



Maritime employee survey 2013

Produced by Coracle and Halcyon Recruitment



Welcome to The Maritime Employee Survey 2013, our annual survey of maritime employees employed within the shore-based markets across a variety of sectors worldwide.

Now in its 5th year, the survey is aimed at employees within the maritime industry who are already working in positions ashore or looking to do so and provides participants with the opportunity to let us know what motivates them in the workplace and what is most important to them as an employee. The survey also focuses on other areas including training, salary increases and bonus payments.

Our Employee Surveys are an excellent resource for employees to gauge market conditions within our industry and for employers to understand what is currently at the forefront of employees' minds when it comes to their current career.

The response to this year's survey has again been exceptional with over 2,000 participants and we would like to take this opportunity to thank you for your time and interest in helping us.

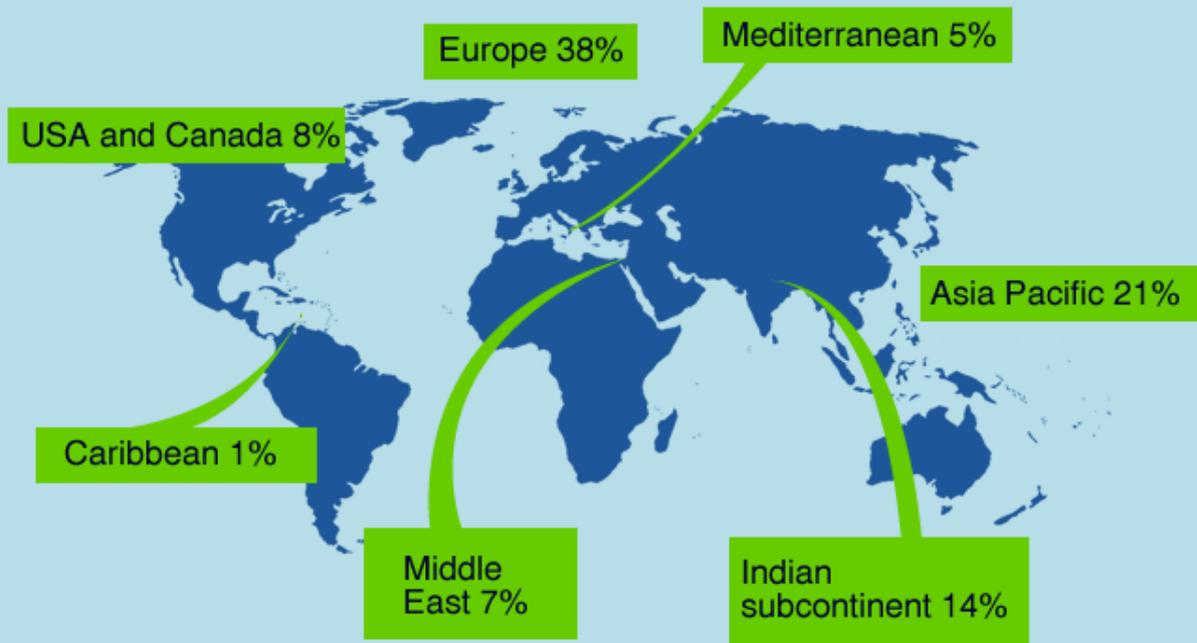
This year's survey has shown that job security is of prime importance to our survey participants and as 77% of them have not changed jobs in the last 12 months despite our survey indicating general discontentment regarding promotion and training opportunities, it is taking something significant to tempt people to move from one employer to another. Salary increases and bonuses are still not widespread, both are at below 50%, with the Asia Pacific region providing greater opportunities in this respect.

There are however some very positive signs. Apart from the fact that we ourselves are seeing a slow increase in jobs coming onto the market within the shore based maritime industry, 56% of our survey participants are more confident about employment opportunities they are seeing in the market with 70% of respondents feeling more confident about their own personal development so perhaps this year is going to see people making those careers moves they have been reluctant to consider in recent years.

Thank you for participating and discovering the results of the 2013 Maritime Employee Survey.

The headline results

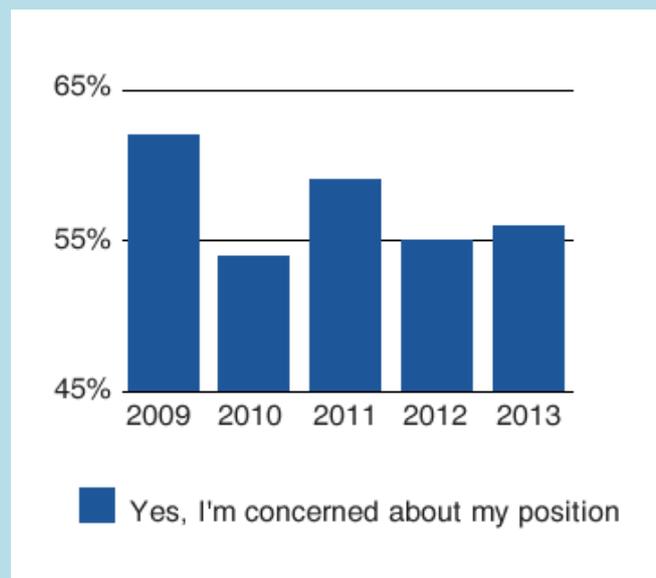
Where our respondents are based



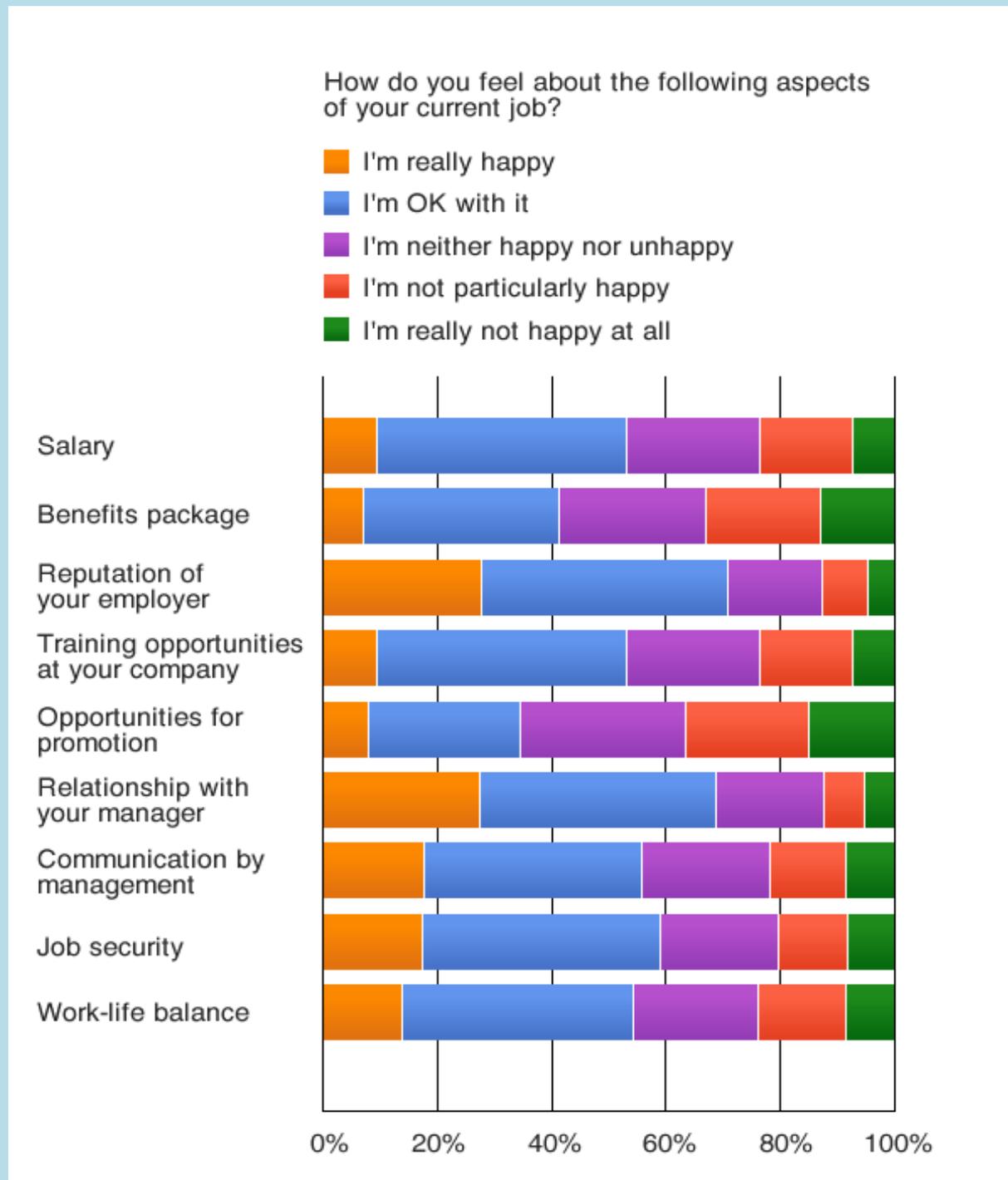
Job security and employment opportunities

56% of our survey participants indicated they are concerned about job security compared to 55% in 2012 and 59% in 2011 but with 36% indicating that they feel more concerned than they were this time last year.

56% are more confident about employment opportunities they are seeing in the market with 70% of respondents feeling more confident about their own personal career development compared to 12 months ago.



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 currently being provided rated as causing the most dissatisfaction, closely followed by benefits packages and training opportunities.

Areas of importance in considering a job change

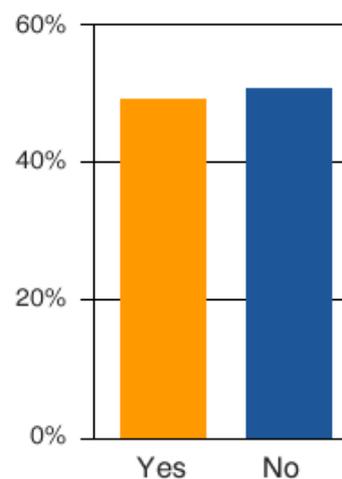
When considering a career move, a work life balance ranked highest in terms of importance with 66% putting this at the top of their list with job security second most important.

Salary / Bonus

42% have received a salary increase, 48% have seen salary stay the same and 10% have taken a lower salary.

49% of respondents have received a bonus in the last 12 months and of those 41% received between 1-10% of their annual salary, 26% received between 11-25% of their annual salary, 11.1% between 26-50%. Of the 49% who did receive a bonus, 69% were happy with the amount they received.

Bonus time! Have you received a bonus in the last 12 months?



With regards to your bonus, was it...

| | |
|----------------------------|-----|
| 1% - 10% of your salary | 41% |
| 11% - 25% of your salary | 26% |
| 26% - 50% of your salary | 11% |
| 51% - 75% of your salary | 4% |
| 76% - 100% of your salary | 10% |
| 101% - 150% of your salary | 5% |
| 151% - 200% of your salary | 2% |
| 201% - 300% of your salary | 1% |
| Over 300% of your salary | 1% |

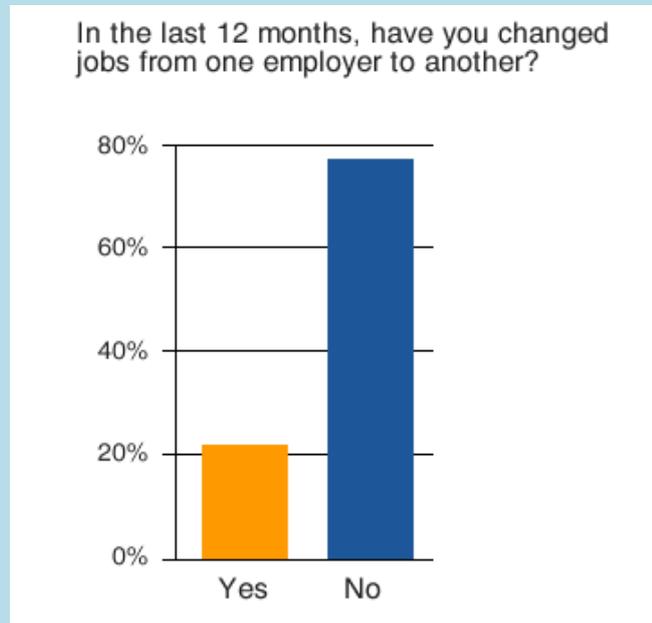
Changing jobs / headcount changes

85% 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.

77% of our survey participants have not changed jobs in the last 12 months.

50.5% of respondents reported no reduction in headcount at their current employer although a

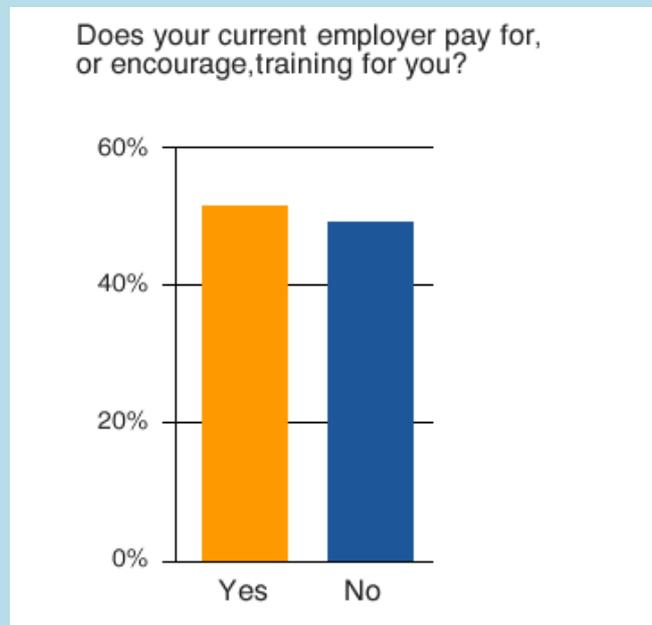
further 8.5% weren't sure. Of those individuals who reported redundancies and headcount reductions, 17% indicated they were of 5 individuals or less within their organisation. Where headcount has increased, 30% of people reported that this was by up to 5 people, 12% reported increases of 6-20 people and 4% of 21-50 people.



Training and development

52% of participants say that their current employer does provide / pay for / encourage training with 48% indicating this is not something that is supported.

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



Results by sector

Brokers/Charterers/Traders

Ranking highest in terms of satisfaction were employers reputation (73% voted this first), relationship with their manager (69% voted this second) and in third place was work life balance (57% ranked this third). This is the first time that we have seen work life balance enter the top three satisfaction rankings.

Scoring lowest again this year was benefits package.

When considering a change of job, job security was of most importance followed by work life balance then relationship with their line manager.

60% of respondents within this sector have received a bonus within the last 12 months (this was 69% in 2012) and of these 43% received between 1-10% of their salary and 20% received 11-25% of their salary. 65% of those receiving a bonus were content with the amount they received. 40% of our participants have seen an increase to their basic salary.

83% 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.

Executive / Senior Management

Ranking highest with respect to satisfaction in their current job, the Executive and Senior Management respondents placed employers reputation in first place (73% placed this first), relationship with their manager in second place (69% placed this second), followed by how well their employers management communicates with them about their contribution to the business (59% placed this third).

Scoring lowest in terms of satisfaction were training opportunities.

When considering a change of job, relationship with line manager ranked as the most important consideration with 66% of all respondents placing this first with work life balance in second place and reputation of employer in third.

76% of respondents were more confident about their own personal career development compared to the previous year.

59% of respondents in this category have received a bonus in the last 12 months with 32% of these receiving between 1-10% of their salary and 36% receiving between 11-25% of salary. 71% of those who received a bonus were happy with what they received.

90% 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.

HSE and Technical

Respondents from the HSE and Technical sectors were most happy with their employers' reputation (73% ranked this first), the relationship they have with their manager (64% ranked this second), and their job security (61% ranked this third). They were least happy in their current positions with promotion prospects (45%).

If considering a change in job, they rated the most important aspects as work / life balance (73% placing this highest on the list). Promotion / advancement opportunities being considered second most important followed by relationship with a manager.

46% of respondents within this survey received a bonus within the last 12 months, of this 46% 38% received 1-10% of salary and 38% received 11-25% of salary. Of those who did receive a bonus, 68% were happy with the amount they received. 39% of respondents in this category have received a pay rise within the last 12 months.

86% 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.

Insurance, Legal, P&I

Within their current jobs in the Insurance, Legal and P&I sector, participants were most satisfied with the reputation of their employer (81% ranked this first), followed by their relationship with their manager (66% placed this second) and job security (57% placed this third). Respondents in this category were least happy with promotion prospects (43%).

When considering new jobs the most important factor was job security (76% voted this first) followed by reputation of employer and work life balance.

Within this sector, 38% of respondents have received a bonus within the last 12 months compared to 57% in 2012. Of those who did receive a bonus, 63% received 1-10% of salary and 25% received 11-25% of salary. 67% of respondents indicated they have received a pay increase within the last 12 months.

76% 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.

Vessel Operations

Operations employees responded that in their current position they were most happy with the reputation of their employer (74% ranked this first), the relationship they have with their manager (70% ranked this second) and the way their employer communicates with them about the business (64% ranked this third). Participants in this category were least happy with training opportunities and promotion potential.

When considering a change in job, the most important factors would be work/life balance (72% placed this first) followed by the relationship with their manager and job security.

43% of the participants in our survey have received a pay increase within the last 12 months and 56% received a bonus. Of those who did receive a bonus 52% received 1-10% of salary and 22% received 11-25% of salary. 66% of those who received a bonus were content with the amount they received.

82% 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.

Liner Trades

Employees in the liner trades are most happy with their relationship with their manager (86% ranked this first), followed by their employers reputation (76% ranked this second) and management communication (72% placed this in third). They are least happy about promotion opportunities with 44% of respondents expressing dissatisfaction in this area.

In considering a move in job, participants from this sector rated job security as having the most importance (76% placed this first) followed by relationship with their manager (72% placed this second) and promotion potential (64% put this third).

Within this category, 76% of respondents received a bonus within the last 12 months with 42% receiving 1-10% of salary and 16% receiving 11-25% of salary. 74% of those who received a bonus were happy with the amount they received. 64% of respondents in this category have received a pay increase within the last 12 months.

100% 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.

Other sectors

This category consists of a diverse group of participants including HR, Crewing, Finance and Admin.

In terms of jobs satisfaction, relationship with line manager ranked highest (73% placed this first) followed by their employers reputation (70% ranked this second) and job security (62% ranked this third). The aspect providing the least job satisfaction were the promotion potential.

When considering a new job, respondents indicated that job security is of primary importance with 70% of respondents placing this in first place.

43% of respondents in this sector have received a pay rise in the last 12 months and 40% have received a bonus. Of those who did receive a bonus, 75% were happy with the amount they received.

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.

About Coracle

Coracle Transforms Learning. Our goal is to bring knowledge to life in a digital world: by developing and managing smartphone, tablet and PC optimised eLearning portals that make it easy for people to integrate learning and development into their daily lives. Our approach is open and social.

Coracle's Learning Line platform manages structured content, as well as allowing users to record unstructured and offline activities. Learners can share useful content with mentors and peers and engage in contextual discussions.

About Halcyon Recruitment

With offices in London and Singapore, Halcyon Recruitment specialises in international shore based maritime recruitment with all of their consultancy team having previous front line maritime and shipping industry experience prior to their careers as highly trained recruitment professionals.

Halcyon offers a distinctively focused, personable, confidential and tailored service of the highest calibre. Their expertise encompasses senior management and top executive roles through to graduate and trainee positions.. Areas of business include the trading, chartering, broking, operations, technical, P&I, legal, HSQE, crewing, finance and liner sectors offering a range of services that include executive search, contingency recruitment, salary and market analysis and HR services.



Contact Coracle

St John's Innovation Centre
Cowley Road
Cambridge CB4 0WS
Telephone: +44 (0)1223 422015
www.mycoracle.com



Contact Halcyon

Telephone: London +44 (0) 20 7717 8686
Singapore +65 6631 2825
Email: info@halcyonrecruitment.com
www.halcyonrecruitment.com