



Crew Calling – there's room for growth

Findings from CC3 market survey 2006

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1. Status of current Crew Calling market

– Policies, attitudes, usage patterns, spend

2. Computer and email usage on board

3. Interest in GSM-to-satellite calling product

4. TV and entertainment consumption

A. 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:
 1. Status of current Crew Calling market
 - Policies, attitudes, usage patterns, spend
 2. Computer and email usage on board
 3. Interest in GSM-to-satellite calling product
 4. TV and entertainment consumption

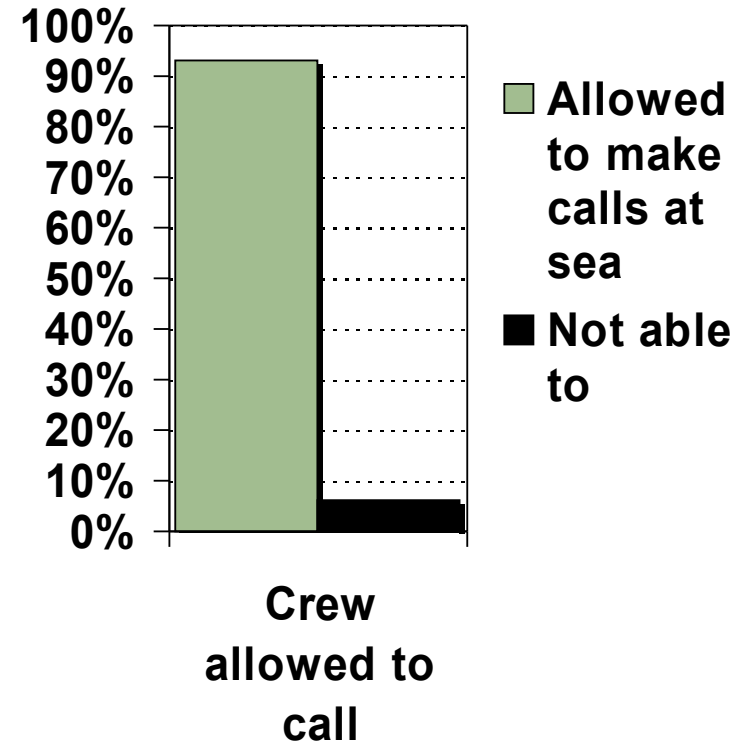
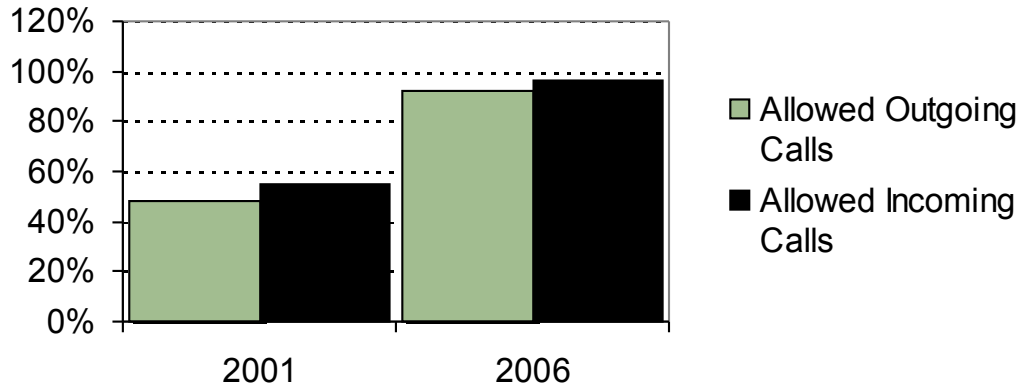
B. Summary of findings

Status of Crew Calling market



Crew Calling is now widely accepted...

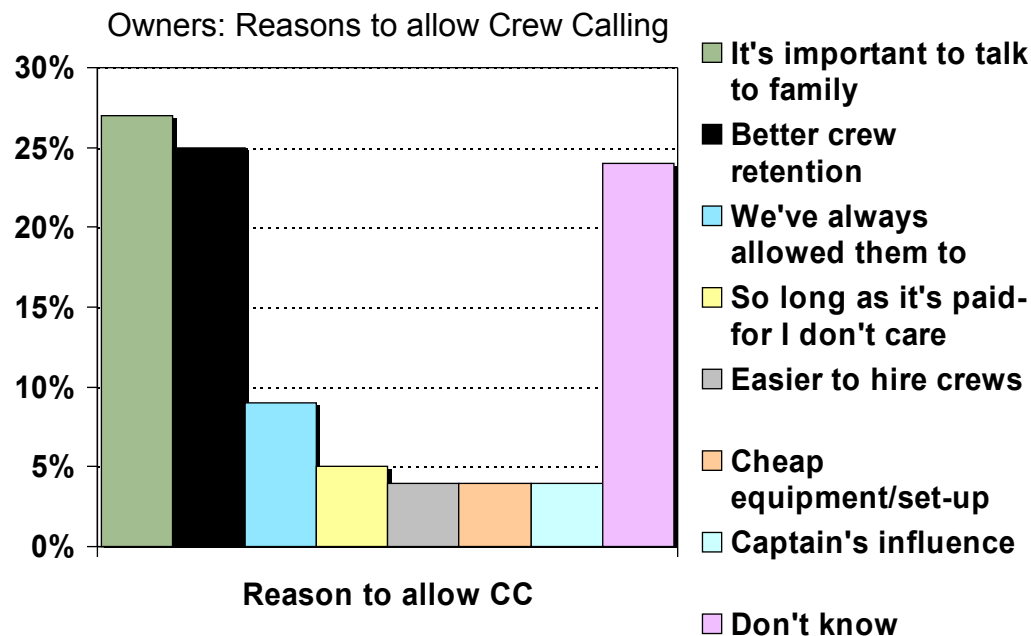
Masters allowing Crew Personal Calls



-> Complete culture change compared to 2001

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

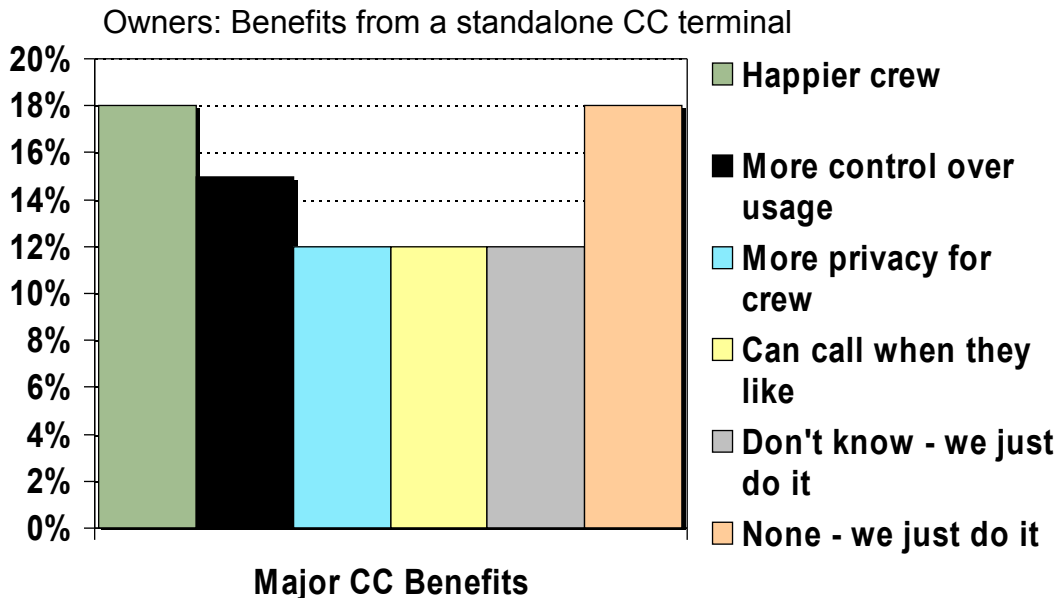
Agreement with following statements	%
Allowing Crew Calling makes for a more efficient ship	65%
Crew Calling means the crew stay with the ship longer	46%



Masters: Attitudes towards Crew Calling

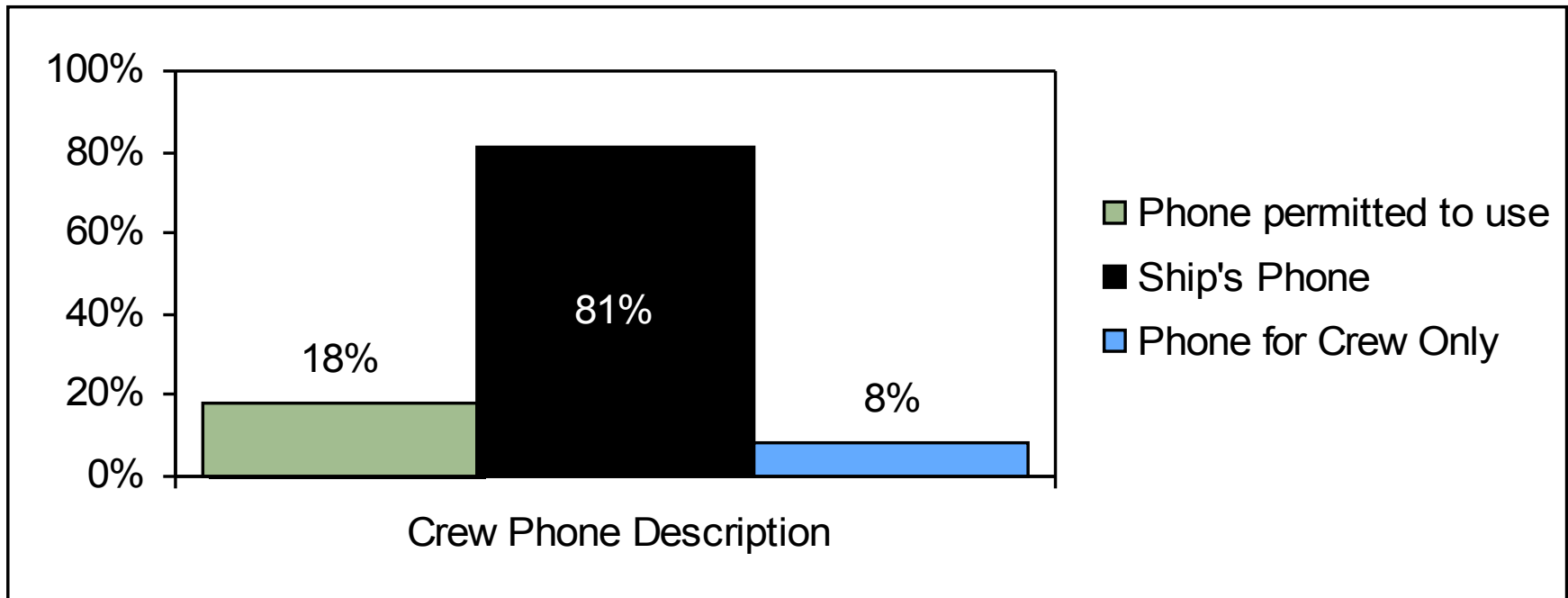
...and want Crew Calling to be off the bridge and on a separate terminal

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



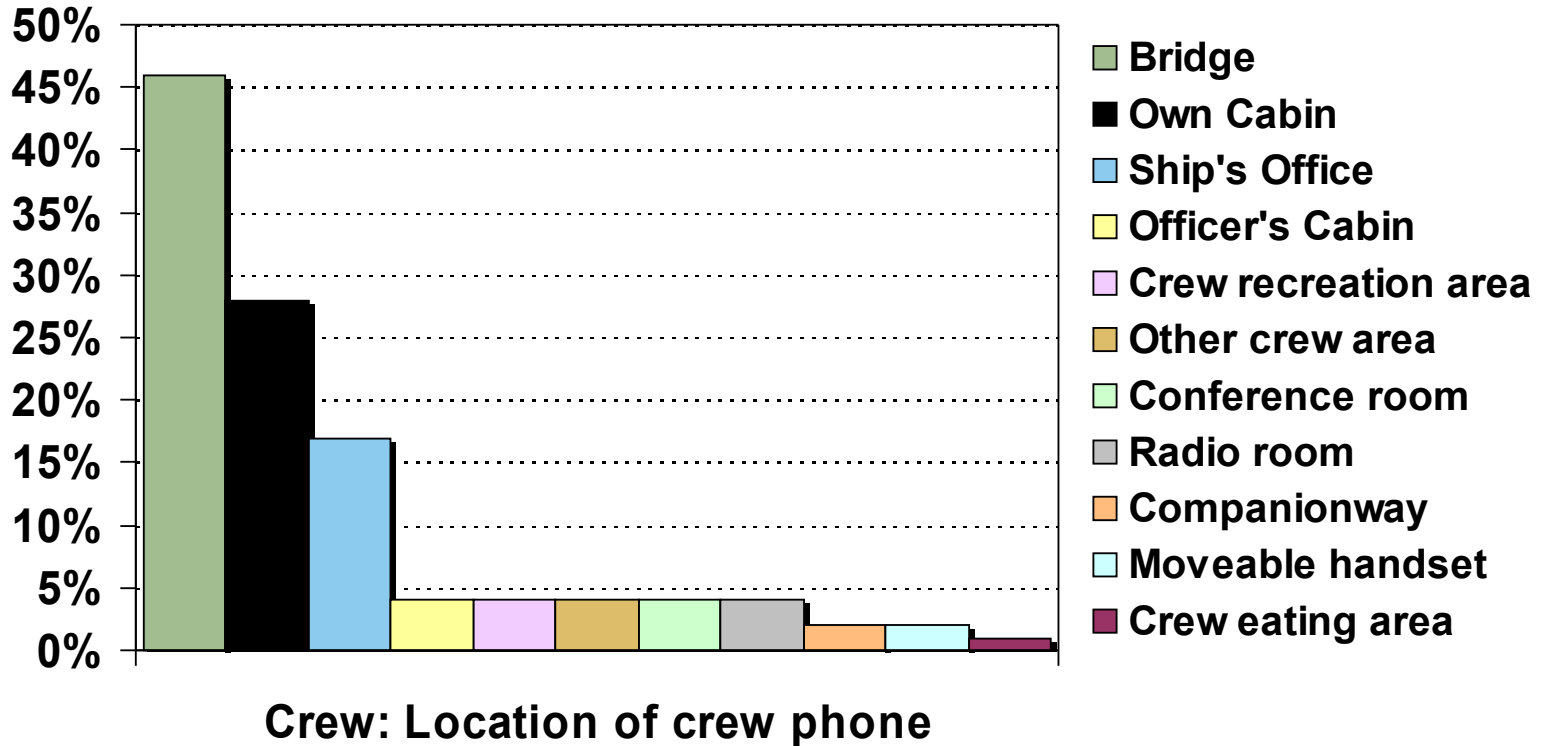
Masters: Attitudes towards Crew Calling

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



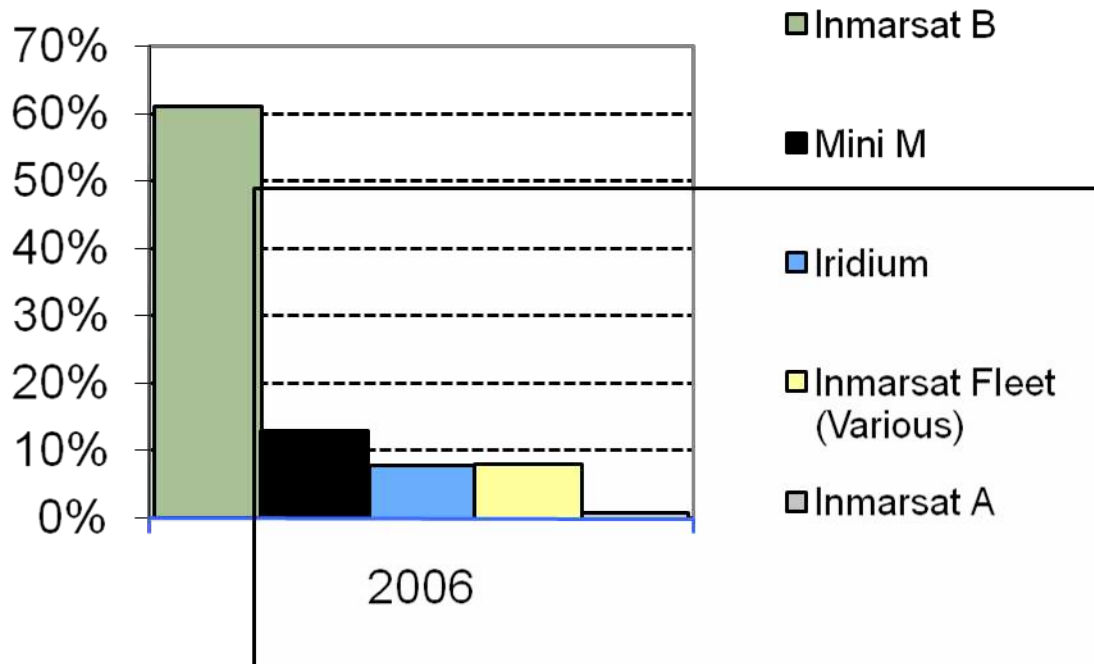
Crew: Description of crew phone
388 Respondents With Crew Phone

...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



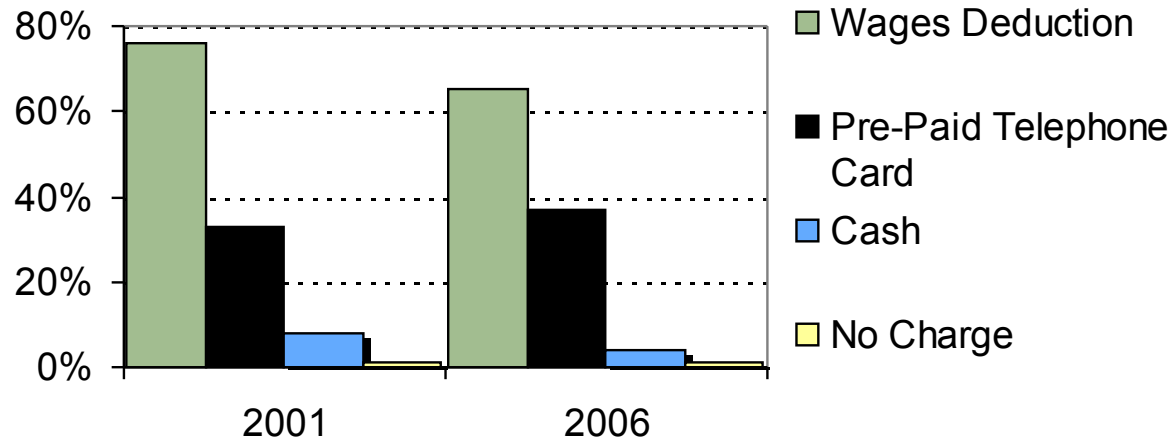
Less than one in three owners know that they can put a dedicated crew handset off the bridge

- 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



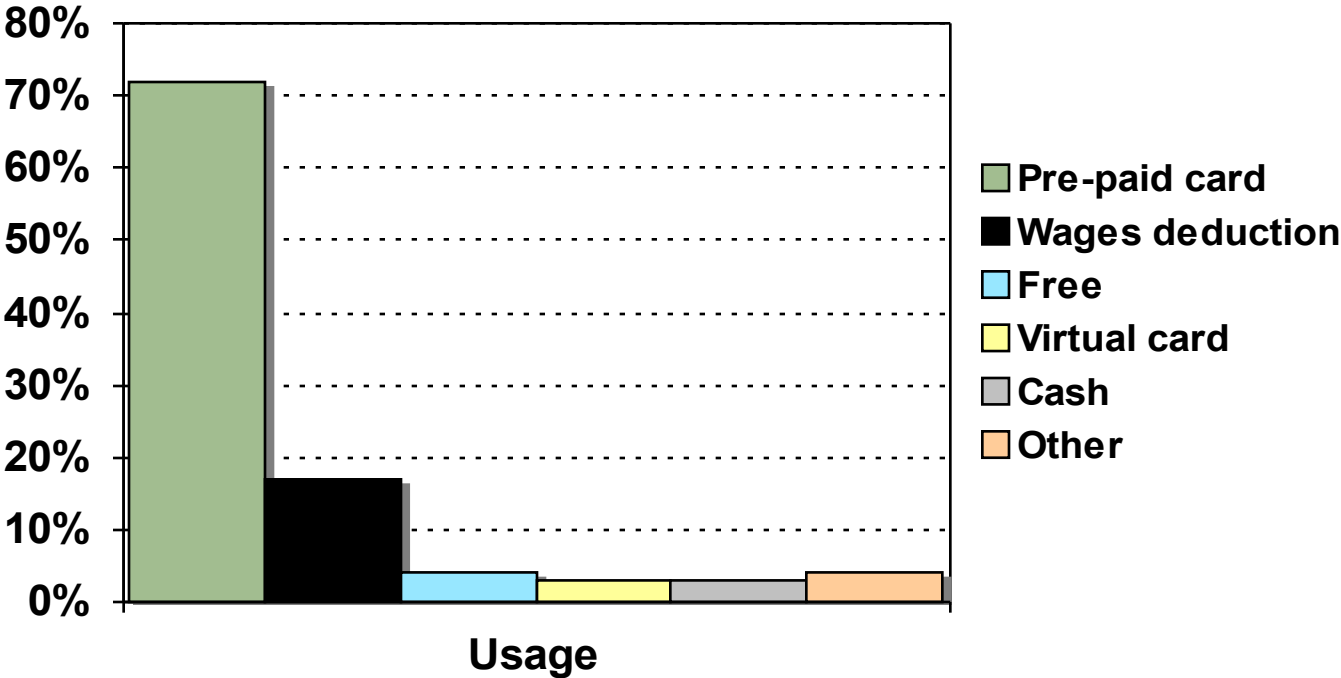
Wage deduction is still the most used payment method

Payment method for Personal Calls

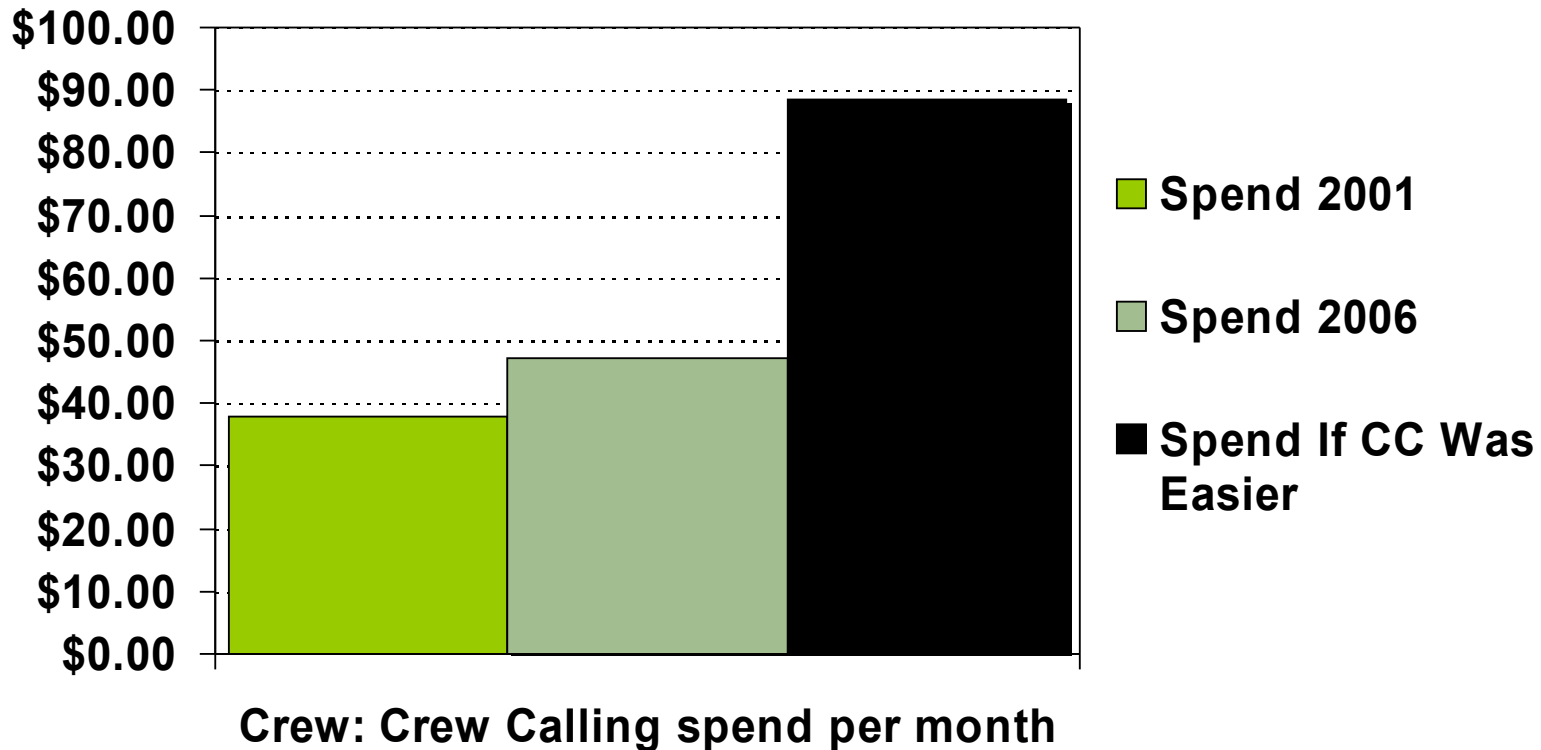


Masters: How Crew are paying for personal calls

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

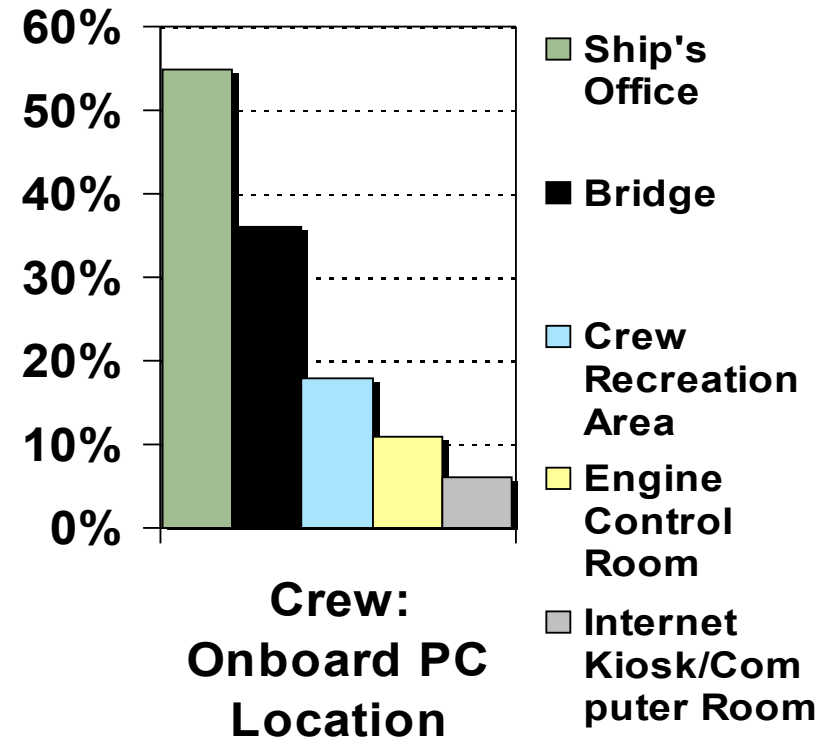


Computer and email usage on board

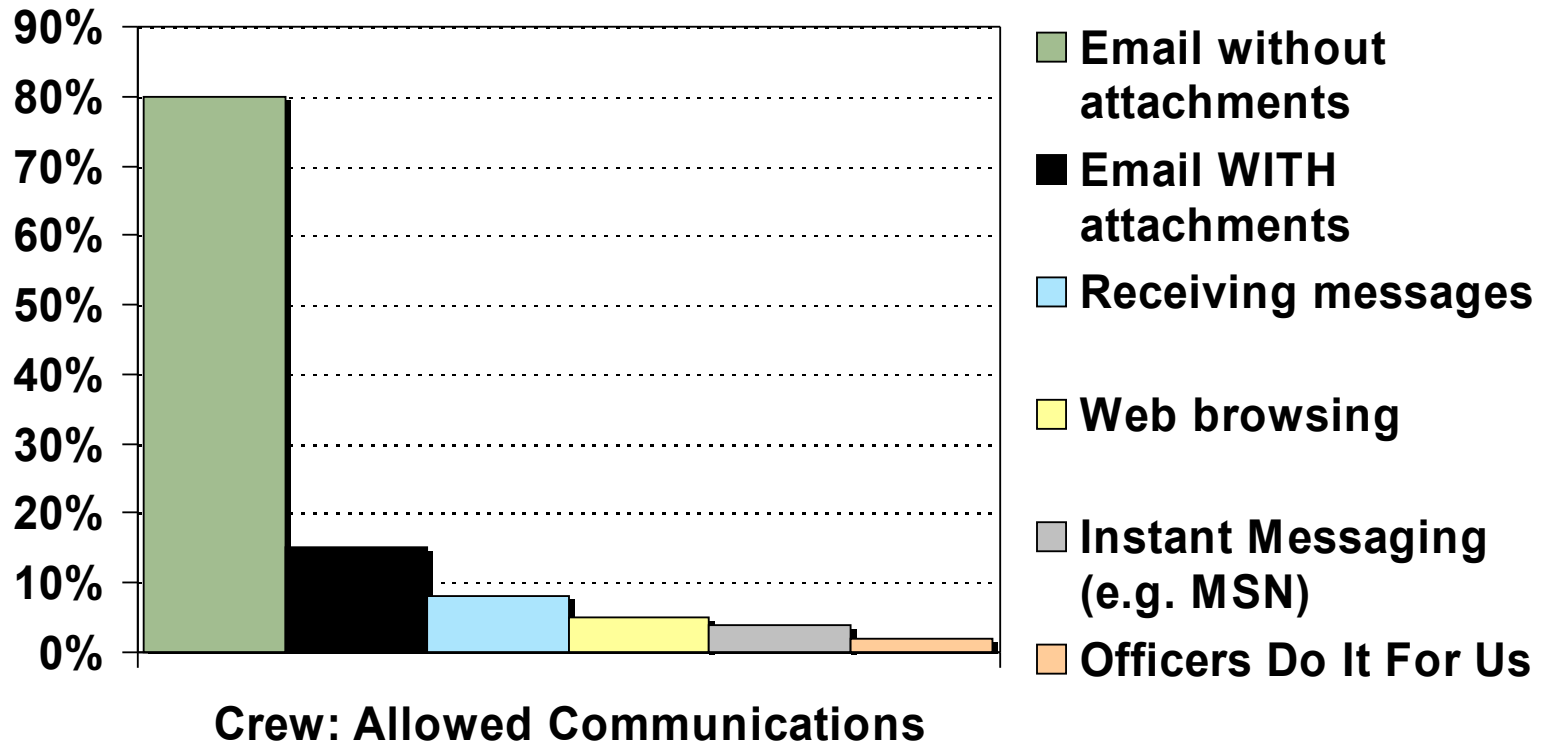


Computer access

- 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.

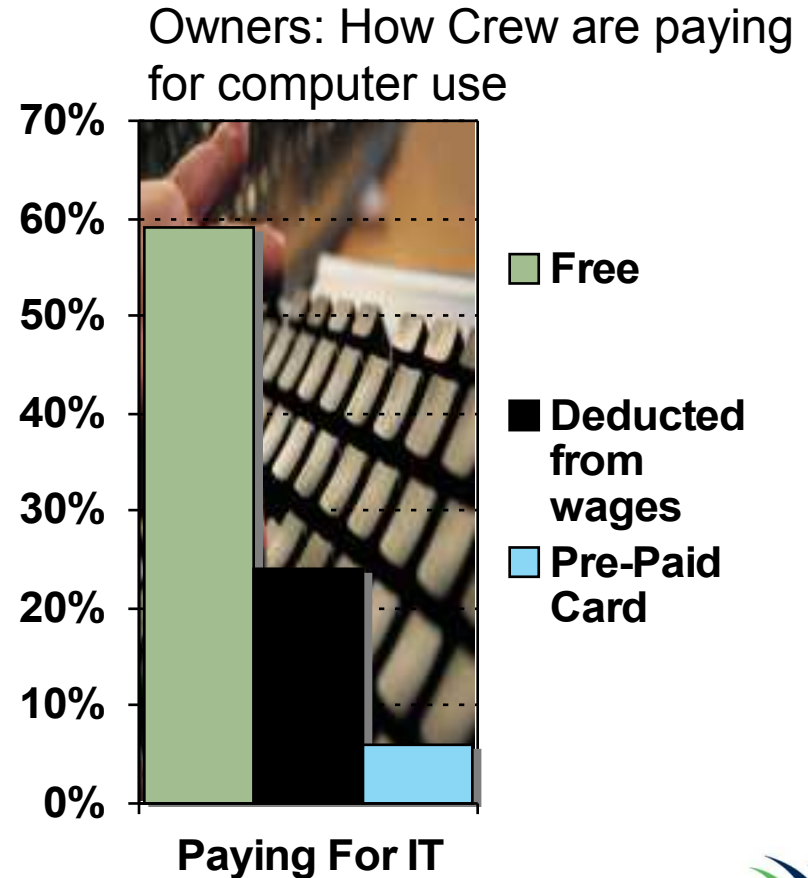


Email is THE data application of choice



And owners provide this free of charge to crew

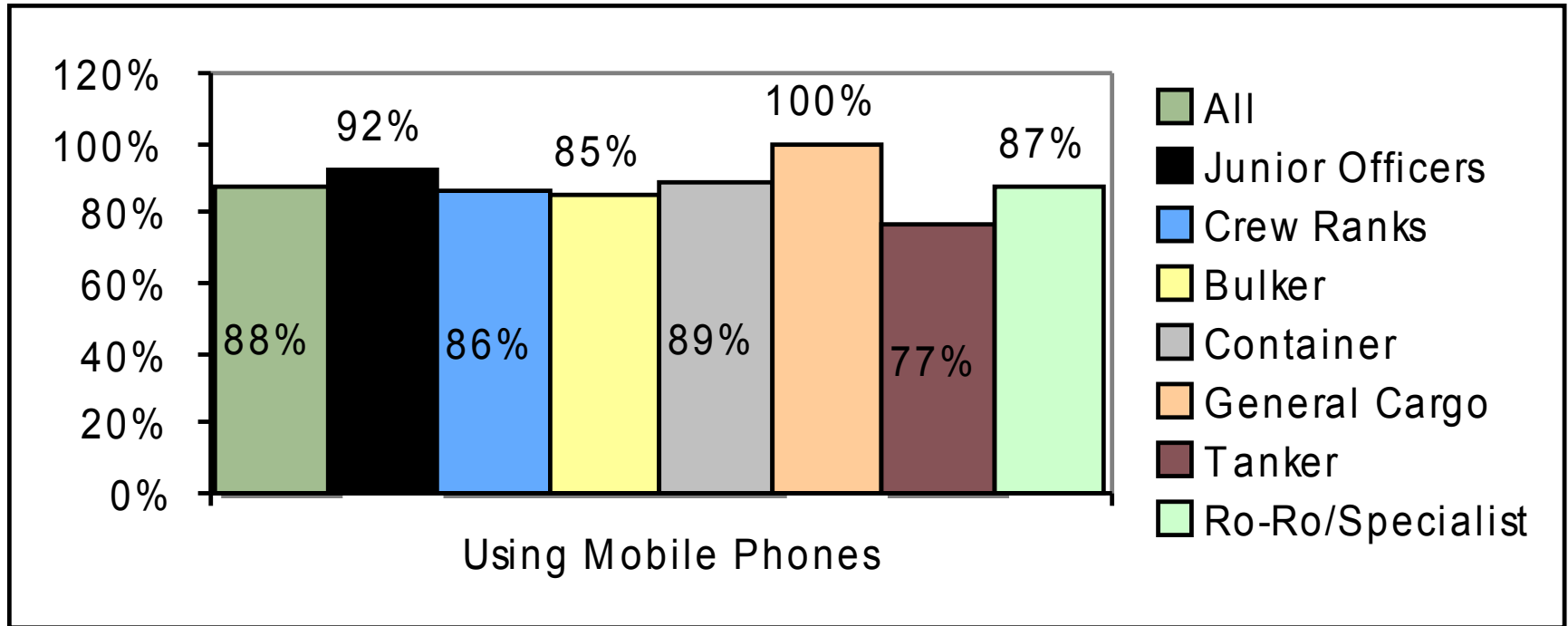
- Six out of ten owners say they don't charge for computer use for crew.
 - 85% of crew reported free computer and email usage
- > Large "hidden" data market if free use would be converted to paid use



Interest in GSM- to-satellite calling product



GSM mobile phones are widely used on vessels of all types



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

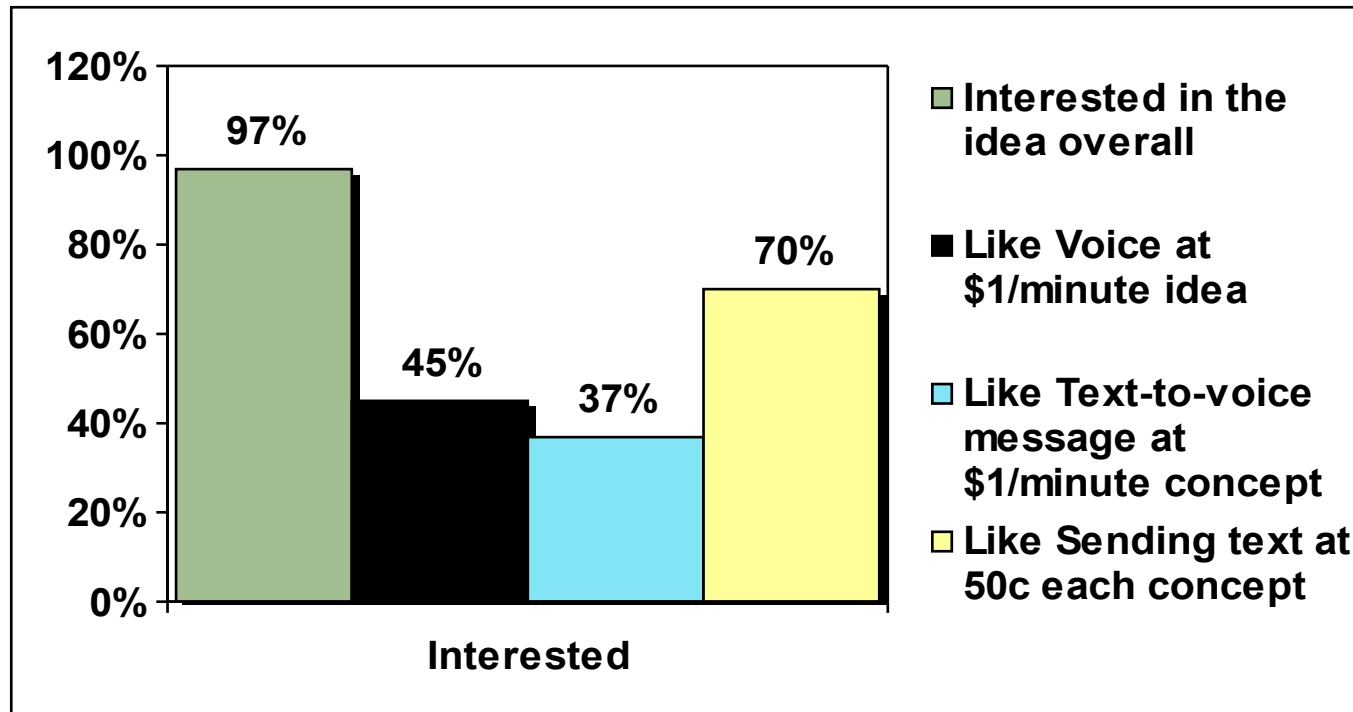
Masters:

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



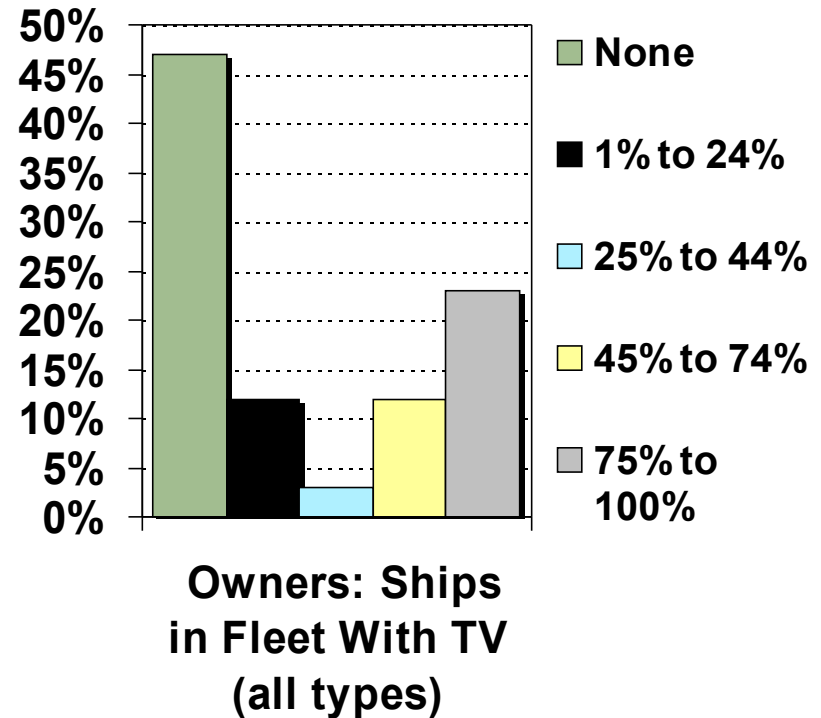
Crew: Reactions to GSM-to-Satellite Concept & Features (All)

Entertainment & TV consumption



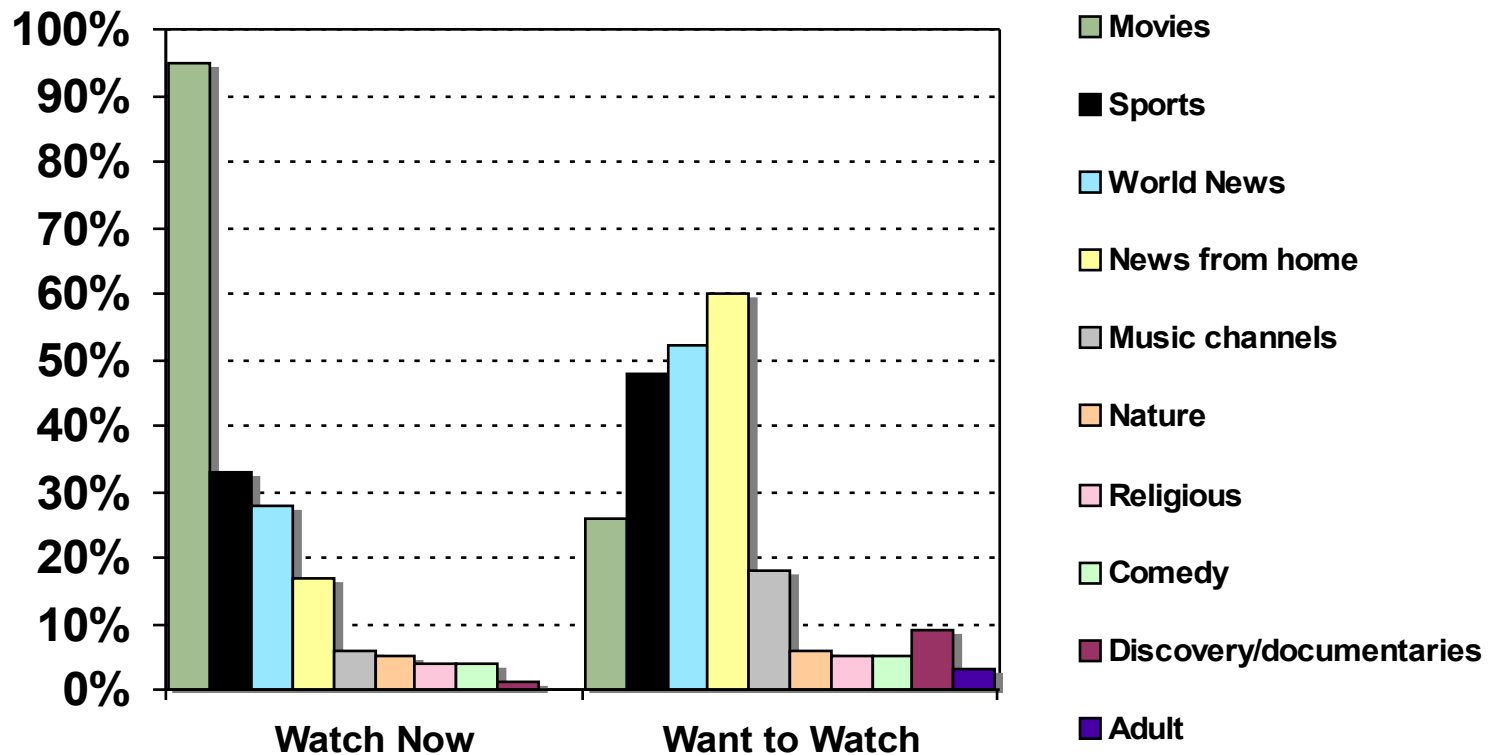
Just over half of vessels are equipped with a visual entertainment solution

- 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, world news and sports



Summary of findings

- Crew calling is now widely accepted
- ...but still cumbersome as calls are still taking place
 - On the bridge
 - Via the ships Inmarsat B terminal
 - Paid for by wage deduction
- Owners, masters and crew all want Crew Calling off the bridge...but only 32% of owners know 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 3 groups
- Visual entertainment is available on ca. 50% of vessels – and if the crew could choose they would watch more news/current affairs and less movies

Your feedback and opinion

- Comments, feedback and input is warmly welcomed:
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