

# A Consultancy Report by Superyacht Intelligence 2018

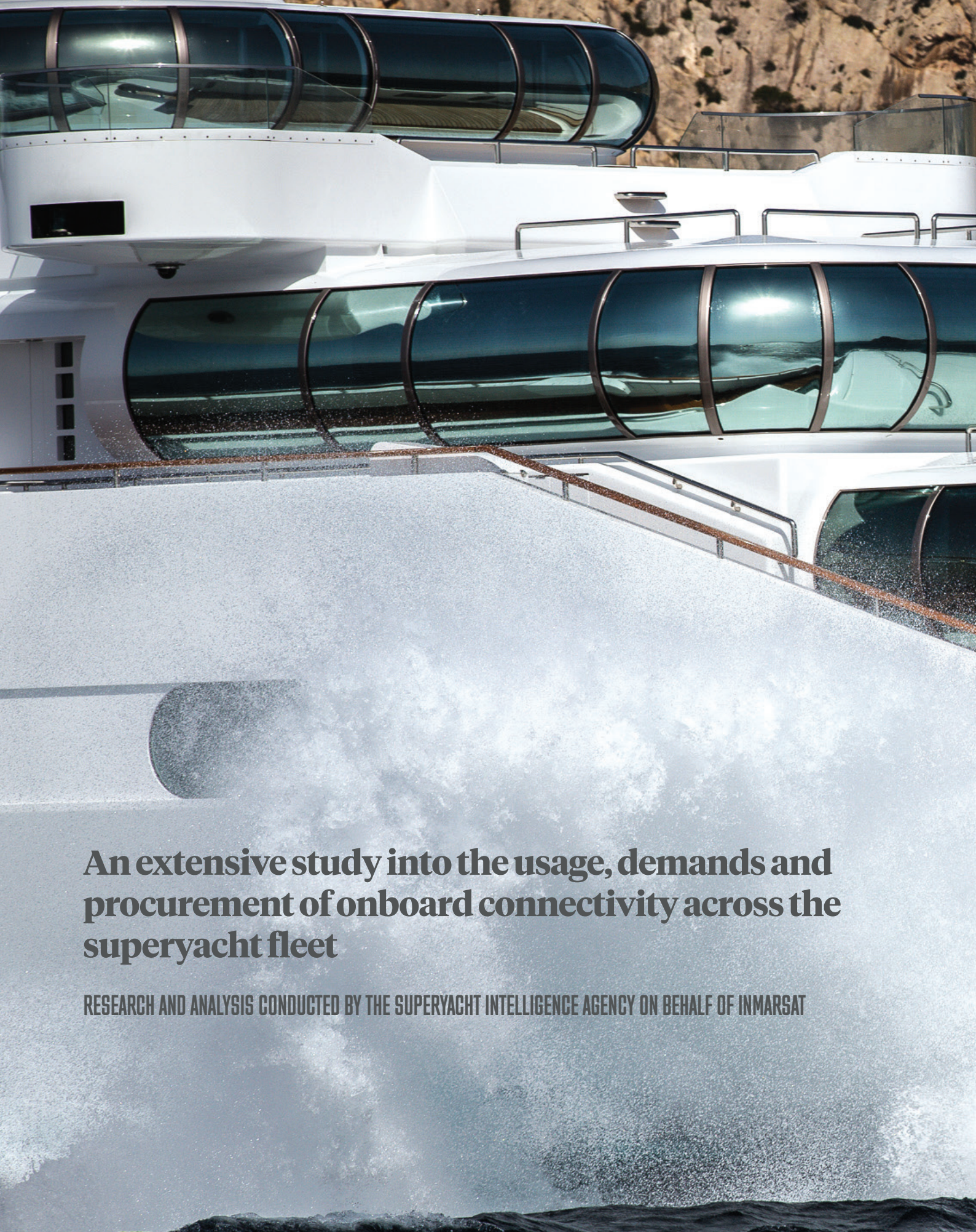
## A SUPERYACHT CONNECTIVITY REPORT

For Inmarsat

Inmarsat  
Research  
Programme  
2018



inmarsat 



# **An extensive study into the usage, demands and procurement of onboard connectivity across the superyacht fleet**

**RESEARCH AND ANALYSIS CONDUCTED BY THE SUPERYACHT INTELLIGENCE AGENCY ON BEHALF OF INMARSAT**



# Inmarsat

*Since 1979, Inmarsat has been providing reliable voice and high-speed data communications to governments, enterprises and other organisations, with a broad range of services that can be used on land, at sea or in the air.*

Inmarsat operates around the world, with a presence in the major ports and centres of commerce on every continent.

Launched in 2016, Inmarsat's Fleet Xpress service offers a powerful and unique combination of high performance, reliable guaranteed global coverage and freedom of subscription flexibility that together sets a new standard for communication for superyachts.

Inmarsat's Fleet Xpress VSAT service for superyachts provides added flexibility to meet seasonal demand changes – high bandwidth during peak demand and minimal service off-season. In addition, the newly integrated Fleet Secure service provides both network and end-point security alongside cyber threat detection.

# The Superyacht Group

*For more than two decades we have dedicated our global media channels to educating, informing and advising all sectors of the superyacht market. Our team of industry experts consistently delivers on our mantra, 'building a better superyacht market'.*

From expert journalism to real-time news coverage; from face-to-face networking to luxury communication tools; from global conference platforms to exclusive private communities, no other media group provides such a concentrated and focused mix of superyacht marketing and information channels.

The Superyacht Intelligence Agency is here to meet the need for superior data-driven decisions in the superyacht market, while the Superyacht Events division organises, hosts and delivers some of the most powerful and respected conferences, meetings and networking opportunities in the industry.

Through a tailored service and long-standing relationships with industry business leaders, The Superyacht Group understands what the superyacht market needs, and has the tools to deliver it.

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and installation of satcomms*

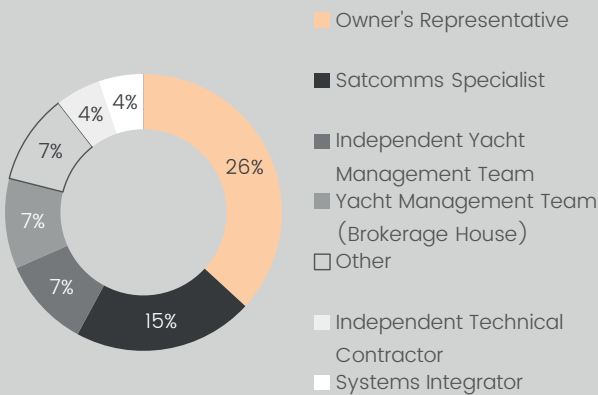


# Approach

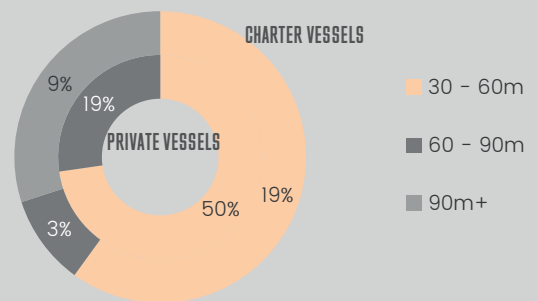
*In order to assess the state of play for satcomms in the superyacht sector, we used both a detailed survey and targeted, qualitative interviews to gain a comprehensive insight into the usage, requirements and future of on-board satellite communications.*

Respondents to the global survey included captains, chief engineers and technical professionals. Senior crew and technical professionals representing over 160 superyacht projects responded to two questionnaires, with the breakdown of respondents detailed below. Findings from the survey and subsequent research were discussed and enhanced at a number of roundtable meetings with captains and engineers during events at the MBYA Charter Show in Barcelona, the Palma Superyacht Show and the Newport VOR stopover event in the US during April & May 2018. All quotes included in this report are from captains and ETOs who attended those meetings.

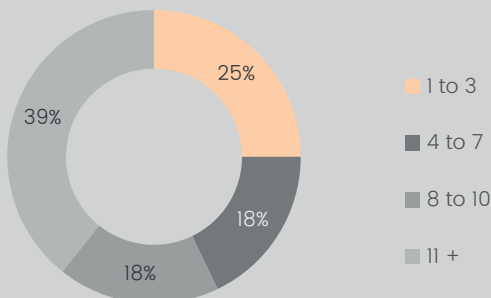
**Industry professionals who participated in satcomms installation and procurement survey**



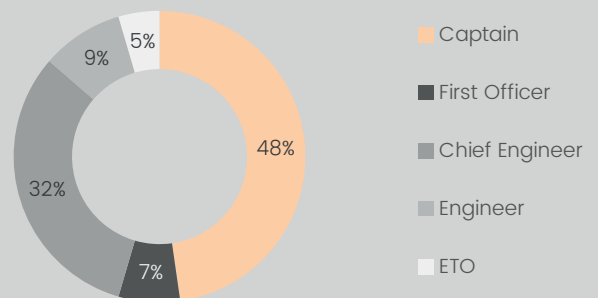
**Type of vessel crew member currently works on**



**Number of superyacht refit or new-build projects industry professionals have worked on**



**Superyacht crew who participated in satcomms survey**







# Summary of findings

*As a new generation of satellites enters service, satellite companies and providers are finally able to offer the potential for onboard internet via VSAT that moves towards replicating the quality of connectivity that owners are used to experiencing in their domestic environments.*

However, the market is in a state of evolution and change. New antenna technology, the growing demands for high throughput services, the shift from 12-month fixed contracts to flexible packages and ultimately bandwidth-on-demand, all play their part in influencing the choice of satcomms package for new-build yachts and refit projects, and also the decision on timing and options for upgrading.

While the ultimate decision-makers are the owners and their immediate representatives, there are several stakeholders involved in the process, from yard technical teams, independent advisors and management teams, to captains, chief engineers and, increasingly, ETOs.

## Biggest influencers over choice of satcomms service-provider aboard superyacht

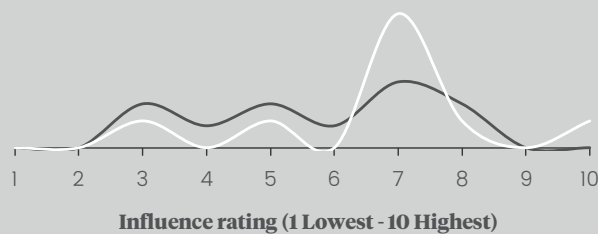
(Descending influence)

- 
- Captain**
  - Owner**
  - Chief Engineer**
  - Engineer**
  - ETO**
  - First Officer**

This study highlights that superyacht captains and crew are reporting increasing demand for satellite-delivered bandwidth to drive vessel management, address higher than anticipated usage of internet of things (IoT) applications onboard and to deliver navigation optimisation.

Despite these critical operations identified as the most important functions of satellite communications onboard, the research also revealed that the level of cyber security deployed by the global superyacht fleet is minimal, with nearly 64% of yachts relying on a simple on-board firewall or crew managed system.

### Influence over satcomms hardware



### Influence over satcomms airtime package

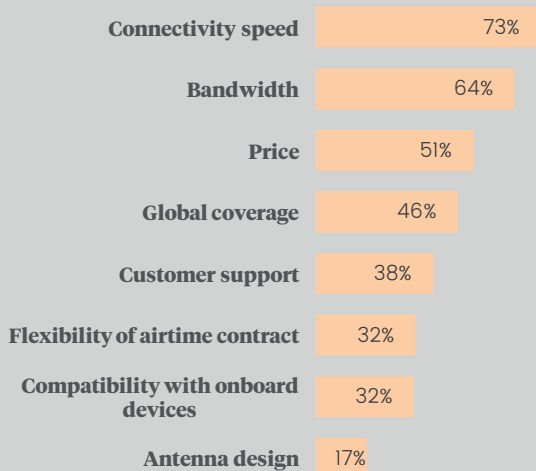


The survey also showed that crucial factors for senior crew members were bandwidth followed by price. With owners demanding a seamless internet connection and home broadband equivalent speeds on their yachts, captains have a demanding challenge to meet both usage expectations and budget limitations.

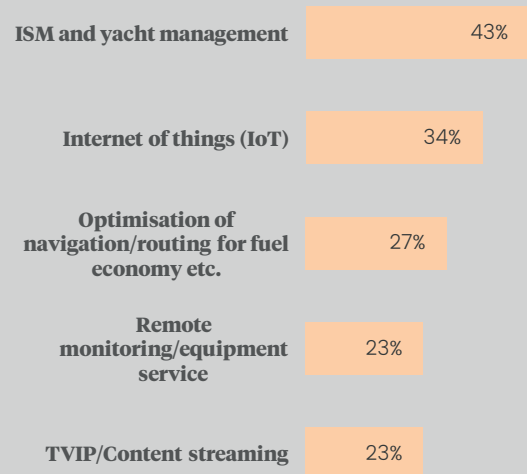
***I spend c.€5,000 per month on my satcomms, which is less than 2.5 per cent of my monthly operating budget, yet the expectation is for more and more bandwidth.***

Respondents to the survey for technical professionals have worked on over 160 superyacht installations and were able to provide valuable insight into the usage and future requirements for global, mobile satellite communications on vessels from 30 metres to over 80 metres.

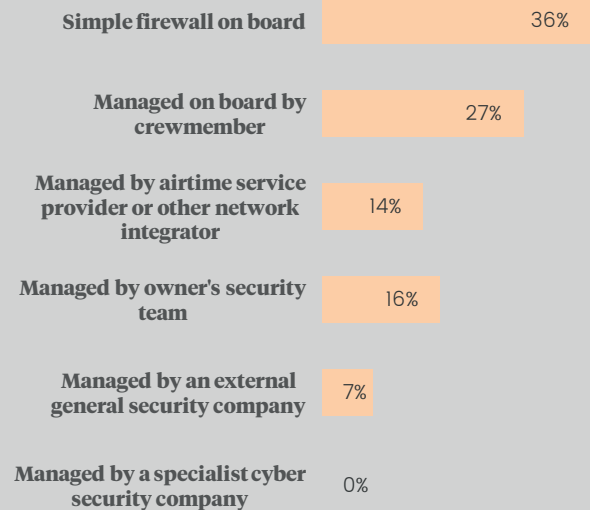
**Factors of importance when assessing and prioritising satcomms needs**



**Primary uses of satcomms aboard**



**Current cyber security aboard**





ESTER III  
GEORGETOWN C.I.



# The Superyacht Fleet

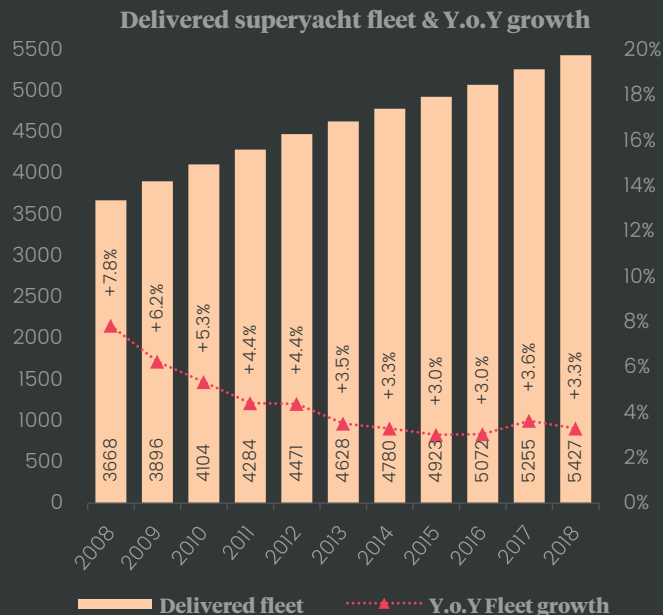
# Fleet analysis & forecast

The global superyacht fleet has been consistently buoyed by positive growth, albeit at varying rates. Since 2008 an average annual-fleet-growth of 4.3 per cent has resulted in an additional 1,587 30m+ yachts joining the global superyacht fleet. By close of 2018, this is expected to be nearer 1,759 delivered vessels.

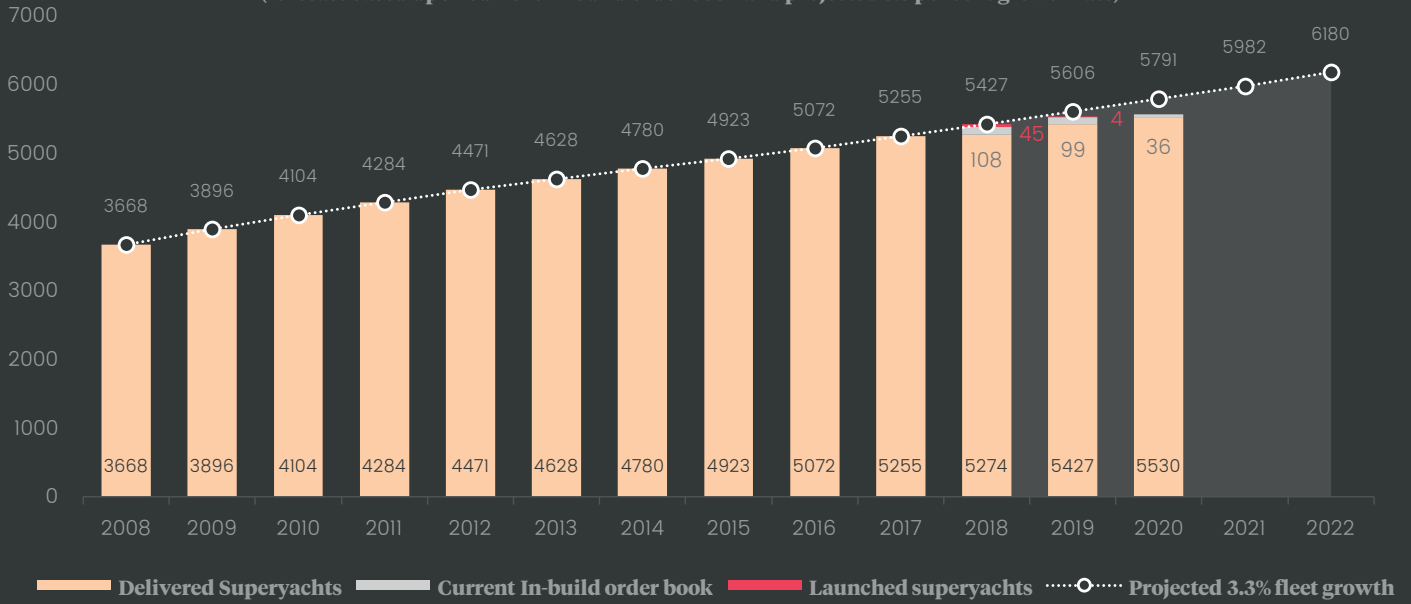
The outlook is certainly positive, but fleet-growth has slowed in recent years; In the five years up to January 2018, average annual fleet growth contracted to 3.3 per cent from 5.6 per cent over the same duration between 2008 and 2012. The global economic boom prior to 2008/9 saw highs of 7.8 per cent and 6.2 per cent. Orders placed during this peak period in 2006/7 will have had a delayed reaction to the global financial crisis due to the extended lead time in the superyacht manufacturing process. There is scope to say that, superyacht fleet growth remains positive with recent renewed vigour, however the numbers still highlight a level of relative optimism and illustrate a market that is not yet exempt from wider market pulls. Into 2018 and beyond, the current order book of in-build projects affords this relative optimism.

The Superyacht Intelligence Agency expects the global superyacht fleet to grow at a moderate rate by c.3.2 per cent to approximately 5,427 superyachts by the end of 2018, (omitting confidential projects not shared by shipyards) and before any additional commissions are considered.

Short-term forecasting towards 2022 uses a 5-year average 3.3 per cent fleet growth rate based on figures between 2013 and 2018. This conservative and credible fleet growth rate forecasts a global superyacht fleet of over 6,000 vessels by close of 2022.

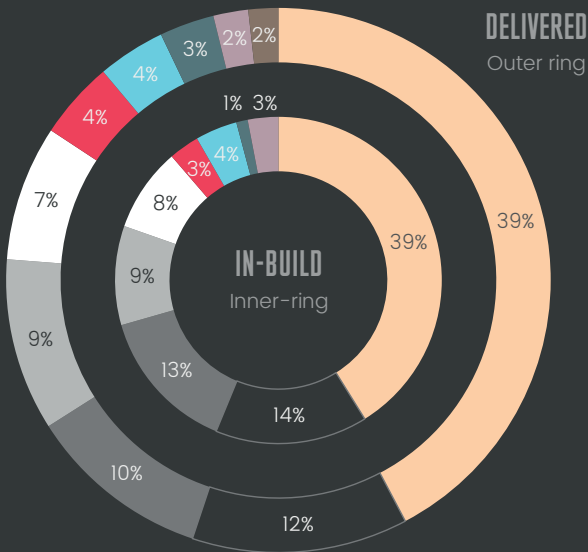


**Total delivered superyacht fleet and forecast**  
(forecast based upon current in-build order book and projected 3.3 per cent growth rate)



\*\* Forecasted growth includes current order-book but omits confidential projects not shared by shipyards – Data accurate as of May 18

**Superyacht fleet contribution by country since 2008**



Analysis of the regional number of deliveries since 2008 clearly indicates a dominant player. Although the superyacht sphere is linked with few select countries – namely, Italy, Germany and The Netherlands, there is growing market penetration by builders in Asia, the Middle East and Oceania. Where in the past owners would have focussed their attention on a select number of builders in Europe and the US, there is now greater choice thanks to ‘disruptive builders’ taking to the world stage; presently however, there is little momentum to trigger any noticeable change.

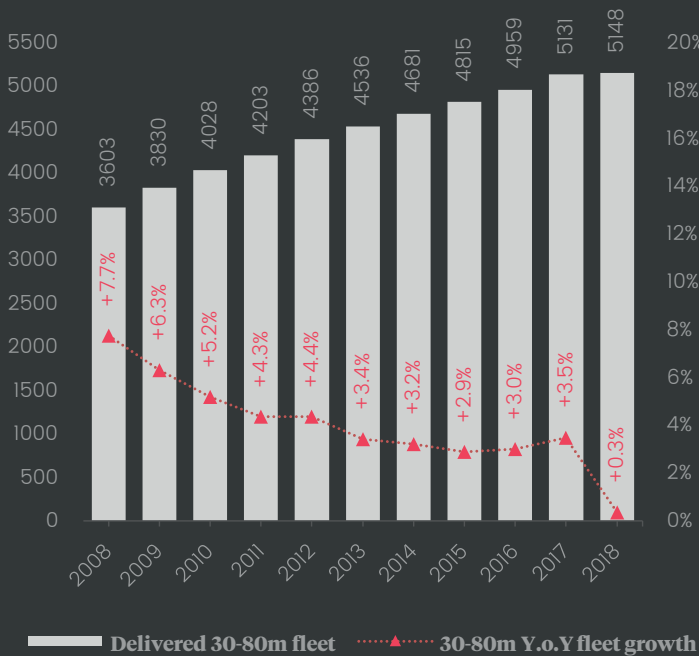
# Analysis of the 30-80m superyacht segment

Superyacht projects in the 30-80m segment are the largest contributor to superyacht fleet growth, but also represent the most competitive market for superyacht construction. Although significantly popular and competitive, the 30-80m segment is exclusively dominated by four countries in Europe and the wider Mediterranean region, with only the USA defining the market beyond this region.

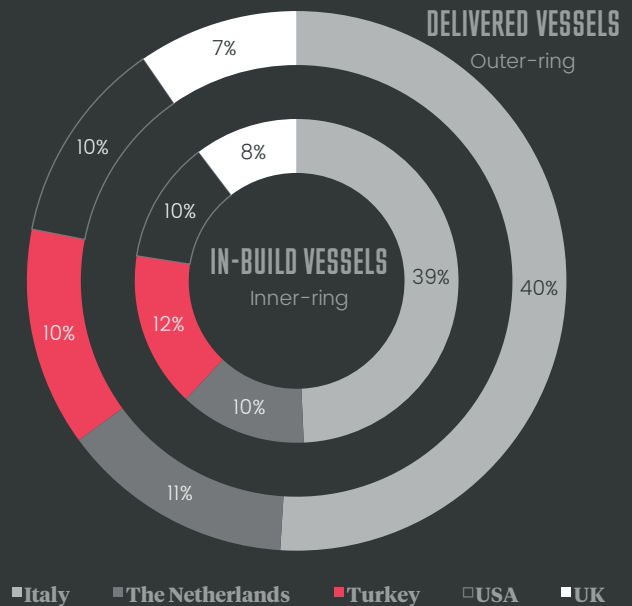
Importantly, of the 1,787 vessels that have sustained the superyacht fleet growth between Q1'08 to Q4'17, 78 per cent have been constructed in one of five counties; crucially, Italian yacht building accounts for 40 per cent, a considerable market contribution that exceeds the output of the remaining top four builders combined.

An 'entry-point' for the superyacht sphere, and a desirable size-range for owners looking to climb incrementally up the vessel sizes, the 30-80m bracket has distinct appeal. However, the 30-80m segment has been characterised by declining year-on-year growth since the global financial crisis of 2008/09. By close of 2007, the superyacht fleet had grown 7.5 per cent (233 vessels). At the same point in 2008, growth inflated only 0.2 per cent (+26 vessels); significant growth in this period was short-term. From a two-year high of c.7.5 per cent, growth eroded to c.3 per cent over six-years to 2013; a 4.4 per cent average growth rate for this period (Q1'08 to Q4'17) eludes to the stagnation of growth and the superyacht market's susceptibility to wider economic pulls.

Delivered 30-80m superyacht fleet & Y.o.Y growth

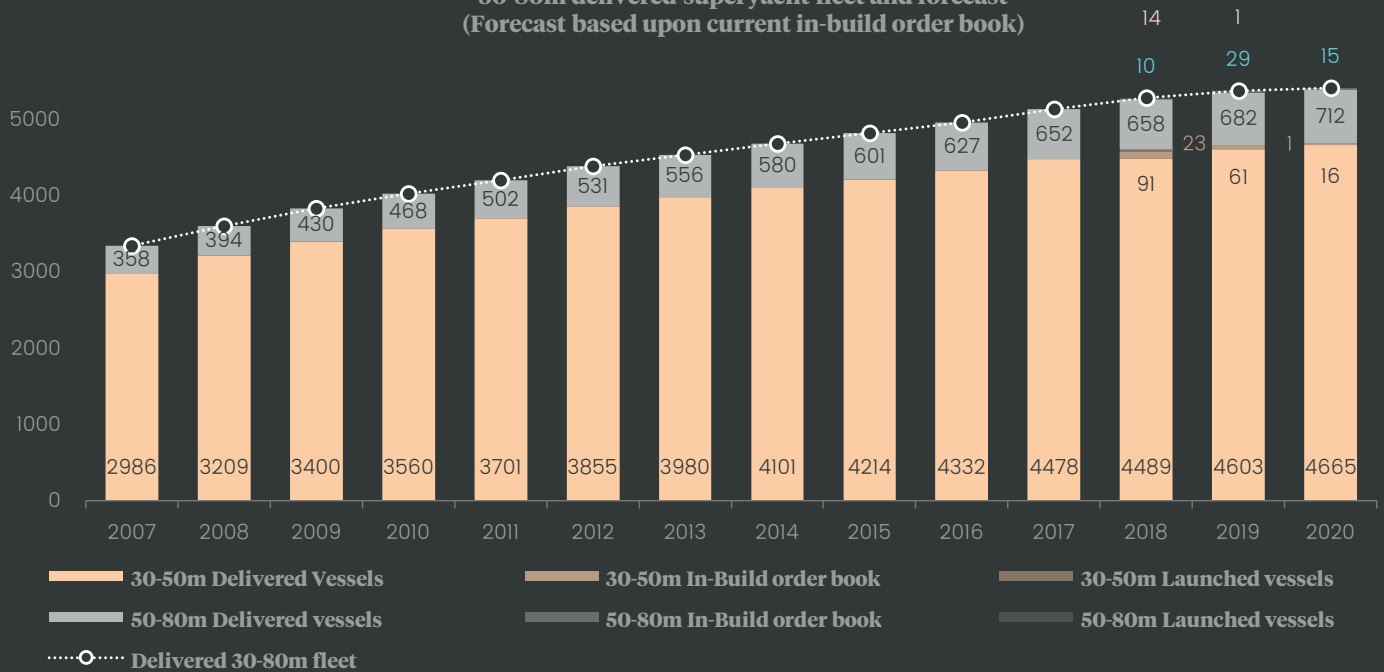


30-80m Superyacht fleet contribution by country since 2008





**30-80m delivered superyacht fleet and forecast  
(Forecast based upon current in-build order book)**



\*\* Forecasted growth includes current order-book but omits confidential projects not shared by shipyards – Data accurate as of May 18

A more detailed breakdown of the 30-80m segment provides greater clarity of the current fleet numbers and the nuanced market fluctuations toward the end of the decade, which shows the 30-50m and 50-80m fleet sub-segments growing at marginally different rates.

The appetite and popularity for yachts in the 30-50m segment vastly outweighs the appetite for vessels in any other size bracket. More competitive pricing, reduced lead times, greater affordability and popularity in the charter market, lower running costs and ease of finding berthing space are just some of the reasons why the 30-50m market appears more popular.

Importantly, from 2012 to 2017, the 30-50m fleet was recorded 169 fewer deliveries than the 646 in the preceding five-year period. Despite reduced lead times and a more competitive pricing framework for new and existing owners, looking to the close of 2020 (based on the May 2018 superyacht order book) the 30-50m fleet is expected to record 350 deliveries, a further decline by 127 units.

It's a similar picture for the 50-80m segment; In the five-years to 2012 the fleet grew by 137 vessels, yet in the five-years that followed, was only buoyed by an additional 96 yachts, a 30 per cent decrease. The period 2016 to 2020 appears to be one of stability, with an order book of 100 units.

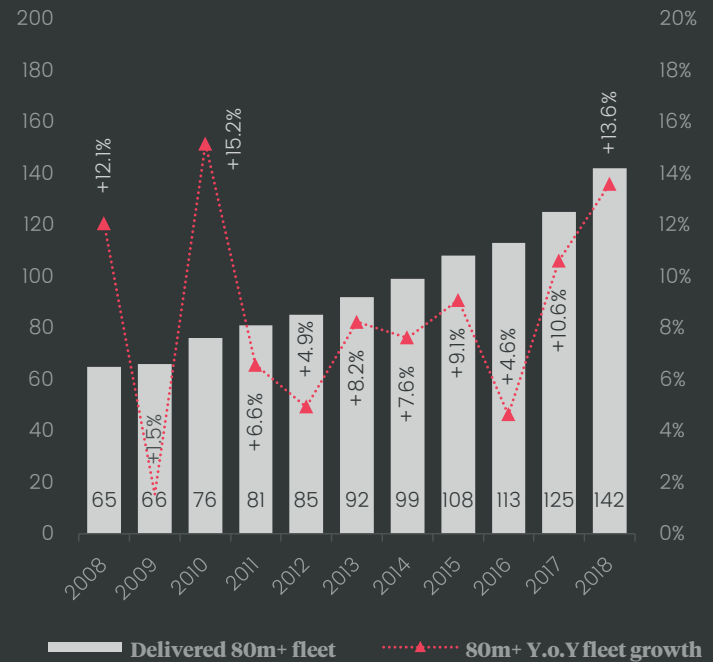
# Analysis of the 80m+ superyacht segment

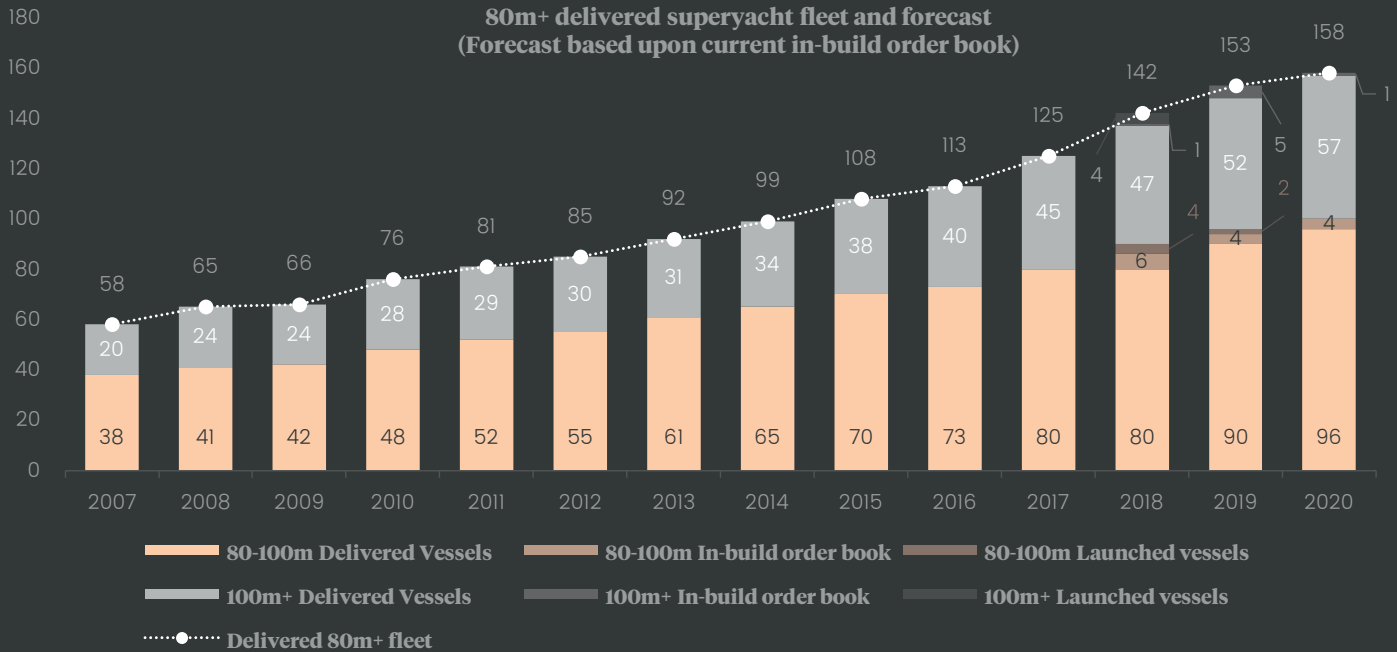
The historical desire and market appetite for vessels in the large luxury yacht market (80m+) has shown significant peaks and troughs. Data pertaining to the future growth of the large yacht segment should be approached with caution given delivery times for 80m+ vessels can skew the overarching message. However, a credible average growth rate of 8.6 per cent since 2008 offers validity in examining the 80m+ market.

Over a 10-year period the number of 80m+ vessels almost doubled, from 65 in 2008 to 125 at the end of 2017, and is projected to swell by a further 17 vessels by the end of Q4 2018. While any consistent annual growth instils confidence, for the larger yacht segment an 8.6 per cent average growth rate since 2008 does instil continued confidence in the robustness of this niche sector.

Looking more closely at vessels for the 80m+ segment towards 2020, trends for the 80-100m and 100m+ size brackets reflect similar movements, showing that not one yacht size bracket is dominating the 80m+ sector but in fact, all 80m+ size brackets are equally attractive to new owners. Forecasted numbers to 2020 confirms this appetite for vessels in the 80m+ category.

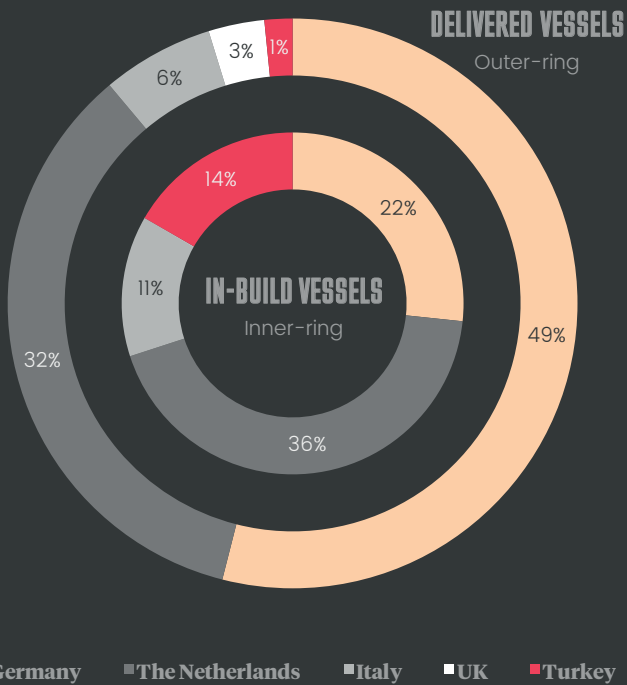
Delivered 80m+ superyacht fleet & Y.o.Y growth





\*\* Forecasted growth includes current order-book but omits confidential projects not shared by shipyards – Data accurate as of May 18

### 80m+ Superyacht fleet contribution by country since 2008



Northern Europe is home to a decorated yacht building heritage and a number of market-leading superyacht builders. It's, thus, unsurprising that countries within this cluster of excellence, namely Germany and the Netherlands maintain a monopoly on the 80m+ superyacht sector. Making up 81 per cent of 90m+ deliveries since 2008, the grip these two countries hold on the global 80m+ superyacht market is unchallenged although importantly, this market share of the order book has contracted. Based on the May 2018 superyacht order book, of the 31 in-built 80m+ superyachts expected to splash by 2020, 58 per cent are from German and Dutch shipyards. Crucially however, the Turkish share of current in-built projects is expected to surpass key players, Italy and the UK.





# Superyacht migration

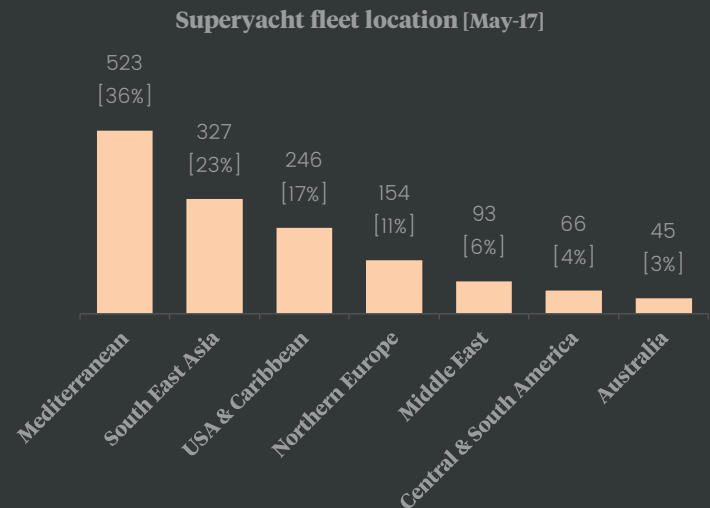
Vessel positioning at the beginning of the 2017 summer season broadly affirms current market discourse. AIS data on 24-May-2017 positioned c. 33% of the 1,454 superyachts in the AIS sample in the Mediterranean.

The reasons for this concentrated cluster of yachts is not surprising. The date in question represented the week of the Monaco Grand Prix, a popular start to the Mediterranean summer charter season (according to 2017 research conducted by The Superyacht Intelligence Agency), while a spike in refit activity explains the high number of yachts that had remained in Europe to carry out winter works. With 36 per cent of the tracked fleet already in the Mediterranean during May, it is clear that the region remains the industry's cruising epicentre.

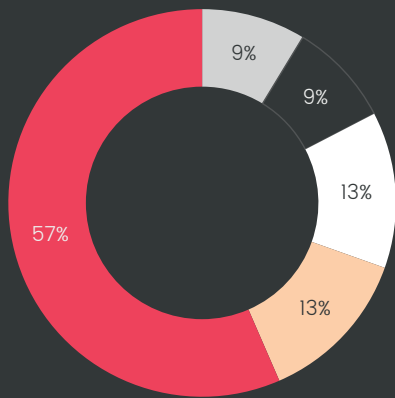
Pertinently, 17 per cent (247 superyachts) were identified in neighbouring waters – 11 per cent (154) in Northern Europe and a further six per cent (93) in the Middle East. The established refit market in Northern Europe substantiates the reasoning for the location of the 154 superyachts in this region.

For the 93 vessels in the Middle East; unlike Northern Europe, the Middle East is attractive because of its price-efficient bunkering options. It can make financial sense to bunker in the Middle East before venturing to the Mediterranean.

While a superyacht's diesel fuel burn can be influenced by a huge number of factors, such as cruising extensively or occasionally, throttling, hull-type (a fuel-efficient displacement vessel or a fast-burning performance planing yacht), or drawing shore power when in port or relying on gensets when cruising or at anchor; The Superyacht Intelligence Agency examined the fuel burn in relation to the average number of nautical miles covered by a superyacht in the 2017 summer season. The data revealed the average 30-40m vessel will burn c. 41,000 litres over this period while a 100m+ vessel c. 208,000 litres of fuel. The huge volume of fuel required highlights the potential cost-saving of bunkering in the Middle East compared to the Mediterranean - which can levy a 90 per cent premium.



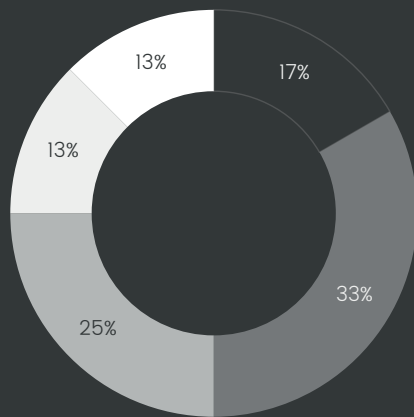
**Number of weeks superyachts were chartered for**  
[Apr 17 - Sept 17]



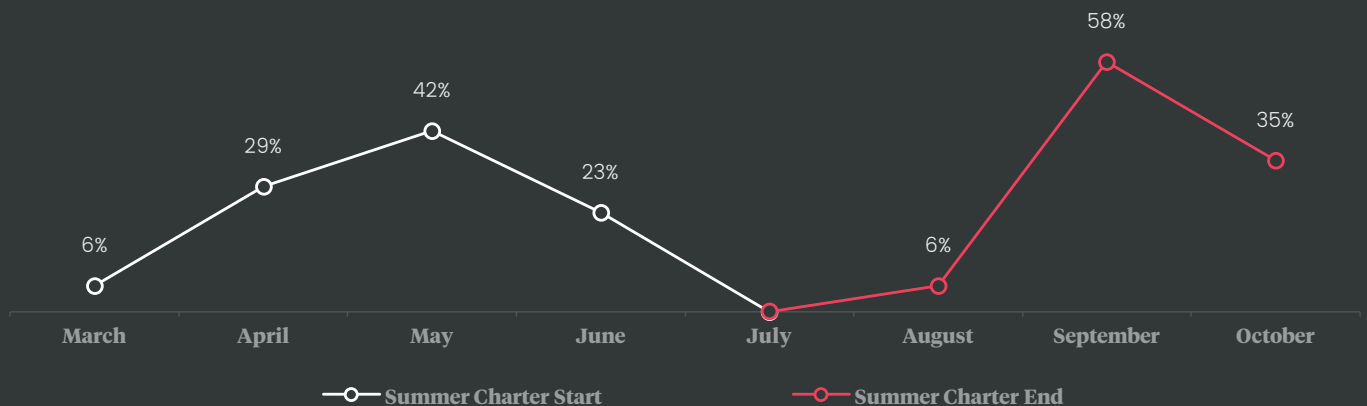
- Less than 1 week
- 2 - 4 weeks
- 4 - 6 weeks
- 6 - 8 weeks
- More than 8 weeks

An assessment of the 2017 Mediterranean charter market shows elongation of the season, with charter bookings starting as early as March and April, through to late summer-bookings in September and October. Crucially, c. 70 per cent of Mediterranean charter vessels were booked for at least six weeks. Towards the end of the summer season, 72 per cent of superyachts intended to stay in the Mediterranean while only 9 per cent intended to leave.

**Average duration of a charter** [Apr 17 - Sept 17]



- Less than 1 week
- 1 week
- 2 weeks
- 3 weeks
- 4 weeks or more









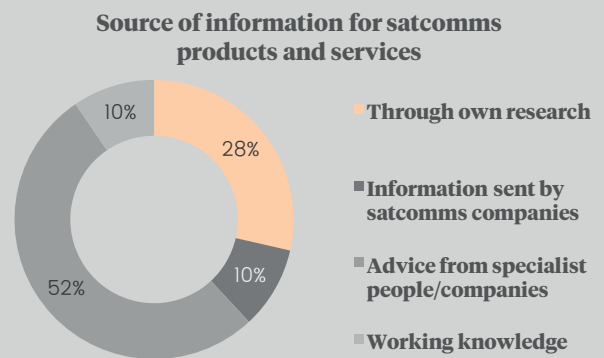
# Superyacht Connectivity

# Salient insight from industry professionals involved in the procurement and installation of satcomms

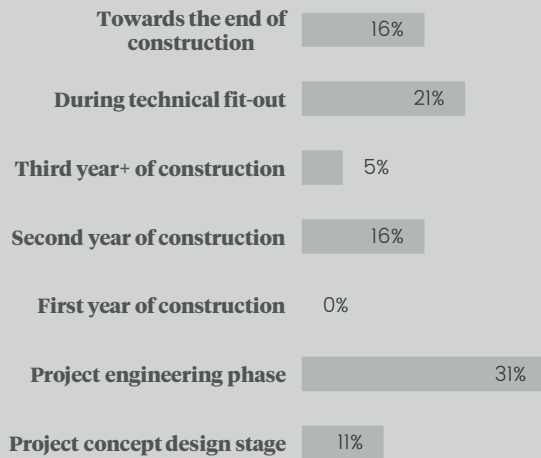
*Presenting the industry with a complete package that includes hardware, airtime and an on-going servicing package could be well received, but technical professionals and those involved in the specification and procurement process need to be aware early in the construction process in the case of new-build superyachts. This also requires a degree of forward planning when it comes to offering packages or communicating new satcomms developments and solutions to the market.*

Data from our survey revealed that 61 per cent of the technical professionals said they would be interested in a complete package from a root satellite company. However, our survey also revealed that when it comes to new-builds (and, by extension, major refit projects), satellite specialists are involved in the system specification at the project concept and engineering phases in 42 per cent of cases, suggesting that the satcomms solution is set before actual construction begins. In addition, it was suggested that a further 21.1 per cent of the time the specialists' involvement happens during the technical fit-out of the project, which again represents an early stage of construction.

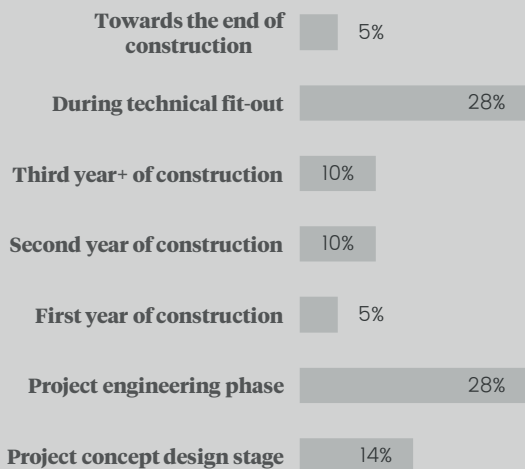
This implies, given the potentially long lead time before final handover to the customer of a project (which can be anything from two to seven years or more from concept to delivery, depending on the size of the vessel and the speed with which the project is undertaken), that a degree of forward planning is required in order to present solutions that will be current when the yacht enters operational service.



**Point in new-build construction when decision is made on satcomms system hardware**



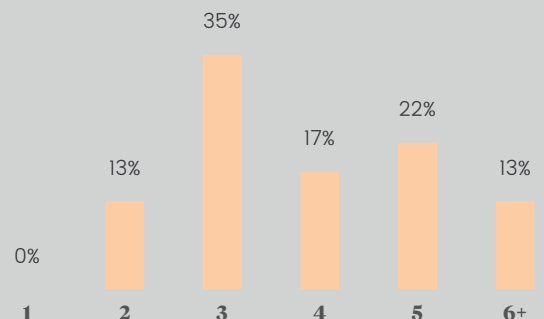
**Point in new-build construction when satcomms service suppliers are involved**



*Relaying information to the key stakeholders and decision-makers should involve promotion both to technical professionals, owners’ teams and senior crew. Our survey reveals that both for technical professionals and for crew, email is a preferred method of communication in the first instance.*

Our survey of technical professionals showed that 87 per cent of those questioned say there are between two and five people involved in the satcomms specification and procurement process. In addition, more than half of technical professionals questioned (56 per cent) said that those involved in the decision-making process rely on information from satcomms specialists. In addition, 28.6 per cent said they get their information from their own research, but only 9.5 per cent said they get their information from materials sent by satellite companies. Good communication that both introduces services and helps potential clients to understand the fundamentals of the technology, the costs, and the benefits of the offering are therefore critical to ensure that decision-makers are informed when it comes to spec’ing superyacht projects. However, a number of our technical professional respondents also highlighted the importance of following up initial e-communications with in-person demonstrations or meetings, either at shows or exhibitions or through direct meetings and presentations.

**Number of figures involved in the satcomms procurement decision**



*Technical professionals provide a good, non-biased conduit to the wider owner and project teams regarding satcomms packages and costs, and it is important to give them clear and concise information.*

More than 80 per cent of technical professionals who took part in our survey said they received neither commission nor on-going fees from satcomms companies or service providers, suggesting they have no vested interest in the choice of satcomms solution. However, 80 per cent of respondents also said that the decision on the ultimate price and scope of the satcomms solution falls to the owner or the owner's team. Taking the role of key advisors within the wider project team, along with captains, the technical professionals therefore should be targeted as a key channel to convey the nature of packages on offer, the advantages of Inmarsat's various offerings, and the evolution of satcomms toward HTS (High-throughput-satellite) VSAT services that can match the growing data demands of owners.



# Understanding current data demands

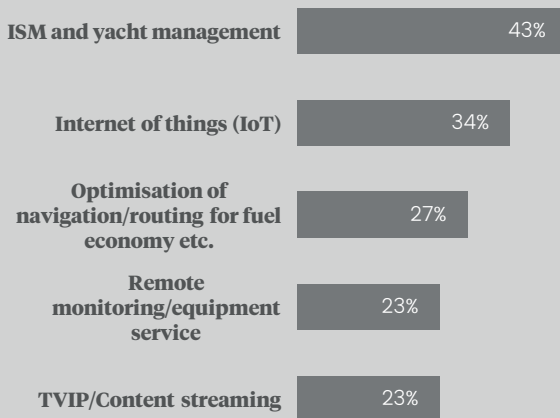
## – salient insight from superyacht crew

*Regulation rules, but onboard application use on the rise*

Safety and compliance is paramount in the operation of superyachts and, as expected, this is reflected in the number one usage for superyacht captains and crew. The position of IoT sensors and applications is a more surprising entry at number two.

ISM or mini-ISM compliance alongside yacht management tools and software takes the top spot in the primary usage of connectivity for business use with 43% of respondents. However, following in second place is the use of IoT onboard, to improve operational efficiency and send data ashore, which was selected by 34% of respondents.

Primary uses of satcomms aboard



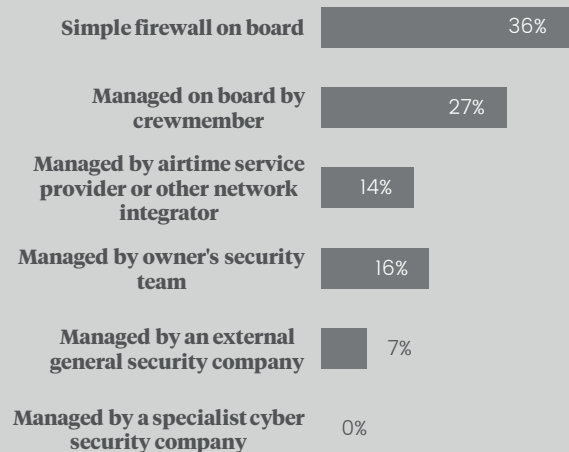
***“Although content streaming is listed in 5th place, I can tell you that often customers will come on board and spend two weeks with a screen in front of them watching Netflix or on social media, even if they’re surrounded with the most impressive locations and surroundings”***

*Cyber resilience is low*

With the advance of digitalisation, cyber resilience amongst superyachts is still seen to be in its infancy with only basic firewalls preventing a harmful cyber-attack.

On-board firewalls were the first and only line of defence for 36% of respondents with only 23% of captains and crew saying that the cyber resilience of the vessels was in the hands of experts - either the owners’ security team or third-party cyber partners.

***“Superyacht owners are a real target for cyber criminals, and so there is a real need for a good network and end-point security service, that is not cloud-based and therefore doesn’t use-up our valuable bandwidth”***



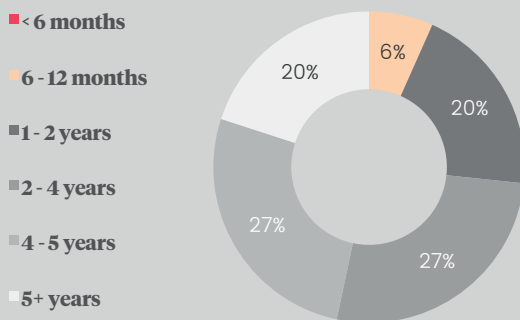
## Many yachts are carrying ageing hardware

Although high-speed satellite communication has become a must-have rather than a 'nice to have', there is still a high percentage of older equipment across the superyacht fleet.

Like the latest plasma TVs, replacing satellite equipment to receive higher speeds is unfortunately a necessity and many yachts are still carrying outdated hardware with close to 50% of those surveyed sailing with equipment over 4 years old.

With only a quarter of captain and crew having replaced their hardware equipment in the last two years, there is plenty of scope for new services such as Inmarsat's Fleet Xpress.

### Age of current satcomms hardware aboard



### Period superyacht will upgrade its satcomms system









# Appendices

# Appendix#1

*For reference, the following lists all questions put forward to captains, chief engineers, engineers, ETO's and officers*

What is your current position?

What type of vessel do you currently work on?

Please estimate the number of weeks' guests or owners are aboard per year?

Please rank the level of influence the following have over the choice of satcomms service-provider

Rate in order of importance when assessing and prioritising your satcomms needs

When selecting the most appropriate satcomms package for your needs

How would you rate your knowledge of cyber security?

Does the yacht you currently work on still have TVRO?

Does the yacht you currently work on use TV over IP (TV/content streaming)?

What are the primary uses for your current satcomms service?

What is your main communication method for on-board entertainment when at sea/cruising?

What is the age of the current satcomms hardware?

Please estimate how much is spent per month on satcomms?

Who installed the current satcomms system?

By what percentage do you expect the yacht's satcomms budget to increase or decrease over the coming 18 to 24 months?

Does the yacht currently use separate satellite data-streams for crew and for owner and guests?

Please estimate the percentage breakdown of total annual satcomms traffic use

Do you currently have a flexible airtime package that allows you to buy bandwidth on demand?

What are the typical data bandwidth levels you currently use?

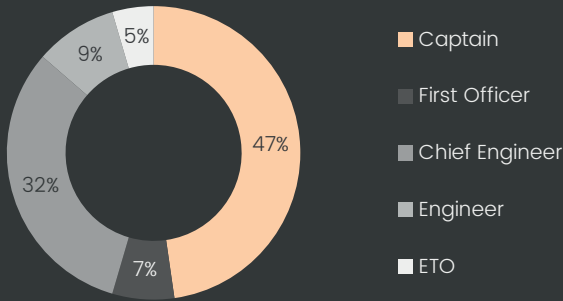
Through VSAT, what download speeds cover the yacht's average voice communication demands?

Which best describes your current cyber security provision?

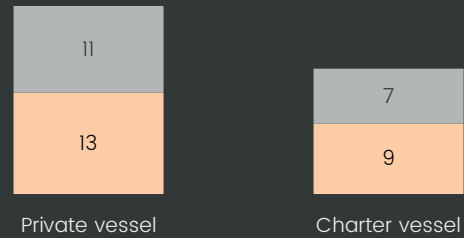
Please estimate when the yacht will upgrade its satcomms system?

# Question Insight

## What is your current position?

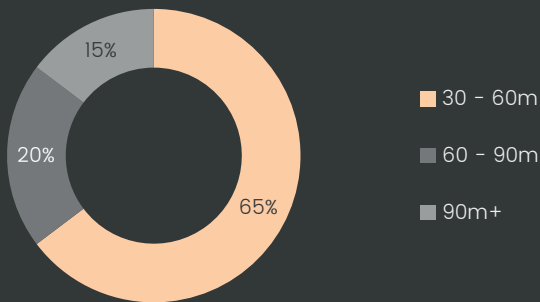


## Please estimate the number of weeks' guests or owners are aboard per year?

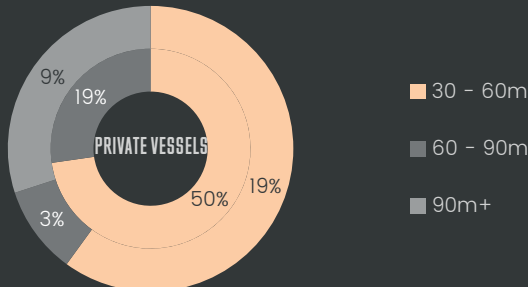


■ Guest Av. ■ Owner Av.

## What type of vessel do you currently work on?



CHARTER VESSELS



## Please rank the level of influence the following have over the choice of satcomms service-provider

- 1 **Captain**
- 2 **Owner**
- 3 **Chief Engineer**
- 4 **Engineer**
- 5 **ETO**
- 6 **First Officer**

Ranked descending influence

## Rate the following in order of importance when assessing and prioritising your satcomms needs

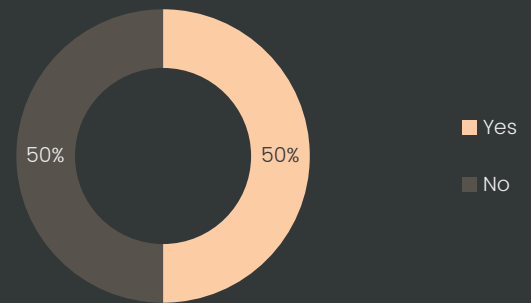
- 1 **Connectivity speed**
- 2 **Bandwidth**
- 3 **Price**
- 4 **Global coverage**
- 5 **Customer support**
- 6 **Flexibility of airtime contract**
- 7 **Compatibility with on-board devices**
- 8 **Antenna design**

Ranked descending importance

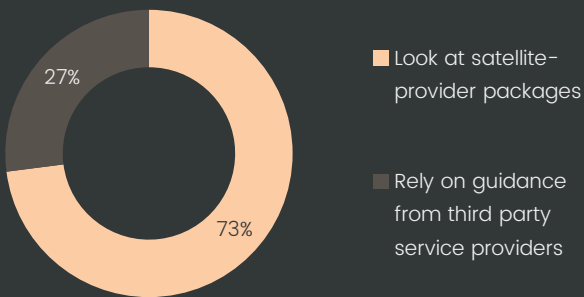
## How would you rate your knowledge of cyber security?

Position	Cyber security knowledge (1 lowest 10 highest)
ETO	8.0
First Officer	8.0
Engineer	7.7
Captain	5.6
Chief Engineer	5.0

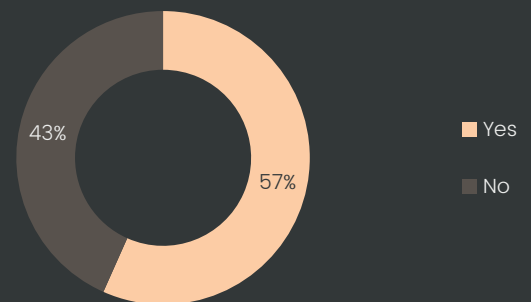
## Does the yacht you currently work on still have TVRO?



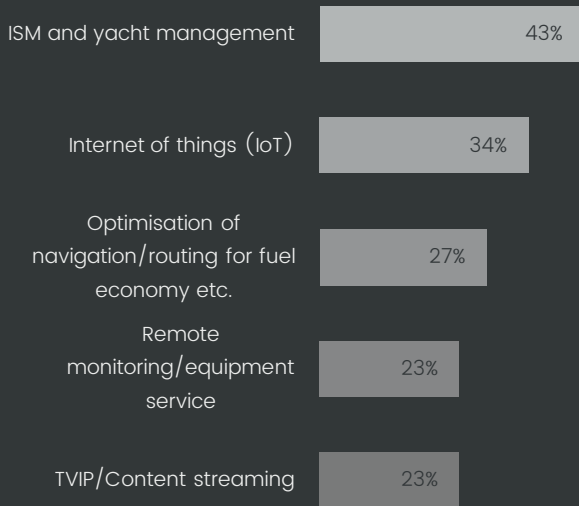
## When selecting the most appropriate satcomms package for your needs do you



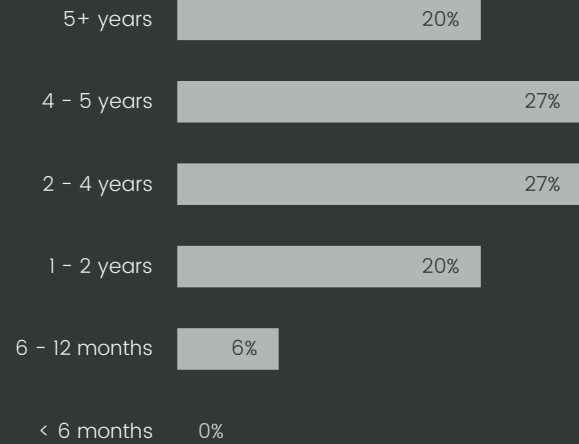
## Does the yacht you currently work on use TV over IP (TV/content streaming)?



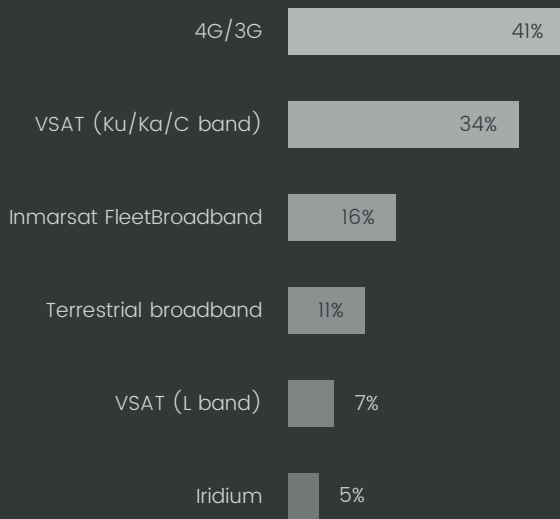
## What are the primary uses for your current satcomms service?



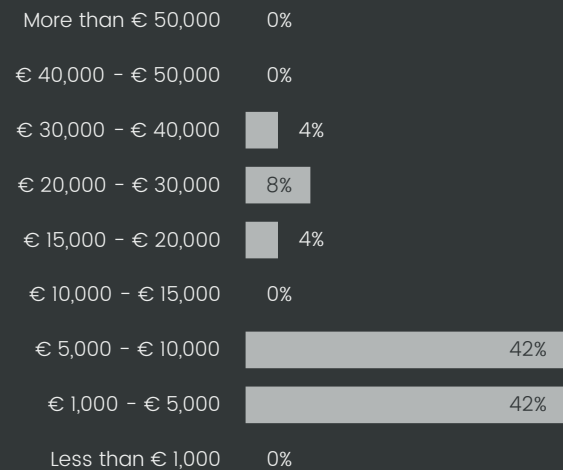
## What is the age of the current satcomms hardware?



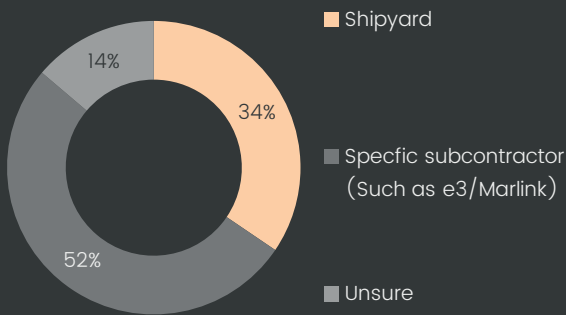
## What is your main communication method for on-board entertainment when at sea/cruising?



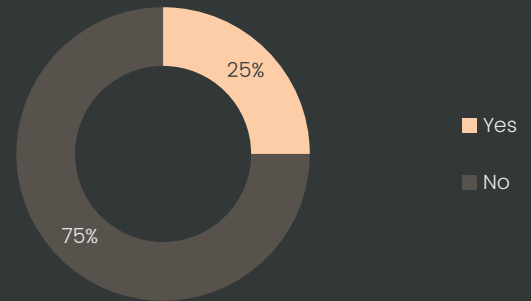
## Please estimate how much is spent per month on satcomms?



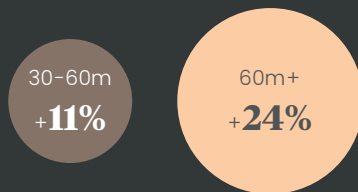
## Who installed the current satcomms system?



## Does the yacht currently use separate satellite data-streams for crew and for owner and guests?

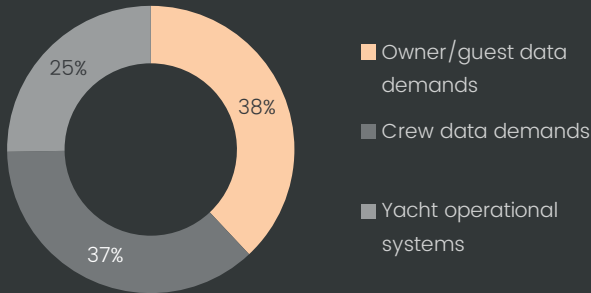


## By what percentage do you expect the yacht's satcomms budget to increase or decrease over the coming 18 to 24 months?

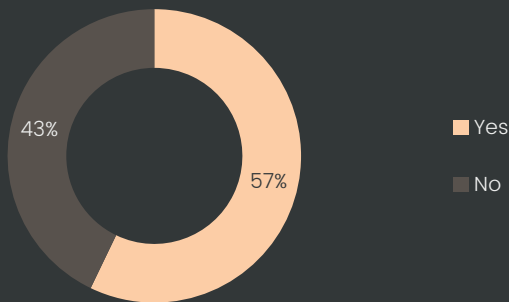


(Expected cumulative average)

**Please estimate what percentage of total annual satcomms traffic is used for**



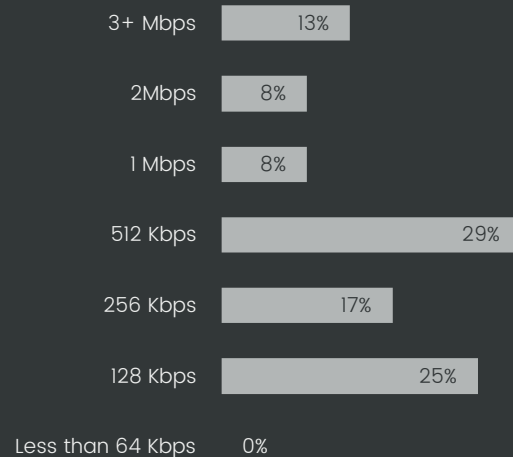
**Do you currently have a flexible airtime package that allows you to buy bandwidth on demand? (E.g. when owner or guests are aboard)**



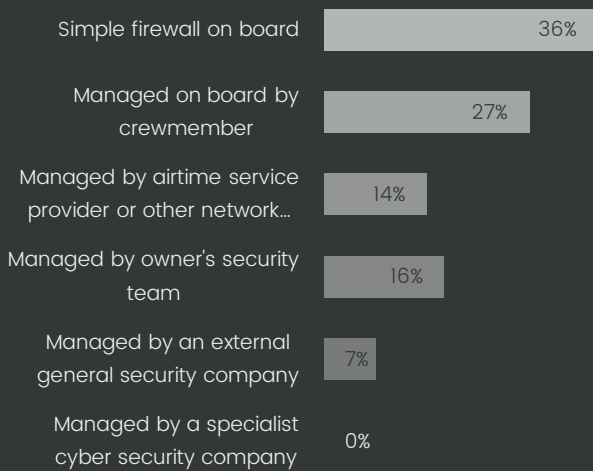
**What are the typical data bandwidth levels you currently use (in Mbps downlink speed)**

**4.3 Mbps  
Average  
Downlink**

**Through VSAT, what download speeds cover the yacht's average voice communication demands?**



## Which of the following best describes your current cyber security provision?



## Please estimate when the yacht will upgrade its satcomms system?







# Appendix#2

*For reference, the following lists all questions put forward to members of the shipyard technical team, independent technical contractors, systems integrators, satcomms specialists, owner's representatives, independent yacht managers and brokerage yacht managers involved in the procurement and implementation of satcomms systems aboard superyachts.*

Which of the following best describes your position?

How many superyacht projects have you worked on?

What type of superyacht projects have you worked on,

What size category did they fall into?

Have you been involved in the procurement of a satcomms solution?

How would you rate your knowledge of satcomms?

What was/is your role in the satcomms procurement decision process?

How much influence do you have on the selection of satcomms hardware?

How much influence do you have on the selection of satcomms airtime packages?

From your experience, how many people are involved in the satcomms procurement decision process?

How strongly does industry recommendation (excluding recommendation from satcomms providers) influence your satcomms procurement decision process?

Who in the satcomms procurement decision process has the most influence?

Where do you get your information of satcomms products and services from?

From your experience, when is the decision made on the specific satcomms system hardware to be used on the yacht?

If applicable, how early are key satcomms service suppliers involved in the satcomms system-design, sourcing and implementation?

Who decides on the ultimate satcomms budget/scope?

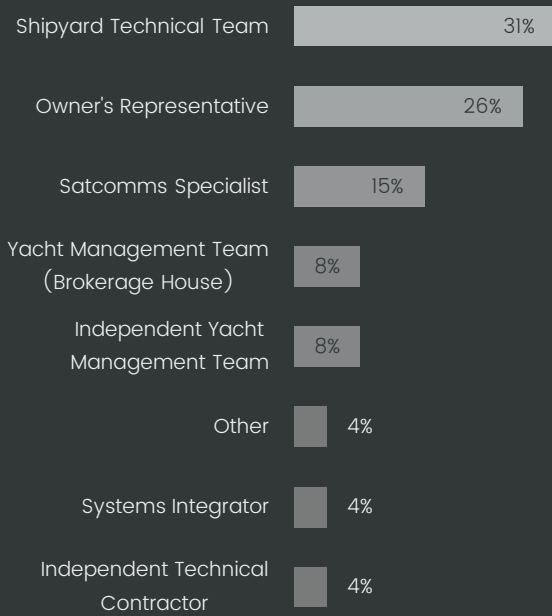
What is the average satcomms installation budget?

By how much do you expect the installation budget to increase or decrease over the next 24 months?

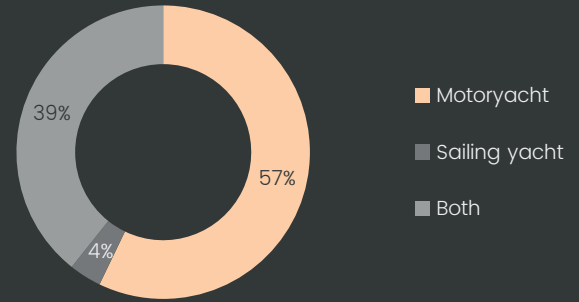
From the project(s) you have been involved with, who is the satcomms hardware package typically serviced by post-launch?

# Question Insight

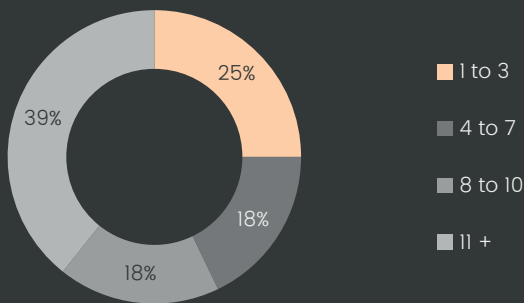
Which of the following best describes your position?



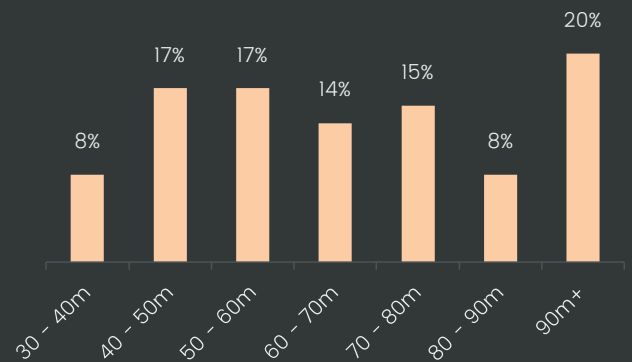
What type of superyacht projects have you worked on?



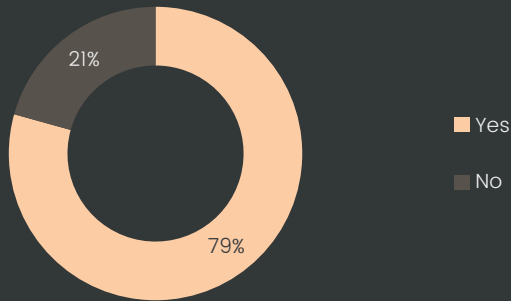
How many superyacht projects have you worked on?



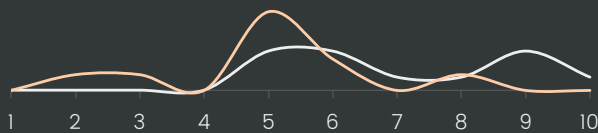
Typically, what size category did they fall into



## Have you been involved in the procurement of a satcomms solution?



## How would you rate your knowledge of satcomms?



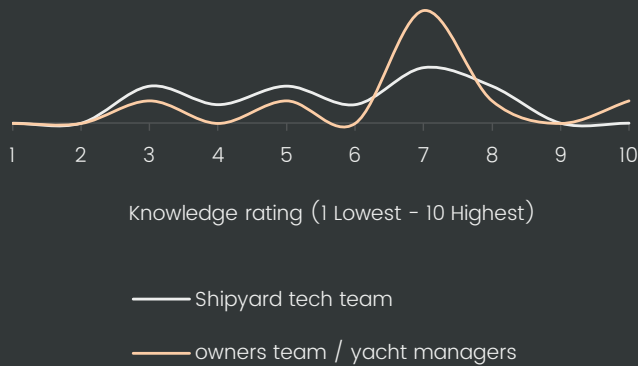
Knowledge rating (1 Lowest - 10 Highest)

— Shipyard tech team  
 — owners team / yacht managers

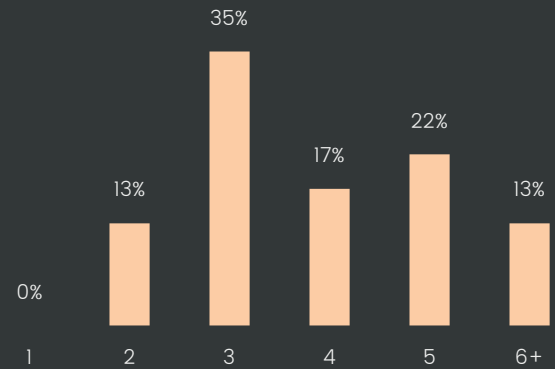
## What was/is your role in the satcomms procurement decision process?

Position	Role in decision matrix
Independent Technical Contractor	<i>Decision maker</i>
Independent Yacht Management Team	<i>System engineering</i>
Owner's Representative	<i>Decision maker</i>
Owner's Representative	<i>Decision maker</i>
Owner's Representative	<i>Advising of the most consumer friendly and yacht adapted supplier</i>
Owner's Representative	<i>Quote comparison</i>
Shipyard Technical Team	<i>Define quantities and types of systems suitable for intended purpose</i>
Shipyard Technical Team	<i>Read, discuss, research &amp; punt</i>
Shipyard Technical Team	<i>Recommend and approve</i>
Shipyard Technical Team	<i>Looking at service providers as well as hardware sometimes</i>
Systems Integrator	<i>Quotation manager</i>
Yacht Management Team (Brokerage House)	<i>Advisor, consultant</i>
Yacht Management Team (Brokerage House)	<i>Project manager / Pre-sales tender phase</i>
Yacht Management Team (Brokerage House)	<i>Finding solutions</i>

## How much influence do you have on the selection of satcomms hardware?



## From your experience, how many people are involved in the satcomms procurement decision process?



## How much influence do you have on the selection of satcomms airtime packages?



## How strongly does industry recommendation (excluding recommendation from satcomms providers) influence your satcomms procurement decision process?

- 1 **Satcomms Specialist**
- 2 **Owner's Representative**
- 3 **Systems Integrator**
- 4 **Shipyard Technical Team**
- 5 **Independent Yacht Management Team**
- 6 **Yacht Management Team (Brokerage)**
- 7 **Independent Technical Contractor**

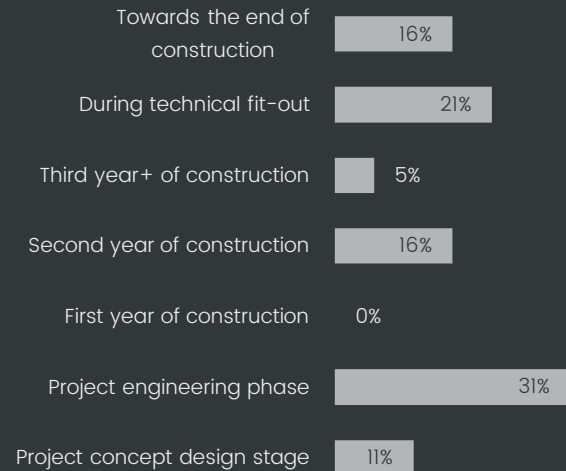
Ranked descending influence

## Who in the satcomms procurement decision process has the most influence?

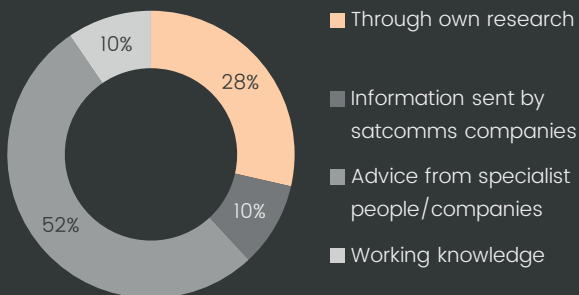
### Perceived Influencer (Sample responses)

Captain  
 Captain  
 Captain  
 Captains  
 Captains & managers  
 Installer  
 Owner's rep who could be the captain  
 Owner  
 Owner (rep) / captain  
 Owner rep  
 Owner representative & captain  
 Owner's rep  
 Technical department  
 The end user

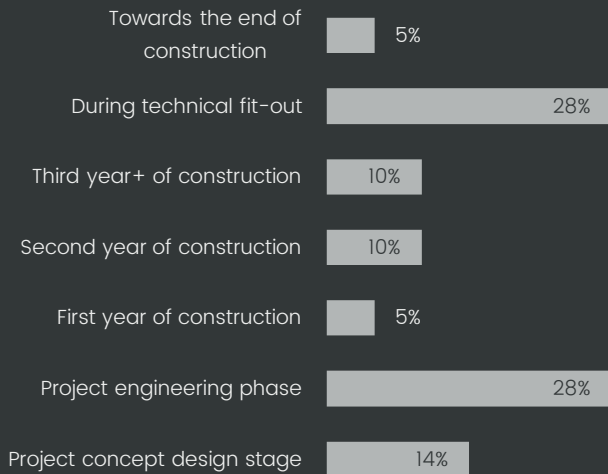
## From your experience, when is the decision made on the specific satcomms system hardware to be used on the yacht?



## Where do you get your information of satcomms products and services from?



## If applicable, how early are key satcomms service suppliers involved in the satcomms system-design, sourcing and implementation?



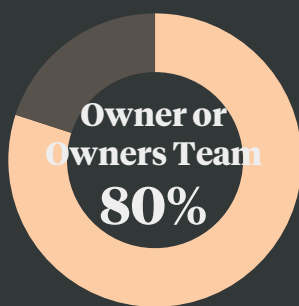
## What is the average satcomms installation budget?

€ 210,000

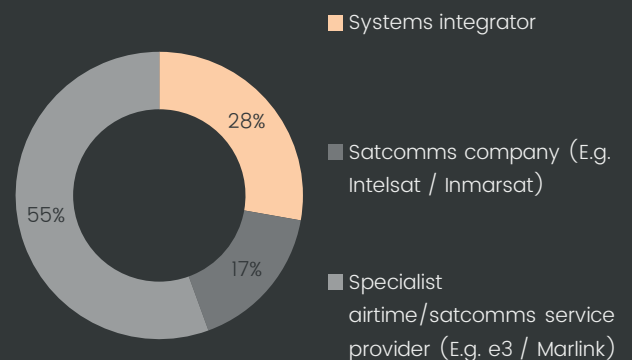
## By how much do you expect the installation budget to increase or decrease over the next 24 months?

+8.9%

## Who decides on the ultimate satcomms budget/scope?



## From the project(s) you have been involved with, who is the satcomms hardware package typically serviced by post-launch?









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# **The Superyacht Intelligence Agency**

**Lansdowne House**

**3-7 Northcote Road**

**London SW11 1NG**

**United Kingdom**

**+44 (0)20 7924 4004**

**[consultancy@thesuperyachtgroup.com](mailto:consultancy@thesuperyachtgroup.com)**

**[www.superyachtintelligence.com](http://www.superyachtintelligence.com)**