



Crew Calling – there's room for growth

Findings from Crew Calling III Market Survey

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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

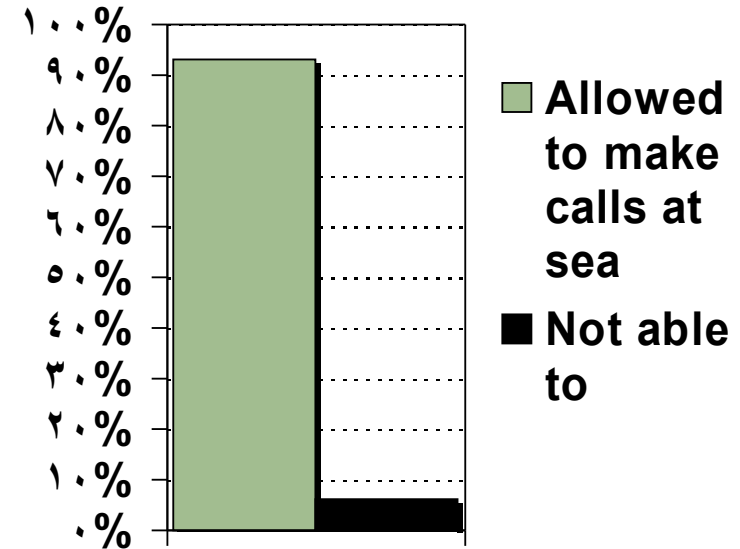
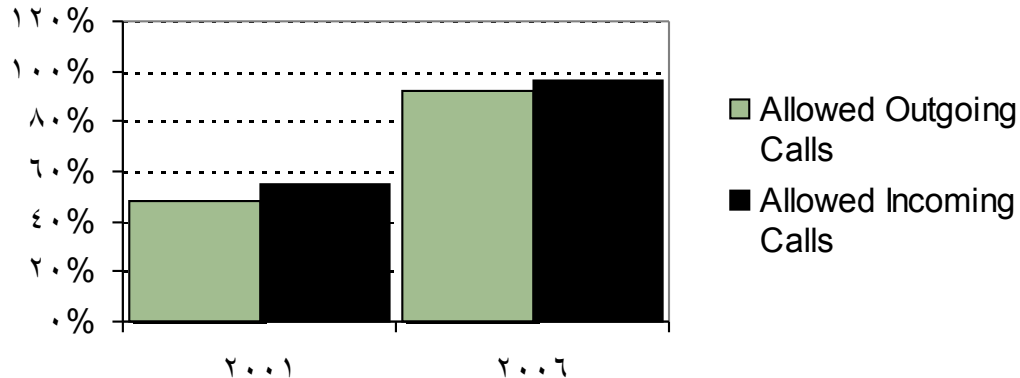
Summary of findings

Status of Crew Calling market



Crew Calling is now widely accepted...

Masters allowing Crew Personal Calls

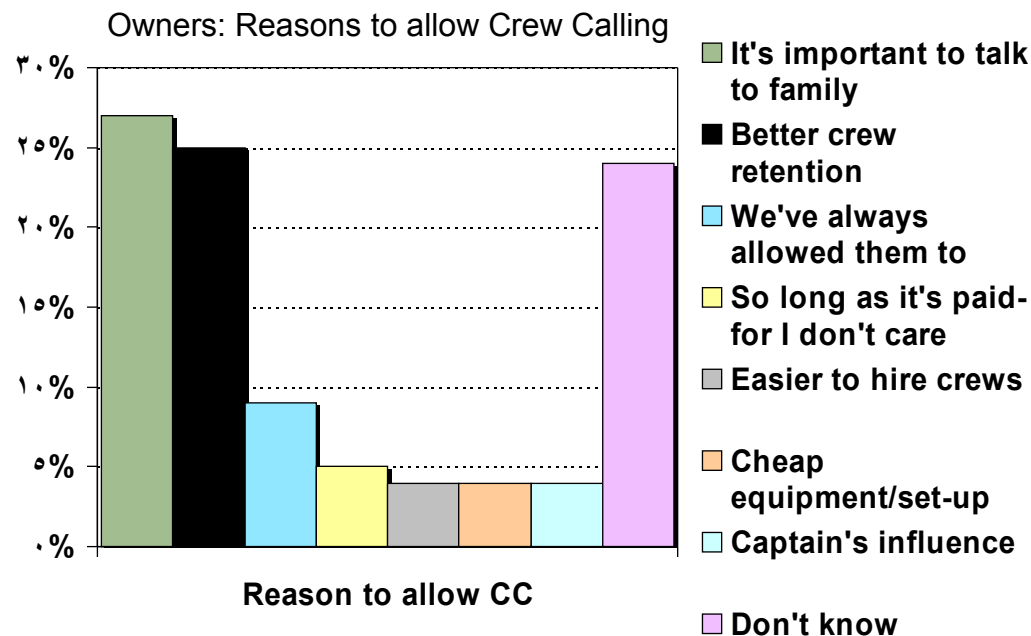


Crew
allowed to
call

-> Complete culture change compared to 2001

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

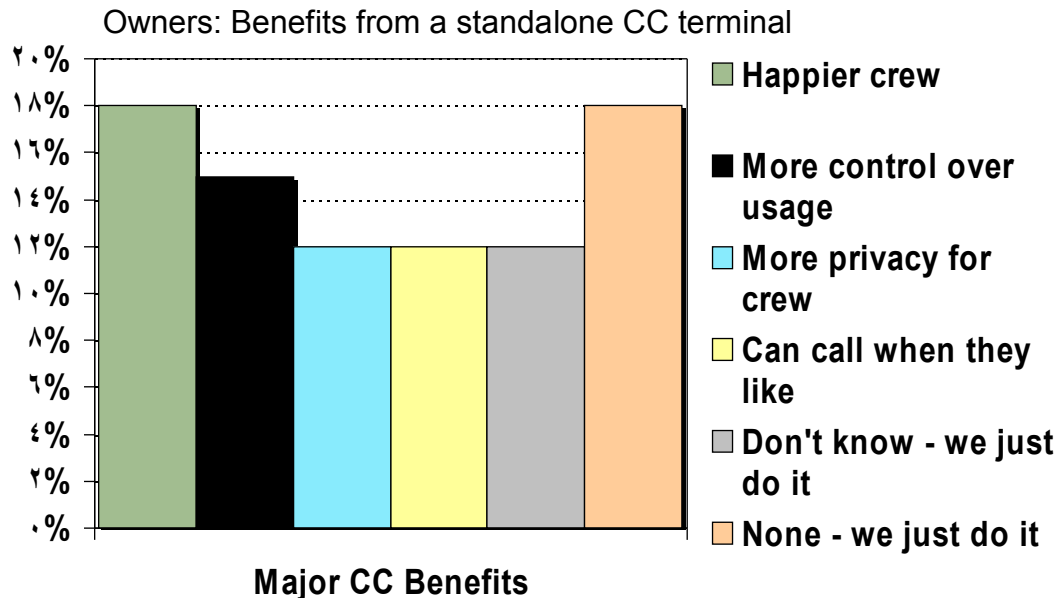
Agreement with following statements	%
Allowing Crew Calling makes for a more efficient ship	65%
Crew Calling means the crew stay with the ship longer	46%



Masters: Attitudes towards Crew Calling

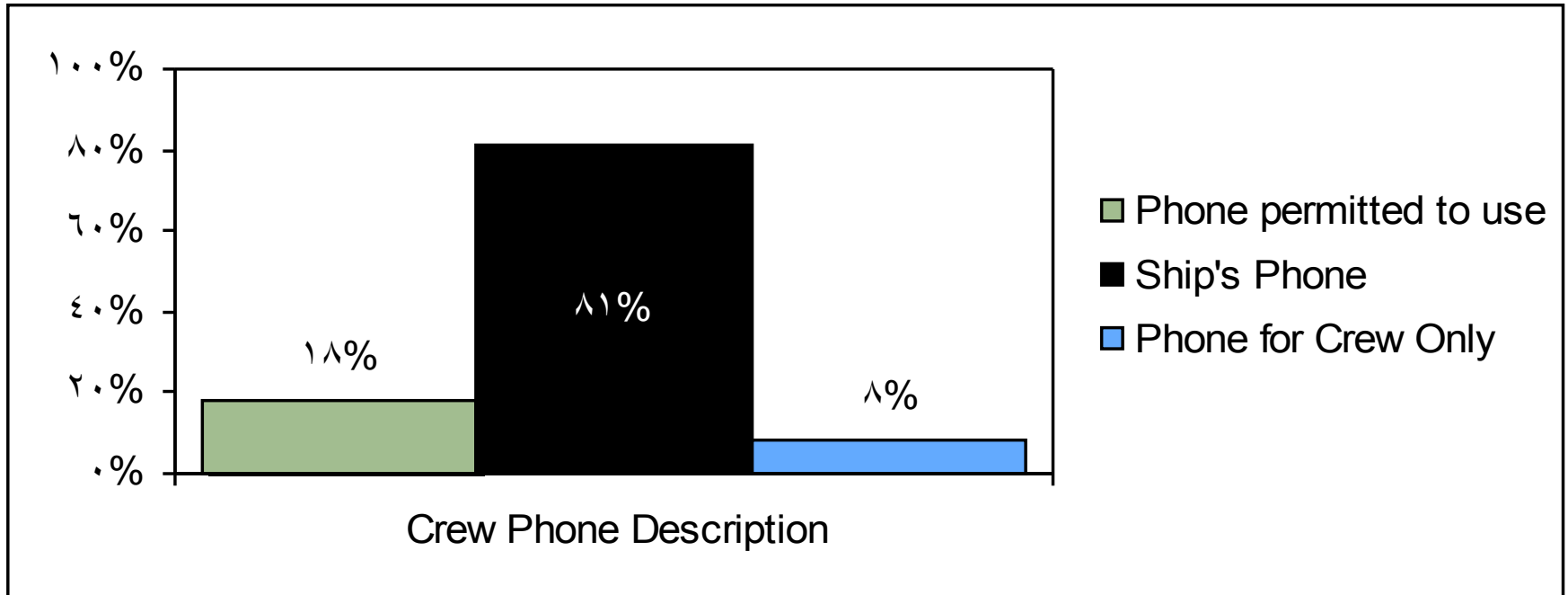
...and want Crew Calling to be off the bridge and on a separate terminal

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



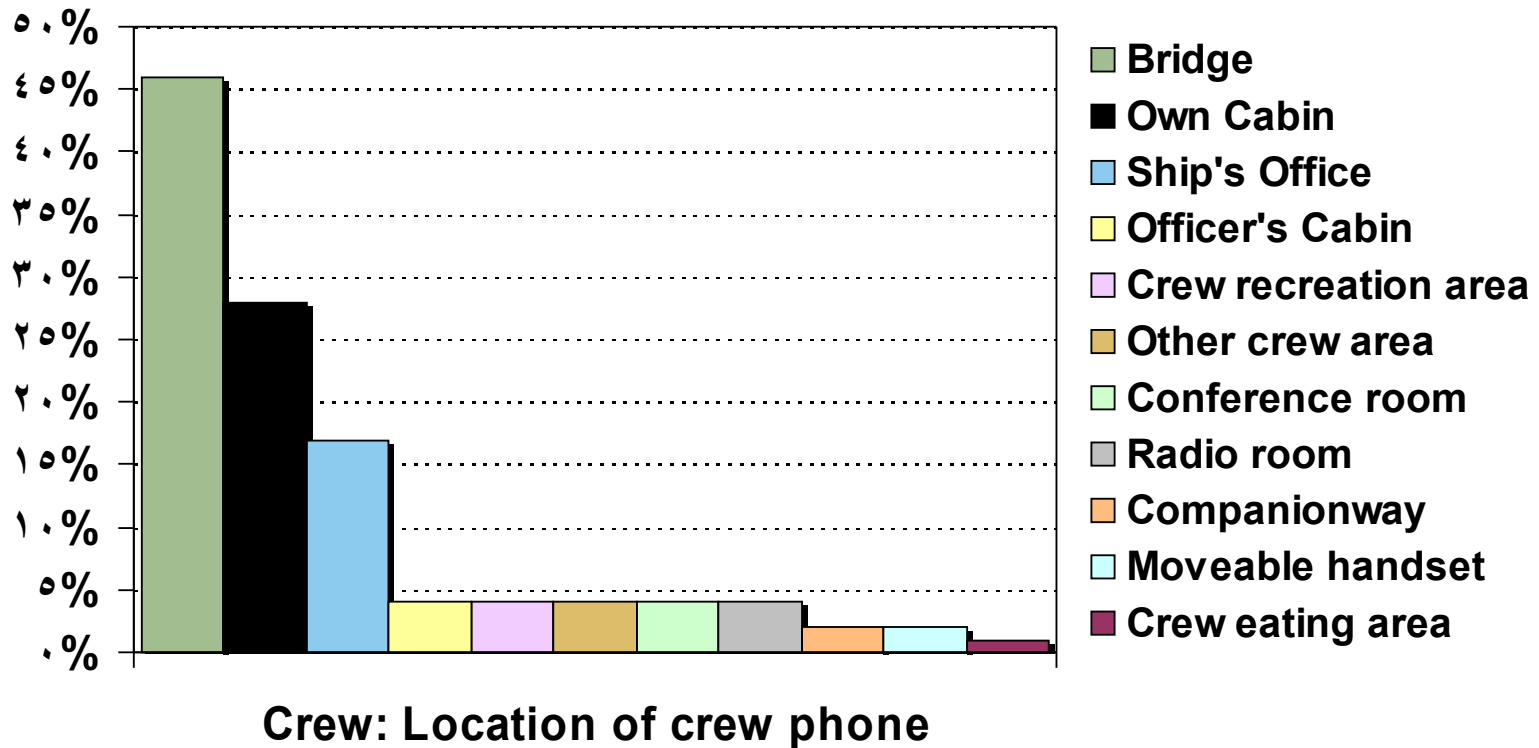
Masters: Attitudes towards Crew Calling

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



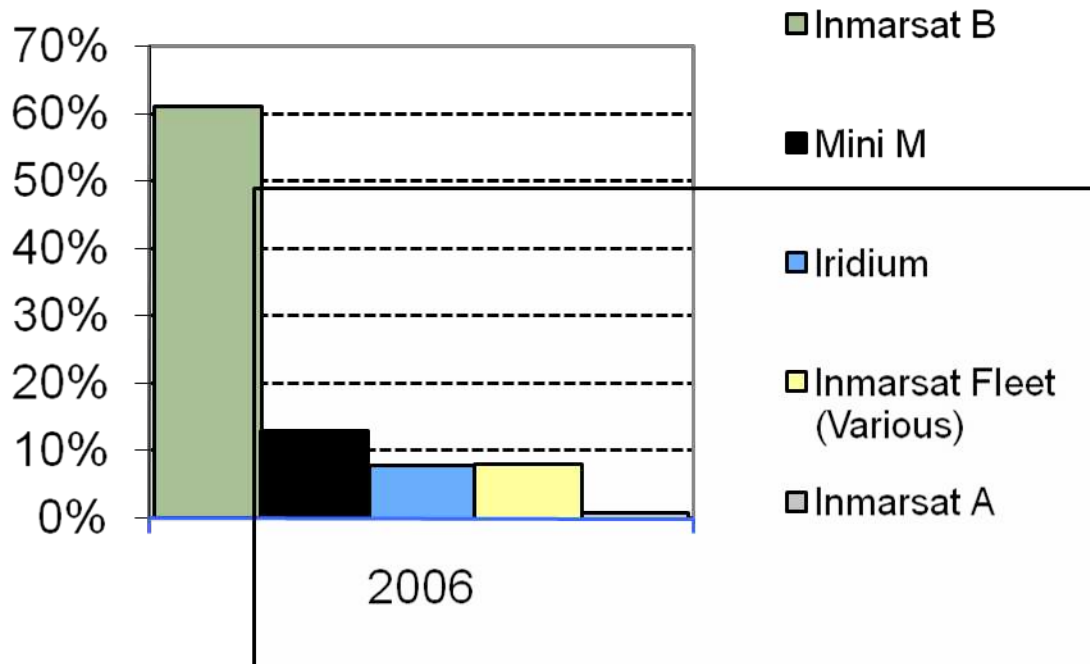
Crew: Description of crew phone
388 Respondents With Crew Phone

...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



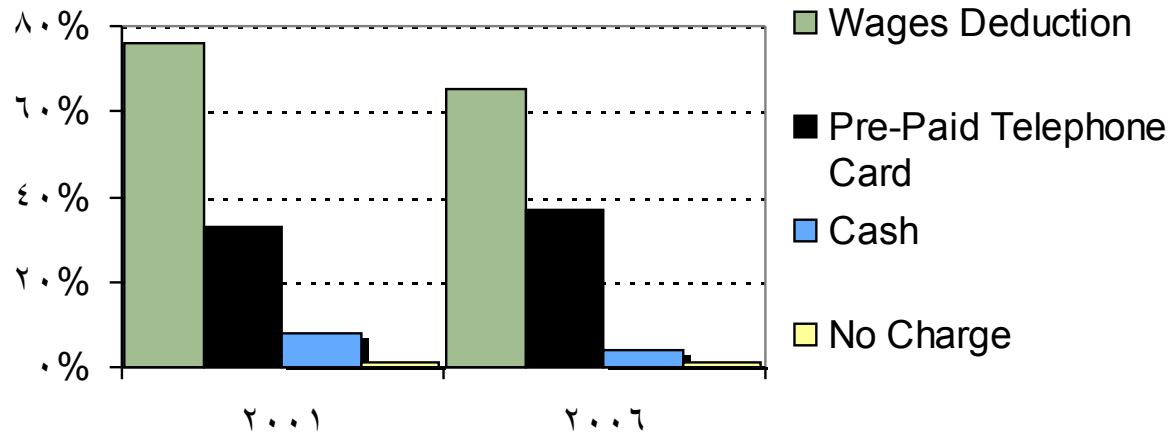
Less than one in three owners know that they can put a dedicated crew handset off the bridge

- 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



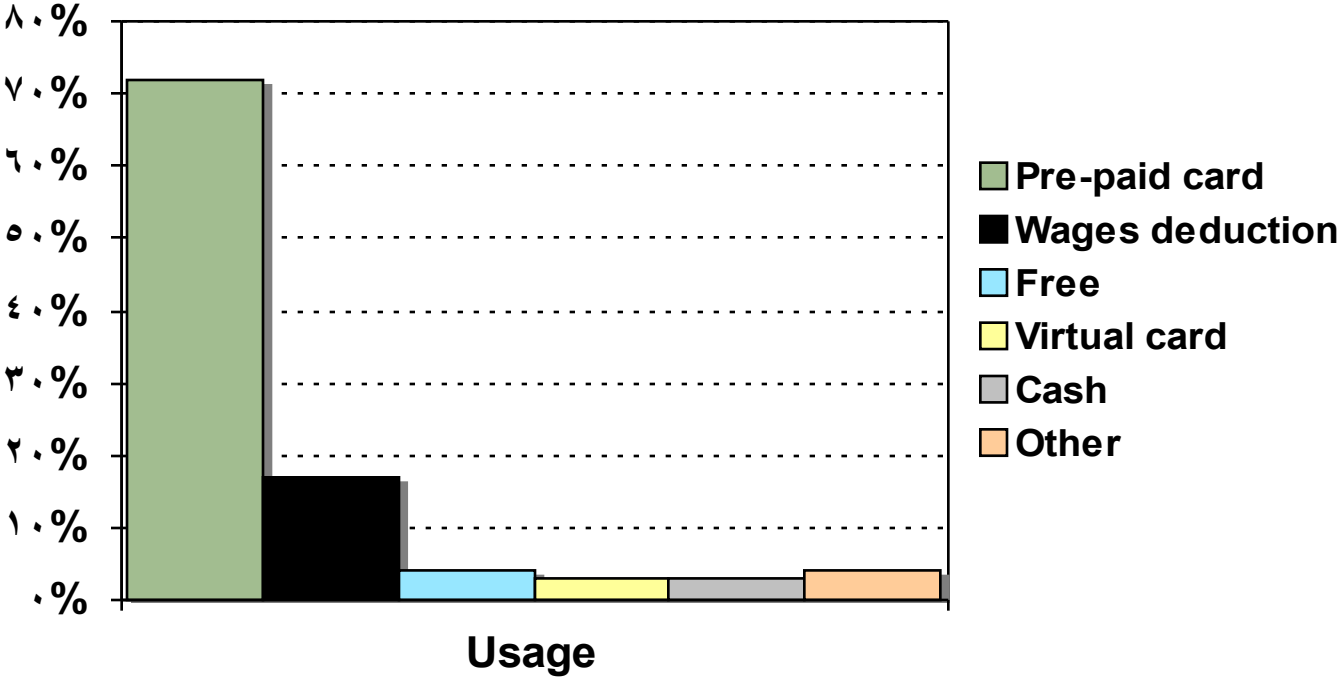
Wage deduction is still the most used payment method

Payment method for Personal Calls

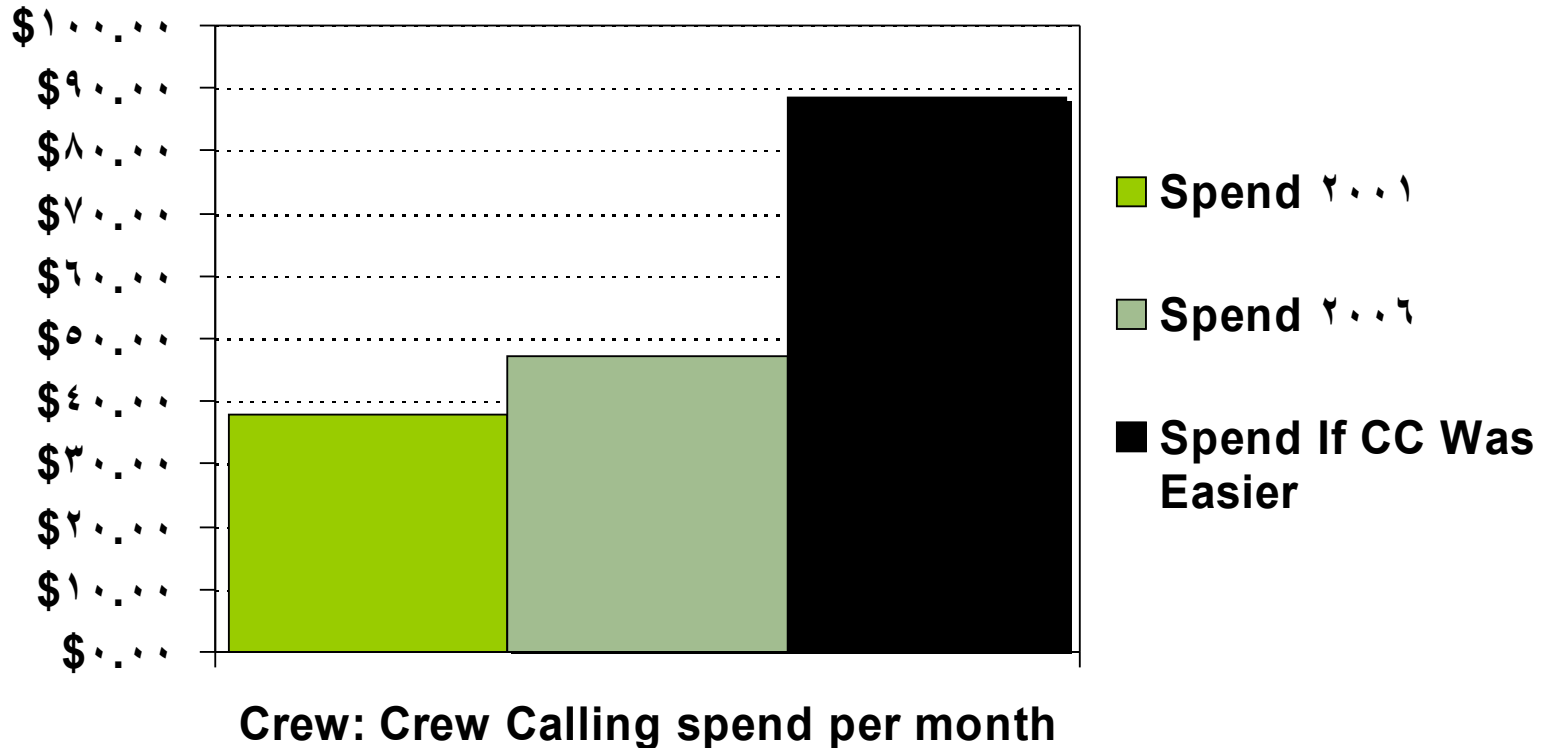


Masters: How Crew are paying for personal calls

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

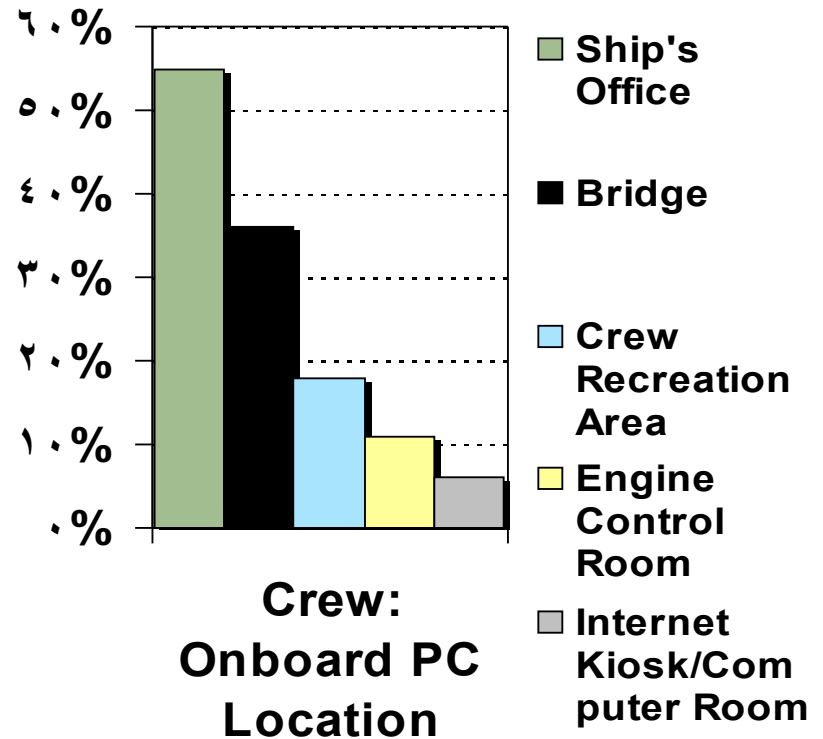


Computer and email usage on board

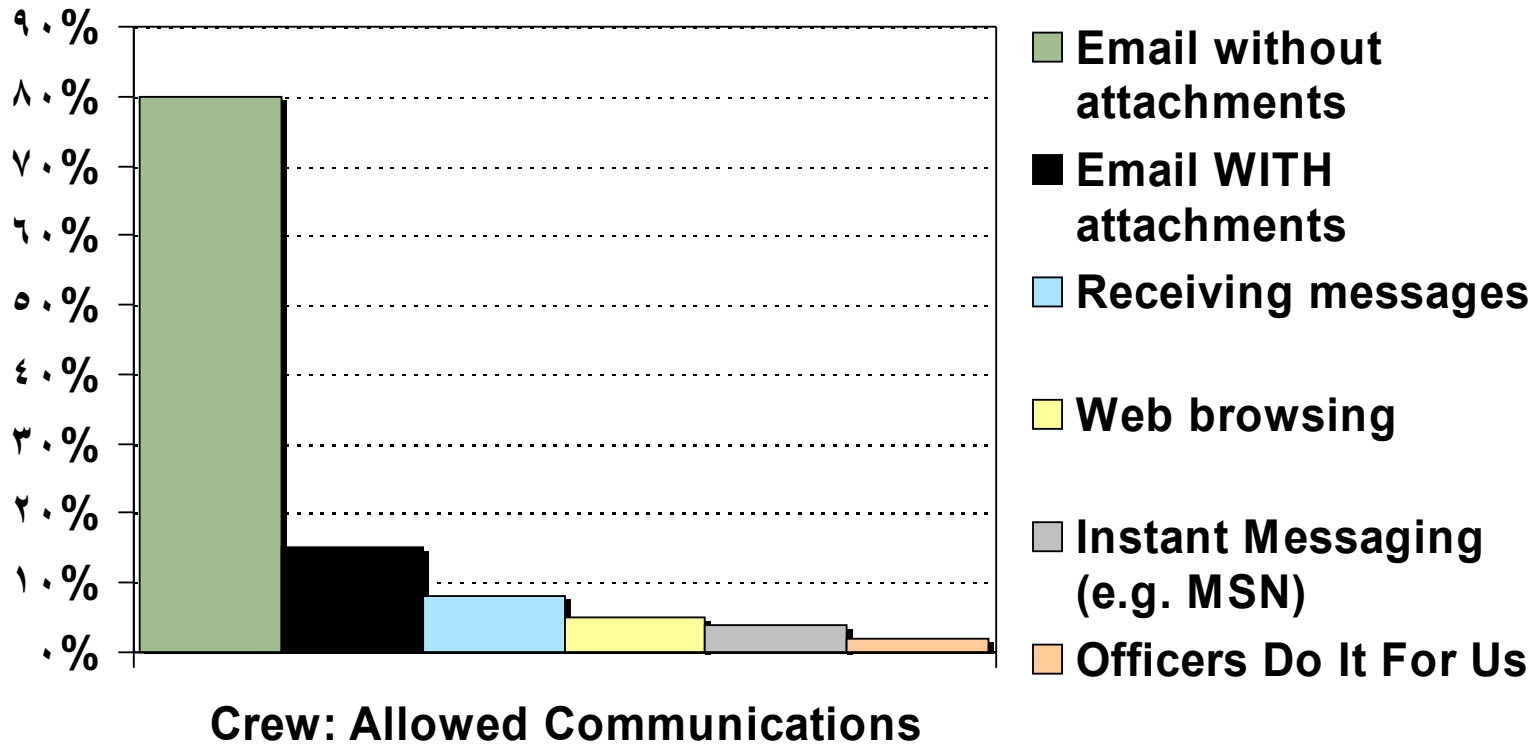


Computer access

- 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.

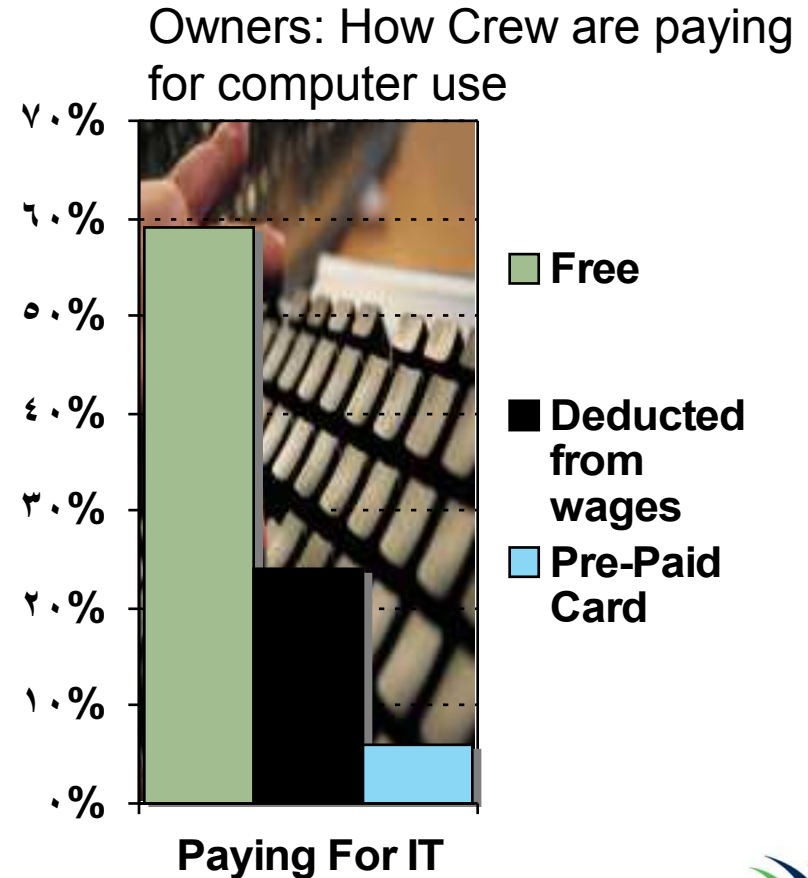


Email is THE data application of choice



And owners provide this free of charge to crew

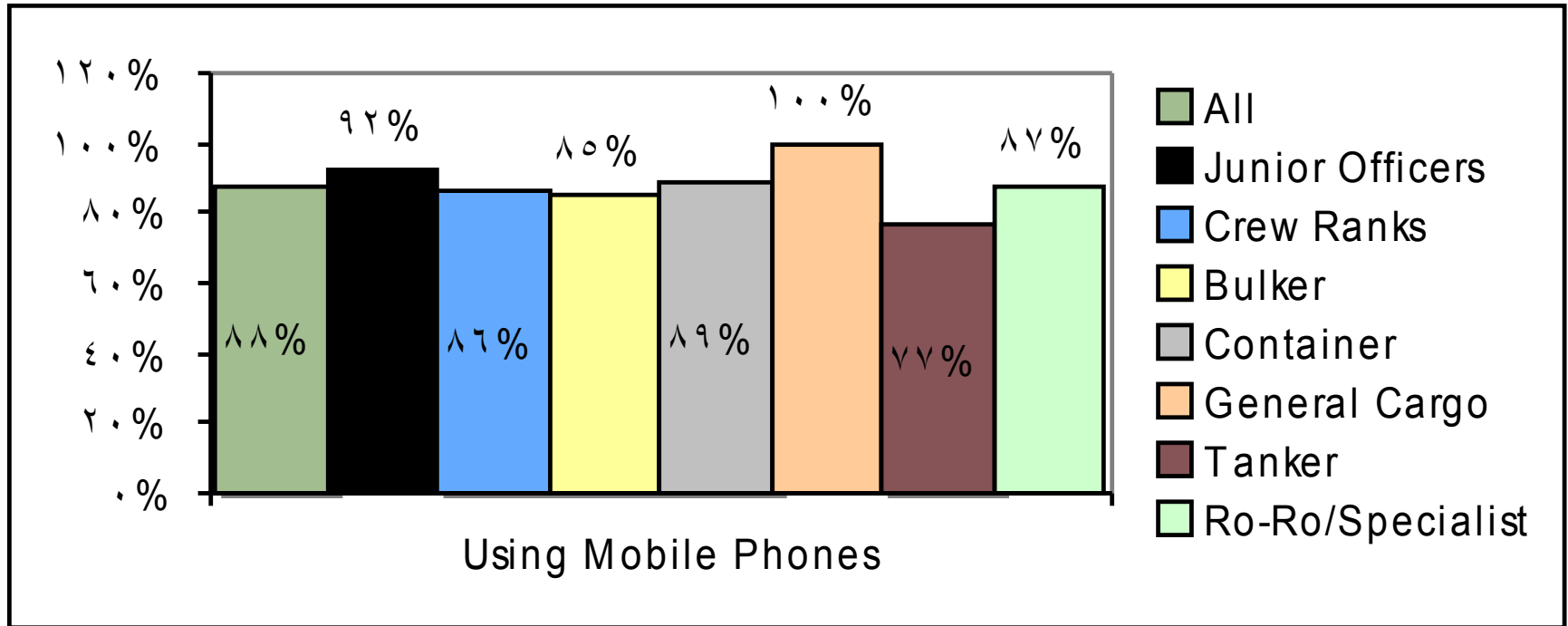
- Six out of ten owners say they don't charge for computer use for crew.
- 85% of crew reported free computer and email usage



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

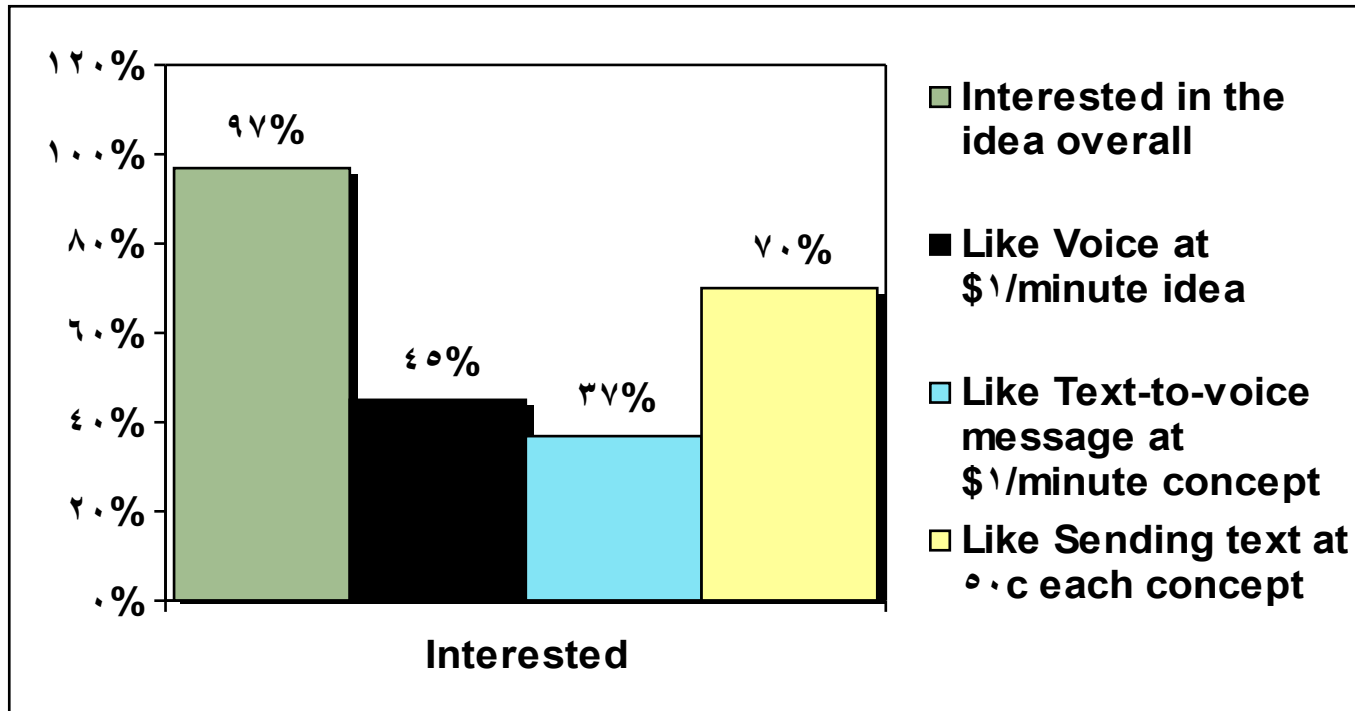
Masters:

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



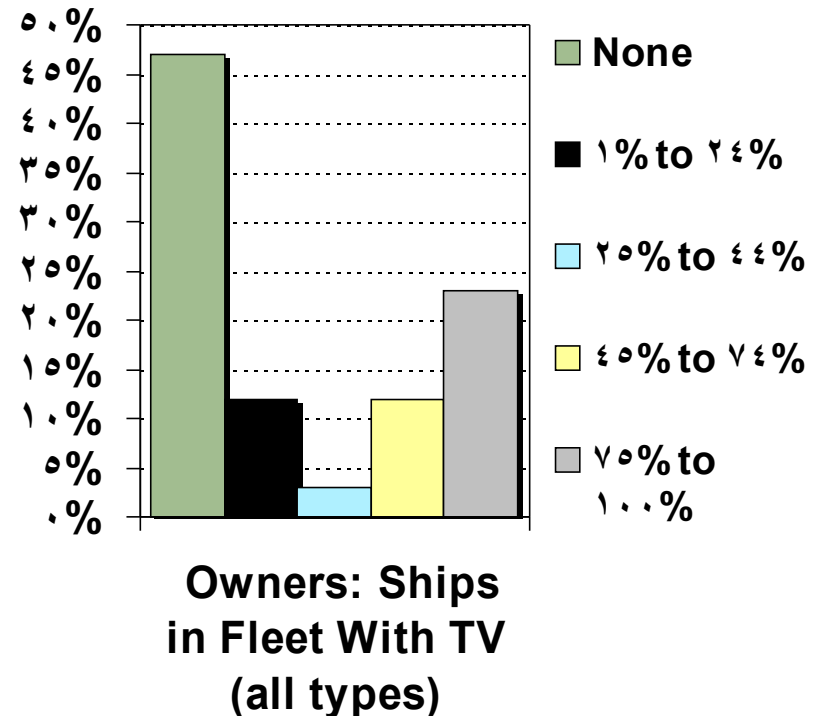
Crew: Reactions to GSM-to-Satellite Concept & Features (All)

Entertainment & TV consumption



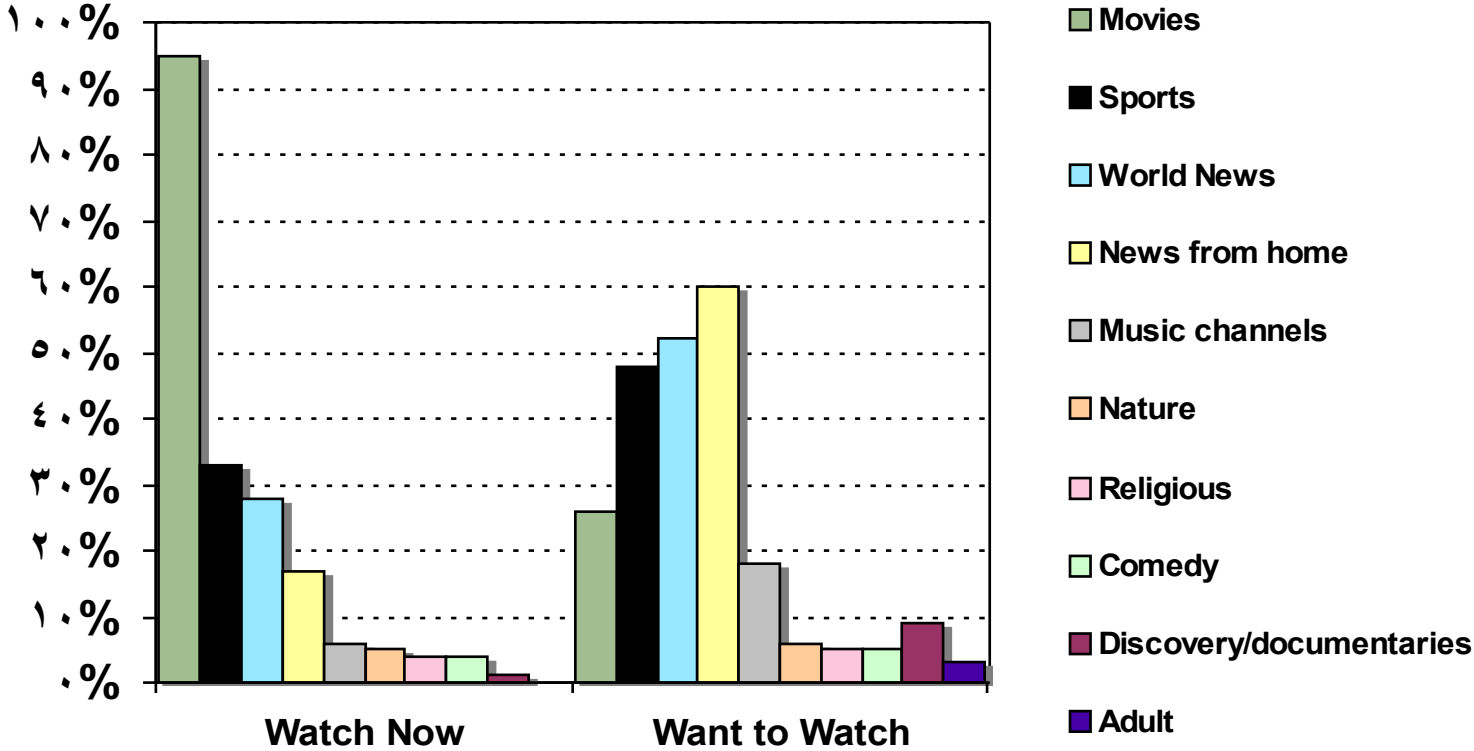
Just over half of vessels are equipped with a visual entertainment solution

- 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.
- Interest in GSM-via-satellite is very high amongst 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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