

# The Maritime Employment Survey 2014

*Attitudes to employment in the maritime sector*

Conducted by

Coracle Online Ltd

and

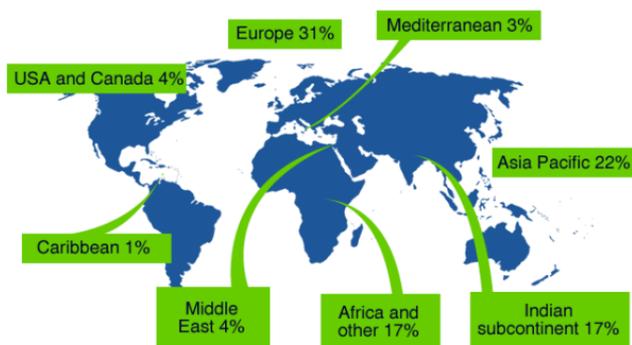
Halcyon Recruitment Ltd



## Welcome to The Maritime Employee Survey 2014.

Now in its sixth consecutive year, this survey of the global shore based maritime market allows you to see how each sector of our industry is faring with respect to salary increases, bonus payments and training and development opportunities. It also influences what action employers take in our industry by allowing them to understand what motivates our employees within the shore based maritime sector, trends that we know from previous surveys change year to year.

Firstly, a big thank you to all of our participants of which there are nearly 2500 this year across 94 countries, our best yet. The map shows how that total breaks down. There are some really interesting developments this year compared to last years' results and we are delighted to share those with you, as well as the responses to our new question relating to how long individuals anticipate staying in one role for – the results may surprise you!



One of the most notable changes within the last 12 months relates to bonus payments. Not only have more of you received a bonus but the amount you received has increased. This year 56% of respondents received a bonus compared to 49% in our 2013 survey and more people received between 11-25% of salary compared to the prevailing rate of 1-10% in 2013.

Geographically, in the Asia Pacific region, 71% of respondents received a bonus and of those in the Med, 80% received a bonus. The Caribs ranks lowest with only 17% of respondents working in the region having been paid a bonus within the last 12 months.

On closer inspection, the Technical/HSE sectors and also the P&I/legal/insurance markets have seen the most dramatic increases in bonus and it is the broking/chartering/trading community who are most dissatisfied (57%) with the amount of bonus they received. This is just below the overall statistic of 58% of people being satisfied with what they received. The overall trend towards individuals becoming less happy with the amount of their bonuses is increasing.

Salary increases have also become more common, rising from 42% of survey participants receiving an increase in 2013 to 49% this year. Asia Pacific is the leading region for pay rises with 54% of respondents having received one in the last 12 months.

General confidence about job security continues to improve, following on from last years' trend as 60% are more confident about employment opportunities they are seeing in the market and 69% of respondents feel more confident about their personal career development. The amount of people changing jobs has remained largely the same with 79% staying in the same job.

This year, with employers frequently expressing concerns over how long someone might stay in their role (especially in the Asia Pacific region), we asked a new question, "how long are you likely to stay in the same job before considering making a move?". We found the results surprising with 35% of respondents saying they would stay up to 1 year, 30% 1-2 years and 20% 3-4 years. This may tie in with fact that 40% of respondents cited promotion and advancement opportunities as being their leading cause of dissatisfaction amongst employees in their current workplace.

Whilst the market remains one driven by employers rather than employees, the results this year are highlighting statistics which indicate that there is a shift back towards employees having more of a say starting to occur. We don't believe that the situation is going to change overnight but with notable shortages of skilled candidates in certain sectors and significant numbers of newbuildings due to come into the market, employers need to be paying careful attention to their employee retention strategies if they value the talent they have.

## What's in this report?

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

### Headline statistics across the survey

- Highlights of the survey findings

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

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

### Geographic specific statistics in the following categories:

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

### Sector specific statistics in the following categories:

- Tanker
- Dry cargo
- Offshore

This report is also online at <http://halcyon.mycoracle.com>

We trust you will find the following report useful and any feedback you have on this year's content or information you might like to see in next year's survey would be welcome. Please email [info@halcyonrecruitment.com](mailto:info@halcyonrecruitment.com) or [info@mycoracle.com](mailto:info@mycoracle.com)

## Headline statistics

### Job security and employment opportunities

51% of our survey participants indicated they are concerned about job security compared to 56% in 2013, 55% in 2012 and 59% in 2011. 28% are more concerned than they were this time last year which is a decrease from last year's 36%.



60% are more confident about employment opportunities they are seeing in the market with 69% of respondents feeling more confident about their own personal career development compared to 12 months ago.

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

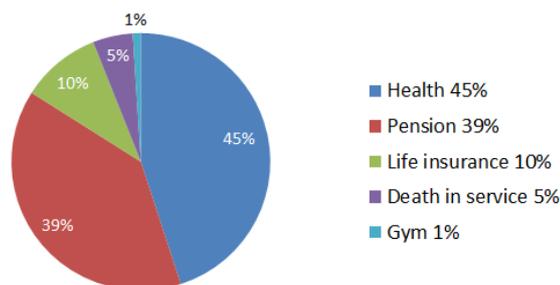
Aspects providing participants in our survey with the most contentment in their jobs are the reputation of their employer, closely followed by the relationship they have with their line manager. Promotion prospects currently being provided rated as causing the most dissatisfaction, closely followed by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

### Areas of importance in considering a job change

When considering a career move, work life balance and the relationship individuals have with their line manager ranked highest in terms of importance.

### Benefits packages

45% of respondents said that health coverage is the most attractive benefit when considering jobs, followed by pension and life insurance.



## Salary / Bonus

49% have received a salary increase and 56% of respondents have received a bonus in the last 12 months. Of those who did receive a bonus, 37% received between 1-10% of their annual salary and 28% received between 11-25% of their annual salary. Of the 56% who did receive a bonus, 59% were happy with the amount they received, compared to 69% last year.

## 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 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.

60% of respondents reported an increase in headcount within their organisation over the last 12 months, 28% of people reported that this was by up to 5 people, 15% reported increases of 6-20 people and 5% of 21-50 people.

## Training and development

Figures are down this year with 47% (compared to 52% in 2013) of participants advising 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.

## Results by business area

### Brokers/Charterers/Traders

Ranking highest in terms of satisfaction were employers' reputation (73% voted this first), relationship with their manager (59% voted this second) and in third place was job security (54% ranked this third).

Scoring lowest this year was promotion/advancement opportunities.

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

62% of respondents within this sector have received a bonus within the last 12 months (this was 60% in 2013 and 69% in 2012). Of these 30% received between 1-10% of their salary, 28% received 11-25% of their salary and 17% received 26-50% of their salary.

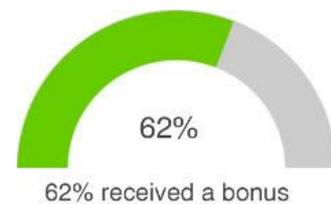
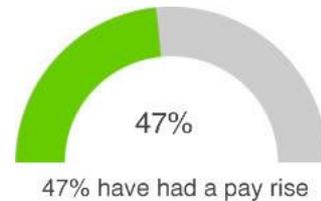
57% of those receiving a bonus were not content with the amount they received.

47% 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 the recruitment consultants they are dealing with have previous front line experience of the maritime sector prior to working in recruitment.

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

- 38% up to 1 year
- 36% 1 to 2 years
- 17% 3 to 4 years



**Executive / Senior Management**

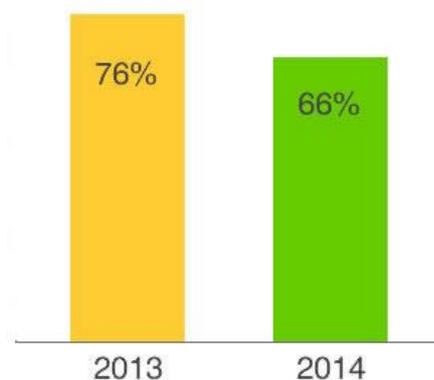
Ranking highest with respect to satisfaction in their current job, the Executive and Senior Management respondents placed employers reputation in first place (75% placed this first), relationship with their manager in second place (70% placed this second), followed by job security (59% placed this third).



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 64% of all respondents placing this first with salary in second place and reputation of employer in third.

66% of respondents were more confident about their own personal career development compared to 76% the previous year.



54% of respondents in this category have received a bonus in the last 12 months with 23% of these receiving between 1-10% of their salary and 34% receiving between 11-25% of salary. 70% of those who received a bonus were happy with what they received.

66% of respondents were more confident about their own personal career development compared to 76% in 2013

79% 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.

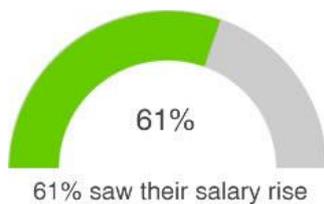
When asked “how long are you likely to stay in the same job before considering making a move?”, the results were:

- 34% up to 1 year
- 22% 1 to 2 years
- 24% 3 to 4 years

### Technical / HSEQ



Respondents from the Technical and HSEQ sectors were most happy with their employers' reputation (64% ranked this first), the relationship they have with their manager (71% ranked this second), and their job security (53% ranked this third). They were least happy in their current positions with promotion prospects (47%).



If considering a change in job, they rated the most important aspects as work / life balance (69% placing this highest on the list). Job security was considered second most important followed by relationship with a manager.

62% of respondents within this survey received a bonus within the last 12 months compared to 46% in 2013. Of this, 44% received 1-10% of salary and 22% received 11-25% of salary. Of those who did receive a bonus, 57% were happy with the amount they received. 61% of respondents in this category have received a pay rise within the last 12 months compared to 39% in 2013.

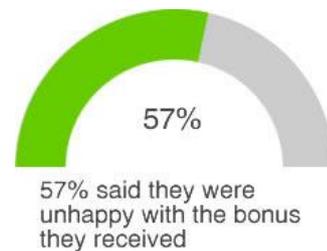
84% of respondents indicated that when dealing with specialist shore based maritime recruitment agencies, it is extremely important to them that the recruitment consultants they are dealing with have previous front line experience of the maritime sector prior to working in recruitment.

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

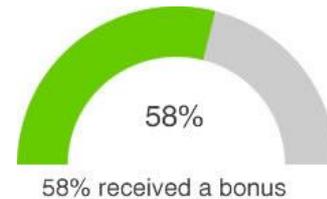
- 37% up to 1 year
- 32% 1 to 2 years
- 17% 3 to 4 years

## P&I, Legal, Insurance

Within their current jobs in the P&I, legal and insurance sector, participants were most satisfied with the relationship with their manager (74% ranked this first), followed by the reputation of their employer (71% placed this second) and job security (64% placed this third). Respondents in this category were least happy with their promotion prospects (38%).



When considering new jobs the most important factors promotion prospects followed by relationship with their line manager and work life balance.



Within this sector, 58% of respondents have received a bonus within the last 12 months compared to 38% in 2013. Of those who did receive a bonus, 57% received 1-10% of salary and 22% received 11-25% of salary. 57% of participants were not happy with the bonus they received.

66% of respondents indicated they have received a pay increase within the last 12 months.

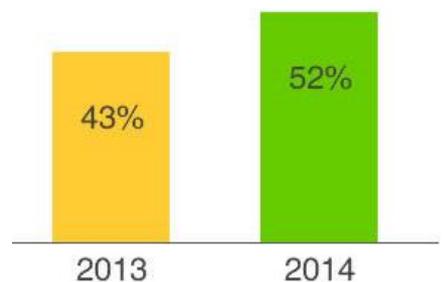
87% of respondents indicated that when dealing with specialist shore based maritime recruitment agencies, it is extremely important to them that the recruitment consultants they are dealing with have previous front line experience of the maritime sector prior to working in recruitment.

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

- 28% up to 1 year
- 39% 1 to 2 years
- 18% 3 to 4 years

### 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 (69% ranked this second) and job security (58% ranked this third). Participants in this category were least happy with promotion potential.



52% have received a pay increase within the last 12 months compared to 43% in 2013

When considering a change in job, the most important factors would be work/life balance (67% placed this first) followed by the relationship with their manager and job security.

52% of the participants in our survey have received a pay increase within the last 12 months compared to 43% in 2013.

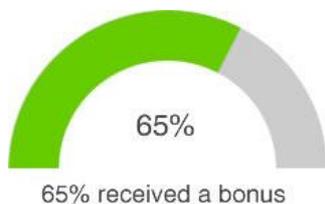
54% received a bonus of which 48% received 1-10% of salary and 28% received 11-25% of salary. 45% of those who received a bonus were not content with the amount they received.

84% of respondents indicated that when dealing with specialist shore based maritime recruitment agencies, it is extremely important to them that the recruitment consultants they are dealing with have previous front line experience of the maritime sector prior to working in recruitment.

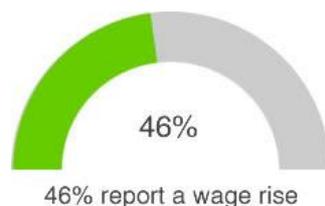
When asked “how long are you likely to stay in the same job before considering making a move?”, the results were:

- 35% up to 1 year
- 30% 1 to 2 years
- 20% 3 to 4 years

### Liner Trades



Employees in the liner trades are most happy with their relationship with their manager (69% ranked this first), followed by their employers reputation (65% ranked this second) and management communication (51% placed this in third). They are least happy about promotion opportunities with 65% of respondents expressing dissatisfaction in this area.



In considering a move in job, participants from this sector rated salary and promotion potential as most important.

Within this category, 65% of respondents received a bonus within the last 12 months with 24% receiving 1-10% of salary and 29% receiving 11-25% of salary. 59% of those who received a bonus were happy with the amount they received. 46% of respondents in this category have received a pay increase within the last 12 months.

81% 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.

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

- 39% up to 1 year
- 27% 1 to 2 years
- 27% 3 to 4 years

## Other

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 (68% placed this first) followed by their employers reputation (66% ranked this second) and job security (56% ranked this third). The aspect providing the least job satisfaction was training opportunities.

When considering a new job, respondents indicated that work life balance is of primary importance with 66% of respondents placing this in first place.

50% of respondents in this sector have received a pay rise in the last 12 months and 56% have received a bonus (compared to 40% in 2013). 34% received 1-10% of salary and 27% received 11-25% of salary. Of those who did receive a bonus, 66% 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 the recruitment consultants they are dealing with have previous front line experience of the maritime sector prior to working in recruitment.

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

32%	up to 1 year
34%	1 to 2 years
20%	3 to 4 years

## Results by sector

### Dry Cargo

57% of participants are concerned about their current position, 29% of these being more concerned than this time last year.

47% are more confident in the number of opportunities they are seeing coming on to the market.

57% have received a bonus within the last 12 months of which 37% received 1-10% of salary and 32% received 11-25% of salary.

42% of participants have received a pay rise within the last 12 months.

24% have changed jobs within the last 12 months.

### Tanker

43% of participants are concerned about their current position, 23% of these being more concerned than this time last year.

65% are more confident in the number of opportunities they are seeing coming on to the market.

63% have received a bonus within the last 12 months of which 43% received 1-10% of salary and 29% received 11-25% of salary.

52% of participants have received a pay rise within the last 12 months.

15% have changed jobs within the last 12 months.

### Offshore

42% of participants are concerned about their current position, 26% of these being more concerned than this time last year.

68% are more confident in the number of opportunities they are seeing coming on to the market.

44% have received a bonus within the last 12 months of which 32% received 1-10% of salary and 30% received 11-25% of salary.

54% of participants have received a pay rise within the last 12 months.

26% have changed jobs within the last 12 months.

## Results by geography

### Europe

40% of participants are concerned about their current position, 22% of these being more concerned than this time last year.

60% are more confident in the number of opportunities they are seeing coming on to the market.

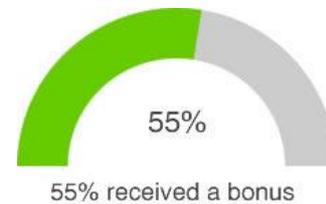
55% have received a bonus within the last 12 months of which 51% received 1-10% of salary and 25% received 11-25% of salary.

50% of participants have received a pay rise within the last 12 months.

22% have changed jobs within the last 12 months.

Employees are likely to stay in the same job for:

- Up to 1 year – 29%
- 1-2 years – 28%
- 3-4 years – 23%
- 5-7 years – 10%



### Mediterranean

50% of participants are concerned about their current position, 8% of these being more concerned than this time last year.

75% are more confident in the number of opportunities they are seeing coming on to the market.

80% have received a bonus within the last 12 months of which 13% received 1-10% of salary and 38% received 11-25% of salary.

30% of participants have received a pay rise within the last 12 months.

20% have changed jobs within the last 12 months.

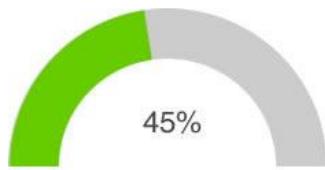
Employees are likely to stay in the same job for:

- Up to 1 year – 18%
- 1-2 years – 9%
- 3-4 years – 27%
- 5-7 years – 36%



50% of participants are concerned about their current position, 8% of these being more concerned than this time last year.

**USA & Canada**



51% of participants are concerned about their current position, 26% of these being more concerned than this time last year.

55% are more confident in the number of opportunities they are seeing coming on to the market.



45% have received a bonus within the last 12 months of which 42% received 1-10% of salary and 26% received 11-25% of salary.

42% of participants have received a pay rise within the last 12 months.

36% have changed jobs within the last 12 months.

Employees are likely to stay in the same job for:

- Up to 1 year – 36%
- 1-2 years – 32%
- 3-4 years – 14%
- 5-7 years – 11%

**Caribs**

70% of participants are concerned about their current position, 31% of these being more concerned than this time last year.

62% are more confident in the number of opportunities they are seeing coming on to the market.

17% have received a bonus within the last 12 months of which 50% received 1-10% of salary and 50% received 11-25% of salary.

42% of participants have received a pay rise within the last 12 months.

28% have changed jobs within the last 12 months.

Employees are likely to stay in the same job for:

- Up to 1 year – 50%
- 1-2 years – 25%
- 3-4 years – 9%



70% of participants are concerned about their current position, 31% of these being more concerned than this time last year.

**Middle East**

60% of participants are concerned about their current position, 28% of these being more concerned than this time last year.

68% are more confident in the number of opportunities they are seeing coming on to the market.

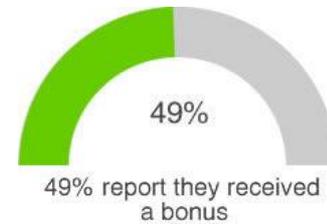
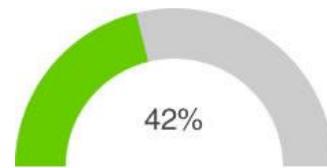
49% have received a bonus within the last 12 months of which 22% received 1-10% of salary and 48% received 11-25% of salary.

53% of participants have received a pay rise within the last 12 months.

23% 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 – 36%
- 3-4 years – 8%
- 5-7 years – 4%



**Indian Sub-Continent**

62% of participants are concerned about their current position, 29% of these being more concerned than this time last year.

64% are more confident in the number of opportunities they are seeing coming on to the market.

56% have received a bonus within the last 12 months of which 30% received 1-10% of salary and 25% received 11-25% of salary.

48% of participants have received a pay rise within the last 12 months.

16% have changed jobs within the last 12 months.

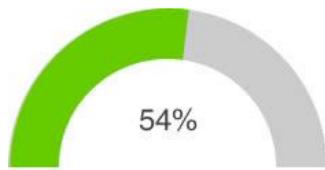
Employees are likely to stay in the same job for:

- Up to 1 year – 44%
- 1-2 years – 26%
- 3-4 years – 15%
- 5-7 years – 7%



64% are more confident in the number of opportunities they are seeing coming on to the market.

**Asia Pacific**



54% received a pay rise

50% of participants are concerned about their current position, 29% of these being more concerned than this time last year.

59% are more confident in the number of opportunities they are seeing coming on to the market.



71% received a bonus

71% have received a bonus within the last 12 months of which 32% received 1-10% of salary and 31% received 11-25% of salary.

54% of participants have received a pay rise within the last 12 months.

21% have changed jobs within the last 12 months.

Employees are likely to stay in the same job for:

- Up to 1 year – 32%
- 1-2 years – 37%
- 3-4 years – 18%
- 5-7 years – 4%

**Africa**

78% of participants are concerned about their current position, 47% of these being more concerned than this time last year.

59% are more confident in the number of opportunities they are seeing coming on to the market.

53% have received a bonus within the last 12 months of which 11% received 1-10% of salary and 32% received 11-25% of salary. 32% received 76-100% of salary.

53% of participants have received a pay rise within the last 12 months.

12% have changed jobs within the last 12 months.

Employees are likely to stay in the same job for:

- Up to 1 year – 28%
- 1-2 years – 31%
- 3-4 years – 26%
- 5-7 years – 7%



78% of participants are concerned about their current position, 47% of these being more concerned than this time last year.

Once again, thank you for your time and interest in The Maritime Employee Survey 2014. If you have any questions, please don't hesitate to contact Heidi Heseltine at Halcyon Recruitment or James Tweed at Coracle Online.

## About Coracle



Coracle makes it easy for people to integrate learning and development into their daily lives by offering next generation e-learning resources and systems.

We specialise in bringing printed education materials to life in digital formats. From our base in Cambridge (UK) we develop learning portals and hosted training courses that help our clients to build 24/7 learning communities and inspire loyalty around engaging and often fun digital resources.

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## About Halcyon Recruitment



Halcyon Recruitment provides bespoke and tailored recruitment services solely for the shore based shipping and maritime sector. 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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