

THE MARITIME EMPLOYEE SURVEY

Attitudes to employment and employers in the maritime sector

SURVEY CONDUCTED
JAN – MAR 2020

BY:



WELCOME TO THE 11TH MARITIME EMPLOYEE SURVEY

Welcome to the results of our **11th annual Maritime Employee Survey** conducted from January – March 2020.

We have again surveyed individuals within the global shipping and maritime markets in order to provide a detailed view of issues from the employee perspective. We would like to thank all those (n=1,371) who took the time to participate.

You will note some changes to topics this year in line with some key issues facing the industry. As in previous years, we look at confidence levels in the current employment market as well as salary increases and bonus payments. This year we have also looked in more detail at working environments, particularly with respect to inclusion, diversity and discrimination. Taking into account concerns that the shipping industry may not be attractive to future generations, we also asked if our survey participants would choose a different industry to work in if they could go back to the beginning of their career.

The results are once more presented by business area, market sector and geographical region.

The commitment and resilience of shipping employees around the globe, both ashore and at sea, has been widely reported and much praised during the COVID-19 crisis, which is still current at the time of writing this report (May 2020). It is widely recognised and acknowledged that an overnight change occurred for most, requiring immediate adaptation to remote working and new technologies, both areas where the shipping industry has been lagging far behind many other industries and sectors. For the first time as an industry, we have openly praised our employees and, one could argue, truly started to realise their position as our most valuable asset.

It is important to keep in mind that the statistics presented in this report originate from our survey conducted just before COVID-19 turned into a global pandemic. Much discussion was had in the 12-24 months prior to COVID-19 regarding creating inclusive working environments, encouraging diversity (notably on the gender front but our findings indicate other areas experience greater discrimination across the industry) and how to both retain and attract employees in the industry. Our research shows some trends which could be perceived as extremely worrying for the industry at any time,

but particularly now when we are faced with such uncertainty and need to rely on an engaged and motivated workforce.

Our survey has found that 55% of employees are actively seeking a new role and a further 39% are not active but open to offers. If only 6 out of every 100 employees are committed to staying put, the potential detrimental impact to any one business is significant and employers would do well to identify why.

Less than half of survey respondents (a mere 48%) have had at least one meaningful conversation about their personal development with their line manager within the last six months preceding survey completion. Furthermore, only 60% of employees cite their company culture as being one where they feel supported in the workplace and an overwhelming 90% would like their employer to do more to create a workplace where everyone feels valued and able to contribute their thoughts and ideas.

Encouragingly from an employee perspective, those who work in the shipping industry are keen to learn and to develop. 74% of our survey participants would like to have a defined development plan with their employer to help them understand what they need to do in order to do their job better. Vessel Operators rank highest (81% wishing to have a defined development plan), perhaps a contributing factor as to why we see so many (60%) actively looking for new employment.

Positively, 76% of respondents are motivated to take part in training to enhance the skills needed to develop their career but these opportunities appear to be in relatively short supply. Only 45% of respondents work for companies who give them the opportunity to participate in external training / education related to their job and only 62% of respondents work for companies who give them the opportunity to participate in internal training / education related to their job.

When looking at diversity, more than half of survey participants (52%) have been aware of discrimination in the industry but, perhaps surprisingly given the industry's focus of late, gender discrimination does not top the list which was nationality (60%), age (41%), gender (37%), ethnicity (32%). There are regional variations within this but, across all regions, nationality topped the list.

Employee engagement has been adopted by many industries as part of their business critical strategy. The Chartered Institute of Personnel Development states that "Employees who have good quality jobs and are managed well, will not only be happier, healthier and more fulfilled, but are also more likely to drive productivity, better products or services, and innovation. This mutual-gains view of motivation and people management lies at the heart of employee engagement, a concept that's become increasingly mainstream in management thinking over the last decade."

The benefit to our industry is that we can capitalise on best practice initiatives that have already been tried and tested. When it comes to human resource management and employee engagement, these practices include:

- involving employees in the development of the business
- communicating with employees
- adopting flexible working and policies that encourage equality and diversity
- setting targets and rewarding achievement
- offering employee development and training

With over one third of our survey participants (35%) stating they would choose a different industry to work in if they could go back to the beginning of their career, perhaps the light that COVID-19 has shone on our resilient employees will encourage shipping and maritime employers to use this opportunity for positive change and from there, over time, we can see some positive trends developing compared to where we are today with respect to employee engagement and development.

WHAT'S IN THE REPORT?

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

Results Overview

Business area specific statistics in the following categories:

- Broking, chartering and trading
- Executive / senior management
- Technical / HSEQ
- P&I / legal / insurance
- Vessel operations
- HR / Crewing / Support functions

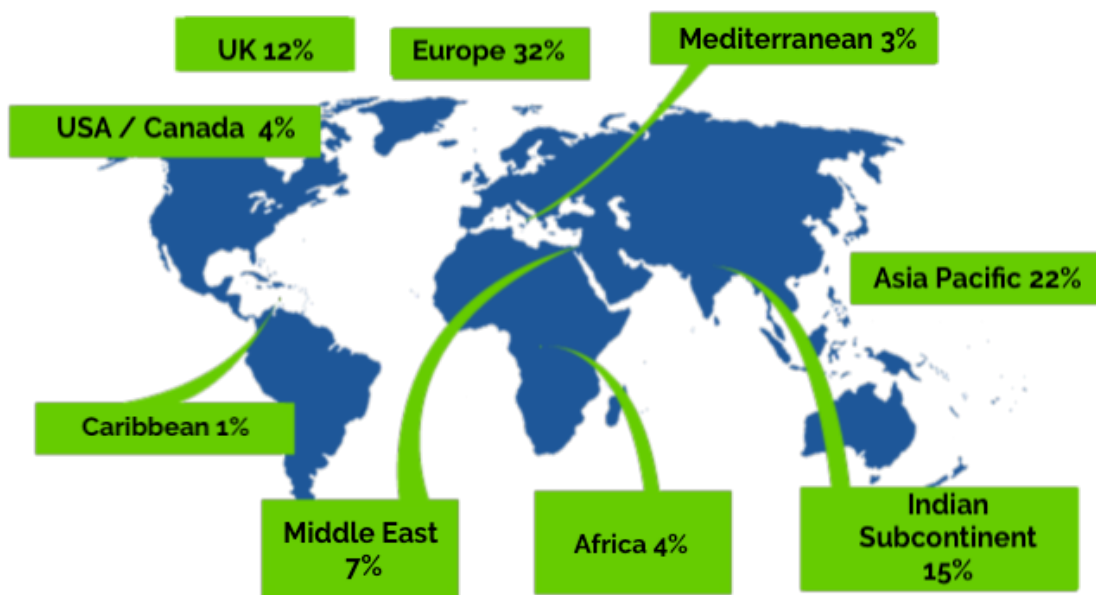
Sector specific statistics in the following categories:

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

Geographic specific statistics in the following categories:

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

Geographical location of respondents:



RESULTS OVERVIEW

Job Confidence

73% of survey participants feel either extremely or moderately secure in their current job and this applies, within a few percentage points, across all business areas reviewed.

Salary Increases

37% of respondents received a salary increase in the 12 months preceding survey completion.

When looking at market sectors, those working in Technical / Health and Safety roles fared best with respect to salary increase with 48% receiving a pay rise in the previous 12 months.

Geographically, Asia Pacific and the Indian sub-Continent fared best on salary increases with 41% of respondees in each region receiving them.

Bonuses

46% of respondents received a bonus in the 12 months preceding survey completion.

Of those who received a bonus, Executive / Senior Management led the percentage of those receiving bonuses with 59% having received one in the 12 months preceding survey completion, they were closely followed by those in Broking / Chartering / Trading (53% receiving a bonus).

Geographically Asia Pacific was strongest with 52% receiving a bonus, closely followed by the Middle East at 51%.

Discrimination

52% of survey respondents have been personally aware of discrimination within the shipping industry. Of these:

- 60% were aware of discrimination due to nationality
- 41% were aware of discrimination due to age
- 37% were aware of discrimination due to gender
- 32% were aware of discrimination due to ethnicity

Only 47% of survey respondents feel they are able to raise discrimination concerns internally with their current employer.

Inclusion and Diversity

76% of respondents are encouraged to contribute and share ideas they have related to their job, the company, the company's business and/or their working environment but only 52% feel these are taken into consideration.

Only 60% of participants state their company culture is one where they feel supported in the workplace and a staggering 90% of respondents would like their employer to do more to create a workplace where everyone feels valued and able to contribute their thoughts and ideas.

When asked how much they feel that the company cares for them, respondents answered:

- 15% a great deal
- 38% moderately
- 31% slightly
- 15% not at all

74% believe employers in shipping / maritime do not value their employees enough.

61% of respondents cite diversity in the workplace as being extremely important, 25% as being somewhat important.

36% know their employer operates a Diversity and Inclusion programme / policy, 39% state their employer does not do so and 25% don't know if their employer does or not.

72% believe their employer could do more to achieve a diverse and inclusive workforce.

Working from home, flexible working hours and financial support for training and development / study ranked highest among the benefits respondents do not presently have but would like to have.

Training and Development

39% of survey respondents state their current employer offers good career progression opportunities.

48% have had at least one meaningful conversation about their personal development with their line manager within the last six months preceding survey completion.

74% would like a defined development plan with their employer to help them understand what they need to do in order to do their job better.

45% of respondents are given the opportunity to participate in external training / education related to their job.

62% of respondents are given the opportunity to participate in internal training / education related to their job.

Current job seeking status

55% of survey participants are actively seeking a new role.
39% are not actually looking but are open to offers

Shipping industry opinion

73% would recommend the shipping / maritime industry to those from outside the sector considering it for a possible career but 35% of respondents would choose a different industry to work in if they could go back to the beginning of their career.

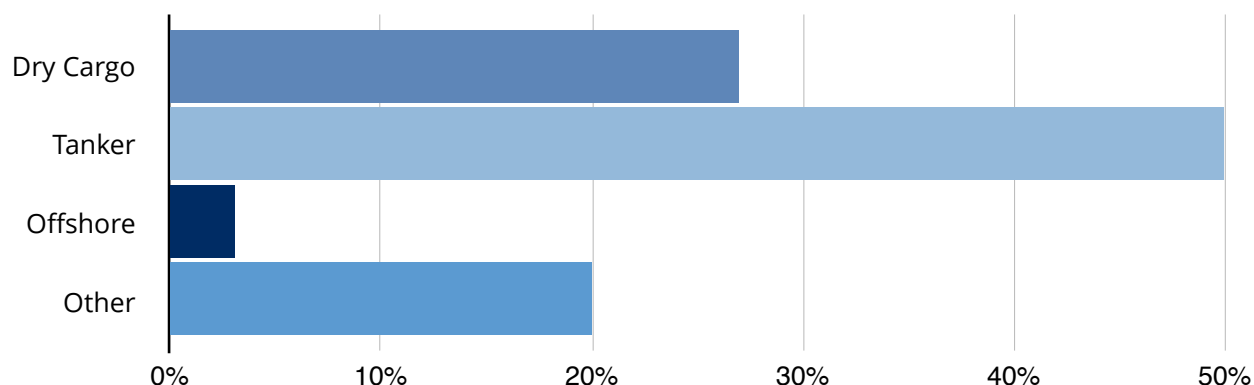
70% of survey respondents believe the shipping industry is struggling to attract new talent.

RESULTS BY BUSINESS AREA

BROKERS / CHARTERERS / TRADERS

Responses came from the following sectors

(Other includes: mixed fleet / container / passenger)



Job Confidence

78% of survey participants feel either extremely or moderately secure in their current job.

Salary Increases

39% of respondents received a salary increase in the 12 months preceding survey completion.

Bonuses

53% of respondents received a bonus in the 12 months preceding survey completion.

Discrimination

37% of survey respondents have been personally aware of discrimination within the shipping industry. Of these:

- 54% were aware of discrimination due to nationality
- 49% were aware of discrimination due to gender
- 38% were aware of discrimination due to age
- 32% were aware of discrimination due to ethnicity

48% of survey respondents feel they are able to raise discrimination concerns internally with their current employer.

Inclusion and Diversity

79% of respondents are encouraged to contribute and share ideas they have related to their job, the company, the company's business and/or their working environment, 64% feel these are taken into consideration.

63% of participants state their company culture is one where they feel supported in the workplace and 84% of respondents would like their employer to do more to create a workplace where everyone feels valued and able to contribute their thoughts and ideas.

When asked how much they feel that the company cares for them, respondents answered:

- 12% a great deal
- 49% moderately
- 27% slightly
- 12% not at all

69% believe employers in shipping / maritime do not value their employees enough.

47% of respondents cite diversity in the workplace as being extremely important.

28% know their employer operates a Diversity and Inclusion programme / policy, 37% state their employer does not.

74% believe their employer could do more to achieve a diverse and inclusive workforce.

Working from home and financial support for training and development / study ranked highest among the benefits respondents do not presently have but would like to have.

Training and Development

45% of survey respondents state their current employer offers good career progression opportunities.

68% have had at least one meaningful conversation about their personal development with their line manager within the last six months preceding survey completion.

65% would like a defined development plan with their employer to help them understand what they need to do in order to do their job better.

43% of respondents are given the opportunity to participate in external training / education related to their job.

49% of respondents are given the opportunity to participate in internal training / education related to their job.

Current job seeking status

44% of survey participants are actively seeking a new role.

48% are not actually looking but are open to offers

Shipping industry opinion

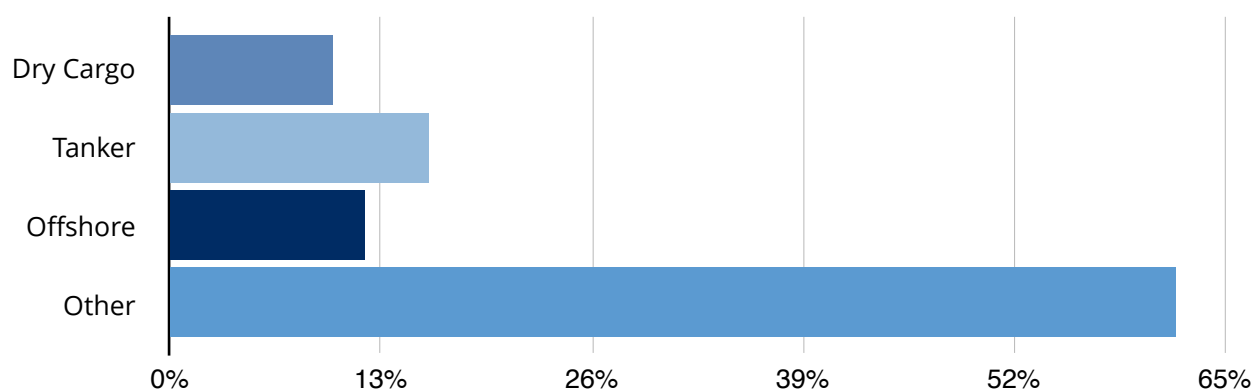
83% would recommend the shipping / maritime industry to those from outside the sector considering it for a possible career but 25% of respondents would choose a different industry to work in if they could go back to the beginning of their career.

60% of survey respondents believe the shipping industry is struggling to attract new talent.

EXECUTIVE / SENIOR MANAGEMENT

Responses came from the following sectors

(Other includes: mixed fleet / container / passenger)



Job Confidence

78% of survey participants feel either extremely or moderately secure in their current job.

Salary Increases

31% of respondents received a salary increase in the 12 months preceding survey completion.

Bonuses

59% of respondents received a bonus in the 12 months preceding survey completion.

Discrimination

58% of survey respondents have been personally aware of discrimination within the shipping industry. Of these:

- 64% were aware of discrimination due to nationality
- 49% were aware of discrimination due to ethnicity
- 44% were aware of discrimination due to age
- 33% were aware of discrimination due to gender

54% of survey respondents feel they are able to raise discrimination concerns internally with their current employer.

Inclusion and Diversity

84% of respondents are encouraged to contribute and share ideas they have related to their job, the company, the company's business and/or their working environment, 65% feel these are taken into consideration.

68% of participants state their company culture is one where they feel supported in the workplace and 88% of respondents would like their employer to do more to create a workplace where everyone feels valued and able to contribute their thoughts and ideas.

When asked how much they feel that the company cares for them, respondents answered:

- 22% a great deal
- 41% moderately
- 24% slightly
- 13% not at all

67% believe employers in shipping / maritime do not value their employees enough.

71% of respondents cite diversity in the workplace as being extremely important.

41% know their employer operates a Diversity and Inclusion programme / policy, 42% state their employer does not.

76% believe their employer could do more to achieve a diverse and inclusive workforce.

Flexible working hours and working from home ranked highest among the benefits respondents do not presently have but would like to have.

Training and Development

47% of survey respondents state their current employer offers good career progression opportunities.

51% have had at least one meaningful conversation about their personal development with their line manager within the last six months preceding survey completion.

77% would like a defined development plan with their employer to help them understand what they need to do in order to do their job better.

45% of respondents are given the opportunity to participate in external training / education related to their job.

70% of respondents are given the opportunity to participate in internal training / education related to their job.

Current job seeking status

54% of survey participants are actively seeking a new role.
39% are not actually looking but are open to offers

Shipping industry opinion

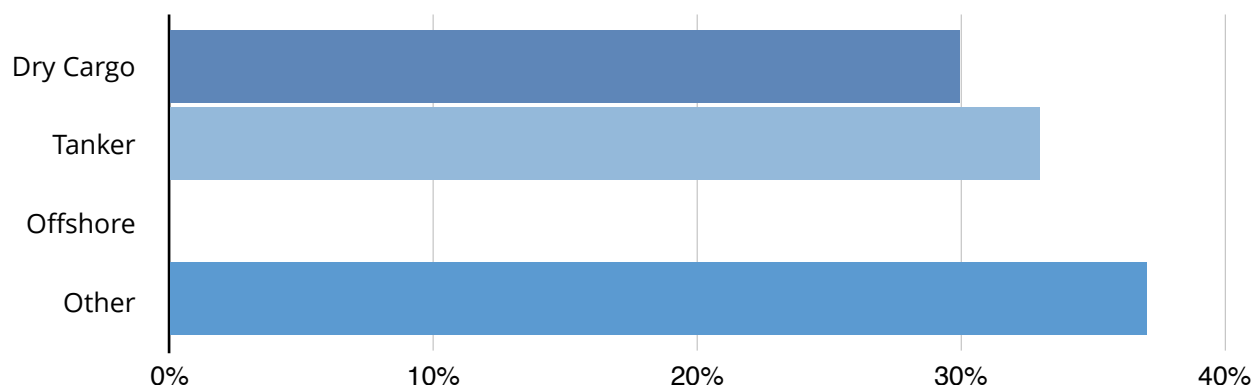
74% would recommend the shipping / maritime industry to those from outside the sector considering it for a possible career but 25% of respondents would choose a different industry to work in if they could go back to the beginning of their career.

80% of survey respondents believe the shipping industry is struggling to attract new talent.

TECHNICAL / HSEQ

Responses came from the following sectors

(Other includes: mixed fleet / container / passenger)



Job Confidence

75% of survey participants feel either extremely or moderately secure in their current job.

Salary Increases

48% of respondents received a salary increase in the 12 months preceding survey completion.

Bonuses

46% of respondents received a bonus in the 12 months preceding survey completion.

Discrimination

52% of survey respondents have been personally aware of discrimination within the shipping industry. Of these:

- 63% were aware of discrimination due to nationality
- 47% were aware of discrimination due to age
- 26% were aware of discrimination due to ethnicity
- 26% were aware of discrimination due to gender

33% of survey respondents feel they are able to raise discrimination concerns internally with their current employer.

Inclusion and Diversity

58% of respondents are encouraged to contribute and share ideas they have related to their job, the company, the company's business and/or their working environment, 42% feel these are taken into consideration.

56% of participants state their company culture is one where they feel supported in the workplace and 89% of respondents would like their employer to do more to create a workplace where everyone feels valued and able to contribute their thoughts and ideas.

When asked how much they feel that the company cares for them, respondents answered:

- 18% a great deal
- 31% moderately
- 36% slightly
- 16% not at all

71% believe employers in shipping / maritime do not value their employees enough.

61% of respondents cite diversity in the workplace as being extremely important.

37% know their employer operates a Diversity and Inclusion programme / policy, 44% state their employer does not.

61% believe their employer could do more to achieve a diverse and inclusive workforce.

Working from home, flexible working hours and financial support for training and development/study ranked highest among the benefits respondents do not presently have but would like to have.

Training and Development

39% of survey respondents state their current employer offers good career progression opportunities.

42% have had at least one meaningful conversation about their personal development with their line manager within the last six months preceding survey completion.

69% would like a defined development plan with their employer to help them understand what they need to do in order to do their job better.

45% of respondents are given the opportunity to participate in external training / education related to their job.

57% of respondents are given the opportunity to participate in internal training / education related to their job.

Current job seeking status

49% of survey participants are actively seeking a new role.
41% are not actually looking but are open to offers

Shipping industry opinion

76% would recommend the shipping / maritime industry to those from outside the sector considering it for a possible career but 34% of respondents would choose a different industry to work in if they could go back to the beginning of their career.

86% of survey respondents believe the shipping industry is struggling to attract new talent.

P&I, LEGAL, INSURANCE

Job Confidence

75% of survey participants feel either extremely or moderately secure in their current job.

Salary Increases

38% of respondents received a salary increase in the 12 months preceding survey completion.

Bonuses

38% of respondents received a bonus in the 12 months preceding survey completion.

Discrimination

60% of survey respondents have been personally aware of discrimination within the shipping industry. Of these:

- 59% were aware of discrimination due to gender
- 50% were aware of discrimination due to nationality
- 42% were aware of discrimination due to education
- 41% were aware of discrimination due to ethnicity

54% of survey respondents feel they are able to raise discrimination concerns internally with their current employer.

Inclusion and Diversity

85% of respondents are encouraged to contribute and share ideas they have related to their job, the company, the company's business and/or their working environment, 39% feel these are taken into consideration.

46% of participants state their company culture is one where they feel supported in the workplace and 85% of respondents would like their employer to do more to create a workplace where everyone feels valued and able to contribute their thoughts and ideas.

When asked how much they feel that the company cares for them, respondents answered:

- 15% a great deal
- 46% moderately
- 23% slightly
- 15% not at all

75% believe employers in shipping / maritime do not value their employees enough.

47% of respondents cite diversity in the workplace as being extremely important.

27% know their employer operates a Diversity and Inclusion programme / policy, 47% state their employer does not.

54% believe their employer could do more to achieve a diverse and inclusive workforce.

Working from home ranked highest among the benefits respondents do not presently have but would like to have.

Training and Development

50% of survey respondents state their current employer offers good career progression opportunities.

46% have had at least one meaningful conversation about their personal development with their line manager within the last six months preceding survey completion.

62% would like a defined development plan with their employer to help them understand what they need to do in order to do their job better.

63% of respondents are given the opportunity to participate in external training / education related to their job.

56% of respondents are given the opportunity to participate in internal training / education related to their job.

Current job seeking status

49% of survey participants are actively seeking a new role.

41% are not actually looking but are open to offers

Shipping industry opinion

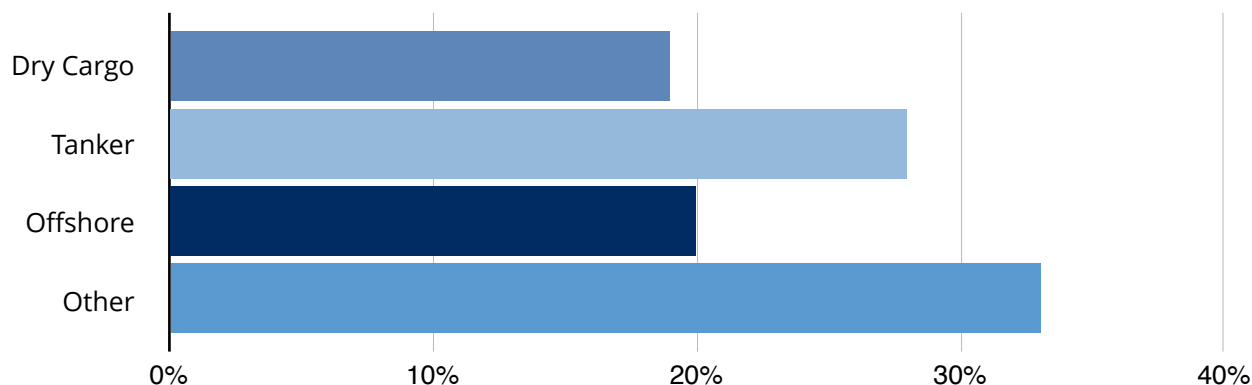
75% would recommend the shipping / maritime industry to those from outside the sector considering it for a possible career but 31% of respondents would choose a different industry to work in if they could go back to the beginning of their career.

53% of survey respondents believe the shipping industry is struggling to attract new talent.

VESSEL OPERATIONS

Responses came from the following sectors

(Other includes: mixed fleet / container / passenger)



Job Confidence

76% of survey participants feel either extremely or moderately secure in their current job.

Salary Increases

43% of respondents received a salary increase in the 12 months preceding survey completion.

Bonuses

47% of respondents received a bonus in the 12 months preceding survey completion.

Discrimination

56% of survey respondents have been personally aware of discrimination within the shipping industry. Of these:

- 57% were aware of discrimination due to nationality
- 35% were aware of discrimination due to age
- 34% were aware of discrimination due to gender
- 32% were aware of discrimination due to ethnicity

46% of survey respondents feel they are able to raise discrimination concerns internally with their current employer.

Inclusion and Diversity

76% of respondents are encouraged to contribute and share ideas they have related to their job, the company, the company's business and/or their working environment, 52% feel these are taken into consideration.

62% of participants state their company culture is one where they feel supported in the workplace and 91% of respondents would like their employer to do more to create a workplace where everyone feels valued and able to contribute their thoughts and ideas.

When asked how much they feel that the company cares for them, respondents answered:

- 13% a great deal
- 43% moderately
- 32% slightly
- 12% not at all

79% believe employers in shipping / maritime do not value their employees enough.

63% of respondents cite diversity in the workplace as being extremely important.

43% know their employer operates a Diversity and Inclusion programme / policy, 33% state their employer does not.

78% believe their employer could do more to achieve a diverse and inclusive workforce.

Flexible working hours, financial support for training and development/study and the option to work from home ranked highest among the benefits respondents do not presently have but would like to have.

Training and Development

38% of survey respondents state their current employer offers good career progression opportunities.

43% have had at least one meaningful conversation about their personal development with their line manager within the last six months preceding survey completion.

81% would like a defined development plan with their employer to help them understand what they need to do in order to do their job better.

48% of respondents are given the opportunity to participate in external training / education related to their job.

63% of respondents are given the opportunity to participate in internal training / education related to their job.

Current job seeking status

60% of survey participants are actively seeking a new role.
36% are not actually looking but are open to offers.

Shipping industry opinion

66% would recommend the shipping / maritime industry to those from outside the sector considering it for a possible career but 36% of respondents would choose a different industry to work in if they could go back to the beginning of their career.

60% of survey respondents believe the shipping industry is struggling to attract new talent.

HR, CREWING, SUPPORT

Job Confidence

69% of survey participants feel either extremely or moderately secure in their current job.

Salary Increases

32% of respondents received a salary increase in the 12 months preceding survey completion.

Bonuses

42% of respondents received a bonus in the 12 months preceding survey completion.

Discrimination

52% of survey respondents have been personally aware of discrimination within the shipping industry. Of these:

- 63% were aware of discrimination due to nationality
- 45% were aware of discrimination due to age
- 42% were aware of discrimination due to gender
- 30% were aware of discrimination due to ethnicity

51% of survey respondents feel they are able to raise discrimination concerns internally with their current employer.

Inclusion and Diversity

77% of respondents are encouraged to contribute and share ideas they have related to their job, the company, the company's business and/or their working environment, 47% feel these are taken into consideration.

58% of participants state their company culture is one where they feel supported in the workplace and 91% of respondents would like their employer to do more to create a workplace where everyone feels valued and able to contribute their thoughts and ideas.

When asked how much they feel that the company cares for them, respondents answered:

- 12% a great deal
- 38% moderately
- 32% slightly
- 18% not at all

74% believe employers in shipping / maritime do not value their employees enough.

58% of respondents cite diversity in the workplace as being extremely important.

31% know their employer operates a Diversity and Inclusion programme / policy, 42% state their employer does not.

68% believe their employer could do more to achieve a diverse and inclusive workforce.

Flexible working hours, financial support for training and development/study and the option to work from home ranked highest among the benefits respondents do not presently have but would like to have.

Training and Development

36% of survey respondents state their current employer offers good career progression opportunities.

46% have had at least one meaningful conversation about their personal development with their line manager within the last six months preceding survey completion.

71% would like a defined development plan with their employer to help them understand what they need to do in order to do their job better.

48% of respondents are given the opportunity to participate in external training / education related to their job.

63% of respondents are given the opportunity to participate in internal training / education related to their job.

Current job seeking status

52% of survey participants are actively seeking a new role.

42% are not actually looking but are open to offers

Shipping industry opinion

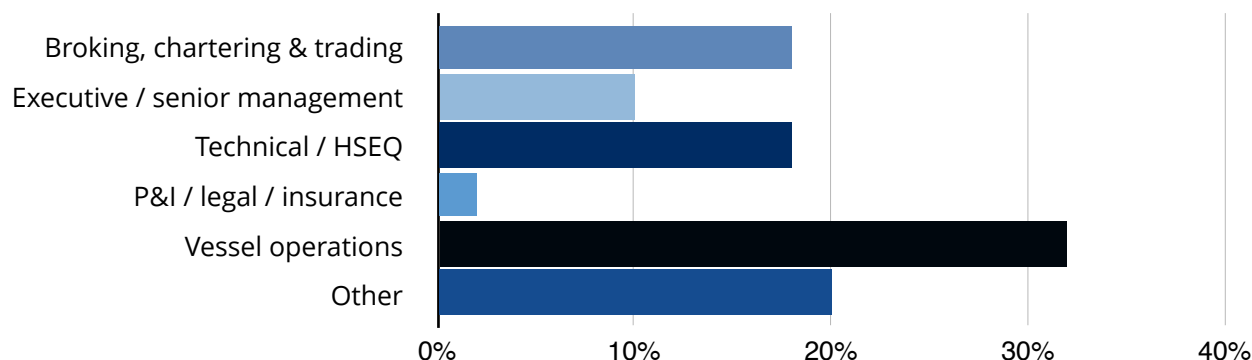
74% would recommend the shipping / maritime industry to those from outside the sector considering it for a possible career but 38% of respondents would choose a different industry to work in if they could go back to the beginning of their career.

72% of survey respondents believe the shipping industry is struggling to attract new talent.

RESULTS BY SECTOR

DRY CARGO

Responses came from the following business sectors



Job Confidence

67% of survey participants feel either extremely or moderately secure in their current job.

Salary Increases

25% of respondents received a salary increase in the 12 months preceding survey completion.

Bonuses

48% of respondents received a bonus in the 12 months preceding survey completion.

Discrimination

47% of survey respondents have been personally aware of discrimination within the shipping industry. Of these:

- 71% were aware of discrimination due to nationality
- 37% were aware of discrimination due to age
- 42% were aware of discrimination due to gender
- 31% were aware of discrimination due to ethnicity

39% of survey respondents feel they are able to raise discrimination concerns internally with their current employer.

Inclusion and Diversity

78% of respondents are encouraged to contribute and share ideas they have related to their job, the company, the company's business and/or their working environment, 53% feel these are taken into consideration.

63% of participants state their company culture is one where they feel supported in the workplace and 86% of respondents would like their employer to do more to create a workplace where everyone feels valued and able to contribute their thoughts and ideas.

When asked how much they feel that the company cares for them, respondents answered:

- 14% a great deal
- 47% moderately
- 24% slightly
- 14% not at all

52% of respondents cite diversity in the workplace as being extremely important.

27% know their employer operates a Diversity and Inclusion programme / policy, 40% state their employer does not.

58% believe their employer could do more to achieve a diverse and inclusive workforce.

Training and Development

39% of survey respondents state their current employer offers good career progression opportunities.

43% have had at least one meaningful conversation about their personal development with their line manager within the last six months preceding survey completion.

69% would like a defined development plan with their employer to help them understand what they need to do in order to do their job better.

56% of respondents are given the opportunity to participate in external training / education related to their job.

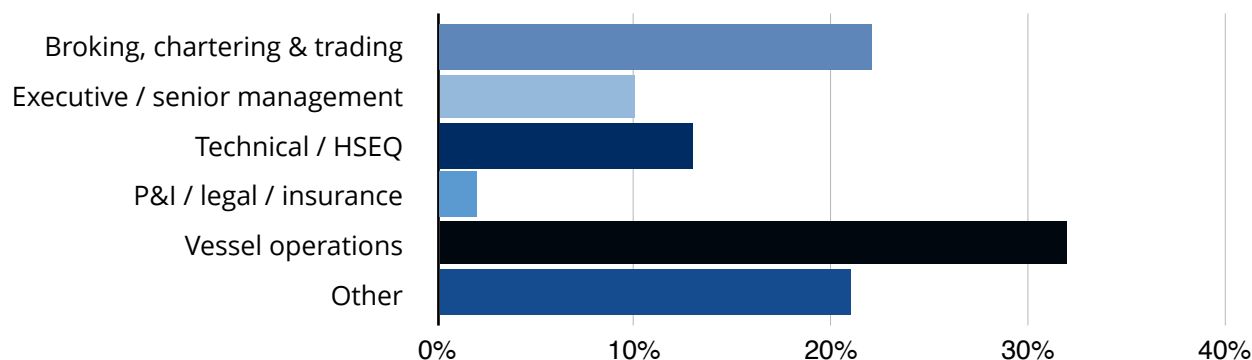
66% of respondents are given the opportunity to participate in internal training / education related to their job.

Shipping industry opinion

67% would recommend the shipping / maritime industry to those from outside the sector considering it for a possible career but 25% of respondents would choose a different industry to work in if they could go back to the beginning of their career.

TANKER

Responses came from the following business sectors



Job Confidence

77% of survey participants feel either extremely or moderately secure in their current job.

Salary Increases

36% of respondents received a salary increase in the 12 months preceding survey completion.

Bonuses

45% of respondents received a bonus in the 12 months preceding survey completion.

Discrimination

53% of survey respondents have been personally aware of discrimination within the shipping industry. Of these:

- 57% were aware of discrimination due to nationality
- 42% were aware of discrimination due to gender
- 36% were aware of discrimination due to age
- 28% were aware of discrimination due to ethnicity

40% of survey respondents feel they are able to raise discrimination concerns internally with their current employer.

Inclusion and Diversity

71% of respondents are encouraged to contribute and share ideas they have related to their job, the company, the company's business and/or their working environment, 46% feel these are taken into consideration.

54% of participants state their company culture is one where they feel supported in the workplace and 82% of respondents would like their employer to do more to create a workplace where everyone feels valued and able to contribute their thoughts and ideas.

When asked how much they feel that the company cares for them, respondents answered:

- 13% a great deal
- 37% moderately
- 37% slightly
- 13% not at all

51% of respondents cite diversity in the workplace as being extremely important.

45% know their employer operates a Diversity and Inclusion programme / policy, 37% state their employer does not.

74% believe their employer could do more to achieve a diverse and inclusive workforce.

Training and Development

36% of survey respondents state their current employer offers good career progression opportunities.

49% have had at least one meaningful conversation about their personal development with their line manager within the last six months preceding survey completion.

70% would like a defined development plan with their employer to help them understand what they need to do in order to do their job better.

47% of respondents are given the opportunity to participate in external training / education related to their job.

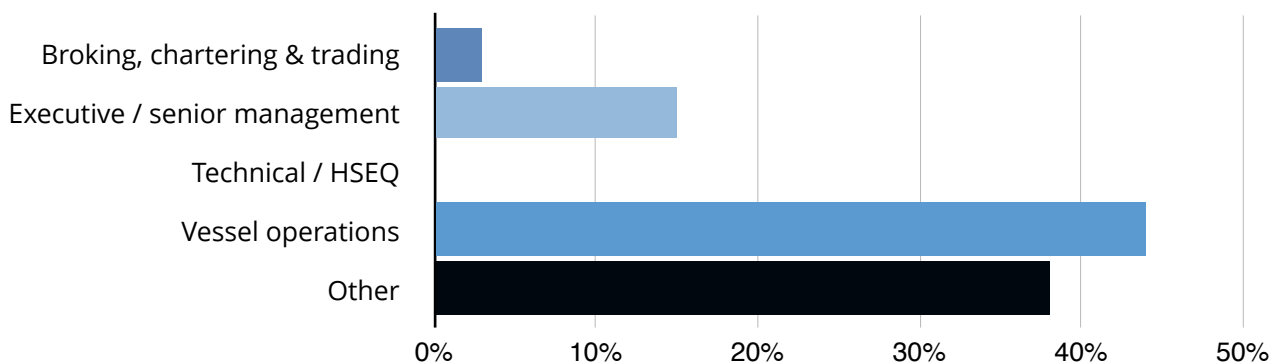
64% of respondents are given the opportunity to participate in internal training / education related to their job.

Shipping industry opinion

71% would recommend the shipping / maritime industry to those from outside the sector considering it for a possible career but 34% of respondents would choose a different industry to work in if they could go back to the beginning of their career.

OFFSHORE

Responses came from the following business sectors



Job Confidence

67% of survey participants feel either extremely or moderately secure in their current job.

Salary Increases

34% of respondents received a salary increase in the 12 months preceding survey completion.

Bonuses

34% of respondents received a bonus in the 12 months preceding survey completion.

Discrimination

71% of survey respondents have been personally aware of discrimination within the shipping industry. Of these:

- 60% were aware of discrimination due to nationality
- 49% were aware of discrimination due to age
- 46% were aware of discrimination due to ethnicity
- 43% were aware of discrimination due to gender

39% of survey respondents feel they are able to raise discrimination concerns internally with their current employer.

Inclusion and Diversity

79% of respondents are encouraged to contribute and share ideas they have related to their job, the company, the company's business and/or their working environment, 58% feel these are taken into consideration.

61% of participants state their company culture is one where they feel supported in the workplace and 100% of respondents would like their employer to do more to create a workplace where everyone feels valued and able to contribute their thoughts and ideas.

When asked how much they feel that the company cares for them, respondents answered:

- 13% a great deal
- 32% moderately
- 34% slightly
- 21% not at all

66% of respondents cite diversity in the workplace as being extremely important.

37% know their employer operates a Diversity and Inclusion programme / policy, 37% state their employer does not.

76% believe their employer could do more to achieve a diverse and inclusive workforce.

Training and Development

36% of survey respondents state their current employer offers good career progression opportunities.

39% have had at least one meaningful conversation about their personal development with their line manager within the last six months preceding survey completion.

84% would like a defined development plan with their employer to help them understand what they need to do in order to do their job better.

52% of respondents are given the opportunity to participate in external training / education related to their job.

61% of respondents are given the opportunity to participate in internal training / education related to their job.

Shipping industry opinion

59% would recommend the shipping / maritime industry to those from outside the sector considering it for a possible career but 33% of respondents would choose a different industry to work in if they could go back to the beginning of their career.

RESULTS BY GEOGRAPHY

EUROPE

Job Confidence

76% of survey participants feel either extremely or moderately secure in their current job.

Salary Increases

35% of respondents received a salary increase in the 12 months preceding survey completion.

Bonuses

43% of respondents received a bonus in the 12 months preceding survey completion.

Discrimination

52% of survey respondents have been personally aware of discrimination within the shipping industry. Of these:

- 54% were aware of discrimination due to nationality
- 48% were aware of discrimination due to age
- 46% were aware of discrimination due to gender
- 24% were aware of discrimination due to ethnicity

50% of survey respondents feel they are able to raise discrimination concerns internally with their current employer.

Inclusion and Diversity

76% of respondents are encouraged to contribute and share ideas they have related to their job, the company, the company's business and/or their working environment, 54% feel these are taken into consideration.

56% of participants state their company culture is one where they feel supported in the workplace and 89% of respondents would like their employer to do more to create a workplace where everyone feels valued and able to contribute their thoughts and ideas.

When asked how much they feel that the company cares for them, respondents answered:

- 13% a great deal
- 40% moderately
- 30% slightly
- 17% not at all

55% of respondents cite diversity in the workplace as being extremely important.

32% know their employer operates a Diversity and Inclusion programme / policy, 40% state their employer does not.

68% believe their employer could do more to achieve a diverse and inclusive workforce.

Training and Development

37% of survey respondents state their current employer offers good career progression opportunities.

44% have had at least one meaningful conversation about their personal development with their line manager within the last six months preceding survey completion.

68% would like a defined development plan with their employer to help them understand what they need to do in order to do their job better.

50% of respondents are given the opportunity to participate in external training / education related to their job.

61% of respondents are given the opportunity to participate in internal training / education related to their job.

Shipping industry opinion

76% would recommend the shipping / maritime industry to those from outside the sector considering it for a possible career but 29% of respondents would choose a different industry to work in if they could go back to the beginning of their career.

USA & CANADA

Job Confidence

72% of survey participants feel either extremely or moderately secure in their current job.

Salary Increases

39% of respondents received a salary increase in the 12 months preceding survey completion.

Bonuses

52% of respondents received a bonus in the 12 months preceding survey completion.

Discrimination

48% of survey respondents have been personally aware of discrimination within the shipping industry. Of these:

- 57% were aware of discrimination due to nationality
- 50% were aware of discrimination due to age
- 36% were aware of discrimination due to ethnicity
- 32% were aware of discrimination due to gender

39% of survey respondents feel they are able to raise discrimination concerns internally with their current employer.

Inclusion and Diversity

71% of respondents are encouraged to contribute and share ideas they have related to their job, the company, the company's business and/or their working environment, 55% feel these are taken into consideration.

55% of participants state their company culture is one where they feel supported in the workplace and 81% of respondents would like their employer to do more to create a workplace where everyone feels valued and able to contribute their thoughts and ideas.

When asked how much they feel that the company cares for them, respondents answered:

- 19% a great deal
- 32% moderately
- 29% slightly
- 20% not at all

45% of respondents cite diversity in the workplace as being extremely important.

29% know their employer operates a Diversity and Inclusion programme / policy, 39% state their employer does not.

61% believe their employer could do more to achieve a diverse and inclusive workforce.

Training and Development

41% of survey respondents state their current employer offers good career progression opportunities.

58% have had at least one meaningful conversation about their personal development with their line manager within the last six months preceding survey completion.

74% would like a defined development plan with their employer to help them understand what they need to do in order to do their job better.

48% of respondents are given the opportunity to participate in external training / education related to their job.

55% of respondents are given the opportunity to participate in internal training / education related to their job.

Shipping industry opinion

69% would recommend the shipping / maritime industry to those from outside the sector considering it for a possible career but 44% of respondents would choose a different industry to work in if they could go back to the beginning of their career.

MIDDLE EAST

Job Confidence

75% of survey participants feel either extremely or moderately secure in their current job.

Salary Increases

29% of respondents received a salary increase in the 12 months preceding survey completion.

Bonuses

54% of respondents received a bonus in the 12 months preceding survey completion.

Discrimination

66% of survey respondents have been personally aware of discrimination within the shipping industry. Of these:

- 78% were aware of discrimination due to nationality
- 50% were aware of discrimination due to ethnicity
- 36% were aware of discrimination due to gender
- 33% were aware of discrimination due to age

59% of survey respondents feel they are able to raise discrimination concerns internally with their current employer.

Inclusion and Diversity

79% of respondents are encouraged to contribute and share ideas they have related to their job, the company, the company's business and/or their working environment, 55% feel these are taken into consideration.

66% of participants state their company culture is one where they feel supported in the workplace and 89% of respondents would like their employer to do more to create a workplace where everyone feels valued and able to contribute their thoughts and ideas.

When asked how much they feel that the company cares for them, respondents answered:

- 23% a great deal
- 36% moderately
- 23% slightly
- 18% not at all

68% of respondents cite diversity in the workplace as being extremely important.

44% know their employer operates a Diversity and Inclusion programme / policy, 29% state their employer does not.

82% believe their employer could do more to achieve a diverse and inclusive workforce.

Training and Development

40% of survey respondents state their current employer offers good career progression opportunities.

56% have had at least one meaningful conversation about their personal development with their line manager within the last six months preceding survey completion.

74% would like a defined development plan with their employer to help them understand what they need to do in order to do their job better.

27% of respondents are given the opportunity to participate in external training / education related to their job.

57% of respondents are given the opportunity to participate in internal training / education related to their job.

Shipping industry opinion

78% would recommend the shipping / maritime industry to those from outside the sector considering it for a possible career but 24% of respondents would choose a different industry to work in if they could go back to the beginning of their career.

INDIAN SUB-CONTINENT

Job Confidence

71% of survey participants feel either extremely or moderately secure in their current job.

Salary Increases

41% of respondents received a salary increase in the 12 months preceding survey completion.

Bonuses

41% of respondents received a bonus in the 12 months preceding survey completion.

Discrimination

47% of survey respondents have been personally aware of discrimination within the shipping industry. Of these:

- 54% were aware of discrimination due to nationality
- 32% were aware of discrimination due to age
- 29% were aware of discrimination due to ethnicity
- 25% were aware of discrimination due to education

33% of survey respondents feel they are able to raise discrimination concerns internally with their current employer.

Inclusion and Diversity

76% of respondents are encouraged to contribute and share ideas they have related to their job, the company, the company's business and/or their working environment, 37% feel these are taken into consideration.

60% of participants state their company culture is one where they feel supported in the workplace and 96% of respondents would like their employer to do more to create a workplace where everyone feels valued and able to contribute their thoughts and ideas.

When asked how much they feel that the company cares for them, respondents answered:

- 13% a great deal
- 30% moderately
- 34% slightly
- 23% not at all

73% of respondents cite diversity in the workplace as being extremely important.

43% know their employer operates a Diversity and Inclusion programme / policy, 42% state their employer does not.

75% believe their employer could do more to achieve a diverse and inclusive workforce.

Training and Development

47% of survey respondents state their current employer offers good career progression opportunities.

42% have had at least one meaningful conversation about their personal development with their line manager within the last six months preceding survey completion.

79% would like a defined development plan with their employer to help them understand what they need to do in order to do their job better.

37% of respondents are given the opportunity to participate in external training / education related to their job.

69% of respondents are given the opportunity to participate in internal training / education related to their job.

Shipping industry opinion

63% would recommend the shipping / maritime industry to those from outside the sector considering it for a possible career but 44% of respondents would choose a different industry to work in if they could go back to the beginning of their career.

ASIA PACIFIC

Job Confidence

71% of survey participants feel either extremely or moderately secure in their current job.

Salary Increases

41% of respondents received a salary increase in the 12 months preceding survey completion.

Bonuses

52% of respondents received a bonus in the 12 months preceding survey completion.

Discrimination

54% of survey respondents have been personally aware of discrimination within the shipping industry. Of these:

- 63% were aware of discrimination due to nationality
- 44% were aware of discrimination due to ethnicity
- 39% were aware of discrimination due to gender
- 37% were aware of discrimination due to age

49% of survey respondents feel they are able to raise discrimination concerns internally with their current employer.

Inclusion and Diversity

75% of respondents are encouraged to contribute and share ideas they have related to their job, the company, the company's business and/or their working environment, 55% feel these are taken into consideration.

64% of participants state their company culture is one where they feel supported in the workplace and 87% of respondents would like their employer to do more to create a workplace where everyone feels valued and able to contribute their thoughts and ideas.

When asked how much they feel that the company cares for them, respondents answered:

- 14% a great deal
- 43% moderately
- 34% slightly
- 9% not at all

62% of respondents cite diversity in the workplace as being extremely important.

38% know their employer operates a Diversity and Inclusion programme / policy, 41% state their employer does not.

76% believe their employer could do more to achieve a diverse and inclusive workforce.

Training and Development

37% of survey respondents state their current employer offers good career progression opportunities.

50% have had at least one meaningful conversation about their personal development with their line manager within the last six months preceding survey completion.

77% would like a defined development plan with their employer to help them understand what they need to do in order to do their job better.

44% of respondents are given the opportunity to participate in external training / education related to their job.

61% of respondents are given the opportunity to participate in internal training / education related to their job.

Shipping industry opinion

67% would recommend the shipping / maritime industry to those from outside the sector considering it for a possible career but 39% of respondents would choose a different industry to work in if they could go back to the beginning of their career.

THANK YOU

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

ABOUT CORACLE MARITIME

Coracle's mission is to create a world where no-one is isolated from learning opportunities. Our white-label digital learning platform puts learning and engagement at the heart of company induction and compliance, whilst providing insights from skills gap analysis.

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ABOUT HALCYON RECRUITMENT

Halcyon Recruitment provides bespoke and tailored recruitment services for the shore based shipping, maritime and energy sectors from its offices in London, Southampton and Singapore. These include:

- Executive Search
- Searchlite
- Contingency Recruitment
- Project Management
- Reference and background verification
- Personality profiling
- Remuneration surveys and benchmarking
- Feasibility studies and employee planning

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ABOUT DIVERSITY STUDY GROUP

The Diversity Study Group is dedicated to championing diversity and inclusion in all its forms in the shipping and energy sectors. It measures and benchmarks progress, shares best practice and helps member organisations to improve their policies and practices, in order to enjoy the benefits of a diverse, inclusive workplace.

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