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T H E M A R I T I M E E M P L O Y E E  
S U R V E Y  
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*Attitudes to employment in the maritime sector*

SURVEY CONDUCTED

JULY-SEP 2016

BY:



Coracle **Transforms Learning**

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# WELCOME TO THE MARITIME EMPLOYEE SURVEY 2016

Celebrating 8 consecutive years, this survey of nearly 3,000 individuals within the global shore-based shipping and maritime market provides a detailed picture of financial and motivational issues from an employee perspective. We would like to thank all those who took the time to participate.

## Headline news

- Confidence in shipping jobs is at an all-time low in the 8 years we have been running this survey and participants are growing increasingly concerned over their job security
- There is a severe lack of promotion and advancement opportunities
- A greater number of employees believe they are likely to change jobs within the next 12 months compared to previous years
- Employees do not see career opportunities with their present employers and envisage better development opportunities with a different employer
- The amount of people given a salary increase in the past twelve months is down on previous years
- Fewer people received a bonus this year than in previous years
- The percentage of bonuses paid has fallen
- But.... the percentage of people who are happy with the bonus they received has increased

## The detail

The headlines are unlikely to surprise many readers of this report. Shipping markets have been, and remain, depressed, and save for some short term improvements, there is no evidence to suggest any notable change on the horizon in the next 12 months. Many industry experts expect it to be several years before any sustainable improvements materialise.

63% of our participants indicated they are concerned over job security with 49% being more concerned than they were this time last year.



36% of respondents reported a decrease in headcount at their current employers. Those showing the biggest level of concern with respect to business sector are brokers/charterers/traders (76%) and when looking at market sector statistics 81% of those in the offshore industry expressed concern with 63% being more concerned than last year.

Only 38% of respondents received a salary increase in the last 12 months, down from 47% in our 2015 survey. Hardest hit are the executive/senior managers with just 30% receiving a salary increase, closely followed by the chartering/trading/broking community with 31% of them receiving a pay rise.

49% of respondents received a bonus in the last 12 months compared to 58% in the 2015 survey. Those working in the technical/health and safety markets are faring best with 53% receiving a salary increase and 60% a bonus.

Of those survey participants who did receive a bonus, 69% were happy with what they were given, an increase from last year (63%) and perhaps an indicator of people realising how precious bonus payments are in the difficult markets the shipping and maritime communities are facing.

When looking at market sectors, those in the tanker segments fared best with 56% receiving a bonus and 42% a pay increase. From a global perspective, Asia Pacific led the way with 59% receiving a bonus, but the Indian Sub-Continent is ahead with respect to salary increases with 44% of our respondents there receiving one in the last 12 months.

The ongoing lack of promotion and advancement opportunities is the leading reason for dissatisfaction among employees in their current role, with 45% citing this as their main area of discontentment, followed by benefits packages. The relationships that individuals have with their line managers is the area employees are most content with, 49% putting this first.

37% of respondents are considering a job change within the next year and a further 25% within two years. 58% believe their job change will come about from moving to a new employer and, of all our survey participants, 64% believe better development opportunities would exist with a different employer. Those in the Executive/Senior Management business areas are the keenest to move on, with 45% likely to consider a move in less than one year. The P&I market is the most stable with only 27% believing they are likely to consider a move in the next 12 months.



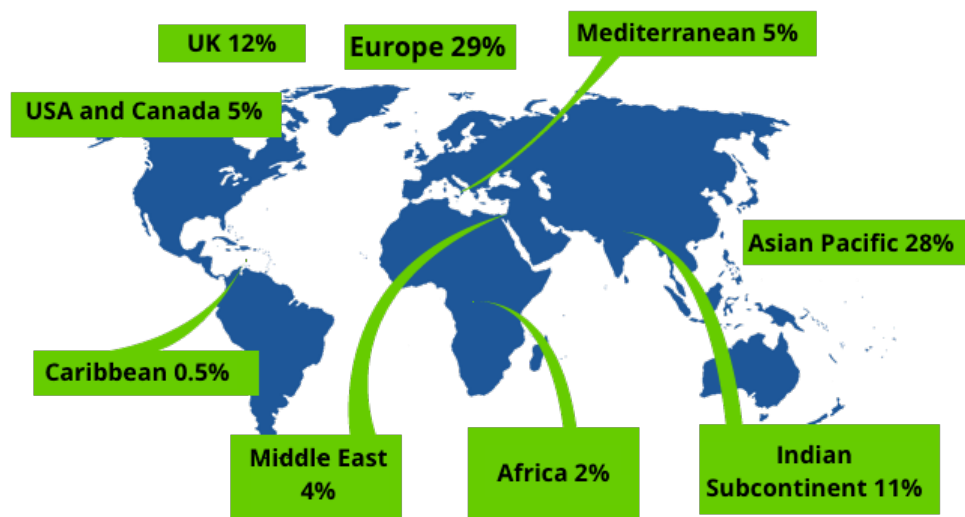
Our participants have indicated that it is extremely important to them that their employer provides training and development opportunities, yet only 47% work for employers who either provide, pay for or simply encourage training. For those who are studying, 63% of employers offer no support, 26% offer access to training courses and 17% offer time off for self-study.

With the impact of Brexit remaining to be seen, we asked for people’s opinion on what might have a positive or negative impact. Our participants found no positives arising from Brexit and perceive the biggest negative as being the impact of business tariffs on trade between the UK and EU, followed by the potential of employers relocating their business as a result of Brexit.

When considering a job change, 80% of those looking for a new job turn to specialist maritime recruiters before considering other avenues such as LinkedIn, TradeWinds, Lloyds List, Facebook or word of mouth opportunities. 84% of respondents feel it is extremely important that the recruitment consultants they are dealing with have previous front line experience of the maritime markets.

This year’s results are thought provoking: 62% of those who took part believe they will change jobs within 24 months and whilst market conditions indicate a flood of new jobs to the market is unlikely, it is clear that employees believe better opportunities exist elsewhere and are motivated to find them. It is understandable that the financial restrictions employers face limit what they can provide in terms of salary increases, bonus payments and training/development, but despite bonus payments being lower than in previous years, more people are happy with the amount they received so there does appear to be a fair amount of realism in people’s expectations. Can anything be done however to improve employee morale without breaking the budget? We believe it can and that there are some very simple steps which can be immediately implemented that yield a positive response and a more cohesive team environment.

Geographical location of respondents:





## WHAT'S IN THE REPORT?

On the following pages, you will find the report broken down as follows:

### **Business area specific statistics in the following categories:**

- Broking, chartering and trading
- Executive / senior management
- Technical / HSEQ
- P&I / legal / insurance
- Vessel operations
- Other (incorporating HR / crewing / finance / admin)

### **Sector specific statistics in the following categories:**

- Tanker
- Dry cargo
- Offshore
- Other (mixed fleet / container / passenger)

### **Geographic specific statistics in the following categories:**

- Europe
- USA & Canada
- Caribs
- Middle East
- Indian sub-Continent
- Asia Pacific

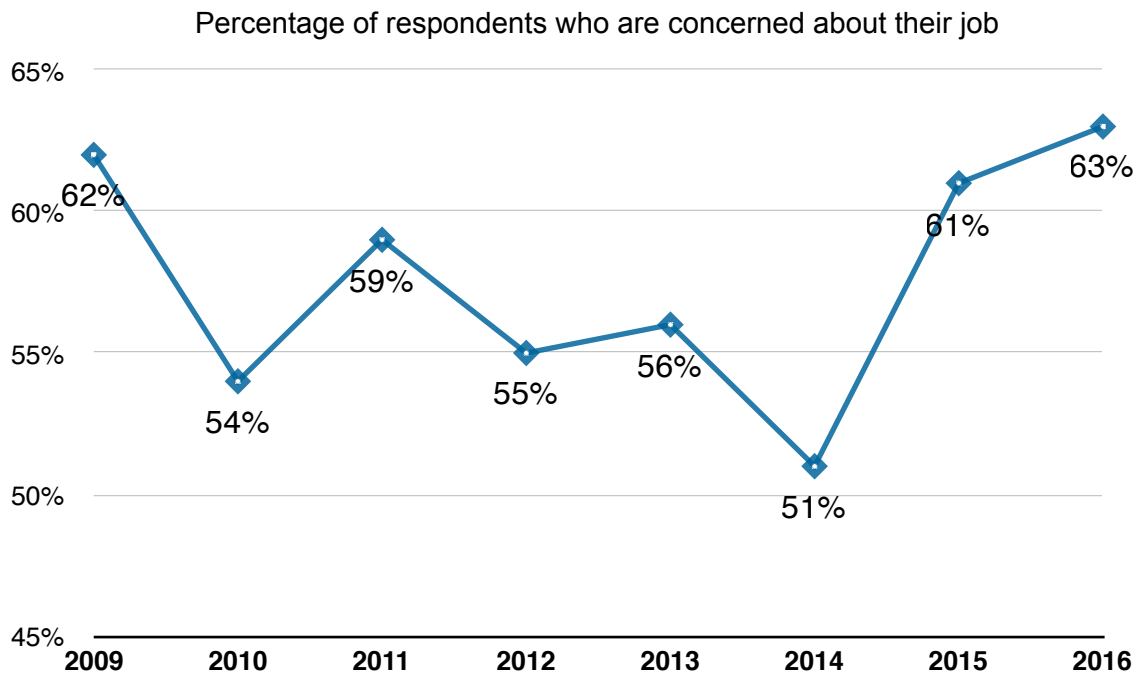


## HEADLINE STATISTICS

### Job security and employment opportunities

63% of our survey participants indicated they are concerned about job security compared to 61% in 2015 and 51% in 2014.

Only 28% are confident about employment opportunities they are seeing in the market compared to 42% in 2015 and 60% in 2014.



### Salary / Bonus

38% have received a salary increase and 49% of respondents have received a bonus in the last 12 months. Of those who did receive a bonus, 32% received between 1-10% of their annual salary and 30% received between 11-25% of their annual salary. Of the 58% who did receive a bonus, 68% were happy with the amount they received.



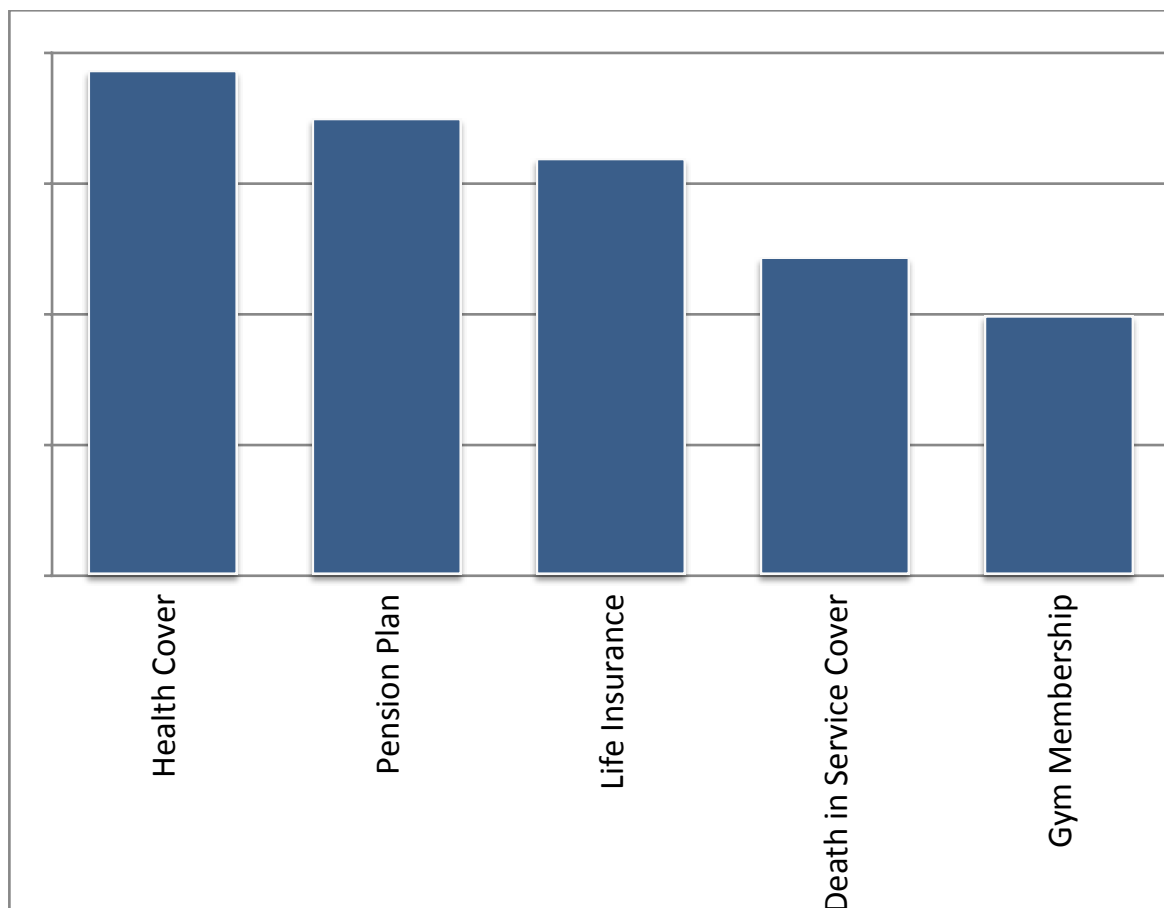
## Areas of current employment providing greatest / least satisfaction

Aspects providing participants in our survey with the most contentment in their jobs are the the relationship they have with their line manager, closely followed by the reputation of their employer. A lack of training and development opportunities is causing the most dissatisfaction, closely followed by benefits packages.

## Areas of importance in considering a job change

When considering a career move, the relationship with a line manager ranks as most important followed by job security.

## Benefits packages



## Changing jobs / headcount changes

84% of respondents indicated that when dealing with specialist shore-based maritime recruitment agencies, it is extremely important to them that that the



recruitment consultants they are dealing with have previous front line experience of the maritime sector prior to working in recruitment.

79% of our survey participants have not changed jobs in the last 12 months.

37% of respondents are considering a job change within 12 months and a further 25% within 24 months.

36% of respondents have reported a decrease in headcount at their current organisation over the last 12 months.

## **Training and development**

39% of respondents possess a post-graduate degree.

47% of participants advised that their current employer does provide / pay for / encourage training.

If they are able to undertake training, the majority of respondents prefer instructor-led face to face training at a training centre.

## **Employment**

37% of respondents said they would anticipate staying in their job for up to 1 year, 25% 1-2 years and 19% 3-4 years.

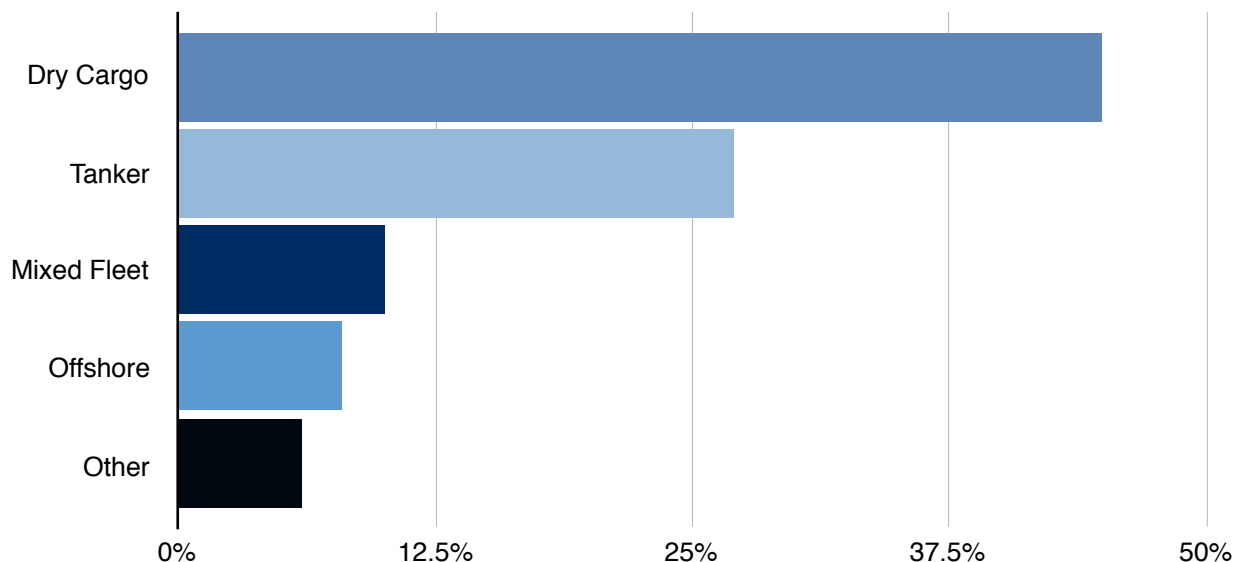
58% of participants said that a job change would most likely occur by moving to a new employer, and 64% of participants feel that better development opportunities would come from a new employer.





## RESULTS BY BUSINESS AREA

### BROKERS / CHARTERERS / TRADERS



#### **Job security and employment opportunities**

76% of our survey participants indicated they are concerned about job security, a significant increase from 2015 where 55% showed concern. 56% indicated they are more concerned than they were this time last year.

15% are confident about employment opportunities they are seeing in the market compared to 2015.

#### **Areas of current employment providing greatest / least satisfaction**

Ranking highest in terms of satisfaction was employer reputation (47% voted this first), followed by relationship with their manager (40% voted this second).

Scoring lowest this year was training and development opportunities with 54% of respondents unhappy in this area.

#### **Areas of importance in considering a job change**

When considering a change of job, relationship with line manager is most important (71% voted this first) followed by job security (69% voted this second).



## **Salary / Bonus**

31% of our participants have seen an increase to their basic salary compared to 47% in 2015.

55% of respondents within this sector have received a bonus within the last 12 months. Of these 33% received between 1-10% of their salary and 30% received 11-25% of their salary. 60% of those receiving a bonus were content with the amount they received.

## **Changing jobs / headcount changes**

49% of respondents report a decrease in headcount within their current organisation in the last 12 months.

88% of respondents indicated that when dealing with specialist shore-based maritime recruitment agencies, it is extremely important to them that the recruitment consultants they are dealing with have previous frontline experience of the maritime sector prior to working in recruitment.

17% of our survey participants have changed jobs in the last 12 months.

## **Training and development**

Only 35% of participants advised that their current employer does provide / pay for / encourage training. Of those who do study, 73% say there is no support from their employer with respect to study leave or paid for courses

If they are able to undertake training, the majority of respondents prefer instructor-led face to face training at a training centre.

## **Employment**

When asked “how long are you likely to stay in the same job before considering making a move?”, the results were:

33% up to 1 year

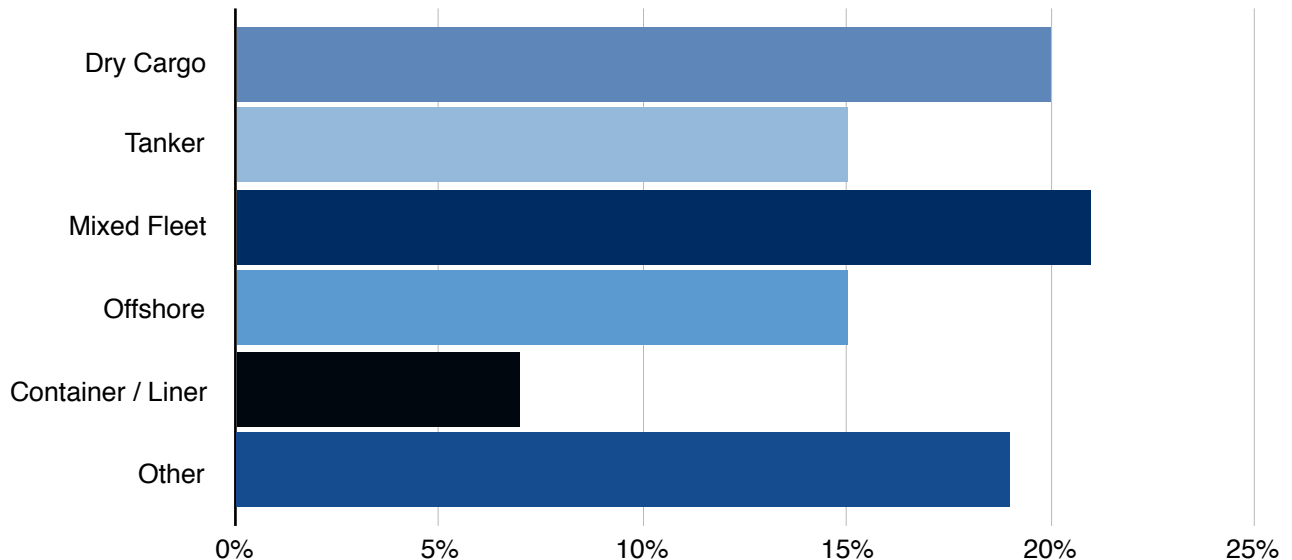
28% 1 to 2 years

20% 3 to 4 years

50% of respondents believe that a job change for them would be most likely by moving to a new employer and 67% of respondents believe that better development opportunities exist for them with a new employer.



## EXECUTIVE / SENIOR MANAGEMENT



### Job security and employment opportunities

64% of our survey participants indicated they are concerned about job security. 48% are more concerned than they were this time last year.

27% are confident about employment opportunities they are seeing in the market compared to 2015.

### Areas of current employment providing greatest / least satisfaction

Aspects providing participants in our survey with the most contentment in their jobs are the relationship they have with their line manager, followed by the reputation of their employer. Training opportunities (or a lack of) are causing the most dissatisfaction, closely followed by promotion and advancement potential.

### Areas of importance in considering a job change

When considering a career move, the relationship individuals have with their line manager ranks highest in terms of importance with 75% of respondents voting this first.



## **Salary / Bonus**

30% have received a salary increase in the last 12 months compared to 45% in our 2015 survey.

45% of respondents have received a bonus in the last 12 months compared to 57% in 2015. Of those who did receive a bonus, 13% received between 1-10% of their annual salary and 32% received between 11-25% of their annual salary. Of the 45% who did receive a bonus, 78% were happy with the amount they received.

## **Changing jobs / headcount changes**

80% of respondents indicated that when dealing with specialist shore-based maritime recruitment agencies, it is extremely important to them that the recruitment consultants they are dealing with have previous front line experience of the maritime sector prior to working in recruitment.

20% of our survey participants have changed jobs in the last 12 months.

54% of respondents reported a decrease in headcount within their organisation over the last 12 months.

## **Training and development**

43% of participants advised that their current employer does provide / pay for / encourage training.

## **Employment**

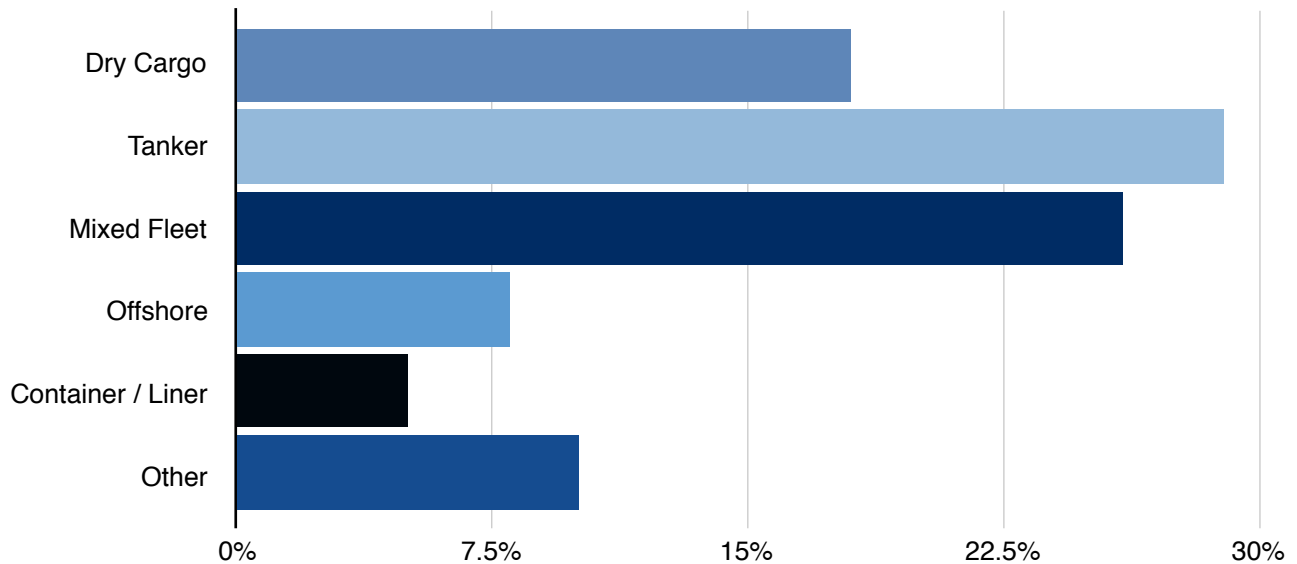
When asked “how long are you likely to stay in the same job before considering making a move?”, the results were:

45% up to 1 year  
19% 1 to 2 years  
16% 3 to 4 years

66% of respondents believe that a job change for them would be most likely by moving to a new employer and 72% of respondents believe that better development opportunities exist for them with a new employer.



## TECHNICAL / HSEQ



### Job security and employment opportunities

58% of our survey participants indicated they are concerned about job security which is similar to the 60% who expressed concern in 2015. 37% feel more concerned than they were this time last year.

31% are confident about employment opportunities they are seeing in the market compared to 2015.

### Areas of current employment providing greatest / least satisfaction

Aspects providing participants in our survey with the most contentment in their jobs are the relationship they have with their line manager. Promotion prospects are causing the most dissatisfaction.

### Areas of importance in considering a job change

When considering a career move, work life balance ranks highest in terms of importance with 64% of respondents voting this first, similar to last year's results.



## **Salary / Bonus**

53% have received a salary increase in the last 12 months compared with 54% of respondents in 2015.

60% of respondents have received a bonus in the last 12 months compared to 69% in 2015. Of those who did receive a bonus, 45% received between 1-10% of their annual salary and 32% received between 11-25% of their annual salary. Of the 60% who did receive a bonus, 75% were happy with the amount they received.

## **Changing jobs / headcount changes**

83% of respondents indicated that when dealing with specialist shore-based maritime recruitment agencies, it is extremely important to them that the recruitment consultants they are dealing with have previous front line experience of the maritime sector prior to working in recruitment.

29% of our survey participants have changed jobs in the last 12 months.

25% of respondents reported a decrease in headcount within their organisation over the last 12 months.

## **Training and development**

58% of participants advised that their current employer does provide / pay for / encourage training.

## **Employment**

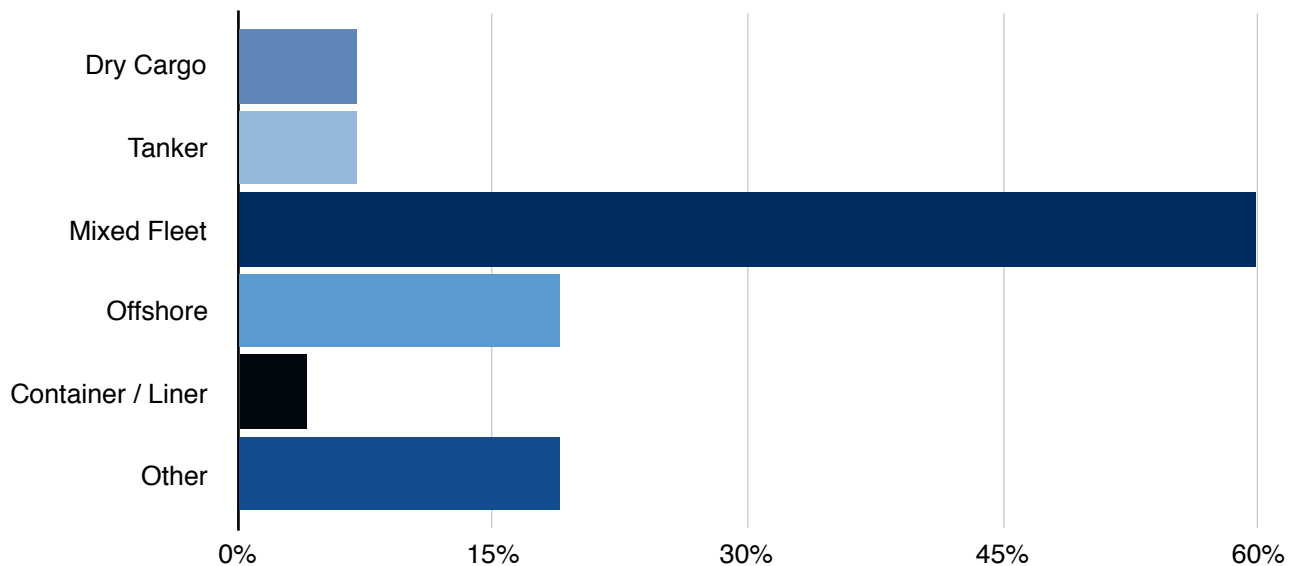
When asked “how long are you likely to stay in the same job before considering making a move?”, the results were:

42% up to 1 year  
20% 1 to 2 years  
17% 3 to 4 years

56% of respondents believe that a job change for them would be most likely by moving to a new employer and 64% of respondents believe that better development opportunities exist for them with a new employer.



## P&I, LEGAL, INSURANCE



### Job security and employment opportunities

63% of our survey participants indicated they are concerned about job security, compared to 48% in 2015. 48% are more concerned than they were this time last year.

22% are confident about employment opportunities they are seeing in the market compared to 2015.

### Areas of current employment providing greatest / least satisfaction

Aspects providing participants in our survey with the most contentment in their jobs are the reputation of their employer, closely followed by the relationship they have with their line manager. Promotion prospects are causing the most dissatisfaction.

### Areas of importance in considering a job change

When considering a career move, job security ranked highest in terms of importance with 84% of respondents voting this first.



## **Salary / Bonus**

48% have received a salary increase in the last 12 months compared to 43% in 2015.

48% of respondents have received a bonus in the last 12 months compared to 52% in 2015. Of those who did receive a bonus, 42% received between 1-10% of their annual salary and 50% received between 11-25% of their annual salary. Of the 48% who did receive a bonus, 52% were happy with the amount they received.

## **Changing jobs / headcount changes**

80% of respondents indicated that when dealing with specialist shore-based maritime recruitment agencies, it is extremely important to them that the recruitment consultants they are dealing with have previous front line experience of the maritime sector prior to working in recruitment.

21% of our survey participants have changed jobs in the last 12 months.

21% of respondents reported a decrease in headcount within their organisation over the last 12 months.

## **Training and development**

50% of participants advised that their current employer does provide / pay for / encourage training.

## **Employment**

When asked “how long are you likely to stay in the same job before considering making a move?”, the results were:

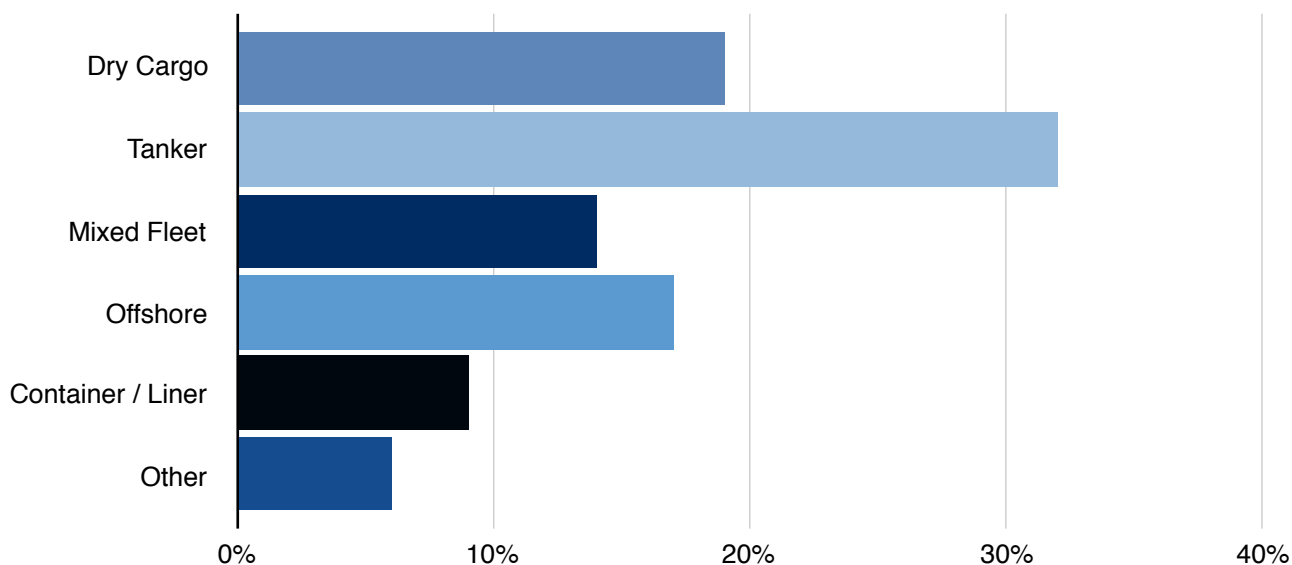
27% up to 1 year  
35% 1 to 2 years  
12% 3 to 4 years

81% of respondents believe that a job change for them would be most likely by moving to a new employer and 69% of respondents believe that better development opportunities exist for them with a new employer.





## VESSEL OPERATIONS



### Job security and employment opportunities

58% of our survey participants indicated they are concerned about job security compared to 65% in 2015. 47% are more concerned than they were this time last year.

27% are confident about employment opportunities they are seeing in the market.

### Areas of current employment providing greatest / least satisfaction

Aspects providing participants in our survey with the most contentment in their jobs are the reputation of their employer. Promotion prospects are causing the most dissatisfaction.

### Areas of importance in considering a job change

When considering a career move, job security ranks highest in terms of importance with 66% of respondents voting this first.

### Salary / Bonus

36% have received a salary increase in the last 12 months compared to 54% in 2015.



52% of respondents have received a bonus in the last 12 months compared to 59% in 2015. Of those who did receive a bonus, 34% received between 1-10% of their annual salary and 28% received between 11-25% of their annual salary. Of the 52% who did receive a bonus, 67% were happy with the amount they received.

## Changing jobs / headcount changes

83% of respondents indicated that when dealing with specialist shore-based maritime recruitment agencies, it is extremely important to them that the recruitment consultants they are dealing with have previous front line experience of the maritime sector prior to working in recruitment.

18% of our survey participants have changed jobs in the last 12 months.

33% of respondents reported a decrease in headcount within their organisation over the last 12 months.

## Training and development

49% of participants advised that their current employer does provide / pay for / encourage training.

## Employment

When asked “how long are you likely to stay in the same job before considering making a move?”, the results were:

34% up to 1 year

25% 1 to 2 years

24% 3 to 4 years

58% of respondents believe that a job change for them would be most likely by moving to a new employer and 58% of respondents believe that better development opportunities exist for them with a new employer.



## OTHER

THIS CATEGORY CONSISTS OF A DIVERSE GROUP OF PARTICIPANTS INCLUDING HR, CREWING, FINANCE, ADMIN AND PROCUREMENT

### **Job security and employment opportunities**

63% of our survey participants indicated they are concerned about job security. 52% are more concerned than they were this time last year.

32% are confident about employment opportunities they are seeing in the market.

### **Areas of current employment providing greatest / least satisfaction**

Aspects providing participants in our survey with the most contentment in their jobs are the relationship they have with their line manager. Promotion prospects are causing the most dissatisfaction.

### **Areas of importance in considering a job change**

When considering a career move, relationship with line manager ranks highest in terms of importance with 67% of respondents voting this first.

### **Salary / Bonus**

40% have received a salary increase in the last 12 months compared to 48% in 2015.

42% of respondents have received a bonus in the last 12 months, compared to 56% in 2015. Of those who did receive a bonus, 36% received between 1-10% of their annual salary and 24% received between 11-25% of their annual salary. Of those who did receive a bonus, 69% were happy with the amount they received.

### **Changing jobs / headcount changes**

87% of respondents indicated that when dealing with specialist shore-based maritime recruitment agencies, it is extremely important to them that the recruitment consultants they are dealing with have previous front line experience of the maritime sector prior to working in recruitment.

22% of our survey participants have changed jobs in the last 12 months.



28% of respondents reported a decrease in headcount within their organisation over the last 12 months.

## **Training and development**

47% of participants advised that their current employer does provide / pay for / encourage training.

## **Employment**

When asked “how long are you likely to stay in the same job before considering making a move?”, the results were:

- 34% up to 1 year
- 27% 1 to 2 years
- 20% 3 to 4 years

52% of respondents believe that a job change for them would be most likely by moving to a new employer and 59% of respondents believe that better development opportunities exist for them with a new employer.



## RESULTS BY SECTOR

### DRY CARGO

66% of participants are concerned about their current position (this was 62% in 2015), 55% of these being more concerned than this time last year.

20% are confident in the number of opportunities they are seeing coming on to the market.

51% have received a bonus within the last 12 months (compared to 54% in 2015) of which 28% received 1-10% of salary and 43% received 28% of salary. 71% were happy with their bonus.

37% of participants have received a pay rise within the last 12 months (similar to 43% in 2015).

18% have changed jobs within the last 12 months (down from 24% in 2014).

### TANKER

55% of participants are concerned about their current position (compared to 52% in 2015), 41% of these being more concerned than this time last year.

32% are confident in the number of opportunities they are seeing coming on to the market.

56% have received a bonus within the last 12 months (this was 66% in 2015) of which 40% received 1-10% of salary and 24% received 11-25% of salary.

42% of participants have received a pay rise within the last 12 months compared to 55% in 2015.

18% have changed jobs within the last 12 months compared to 15% in 2014.



## OFFSHORE

81% of participants are concerned about their current position (up from 67% in 2015), 63% of these being more concerned than this time last year.

25% are confident in the number of opportunities they are seeing coming on to the market.

29% have received a bonus within the last 12 months (down from 66% in 2015) of which 35% received 1-10% of salary and 24% received 11-25% of salary.

17% of participants have received a pay rise within the last 12 months (a drastic reduction from 55% in 2015).

22% have changed jobs within the last 12 months.

## OTHER

(MIXED FLEET / CONTAINER / PASSENGER)

62% of participants are concerned about their current position, 48% of these being more concerned than this time last year.

27% are confident in the number of opportunities they are seeing coming on to the market.

47% have received a bonus within the last 12 months of which 28% received 1-10% of salary and 34% received 11-25% of salary.

39% of participants have received a pay rise within the last 12 months.

23% have changed jobs within the last 12 months



## RESULTS BY GEOGRAPHY

### EUROPE

63% of participants are concerned about their current position (up from 49% in 2015), 49% of these being more concerned than this time last year.

28% are confident in the number of opportunities they are seeing coming on to the market.

49% have received a bonus within the last 12 months (compared to 52% in 2014) of which 32% received 1-10% of salary and 30% received 11-25% of salary.

39% of participants have received a pay rise within the last 12 months compared to 44% in 2015.

21% have changed jobs within the last 12 months compared to 22% in 2014.

Employees are likely to stay in the same job for:

Up to 1 year – 37%

1-2 years – 25%

3-4 years – 19%

### USA & CANADA

70% of participants are concerned about their current position (this was 48% in 2015), 61% of these being more concerned than this time last year.

18% are confident in the number of opportunities they are seeing coming on to the market.

57% have received a bonus within the last 12 months (compared to 68% in 2014) of which 25% received 1-10% of salary and 37% received 11-25% of salary.

36% of participants have received a pay rise within the last 12 months compared to 35% in 2014.

18% have changed jobs within the last 12 months compared to 36% in 2014.

Employees are likely to stay in the same job for:

Up to 1 year – 60%

1-2 years – 23%

3-4 years – 7%



## MIDDLE EAST

77% of participants are concerned about their current position (compared to 48% in 2015), 59% of these being more concerned than this time last year.

27% are confident in the number of opportunities they are seeing coming on to the market.

53% have received a bonus within the last 12 months (compared to 68% in 2015) of which 20% received 1-10% of salary and 10% received 11-25% of salary.

21% of participants have received a pay rise within the last 12 months compared to 35% in 2015.

16% have changed jobs within the last 12 months.

Employees are likely to stay in the same job for:

Up to 1 year – 45%

1-2 years – 30%

3-4 years – 10%

## INDIAN SUB-CONTINENT

74% of participants are concerned about their current position (this was 72% in 2015), 53% of these being more concerned than this time last year.

26% are confident in the number of opportunities they are seeing coming on to the market.

57% have received a bonus within the last 12 months (compared to 51% in 2015) of which 47% received 1-10% of salary and 28% received 11-25% of salary.

44% of participants have received a pay rise within the last 12 months (this was 51% in 2015).

21% have changed jobs within the last 12 months.

Employees are likely to stay in the same job for:

Up to 1 year – 48%

1-2 years – 23%

3-4 years – 15%





## ASIA PACIFIC

64% of participants are concerned about their current position (this was 65% in 2015), 50% of these being more concerned than this time last year.

50% are confident in the number of opportunities they are seeing coming on to the market.

59% have received a bonus within the last 12 months (this was 74% in 2015) of which 30% received 1-10% of salary and 29% received 11-25% of salary.

40% of participants have received a pay rise within the last 12 months (this was 61% in 2015)

20% have changed jobs within the last 12 months (similar to 2014s 21%).

Employees are likely to stay in the same job for:

Up to 1 year – 38%

1-2 years – 29%

3-4 years – 18%

## THANK YOU

Thank you for taking part in the Maritime Employee Survey 2016. We hope you found the results of interest. If you have any comments, please get in touch with the teams at Halcyon Recruitment and/or Coracle Online.



## ABOUT CORACLE ONLINE

Coracle offer a business focussed, white-label learning platform. Putting digital learning and engagement at the heart of company induction and compliance is a key step to gaining insights from skills gap analysis.

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## ABOUT HALCYON RECRUITMENT

Halcyon Recruitment provides bespoke and tailored recruitment services solely for the shore-based shipping and maritime sector from its offices in London, Southampton and Singapore. Filling roles across the globe from Executive Search level positions through to graduate and trainee recruitment, all of our expert recruitment team have previous front line maritime industry experience prior to their careers as highly trained recruitment professionals.

Roles that we cover include CEOs, COOs, CFOs, MDs, charterers, traders, brokers, operators, technical positions (managers / superintendents / HSQE personnel), purchasers, P&I (claims handlers through to Directors), lawyers, crew managers/executives, HR managers, accountants and so on. We offer a wide range of services that include executive search, contingency recruitment, salary and market analysis and HR services.

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