

# Crew Calling – there's room for growth

## Findings from CC3 market survey



Kartik Sinha  
(Maritime Market Manager)

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  - Status of Current Crew Calling Market
    - Policies, Attitudes, Usage & Spend
  - Email Usage
  - Interest in GSM to Satellite
  - Visual Entertainment



# Overview of the Survey

# CC3 was the biggest recent maritime survey

- ➔ 3 survey groups: Owners, Masters and Crew
- ➔ 415 crew interviews, 60 owners and 103 masters
- ➔ Survey divided into 4 areas of research:
  - Status of current Crew Calling market
    - Policies, attitudes, usage patterns, spend
  - Computer and email usage on board
  - Interest in GSM-to-satellite calling product
  - TV and entertainment consumption

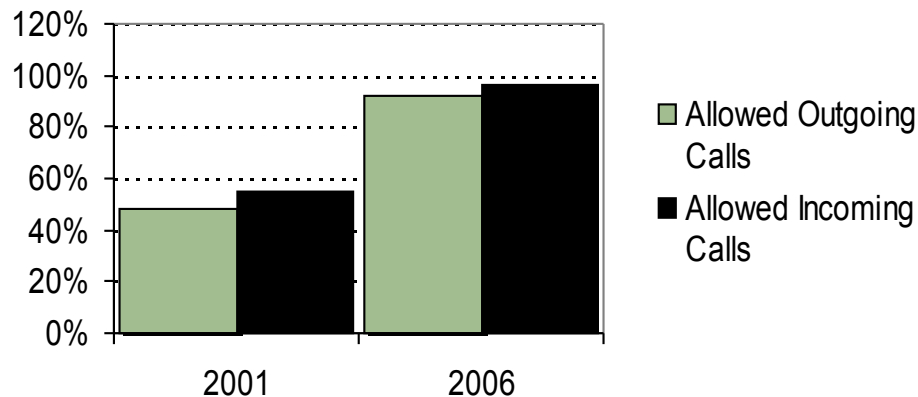


# Summary of findings

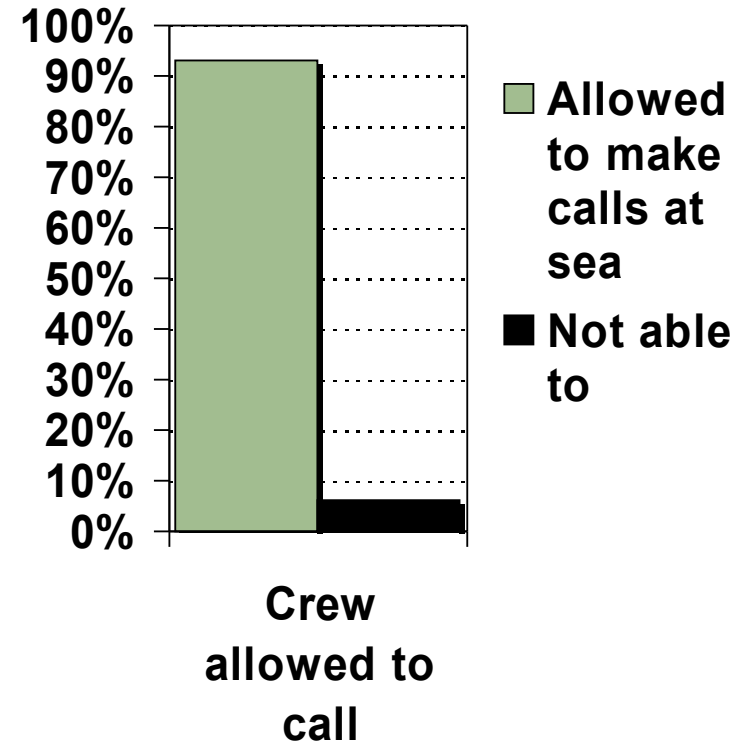
## - Crew Calling Market

# Crew Calling is now widely accepted...

## Masters allowing Crew Personal Calls



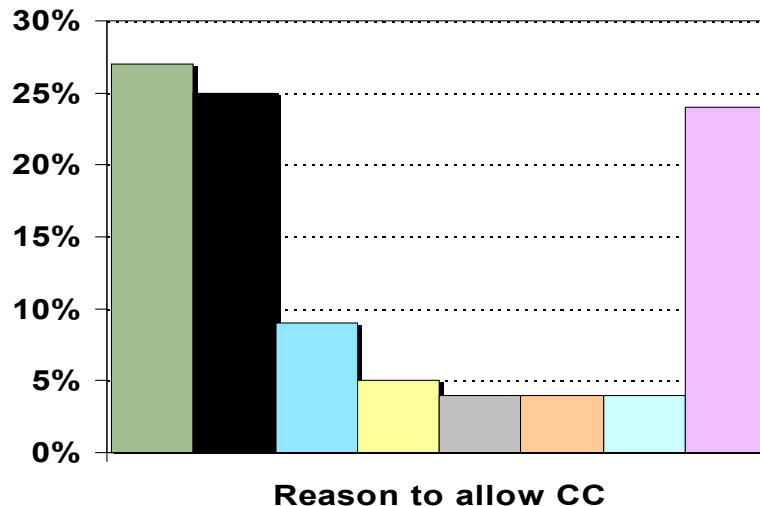
-> Complete culture change compared to 2001



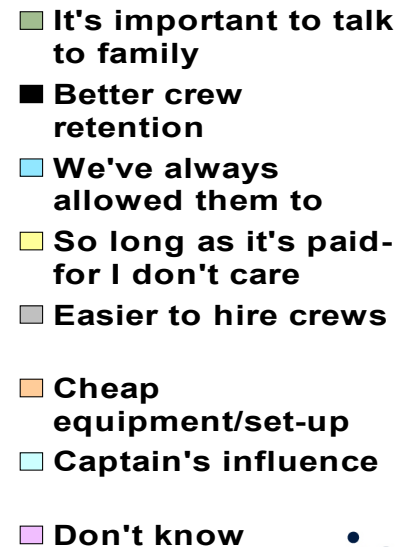
# ...as Masters and owners see Crew Calling as beneficial for the operation of the ship

Agreement with following statements	%
Allowing Crew Calling makes for a more efficient ship	65%
Crew Calling means the crew stay with the ship longer	46%

Owners: Reasons to allow Crew Calling



Masters: Attitudes towards Crew Calling

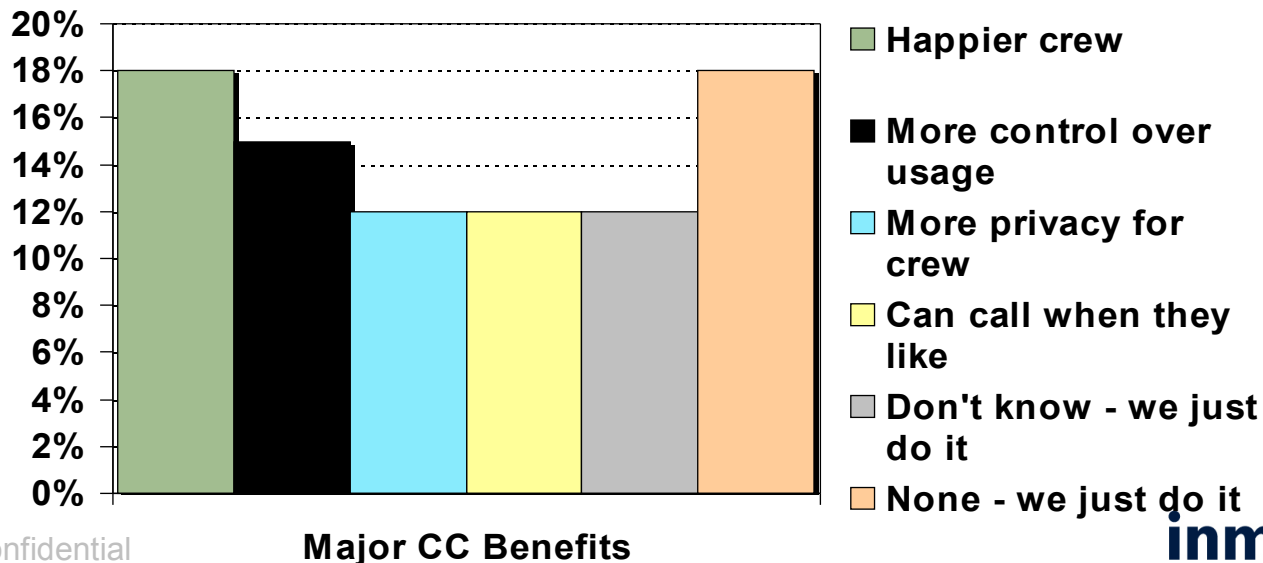


# ...and want Crew Calling to be off the bridge and on a separate terminal

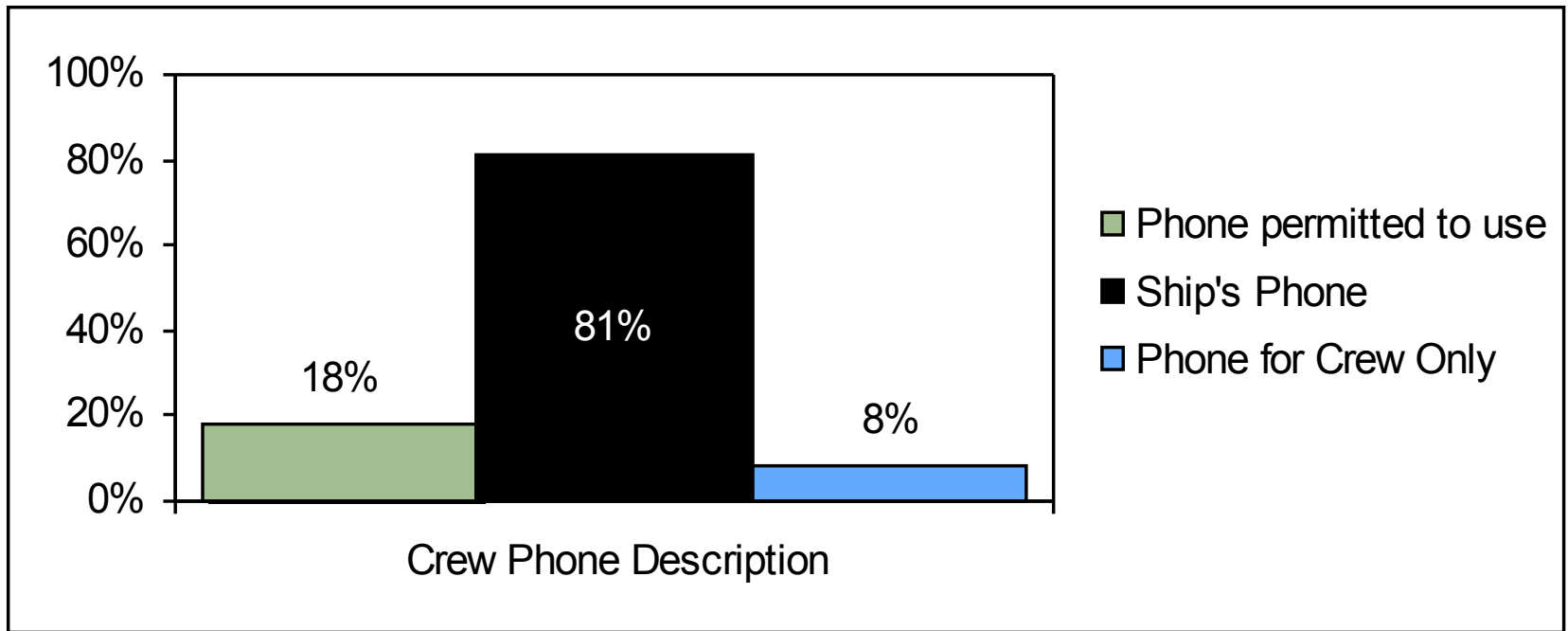
Agreement with following statements	%
It should always be off the bridge	71%
It should be on a standalone terminal	67%

Owners: Benefits from a standalone CC terminal

Masters: Attitudes towards Crew Calling

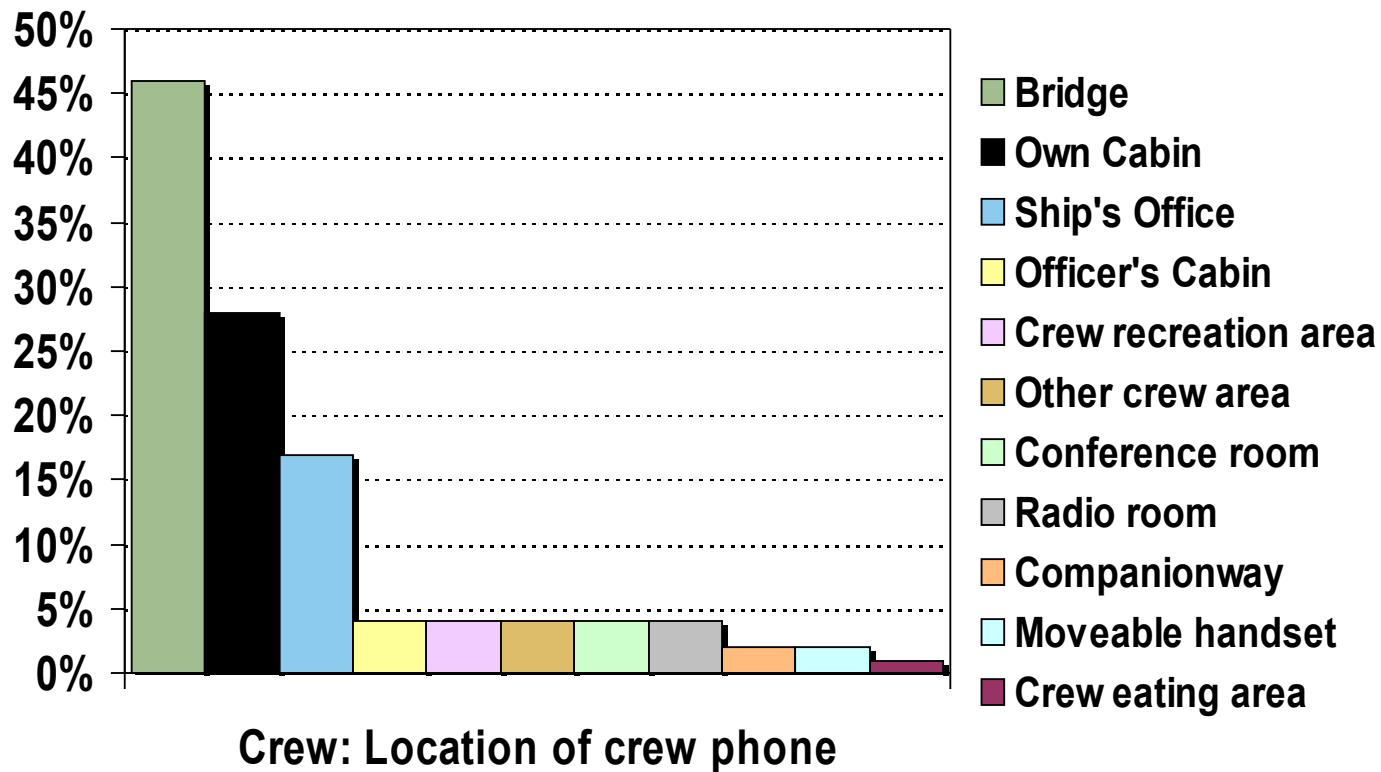


# ...but very few crew have access to a dedicated crew phone



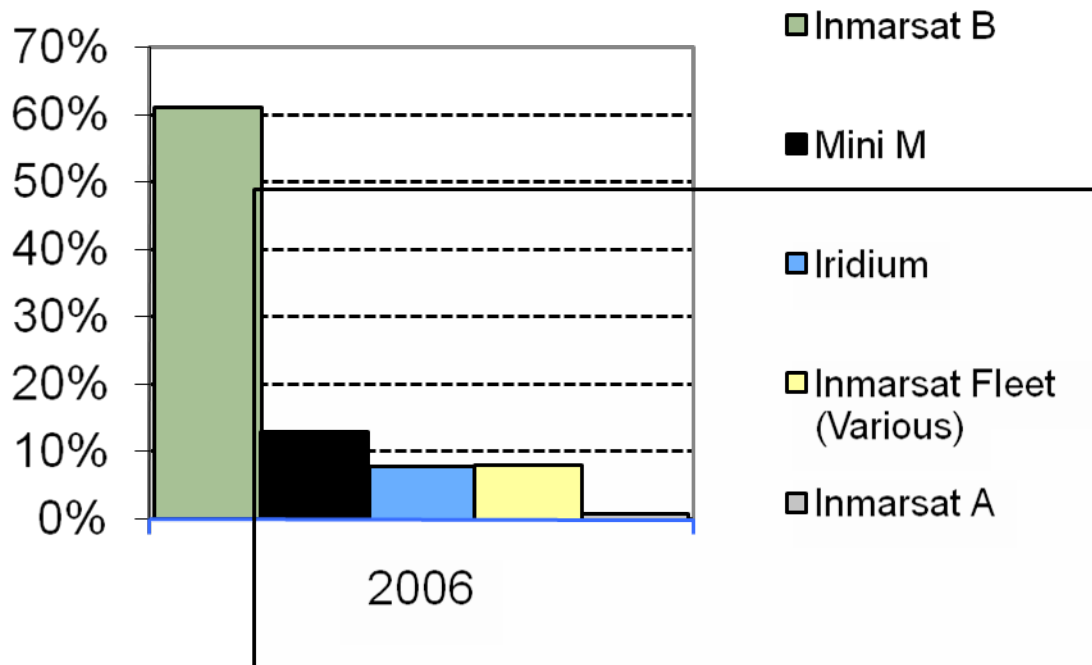
**Crew: Description of crew phone 388 Respondents With Crew Phone**

# ...as the phone is still located on the bridge or in the ship's office



# ...With Inmarsat B as the most used terminal

CrewCalling Terminals



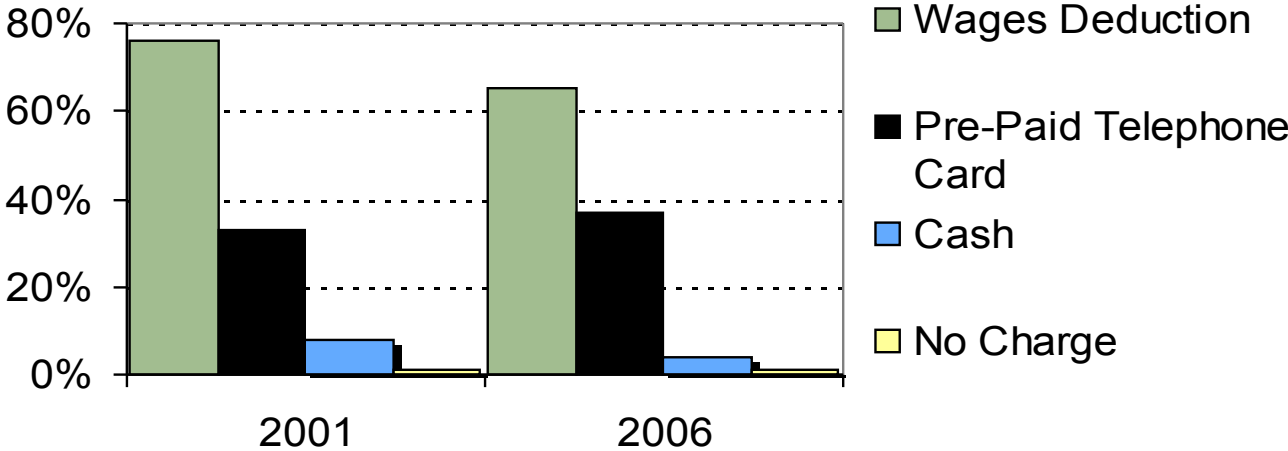
# Less than 1 in 3 Owners know that they can put a dedicated crew handset off the bridge

- ➔ 32% of Owners were not aware that they can install a crew handset away from the bridge
- ➔ But when asked, 75% would have thought about doing that



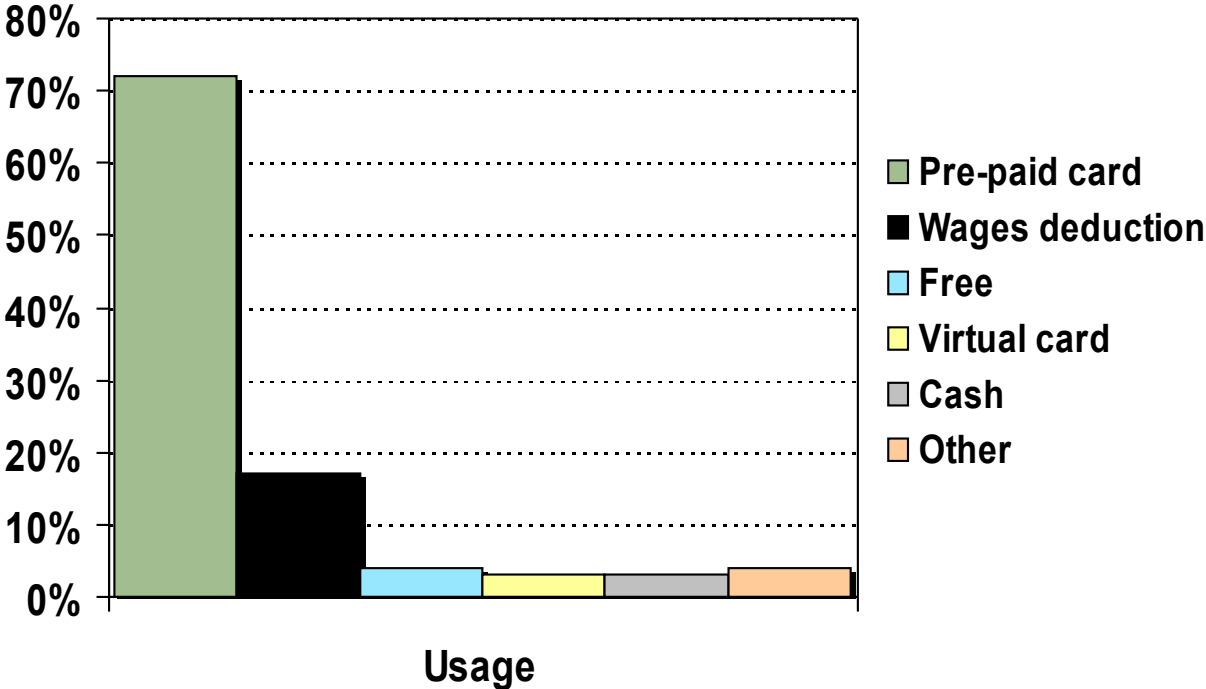
# Wage deduction is still the most used payment method

## Payment method for Personal Calls

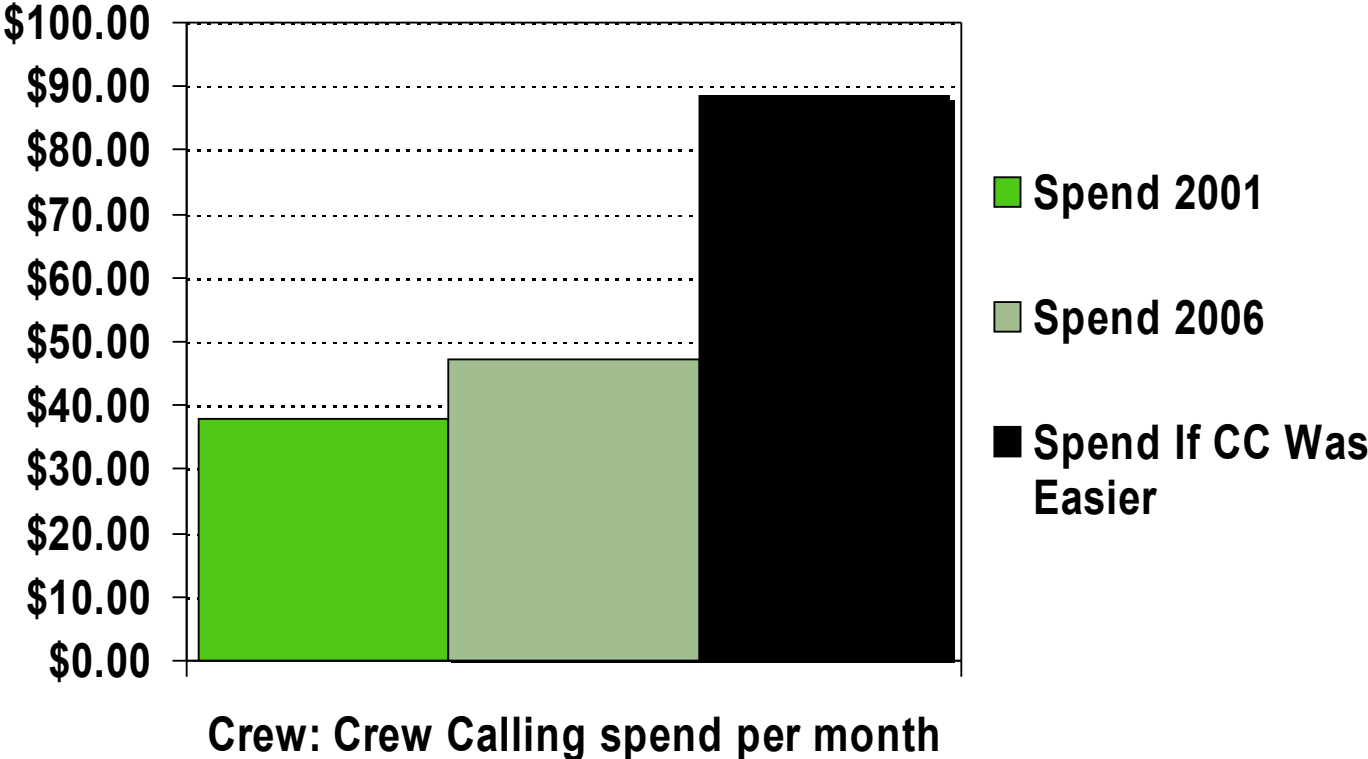


**Masters: How Crew are paying for personal calls**

# When Pre-paid cards are used, they are physical



# Since 2001, average CC spend has increased by 25% and if made easier it would almost double

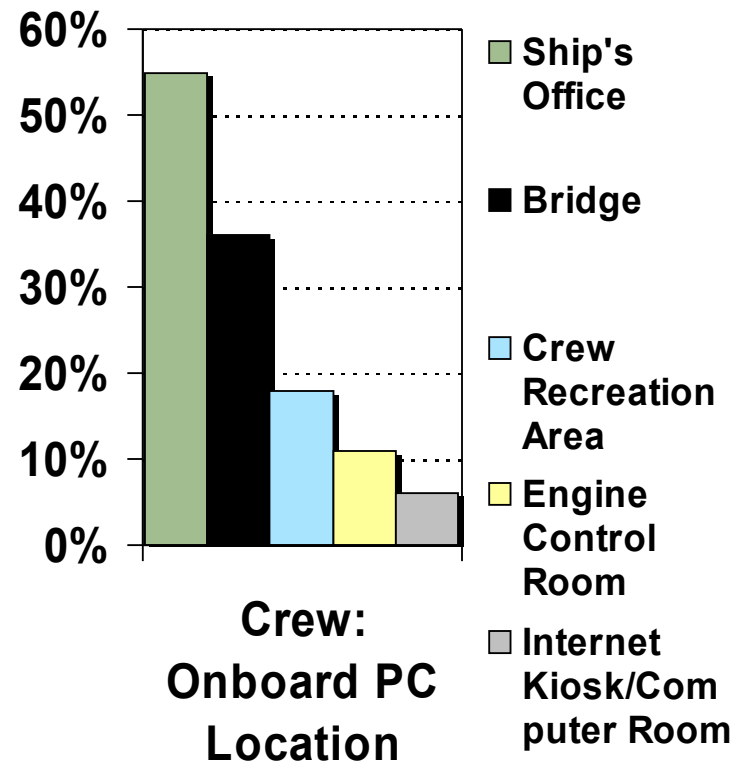


# Email Use Onboard

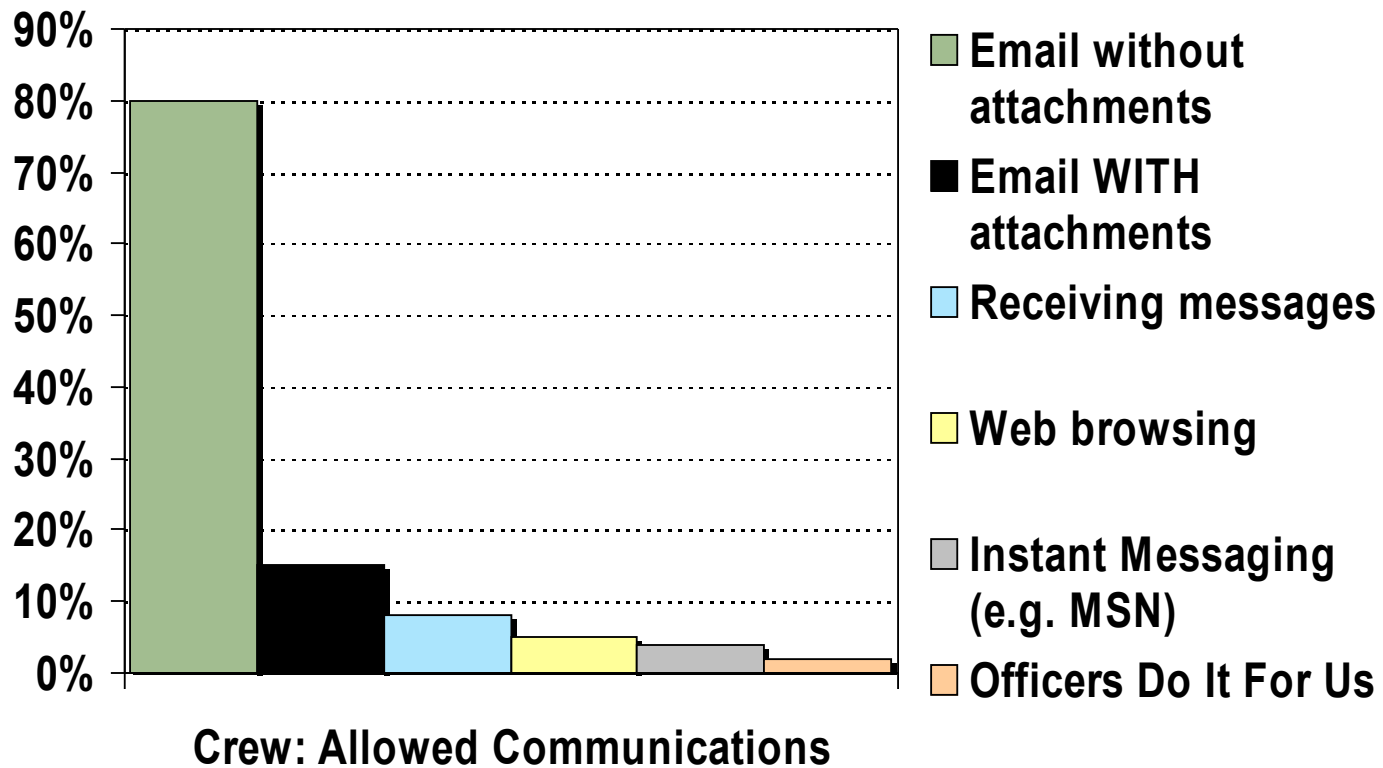


# Computer access

- ➔ 69% of crew have access to a computer to use onboard.
- ➔ 69% are allowed to use it to contact family & friends.
- ➔ Usually in working areas but policy seems more open.



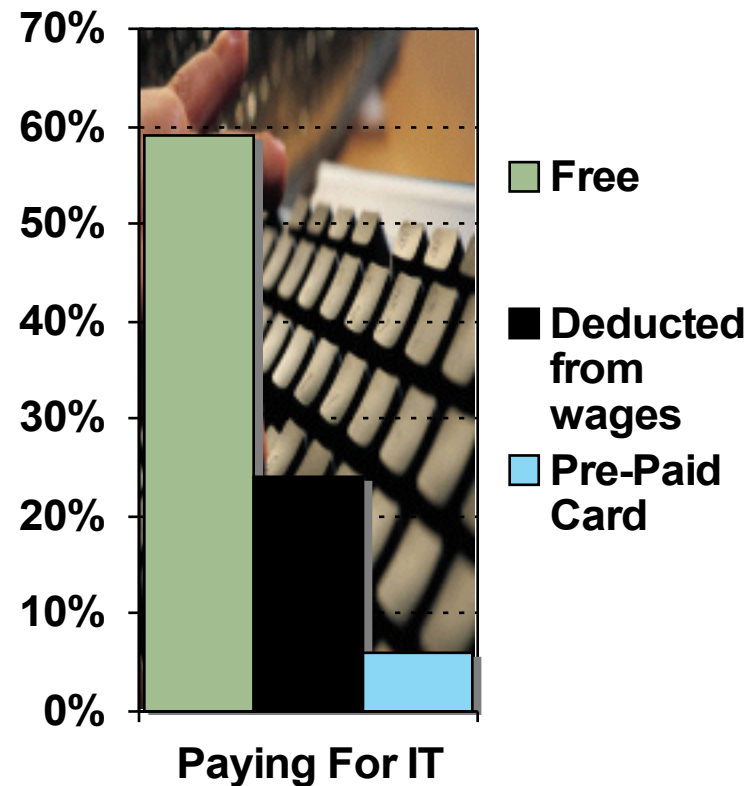
# Email is the data application of choice



# And owners provide this free of charge to crew

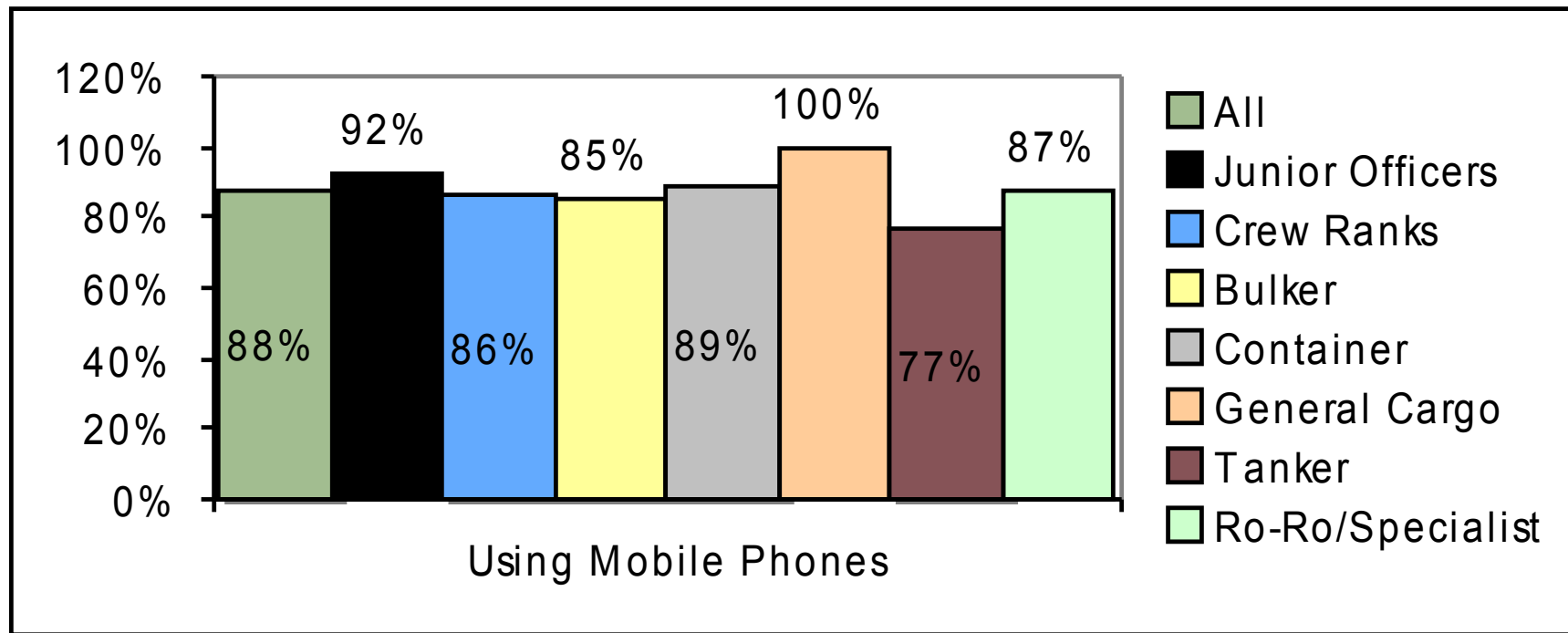
- ➔ Six out of ten owners say they don't charge for computer use for crew.
- ➔ 85% of crew reported free computer and email usage
- ➔ Large “hidden” data market if use would be promoted

Owners: How Crew are paying



# GSM to Satellite Calling Products

# GSM mobile phones are widely used on all types of vessels



**Crew: Use of Mobile Phones While Away From Home: All Respondents (415)**

# A GSM-to-Satellite concept would be warmly welcomed by all respondent groups

## ➔ Owners:

- 83% say they would allow it
- 40% say they would install it for Crew use only

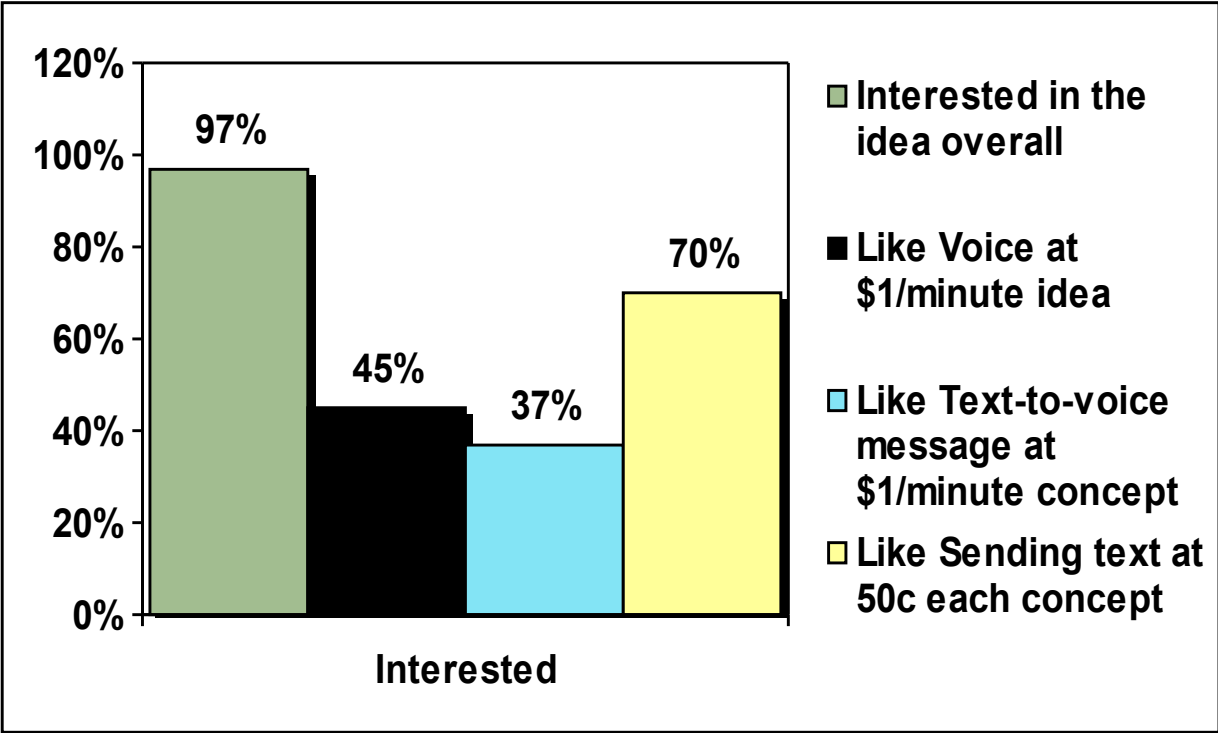
## ➔ Masters:

- 69% said there would be clear benefits to the concept, such as a happier crew, more privacy and convenience

## ➔ Crew:

- 97% would use it

# With 70% saying they would use it, text messaging was the most popular GSM application



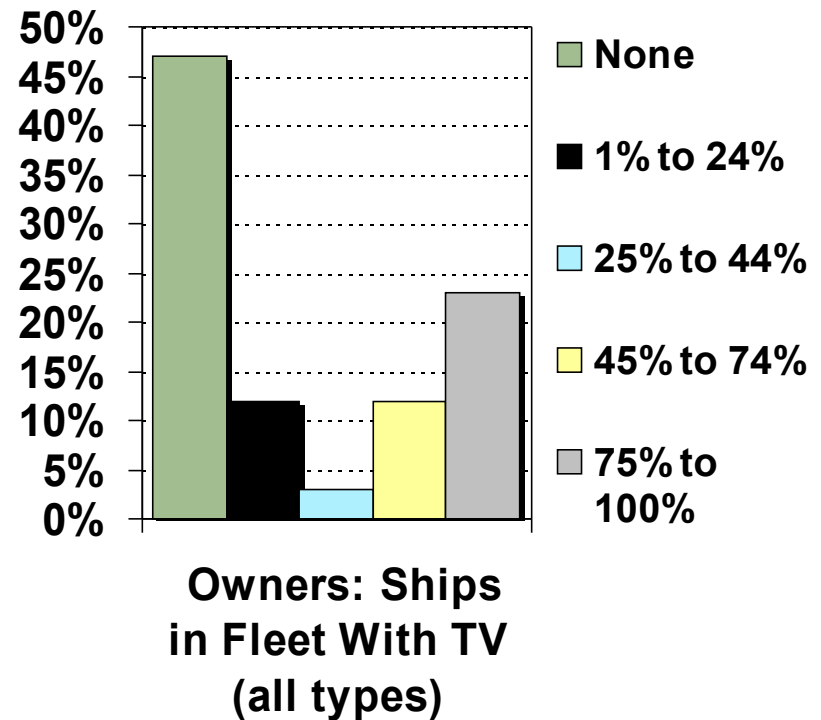
Crew: Reactions to GSM-to-Satellite Concept & Features (All)

Three circular icons are arranged vertically on the left side of the slide. The top icon shows a hand holding a mobile device. The middle icon shows a white ship on a blue background. The bottom icon shows a white airplane on a blue background.

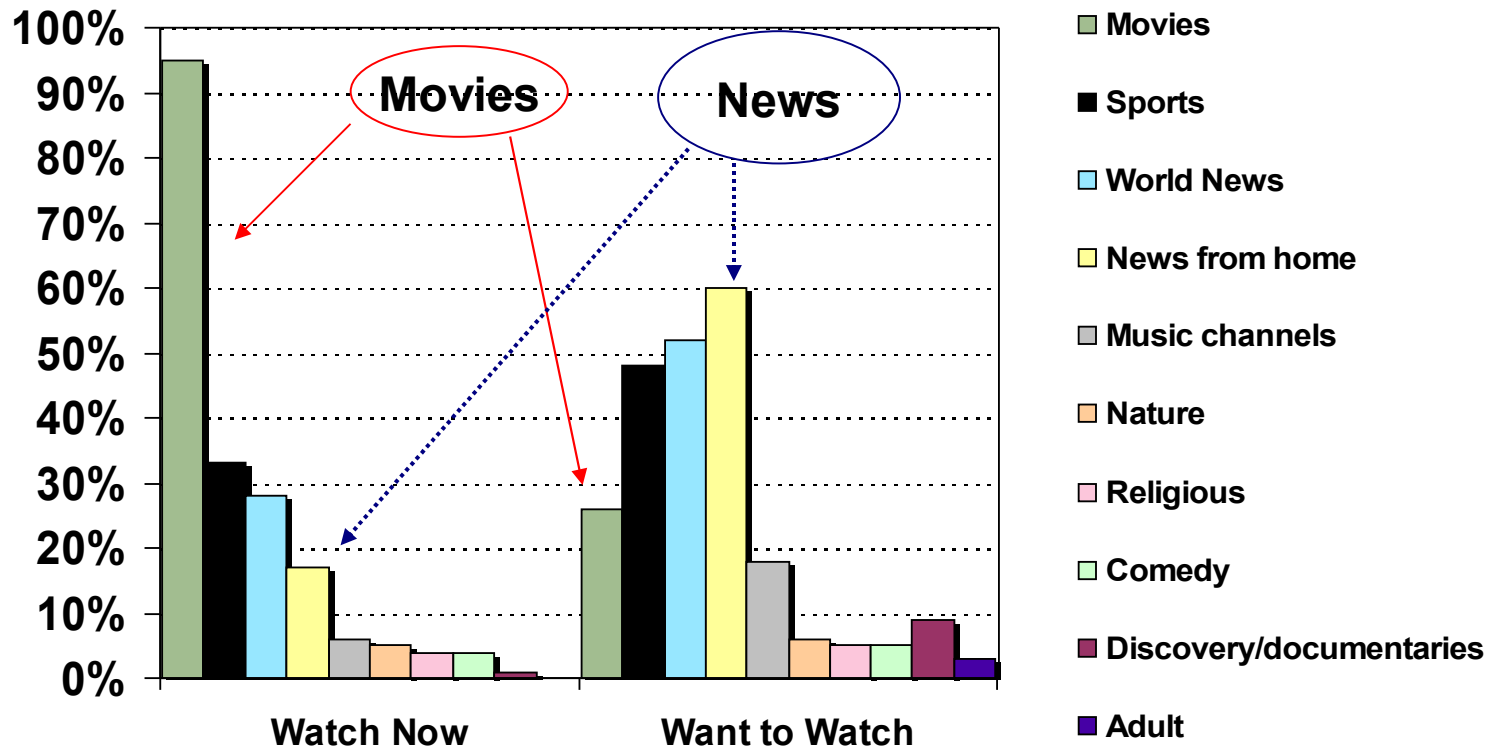
# Visual Entertainment

# Just over half of vessels are equipped with a visual entertainment solution

- Overall, 31% of vessels claim to have satellite TV.
- 86% have DVDs or videos.
- Captain (37%) and crew (33%) decide what they watch.
- Masters say it's good for morale (27%)



# Crew expressed a clear desire for a change in entertainment content provided



**Marked shift towards News 'from Home',  
Compared to world news and sports**

# Summary of findings

- ➔ Crew calling is now widely accepted
- ➔ ...however, still cumbersome as calls are still taking place
  - On the bridge
  - Via the ships Inmarsat B terminal
  - And Paid for by wage deduction
- ➔ Owners, Masters and Crew want Crew Calling off the bridge...but only 32% of owners are aware that this is possible
- ➔ Computer use is widespread and crews do not pay for it – “hidden market” for data if possible to exploit
- ➔ interest in GSM-via-satellite is overwhelming among all groups
- ➔ Visual entertainment is available on ca. 50% of vessels – and if the crew could choose they would watch more **News ‘from Home’** / current affairs and less movies

# Your feedback and opinion

➔ Your feedback, input & Comments are warmly welcomed:

- Email: **kartik \_ sinha @ inmarsat . com**

- Phone: **+44 20 7728 1979**