

# Crew Communications

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## **Crew Calling – there's room for growth Findings from CC3 market survey 2006**

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- A. Overview of the survey
- B. Summary of findings
  - 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

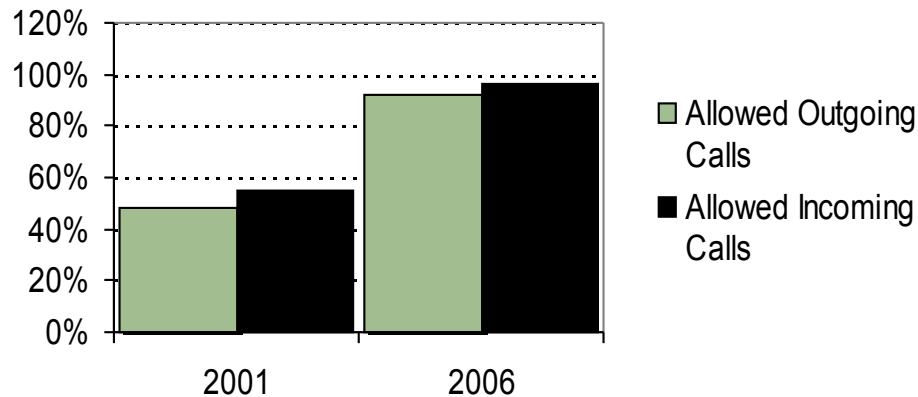
## B. Summary of findings

# Status of Crew Calling market

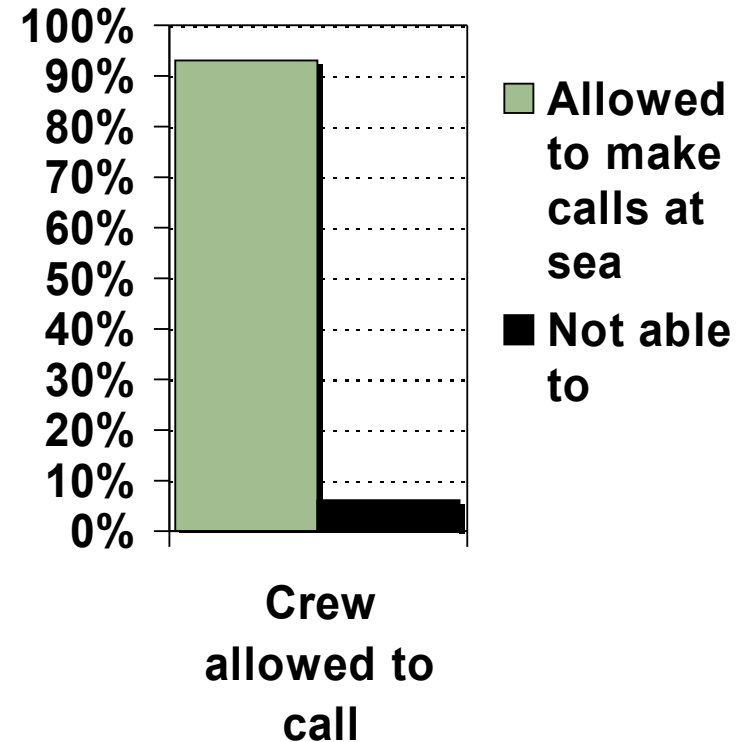


# Crew Calling is now widely accepted...

## Masters allowing Crew Personal Calls

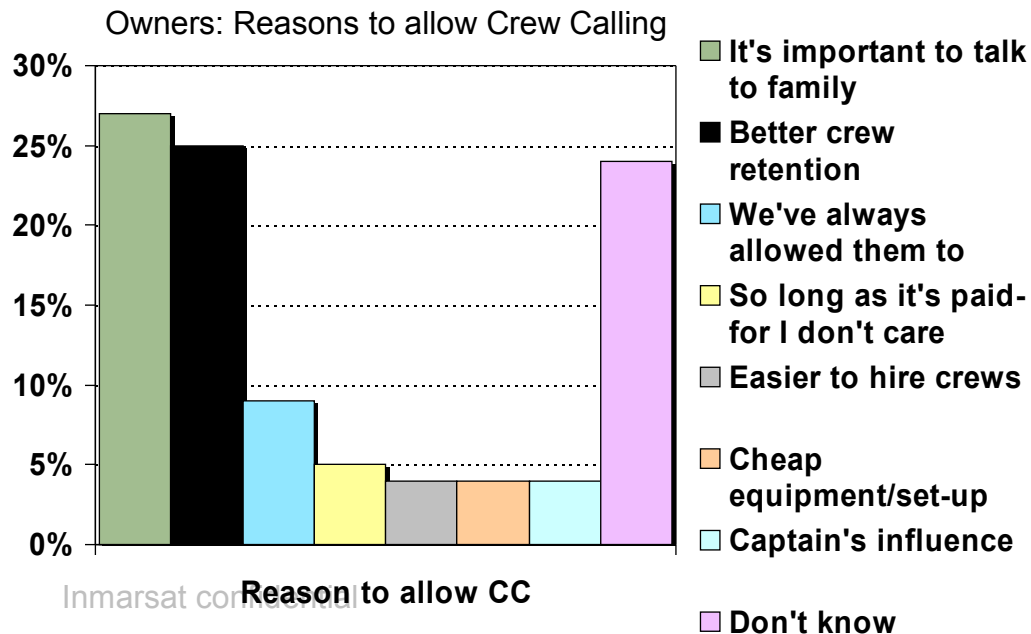


-> Complete culture change compared to 2001



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

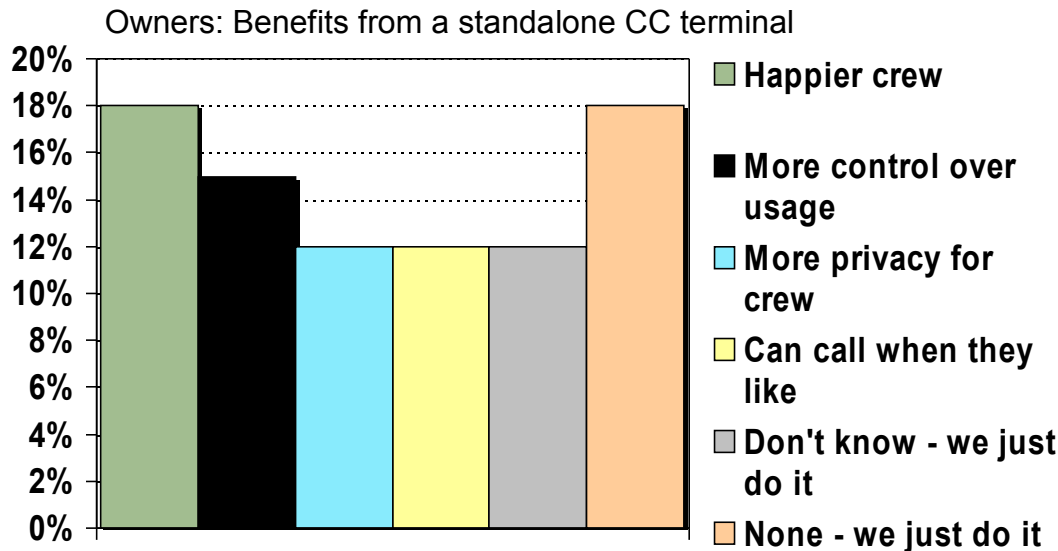
| Agreement with following statements                   | %   |
|---|-----|
| Allowing Crew Calling makes for a more efficient ship | 65% |
| Crew Calling means the crew stay with the ship longer | 46% |



Masters: Attitudes towards Crew Calling

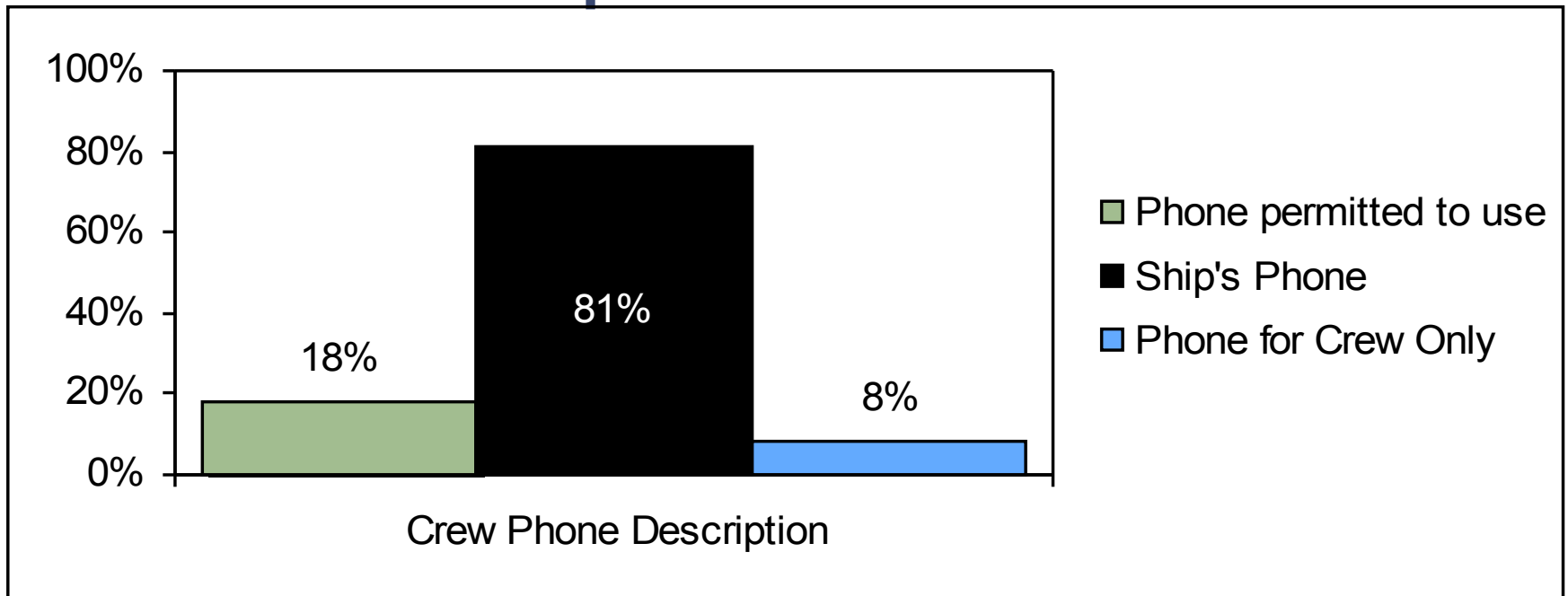
# ...and want Crew Calling to be off the bridge and on a separate terminal

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



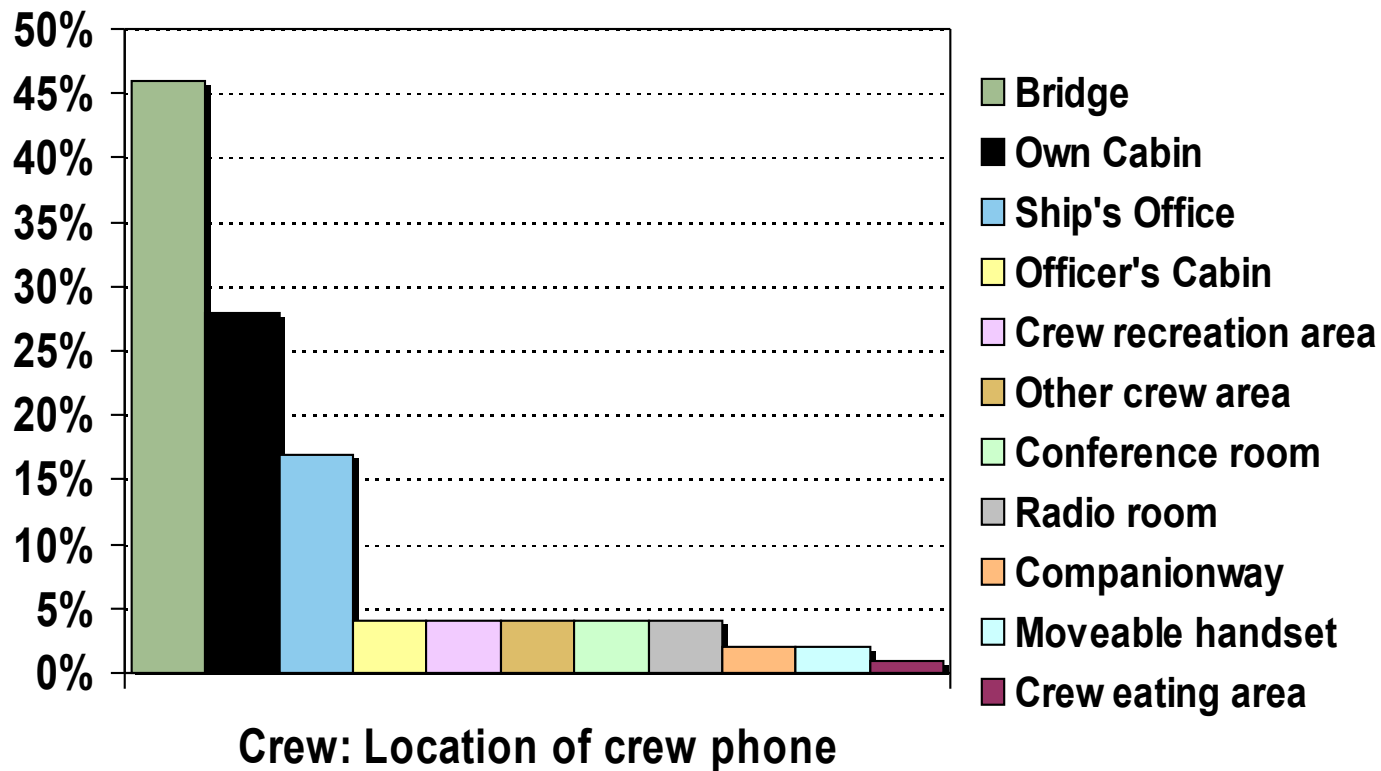
Masters: Attitudes towards Crew Calling

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



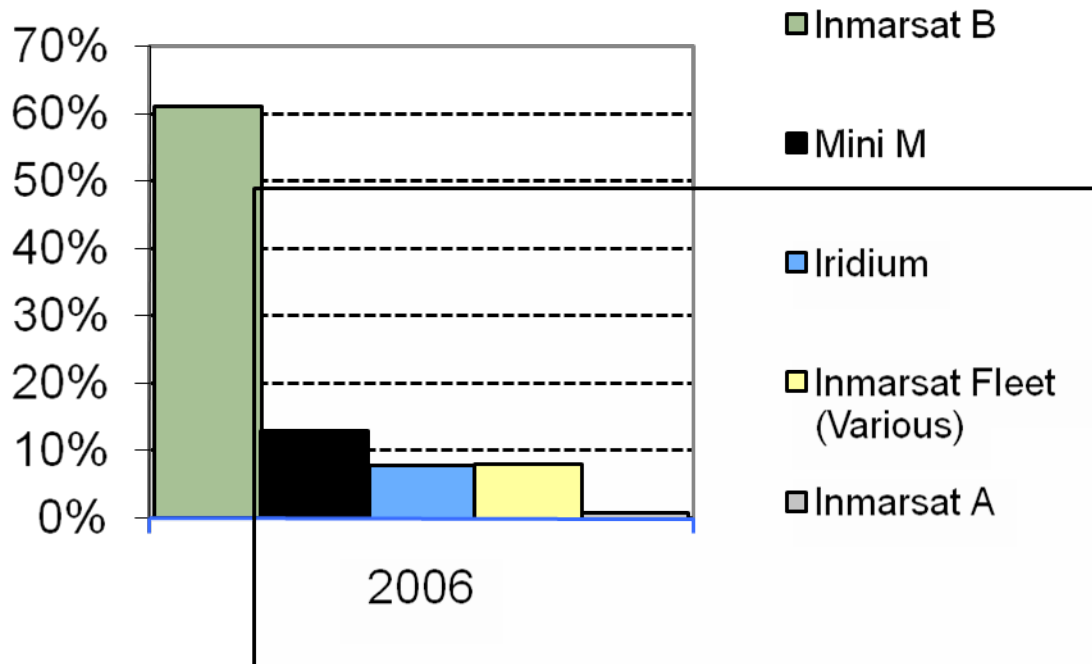
**Crew: Description of crew phone**  
**388 Respondents With Crew Phone**

# ...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



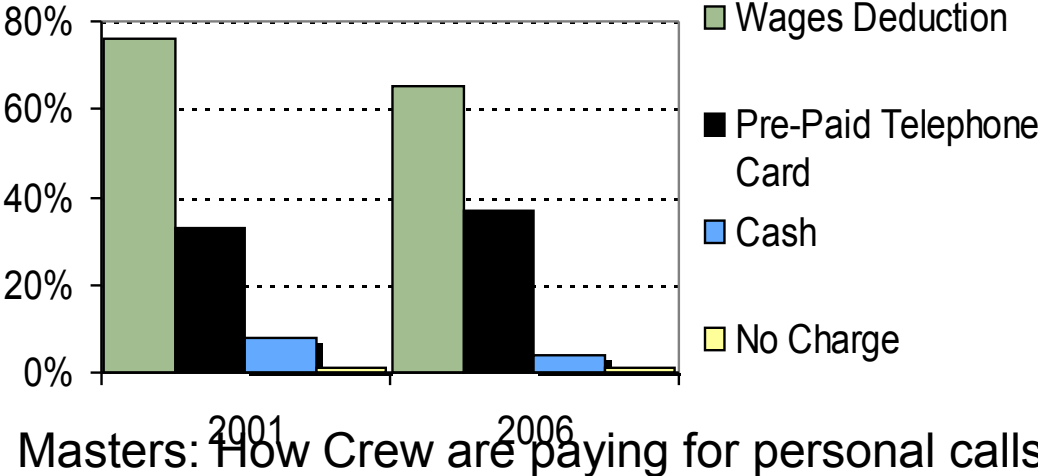
# Less than one in three owners know that they can put a dedicated crew handset off the bridge

- ➔ 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

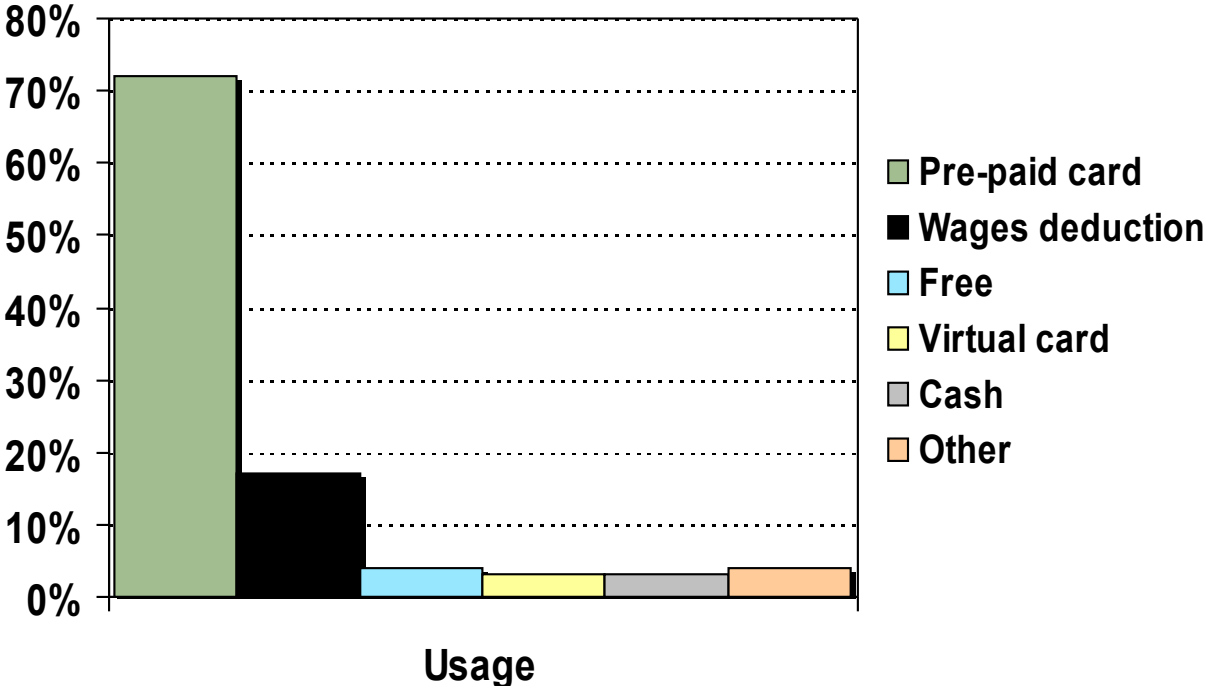


# Wage deduction is still the most used payment method

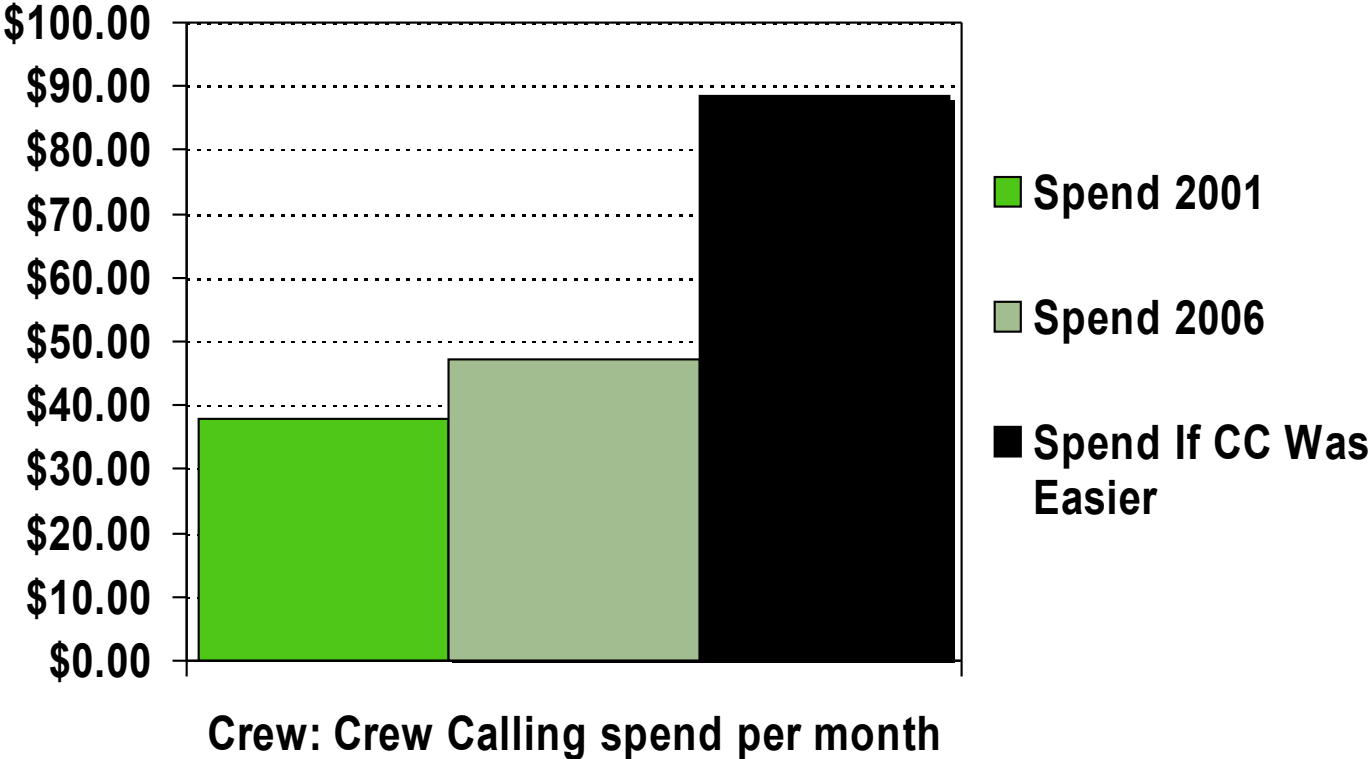
## Payment method for Personal Calls



# 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

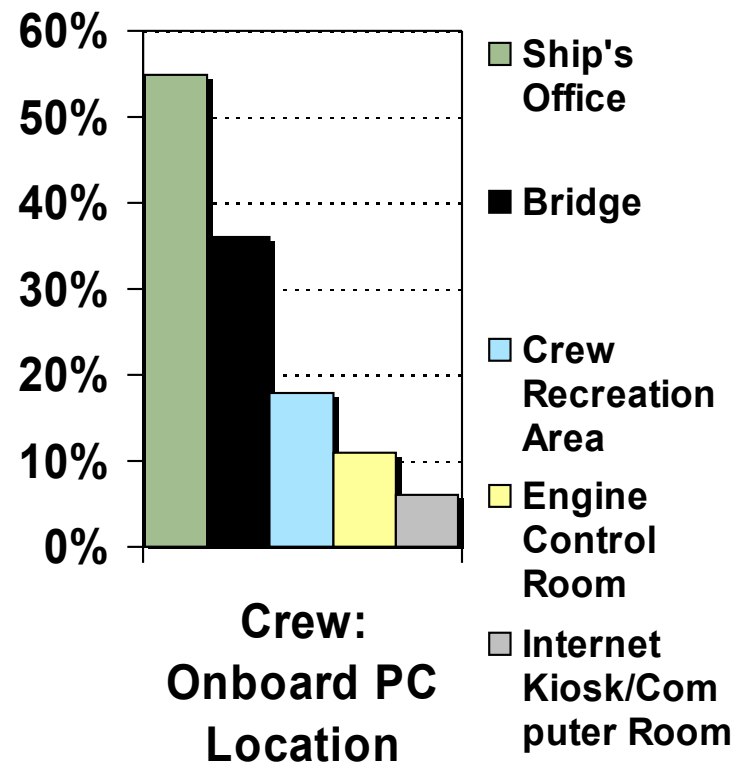


# Computer and email usage on board

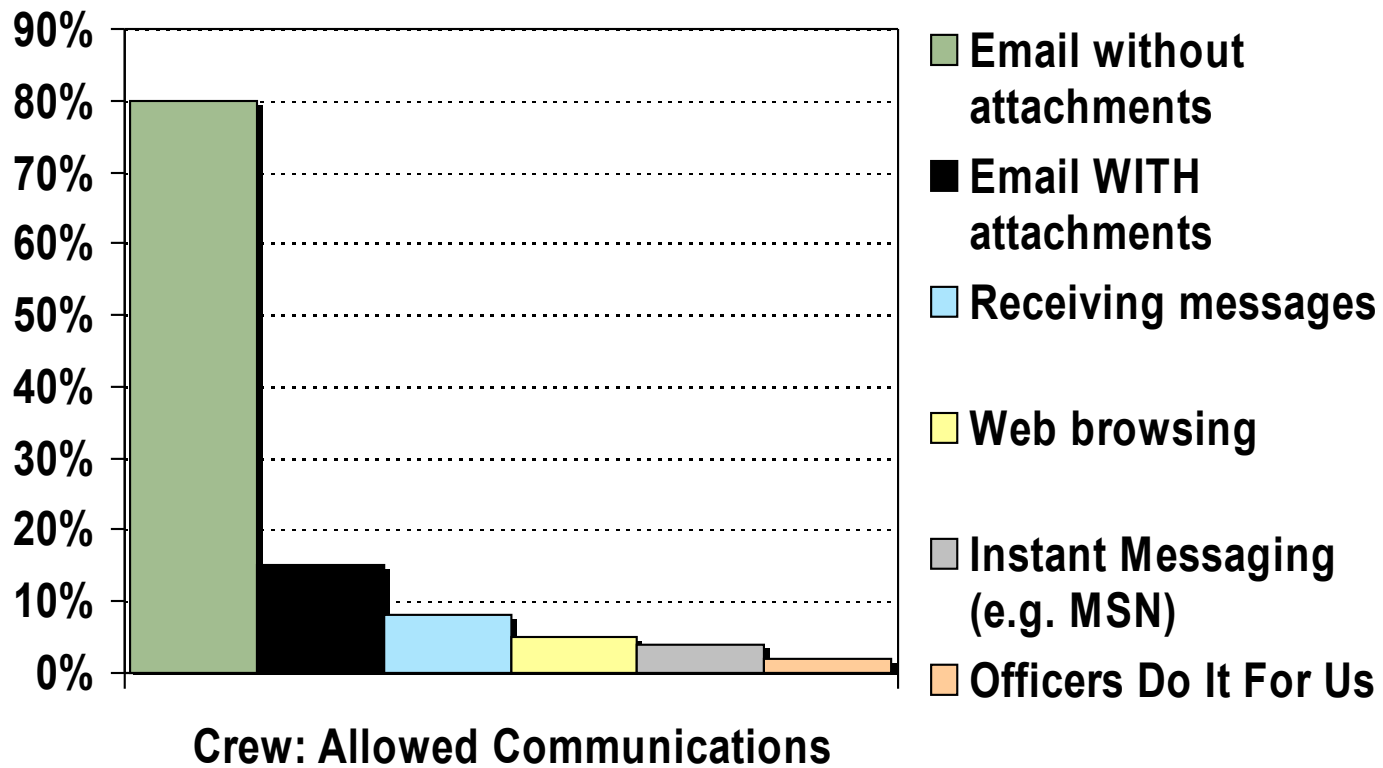


# Computer access

- ➔ 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.

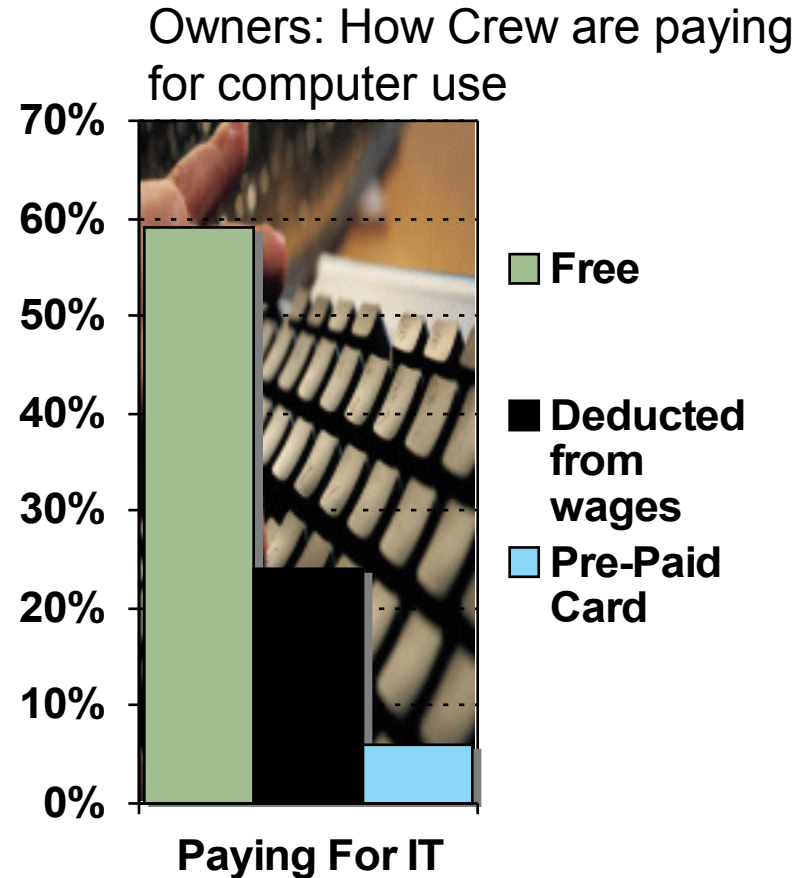


# Email is THE data application of choice



# And owners provide this free of charge to crew

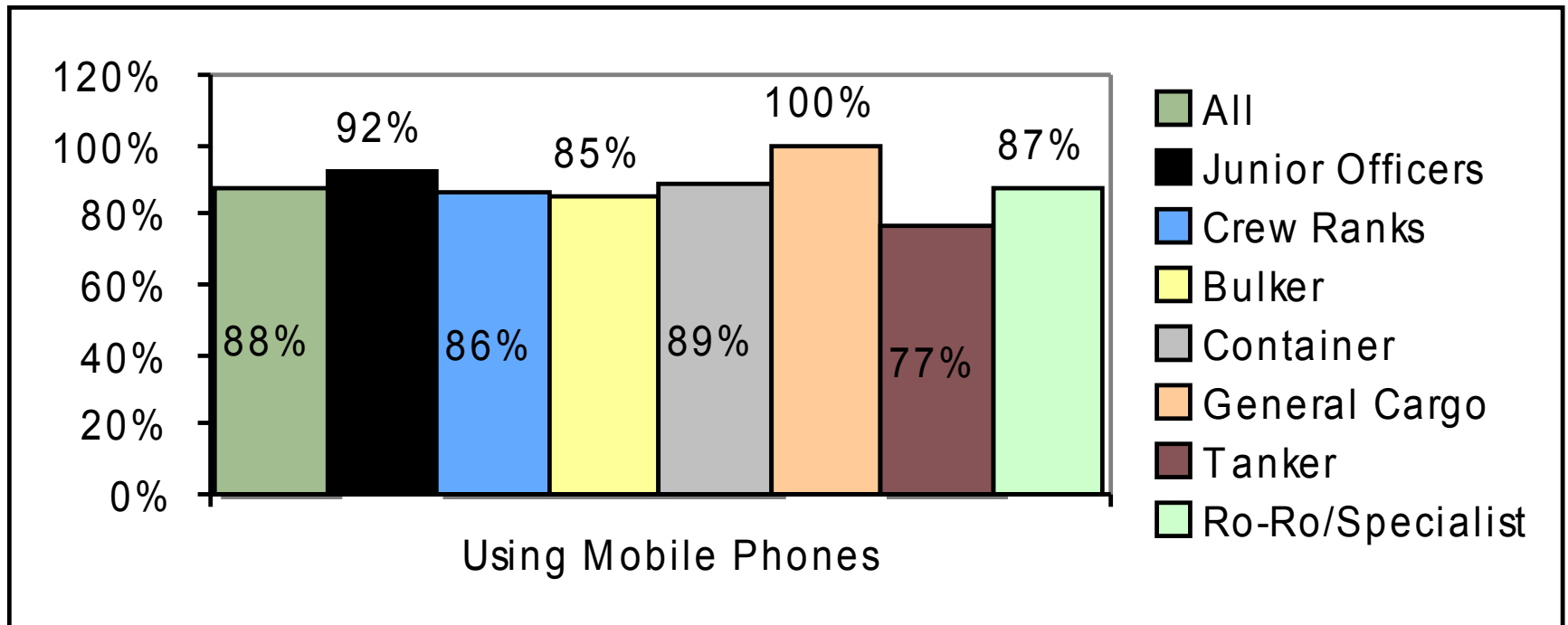
- Six out of ten owners say they don't charge for computer use for crew.
  - 85% of crew reported free computer and email usage
- > Large "hidden" data market if free use would be converted to paid use



# 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

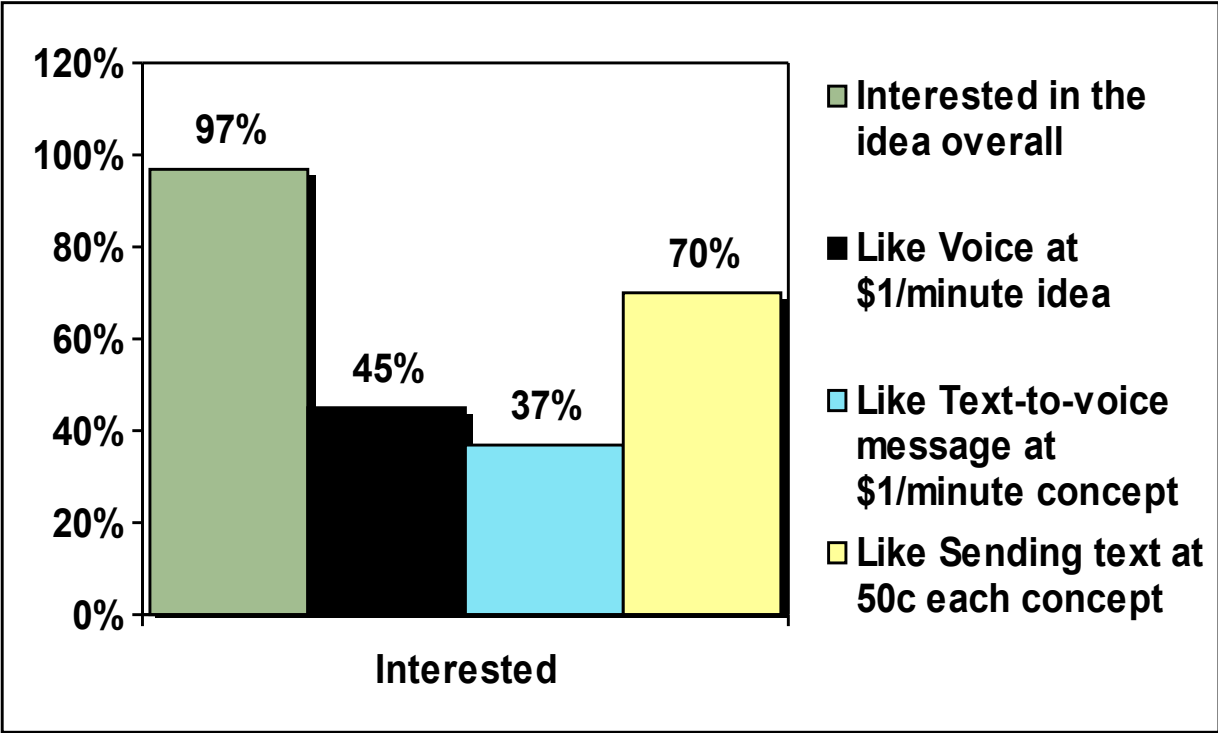
Masters:

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)

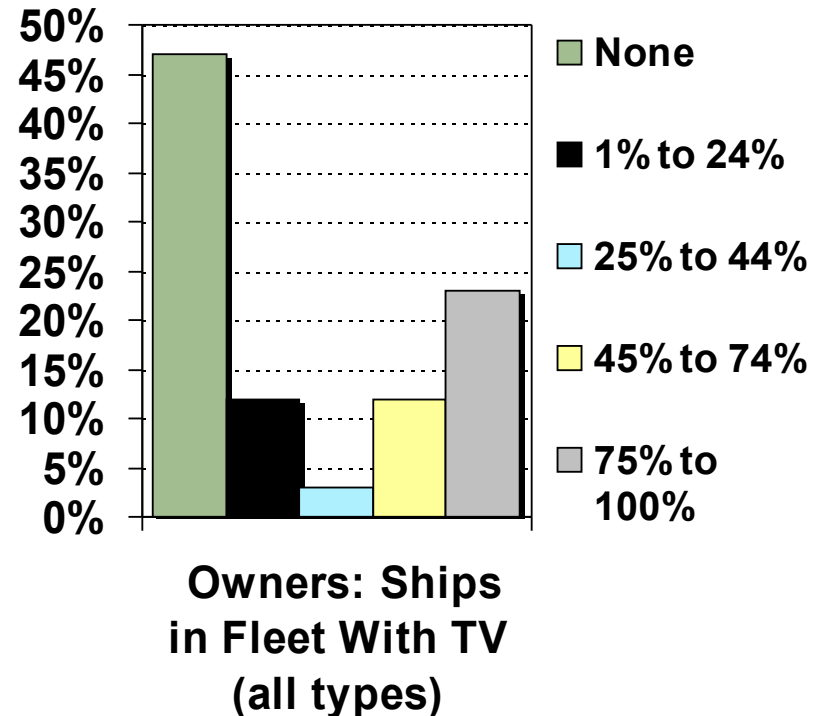


# Entertainment & TV consumption



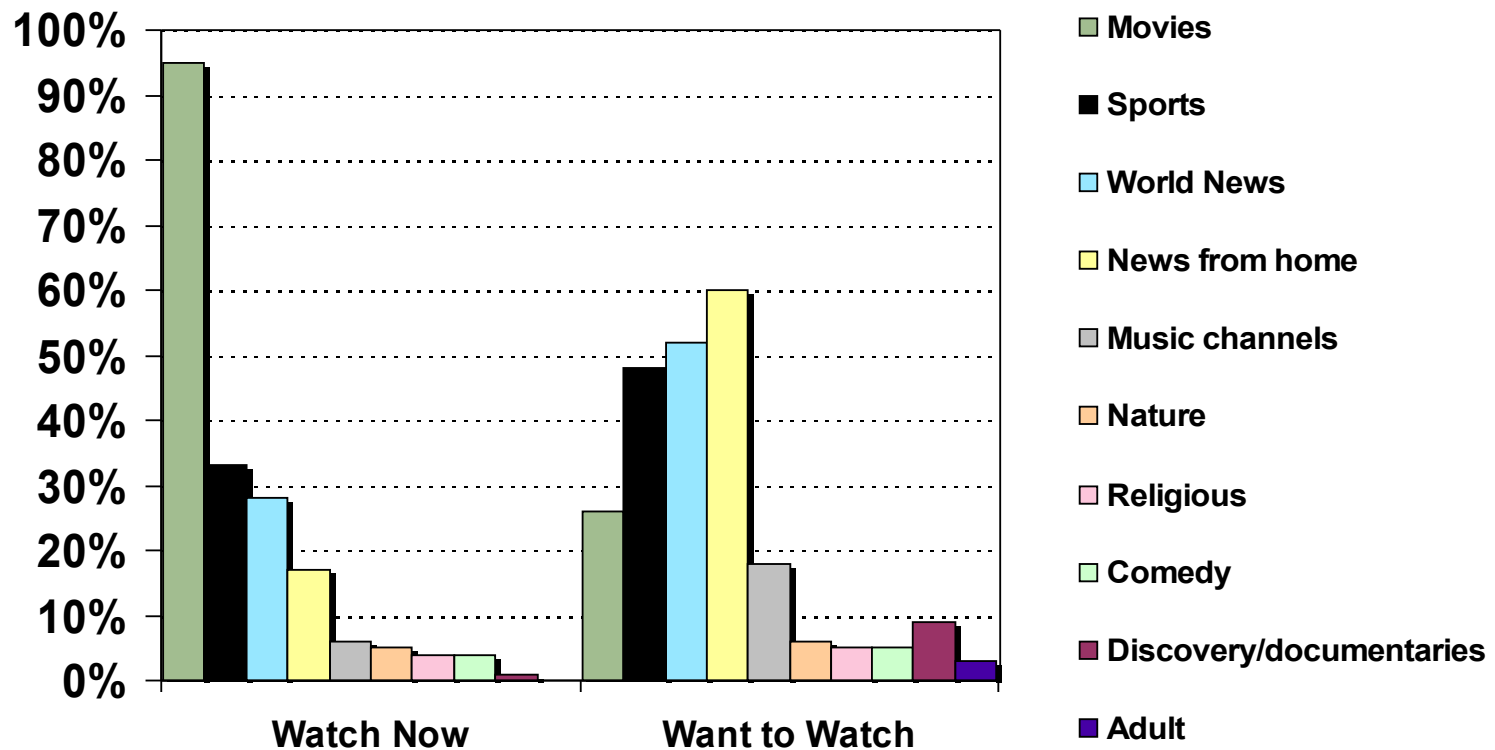
# Just over half of vessels are equipped with a visual entertainment solution

- 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

# Questions



**Thank You**

