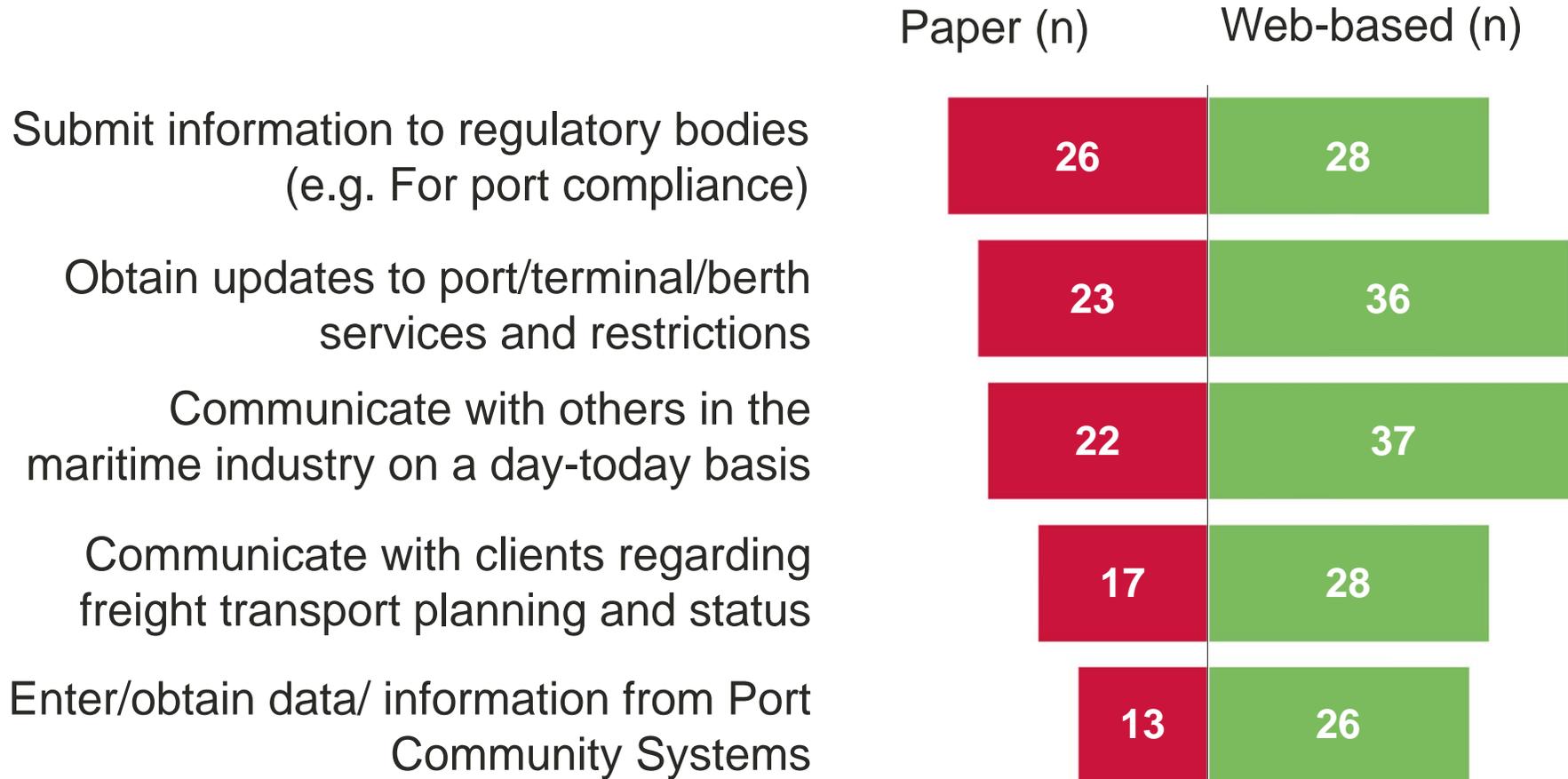
**Q4. Which of these, if any, do you do on a regular basis? By regular we mean at least once a month or so.**



Base: 85 responses to Q4, total sample is 85 online interviews, September-October 2012, N.B. Small base sizes

# Systems used to source/share information

**Q5a. Which, if any, of the following systems do you use when you...[ACTIVITY at Q4]?**



Base: 16-57 responses to Q5a, total sample is 85 online interviews, September-October 2012, N.B. Small base sizes

**Q5a. Which, if any, of the following systems do you use when you...[ACTIVITY at Q4]?  
Q5b. Still thinking about when you [ACTIVITY], would you say you mainly use paper-based systems, mainly use web-based systems or do you mainly use other systems?**

- Respondents to this survey report using a wide variety of systems across different activities, with web-based systems already widely in use
- Paper is still common however, particularly when obtaining technical information or administrative information such as KPIs and benchmarks, as well as when obtaining information on matters such as port services
- Paper also serves as a source of communication in some instances, although phone is most common, for example in day to day contact with clients or others in the industry
- For those respondents still using paper, they were also asked about the systems that they **mainly** use: paper is still a predominant source for some, perhaps not surprisingly in relation to some activities that may involve legal documentation; for instance submitting information to regulatory bodies
- However, paper is also important for a minority when it comes to communication – and that is when weighed against phone or web-based options
- Many respondents claimed to use all of these systems equally

Base: 16-57/ 6-26 responses to Q5a/ Q5b, total sample is 85 online interviews, September-October 2012, N.B. Small base sizes

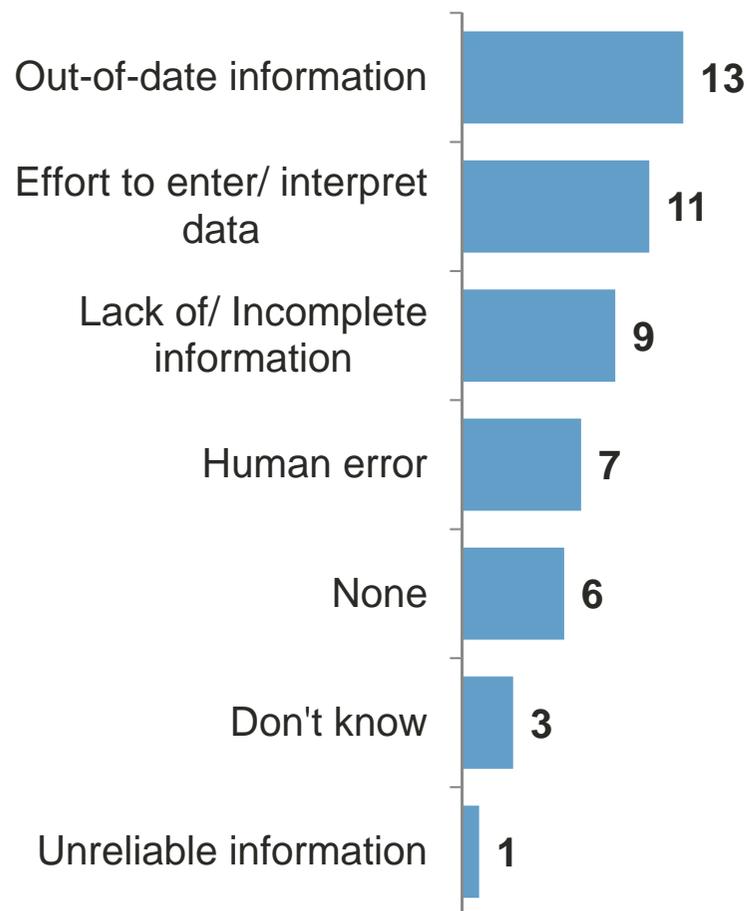
## ***Q5c. Still thinking about when you [ACTIVITY], how much of a problem, if at all, do you find it to use the systems you use?***

- On the whole, and across activities, respondents did not claim to have a big problem with the system(s) that they currently use
- In every case fewer respondents claimed to have a problem with the system they used than claimed to have no problems at all; respondents were least likely to have a problem in relation to bill of lading or other information needs
- Generally even those respondents who had problems with their current systems tended to say that it was a fairly big rather than very big issue
- A minority noted problems with benchmarking data and day to day communications via their existing systems
- However, it is possible that the use of existing systems might not be a big issue because users have found/or developed ways to circumvent existing systems issues. So the fact that there is not currently a big problem with a system does not necessarily mean that a respondent would be unwilling to move to a newer/more up to date system if it was clear that it was easier, quicker or more efficient to use it

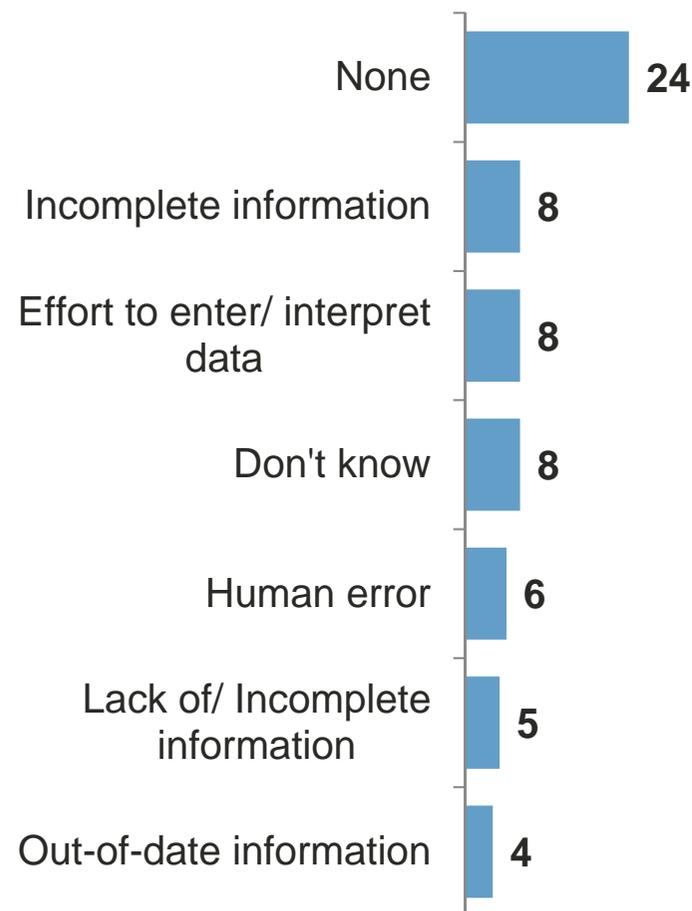
Base: 16-57 responses to Q5c, total sample is 85 online interviews, September-October 2012, N.B. Small base sizes

**Q6. Thinking in general about [MODE] systems, what would you say is the main problem in using them?**

Paper-based systems (n=53)



Web-based systems (n=65)



Base: 51-65 responses to Q6, total sample is 85 online interviews, September-October 2012, N.B. Small base sizes

## *Q6. Thinking in general about [MODE] systems, what would you say is the main problem in using them?*

- Although only a minority cited problems with the current systems they use, paper-based forms are clearly more problematic than web-based ones
- Whereas most respondents who have problems with the **web-based systems** that they used could not cite a specific issues, **out-of-date, or a lack of/ incomplete information** and the **effort of entering/ interpreting data** were all identified as big issues
- Given the very low bases involved, none of these figures can be considered statistically robust enough for extrapolation purposes, but among this group it is clear that there are some underlying issues with using paper-based systems that are less readily identified when it comes to web-based ones
- Other non-web-based systems have in common some of the issues identified for paper:
  - For those using phone, **unreliable information**, the **effort to enter/ interpret data** and **human error** all featured as relative concerns
  - These latter two issues were also mentioned in relation to fax systems, along with the problem of **out of date information/ data**

Base: 51-65 responses to Q6, total sample is 85 online interviews, September-October 2012, N.B. Small base sizes

# Awareness and potential use of e-Maritime

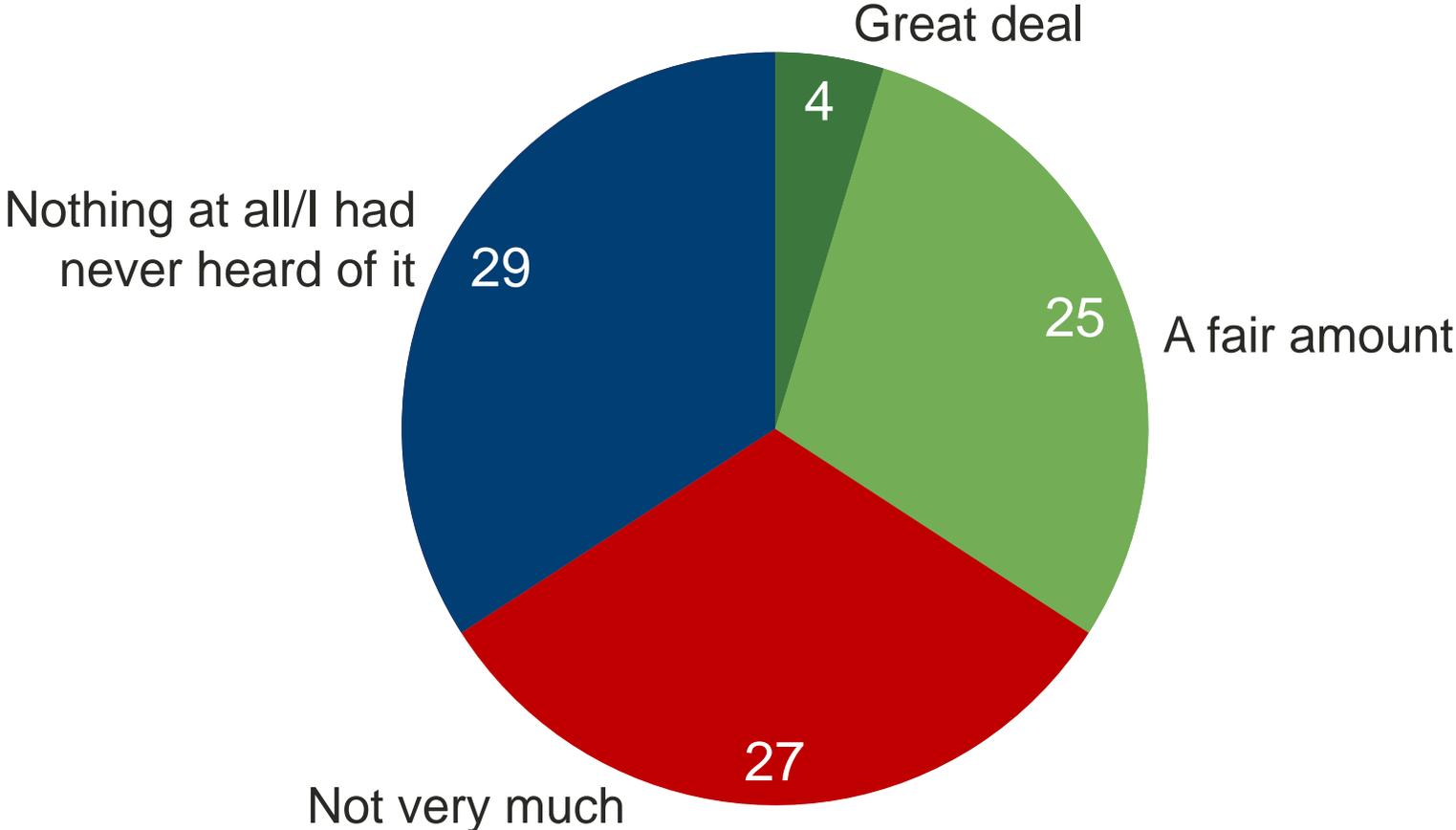


## *Q7. Before taking part in this survey, how much, if anything did you know about e-Maritime?*

- Awareness/understanding of e-Maritime is generally low, even amongst this set of respondents who had been contacted via the eMAR partners
- The majority – **56** of the 85 – had, at most, not heard very much
- **29** of this group had never heard of e-Maritime or had heard nothing about it
- A minority, **25**, claimed fair amount of knowledge
- Just **4** that they knew a great deal
- Considering such a low level of knowledge, even within a group who had been invited to complete the survey by the consortium, these findings suggest that there is a need to boost awareness of the e-Maritime platform and its planned capabilities

Base: 85 responses to Q7, total sample is 85 online interviews, September-October 2012, N.B. Small base sizes

**Q7. Before taking part in this survey, how much, if anything did you know about e-Maritime?**



Base: **85** responses to Q7, total sample is 85 online interviews, September-October 2012, N.B. Small base sizes

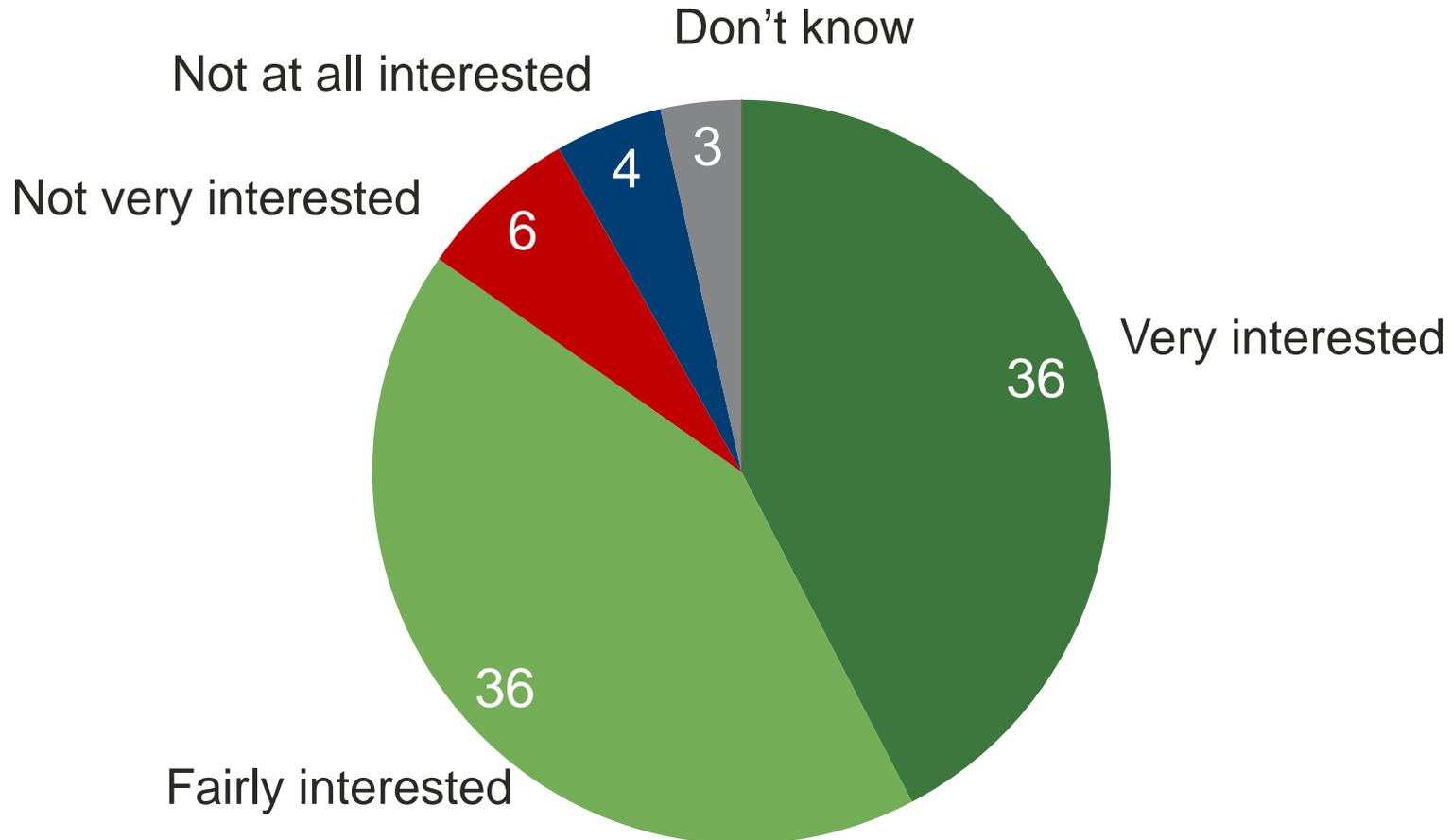
## ***Q8. How interested, if at all, would you be in using more web-based systems to source or share information?***

- In spite of generally low awareness, there is clearly an appetite for web-based systems
- The vast majority were interested in the system (**72** of the 85), with **36** very interested, and organisations of all types and operating in different locations were in this group
- A minority of respondents (**10**) claimed to not be interested
  - This group is difficult to pin down to a particular geography or organisation type, especially given such a low base. However, most of this group claimed not to have issues with their existing web-based or non-web-based systems, suggesting that they are relatively comfortable with what they already have
  - Even within this minority however, just **3** respondents said that there was nothing that they would be interested in using e-Maritime to do
- Overall therefore, this would suggest an opportunity with the majority of our respondents; it must be borne in mind that these results are indicative only but in terms of interest, the message from this survey is a positive one

Base: 85 responses to Q7, total sample is 85 online interviews, September-October 2012, N.B. Small base sizes

# Interest in using web-based systems

**Q8. How interested, if at all, would you be in using more web-based systems to source or share information?**



Base: 85 responses to Q8, total sample is 85 online interviews, September-October 2012, N.B. Small base sizes

## **Q9. You say that you would be [INSERT RESPONSE FROM Q8] in using more web-based systems. Why is that?**

- The reasons given for being interested in these systems varies but these can be broadly categorised as follows:
  - perceived improvements in speed and efficiency in executing processes
  - the possibility of simpler, more accessible and more user-friendly systems
  - increased accuracy in the data being entered/ used
  - reduction in reliance on paper
  - cost reductions
- Of the minority who were not interested in using non-web-based systems, there was no single overriding reason given, although scepticism about the benefits of a new system, as well as the addition of another system on top of existing systems were mentioned

Base: 85 responses to Q9, total sample is 85 online interviews, September-October 2012, N.B. Small base sizes

## **Q9. You say that you would be [INSERT RESPONSE FROM Q8] in using more web-based systems. Why is that?**

### **POSITIVE COMMENTS**

- Avoids missing data/easy to save data
- Cheaper/will decrease costs
- Ease of use/accessibility/user friendly/convenient
- Easy/better/documented communication
- Efficient/will streamline operations/increase efficiency/simplify/improve our system
- Faster/easier/timely/instant/greater access to information/accurate/up to date information
- Focussed
- Paperless/will reduce the use of paper
- Quick to use
- Time saving/management
- Will increase accuracy
- Will increase standardisation/integrate service providers/same information from different sources/in one place/ensure everyone is linked

### **NEGATIVE COMMENTS**

- Don't need any more additions/current systems provide all the information we use
- Unsure how influential/useful/relevant this/the findings will be

Base: 85 responses to Q9, total sample is 85 online interviews, September-October 2012, N.B. Small base sizes

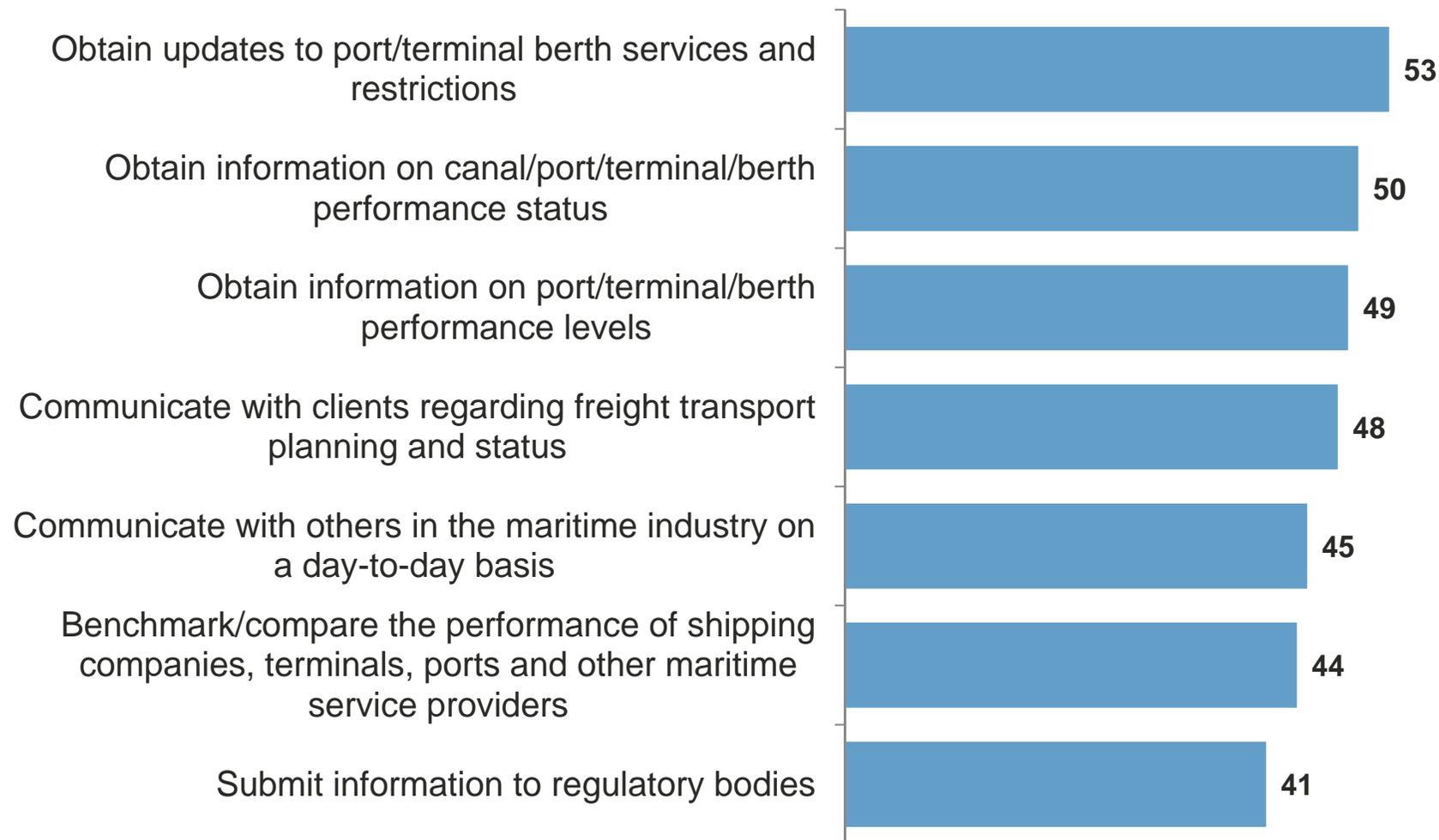
***Q10. We are now going to show you some examples of the sorts of information that you might source or share. Which, if any, of these would you be interested in using e-Maritime to do?***

- In terms of interest in the things that a new platform could do; communication and information retrieval/ sharing were particularly popular options
- This interest applies across shipping and port and terminal operations
- It was particularly pronounced in areas where paper is still common
- Only a tiny minority had no idea about what they would like the platform to do
- Again, these results indicate that there is an appetite for e-Maritime as a whole, and in having a system that has a wide-ranging functionality: it could be both a platform for communications as well as source of information retrieval/ sharing
- Again, these figures seem to be consistent with the hypothesis that even if users aren't experiencing big problems with present systems, they are not averse to exploring different options

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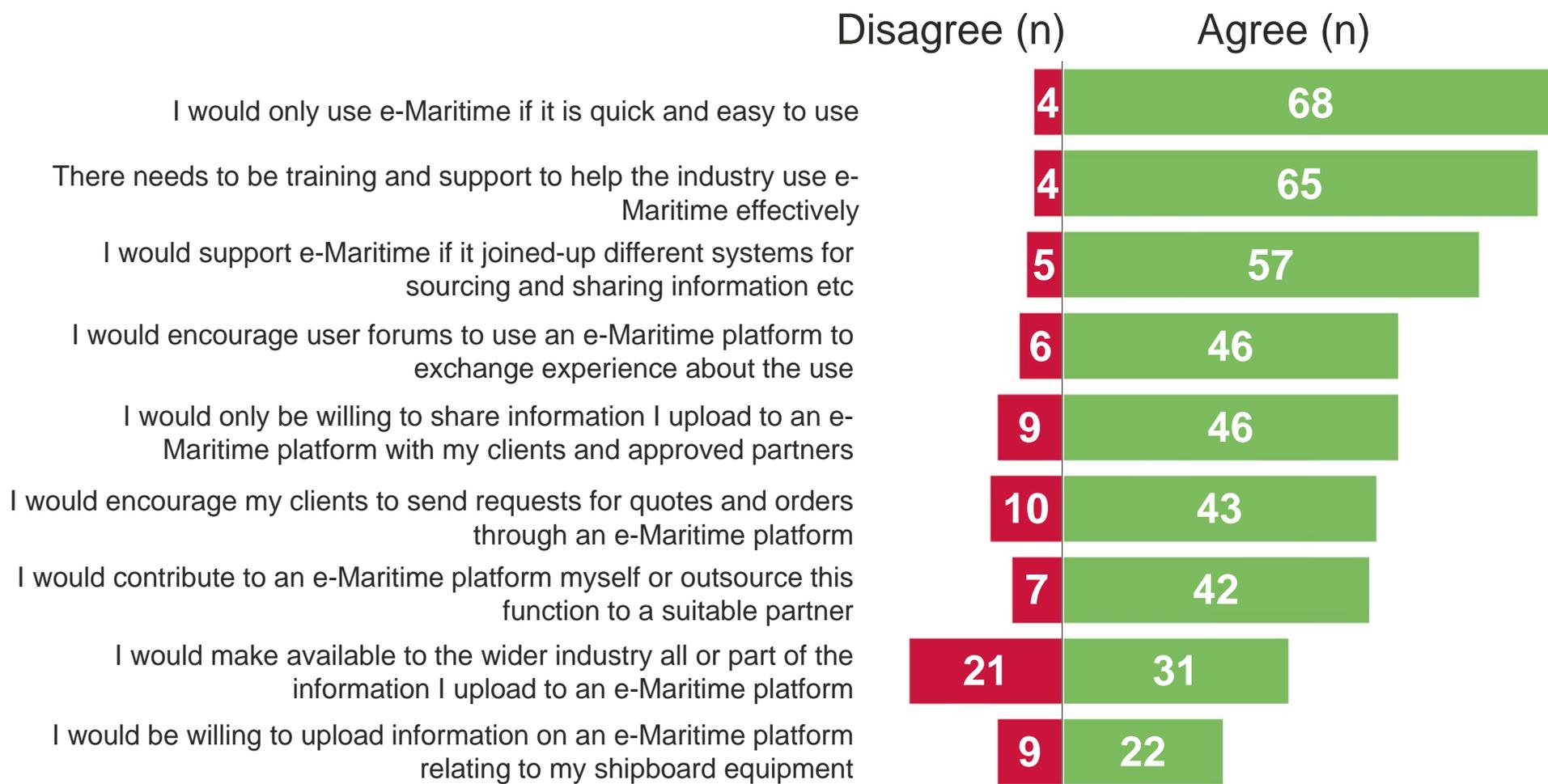
Base: 85 responses to Q10, total sample is 85 online interviews, September-October 2012, N.B. Small base sizes

**Q10. We are now going to show you some examples of the sorts of information that you might source or share. Which, if any, of these would you be interested in using e-Maritime to do?**



Base: 85 responses to Q10, total sample is 85 online interviews, September-October 2012, N.B. Small base sizes

**Q12. Based on what you know or have learnt about e-Maritime while completing this survey, to what extent do you agree or disagree with the following statements?**



Base: 85 responses to Q12, total sample is 85 online interviews, September-October 2012, N.B. Small base sizes

## **Q12. Based on what you know or have learnt about e-Maritime while completing this survey, to what extent do you agree or disagree with the following statements?**

- Stated intentions about use are on the whole positive (even if only hypothetical); the majority of respondents agreed that they would be prepared to want to share information, encourage their clients and colleagues to do the same and contribute to the platform
- However, there is clearly a need to ensure that e-Maritime offers something different and really does deliver a solution to the problems it is seeking to address; the strongest agreement is with statements about what the platform would offer; namely *if*
  - it joined-up different systems for sourcing and sharing information to make them more efficient
  - it is quick and easy to use
- A large majority also agreed that there needs to be training and support to help the industry use e-Maritime effectively
- Moreover, although positive, the results from this group suggest that there is some scepticism over whether it will work. For instance, coupled with low awareness, a sizeable group neither agreed nor disagreed with the statements; that could be because this is very much a concept and they need convincing that the platform will deliver

Base: 85 responses to Q12, total sample is 85 online interviews, September-October 2012, N.B. Small base sizes

**Q12a. You agreed that you would be willing to upload information on the e-Maritime platform relating to your equipment. Which, if any, of these would you be willing to upload?**

- Of those respondents who were prepared to upload information to e-Maritime, training videos and performance indicators were the most popular options, with technical forms and bulletins also a popular option
- Only a small minority were not sure what they would upload
- Most of those willing to upload operate on a global basis rather than in the European area alone, and most are involved in transport operations of one form or another
- Given the small base however, it is difficult to draw any conclusions for these profiles. All of these respondents are interested in web-based systems which might be because they are already literate in interacting with similar platforms or sharing information in this manner

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Base: 22 responses to Q12a, total sample is 85 online interviews, September-October 2012, N.B. Small base sizes

**Q13. Based upon what you know or have learnt about e-Maritime while completing this survey, how likely or unlikely do you think you/your organisation will be to use e-Maritime in the future?**

- In line with other results, views on the likelihood of using e-Maritime are generally positive with the majority (**57**) saying that they were likely to use it, a substantial portion saying that they were very likely or certain (**30**)
- A very small minority claimed that they were unlikely to use the platform, mirroring the minority that said they were not interested in making further use of web-base systems
- A significant minority (**19**) of this group said that they ‘don’t know’, again suggesting that there is some uncertainty around the system and even if respondents are generally engaged and positive towards web-based systems, they will need to understand how it works and be convinced that it will provide solutions to existing problems

Base: 85 responses to Q13, total sample is 85 online interviews, September-October 2012, N.B. Small base sizes

**Q14. Would you be willing to be re-contacted by Ipsos MORI on behalf of the eMAR consortium for further research as part of this project in the next 18 months or so?**

**Q.16 Would you like to receive further information from the eMAR consortium**

- Although only a minority (**38**) said that they wanted to receive more information about e-Maritime from the consortium (**47** said that they didn't want more info), the majority (**48**) would not mind being contacted in future by Ipsos MORI on behalf of the consortium
- Again, this suggests that there is an appetite for further information, it may just be that the consortium needs to consider how this information is delivered to a wider audience

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Base: 85 responses to Q13, total sample is 85 online interviews, September-October 2012, N.B. Small base sizes

# Conclusions



- The findings from this exercise should be treated as illustrative, and any extrapolations to the wider sector undertaken with caution:
  - most respondents were involved in activities relating to both shipping and port/terminal operations
  - however, the sample was self-selecting and is not necessarily representative of the wider sector...
  - ... and 85 respondents overall represents a disappointing response to the invitation to take part in the survey
- Respondents use a variety of systems to source/share information including web-based ones
- Paper is still prevalent and predominates for some activities especially those with legal aspects
- Respondents report few problems with current systems, but what we don't know is whether respondents have learnt to cope with limitations:
  - this is perhaps demonstrated by numbers who, when pushed, identify some issues with systems
  - and, relatively speaking, there are more underlying issues with paper systems than others, including effort of entry, data being out-of-date, and/or incomplete

- The survey suggests scope to build awareness of e-Maritime (even among this probably more engaged group):
  - while users are not, on the whole, reporting problems with current systems, there is an appetite for upgrading
  - the main reasons given for interest are: speed, efficiency, access, accuracy of data entry, cost
- Interest in e-Maritime is focussed on:
  - communication and information retrieval
  - and in respect of activities where paper most common
  - among minority not interested, the main reasons include scepticism about benefits and concerns about duplication of existing systems
- Stated intentions about use of e-Maritime are positive...
- ... but there are some signs of hesitancy of use which may relate to confidentiality but also low knowledge of detail
- Support and use are likely to depend on the practicalities; there is a need to ensure that e-Maritime:
  - offers something different, and...
  - does actually deliver joined-up, efficient, easy-to-use solutions

- Key in moving e-Maritime from concept to practice will be ensuring clear, effective communication of the platform and its benefits, but also achieving working, consumer-friendly implementation
- If there is to be any further market research , we think it would be best focused on:
  - a more qualitative understanding of barriers to use, and
  - in “usability” testing platform platforms to identify and resolve any pinchpoints



## Contact details

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