

DANICA
CREWING SPECIALISTS



DANICA SEAFARERS' SURVEY 2023

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Danica Seafarers' Survey 2023

As a leading crewing service provider Danica boasts a worldwide database of more than 65K applicants, particularly from Eastern Europe, India, and the Philippines.

This year (2023) – as we did in 2019, 2020, and 2021 - we invited all our seafarer applicants to participate in our annual Seafarers' Employment Condition Survey. In total 6,228 seafarers participated in this year's survey. We collected the data from May to October 2023. We also invited seafarers to participate through our social media channels.

We are pleased to share the results and analysis of the survey with you. On the following pages you will find some interesting and surprising results which we hope will help you to enhance your HR-marine strategies.



Feel free to contact us at any time if you need any further information:

CEO and founder Capt. **Henrik Jensen**,

Enjoy the reading!

Danica Crewing Specialists

Henrik Jensen, Chief Executive Officer

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Highlights:

- Salaries are rising by at least 10% as the crew employment market tips in the favour of seafarers.
- Shortages are evident in certain ranks – with salaries rising sharply for these seafarers as a result.
- Seafarers are largely satisfied with a career at sea but strong competition remains from shore employment.
- There are still welfare issues evident, particularly in relation to salary non-payment and late relief. Bullying and other issues are a concern but increasing numbers of seafarers have access to mental health support and are finding this helpful.
- Training is now delivered principally online. However, there is still a shortage of training in 'soft skills' such as leadership.

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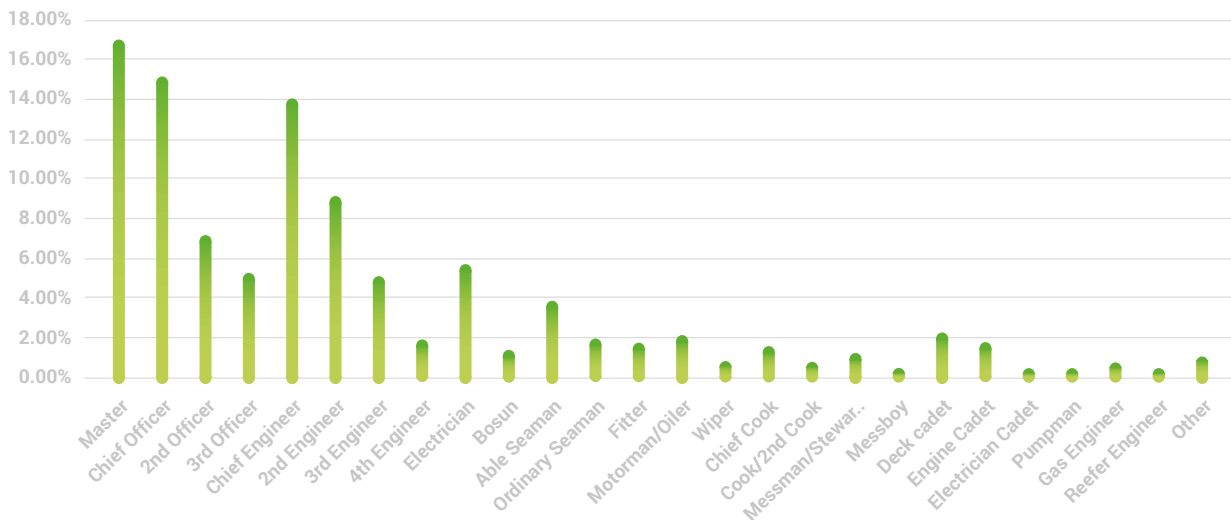
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01

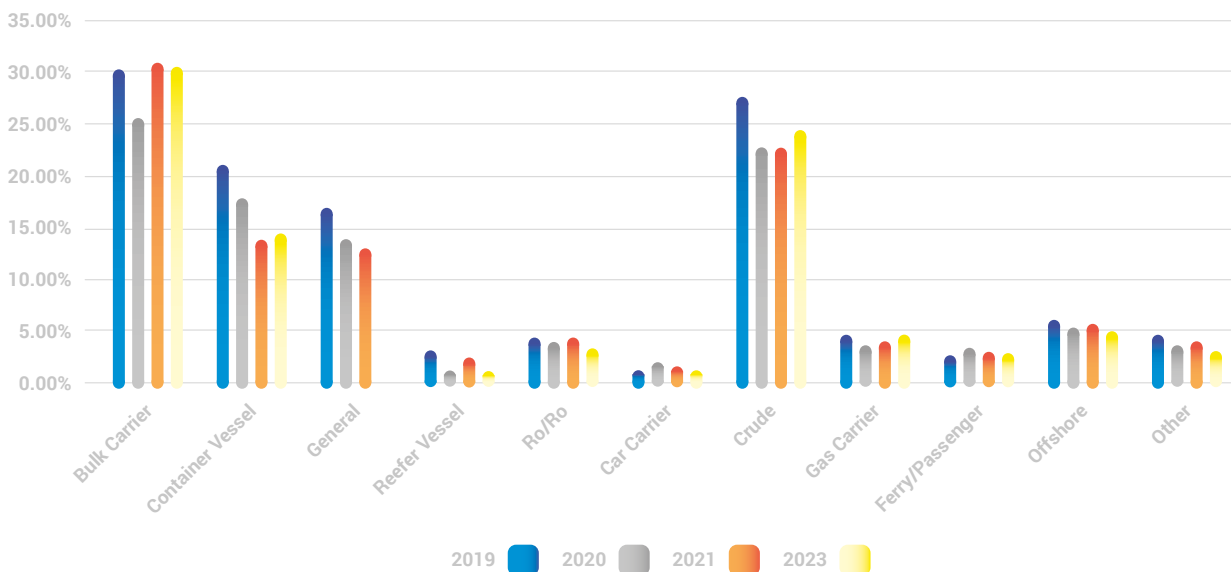
Who Responded?

- The 64,354 seafarers in Danica's database of applicants were invited to participate in the survey.
- In total 6,228 seafarers responded to the survey.
- As with the previous surveys in 2019, 2020 and 2021 most of the responses came from senior officers.
- The nationality of all respondents is Ukrainian or Russian. Responses came particularly from Eastern European, Indian and Philippino seafarers. The data was collected between May and October 2020.
- The survey consisted of in total 45 questions.
- The participants' vessel type experience very well reflects the vessel types the seafarers registered in Danica's database typically are deployed on, and the distribution is about the same as for all the other years we have done conducted the survey.

What rank did you serve in during your last contract



What was the type of your last vessel?

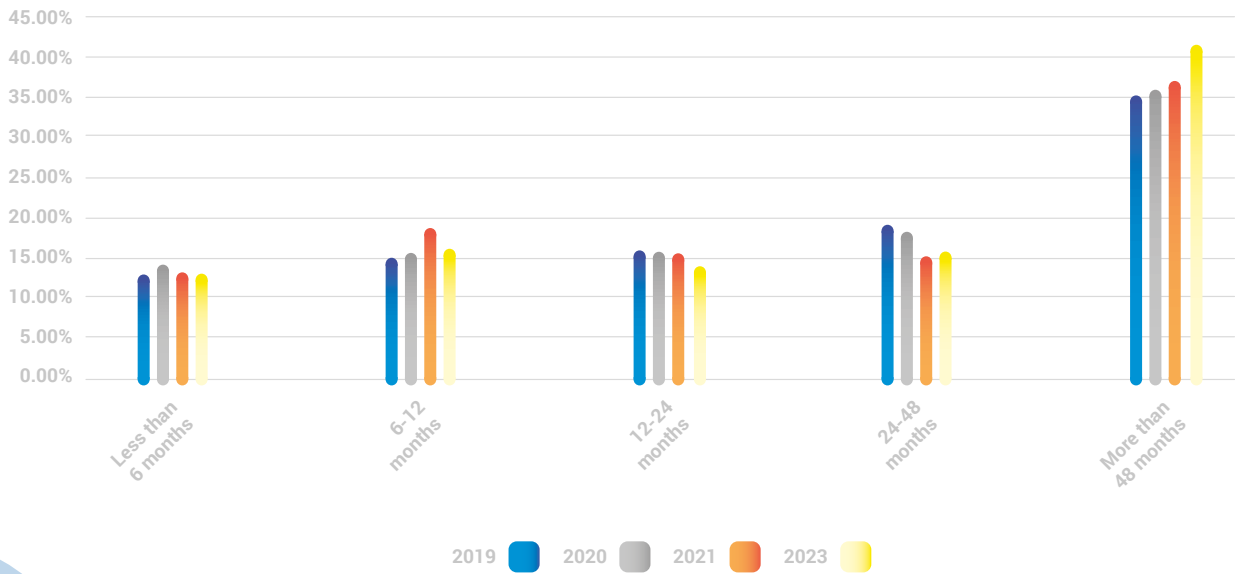


02

Seniority in Rank

- There is a slight trend that seafarers participating in the survey have a higher seniority.
- 57% of the respondents had 24 months or more seniority in rank. This is 5% up compared to 2021.

How many months seniority do you have in your current rank?

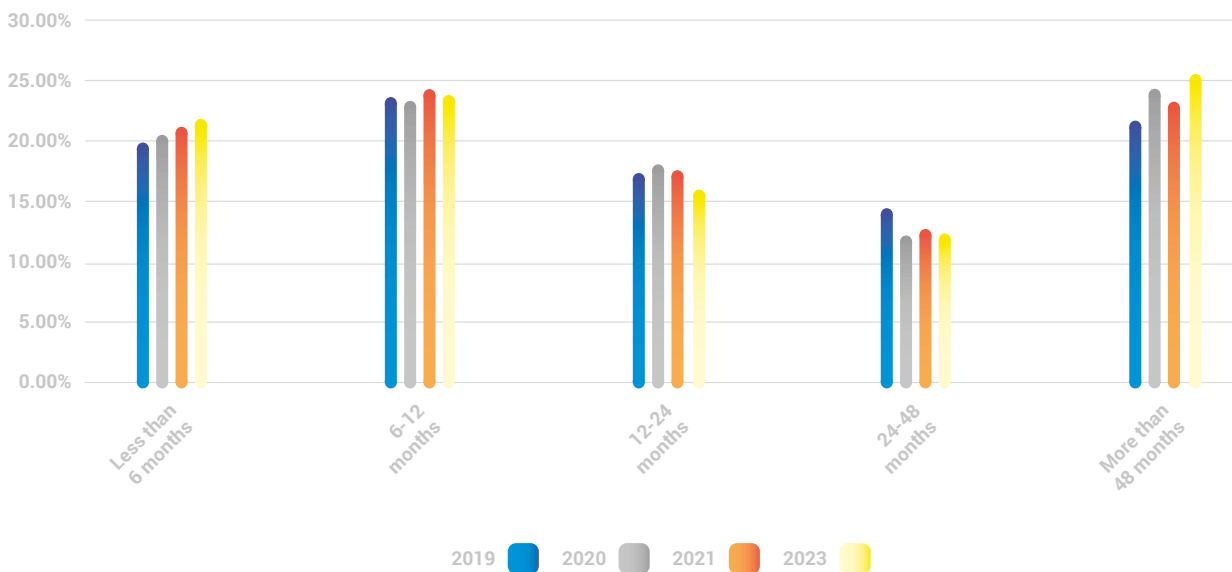


03

Seniority with current employer

- Seniority in rank is not earned with the same employer.
- Nearly half (45%) of the seafarers have less than 24 months experience with the current employer
- The company seniority has not changed much over the years.

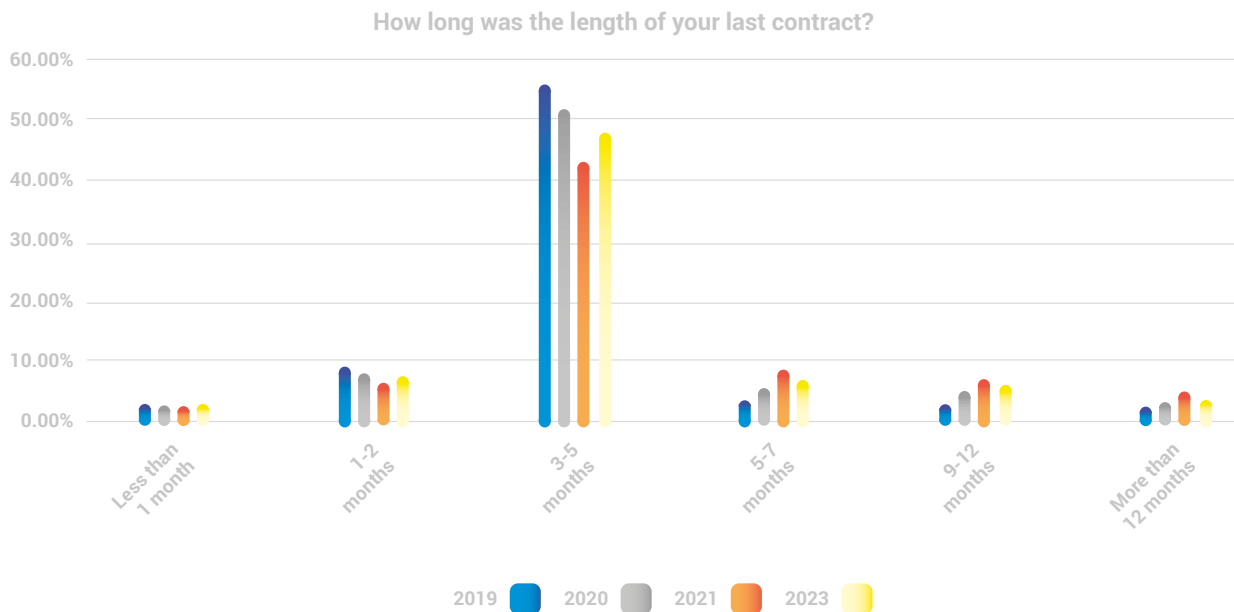
How many months seniority do you have with your current company?



04

Onboard Period (Contract Length)

- Compared to the last Danica survey (2021) the number of seafarers with a contract length of 5-7 months has dropped and the group with a contract length of 3-5 months has increased.
- This is somehow expected as in 2021 the COVID-19 pandemic affected abilities to relieve seafarers as contractually agreed.
- However, compared to 2019 and 2020, seafarers with a period onboard of 8 months or more are significantly higher.



05

Remuneration

We also asked the seafarers about their remuneration and fringe benefits.

The Danica survey, in combination with our in-depth knowledge of crew employment markets, gives us a unique and detailed insight into salaries for each rank and each vessel type and size.

Due to the complexity of the wage data, we cannot list all wages in this short recap of the survey. However:

- For senior officers (top-4) for all nationalities there is an increase in salaries of 10-15% compared to the last survey in 2021.
- In particular, the salaries for the top-4 have risen on dry cargo vessels (container, bulk, and multipurpose vessels)
- The salaries for top-4 on tankers were more moderate.
- The wages on offshore vessels remained the same as previous years.
- The wage gap between Filipino and Eastern European officers is narrowing.
- Indian senior officers on dry cargo vessels continue to have about 10% higher wages than their Eastern European peers.
- Bosuns, cooks and fitters remain in demand and wages have increased about 10% across all vessel types.
- Ukrainian fitters have had increases up to 30% due to a huge shortage.



As international recruitment experts across all vessel type and with owned offices in Ukraine, Georgia, India and the Philippines, Danica is in possession of in-depth wage intelligence.

Our Group Recruitment Manager **Yulia Filchukova** has overall responsibility for recruitment in the Danica Group.

Feel free to contact Yulia to learn more about wage levels for seafarers from the countries we recruit from.

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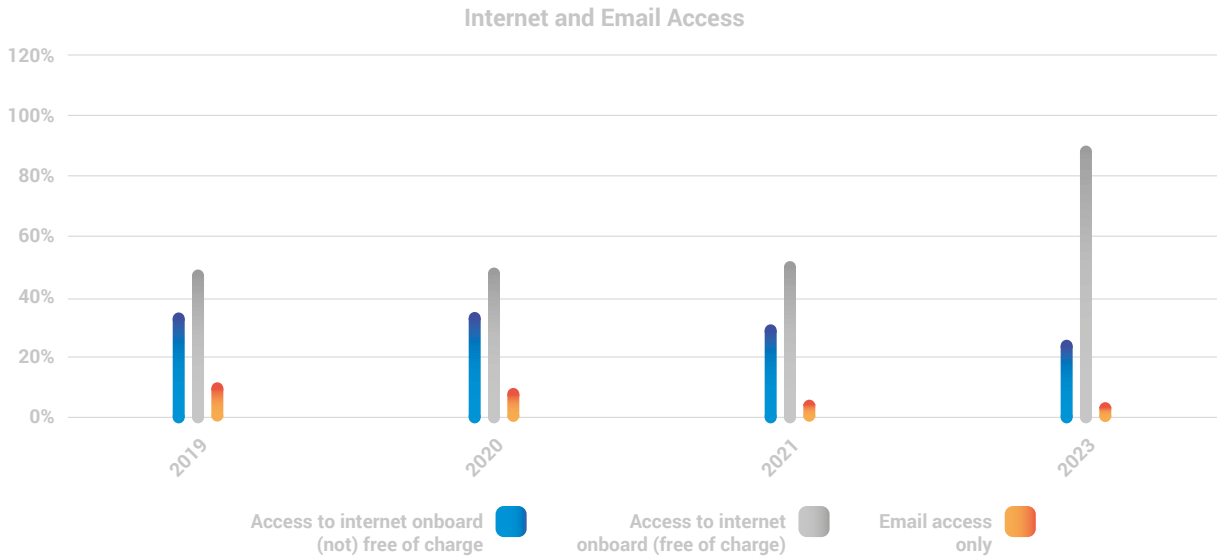
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Internet and Email Access

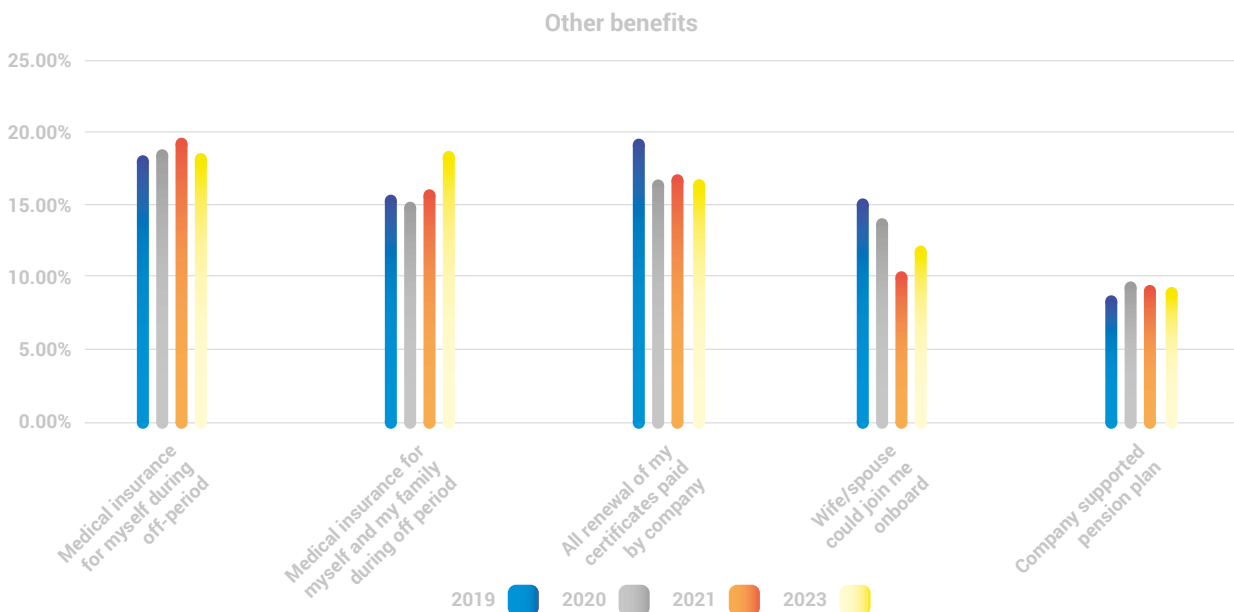
- 96% of seafarers now have access to the internet – 6% up from 2021.
- 70% of the seafarers today have free access to the internet. This is a significant increase of 15% compared to 2021, and 23% up compared to four years ago.
- Now only 1% of the seafarers are without internet and email access.



07

Fringes

- The number of seafarers being offered benefits in addition to their salaries has not changed much over the years.

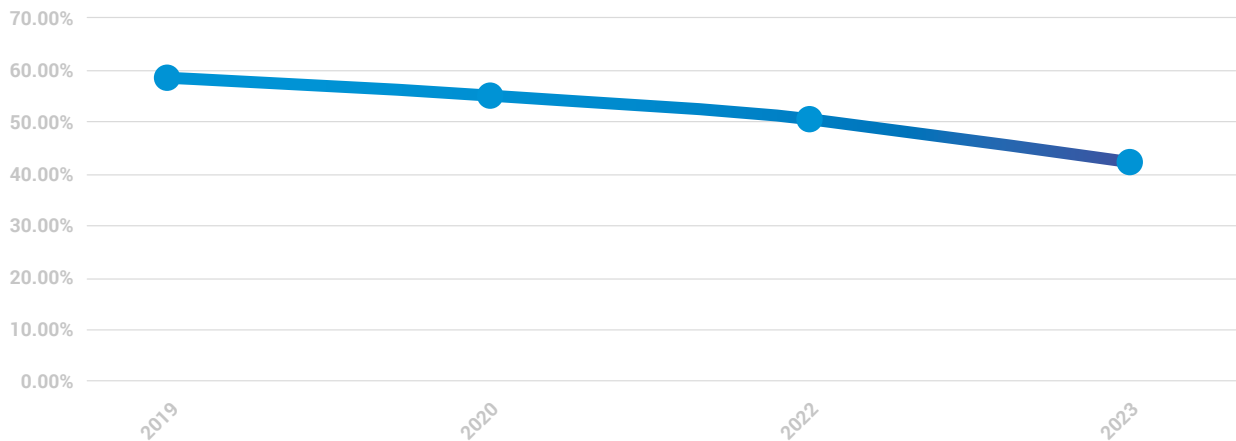


08

Promoted with current employer.

- The number of officers who are still with the employer who promoted them to a higher rank has significantly dropped over the year.
- In our 2019-survey 58% of the officers were still with the company where they had received promotion.
- In the 2023-survey that number has dropped to 42%.
- It seems that a promotion is creating less loyalty with seafarers than in the past and seafarers move on faster following a promotion.

Have you been promoted within your current company?

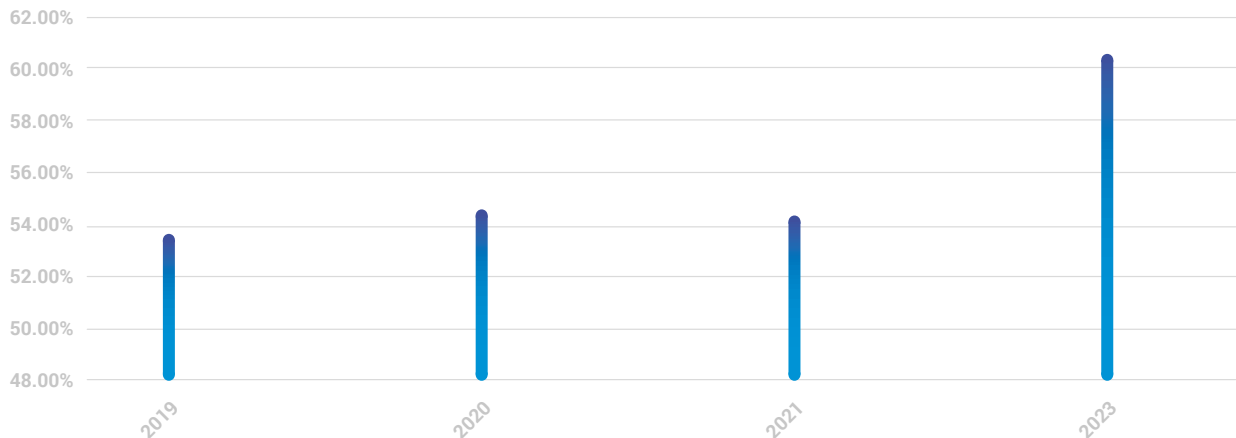


09

Training during home periods

- More companies are training their crew members during their home periods.

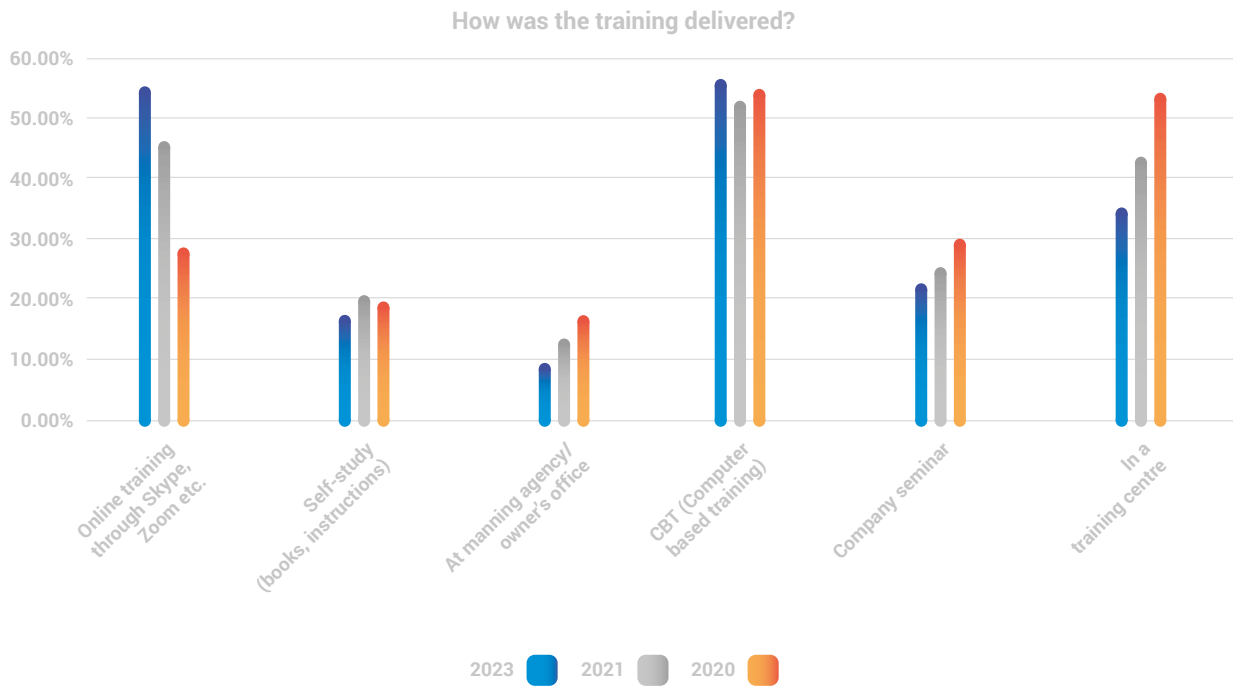
Training during home period



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How was the training delivered?

- Since 2020 the percentage of respondents who received training online has nearly double and the training delivered on site in a training center has decreased.
- It is not surprising that training during the COVID-19 pandemic was delivered online, but the use of online training has continued to expand.
- This question was not included in the 2019 survey.



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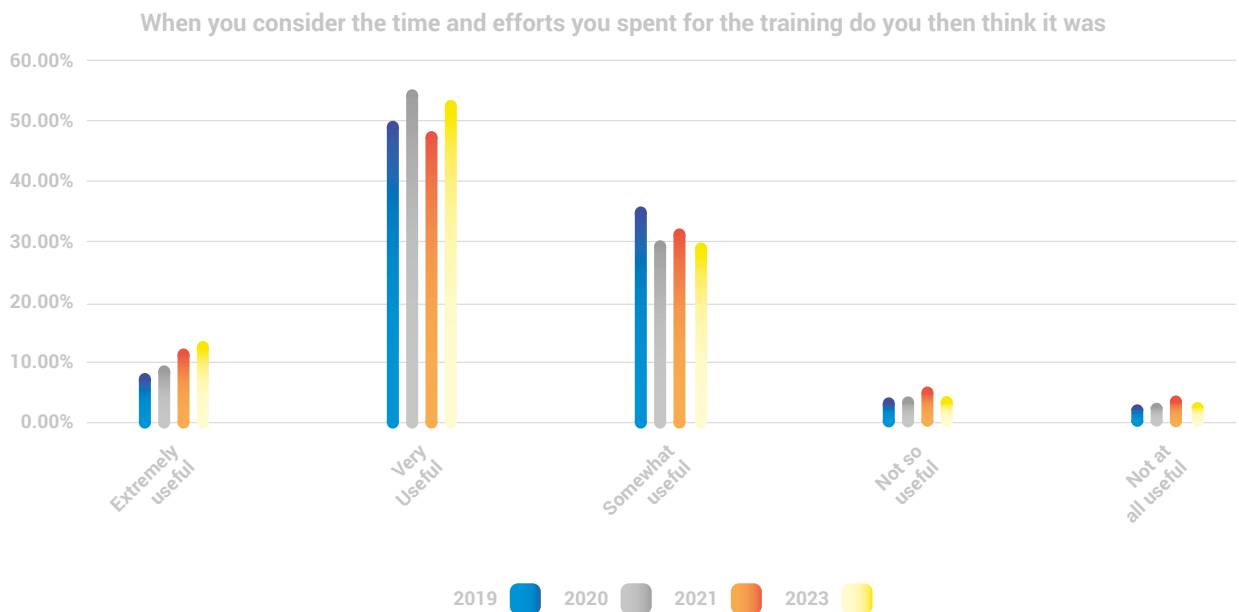
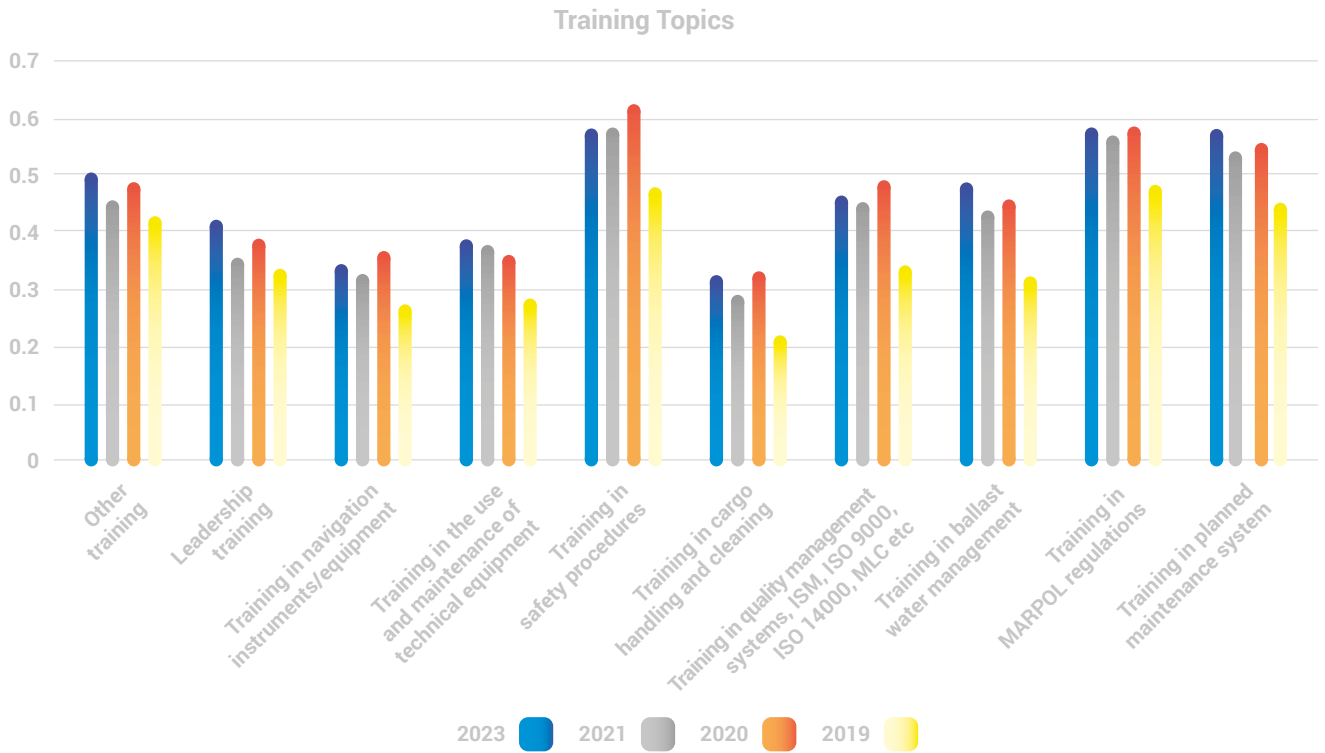
How useful was the training for the seafarers?

- Over the years there is a significant trend that seafarers find the training very or somewhat useful.
- However, only 11% find the training provided extremely useful.
- 30% of the seafarers see the training as only somewhat useful, not so useful, or not at all useful
- Employers are investing a lot in training. Does this give value for money?



Training subjects

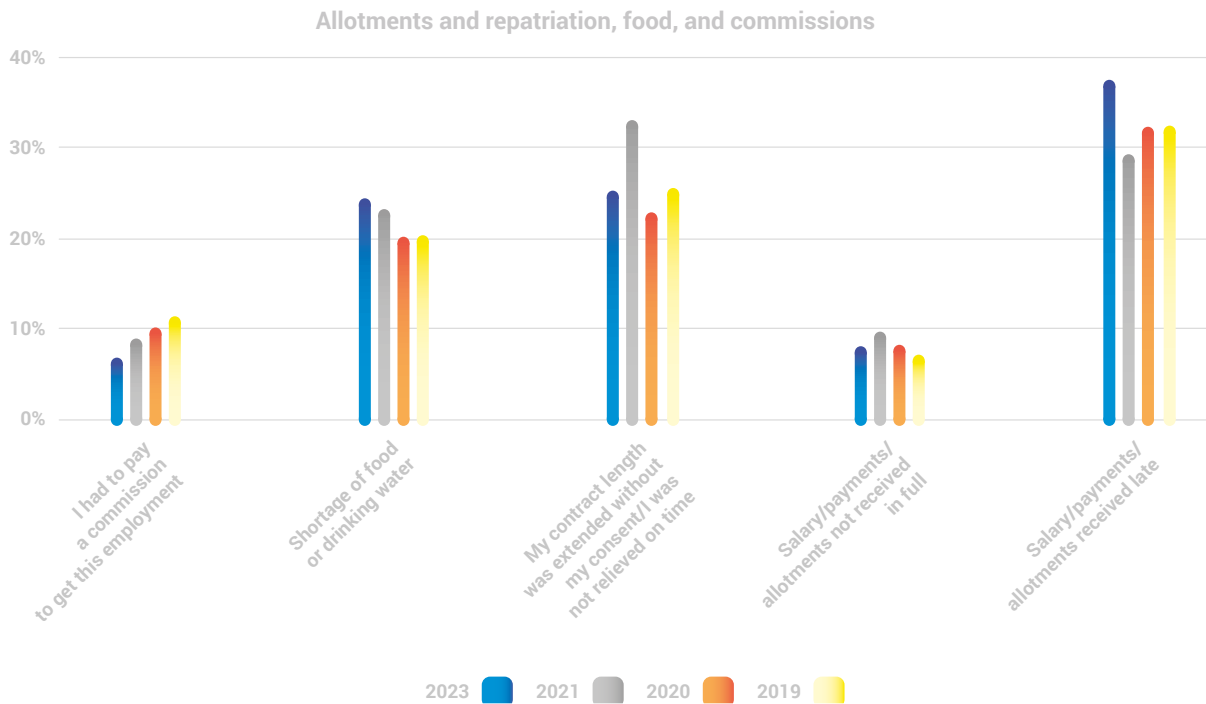
- There is a trend that seafarers receive training in more topics.
- Most of the training is about technical and compliance matters and little about leadership.
- Training in rules results in seafarers who comply.
- Training in leadership results in seafarers who can lead, manage and think ahead.



13

Allotments and repatriation, food, and commissions

- In 2023 the number of seafarers who reported that they were – without their consent - not relieved as contractually agreed dropped to the same level as before the pandemic.
- However, one out four seafarers still do not get home at the time agreed.
- As many as 36% of the respondents claim that their salary was not timely received. This group has increased since 2021 by nearly a fourth.
- 8% of the seafarers did not receive their salary in full.
- As in previous years, about 20% of seafarers encountered shortage of food and drinking water onboard.
- The only good news here is that the number of seafarers who had to pay a commission dropped to 6% - although that is still too many.
- From the detailed data we can see that the drop is caused by less Ukrainian seafarers paying a commission. The reason most probably being that the Ukrainian seafarers are no longer in physical contact with their manning agencies as seafarers are not returning to Ukraine during their off-home periods. Russian, Indian, and Filipino seafarers unfortunately still pay commissions at the same level as for the other years. Danica does not make such a charge.



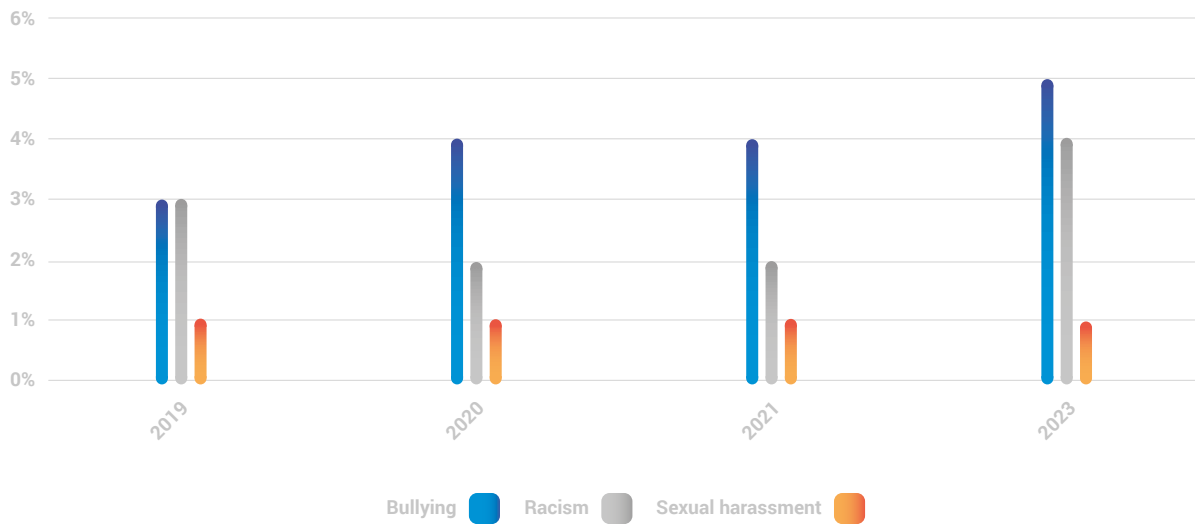


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Bullying, Racism and Sexual harassment

- 1 out of 20 seamen (it is about one on each ship) reports that they have been bullied.
- 4% of seafarers have faced feeling being discriminated because of their race.
- 1% of seafarers felt that they have been exposed to sexual harassment.
- The numbers are generally unchanged over the years.

Bullying, Racism and Sexual harassment

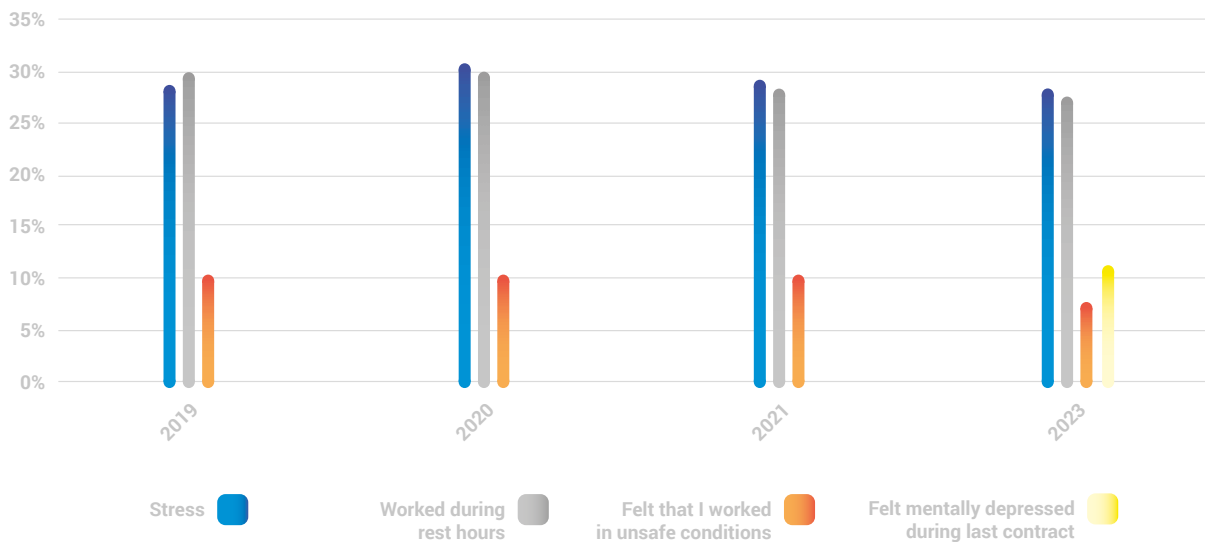


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Wellbeing

- The seafarers' wellbeing has not changed much over the years.
- About a third of seafarers feel that they are stressed when onboard.
- On a third of the ships the statutory rest hours are not followed
- In 2023 7% of seafarers felt they have worked in unsafe conditions. This is a small drop compared to the previous years.
- 11% felt mentally depressed during their last contract. (This is the first time we have included this question in the survey)

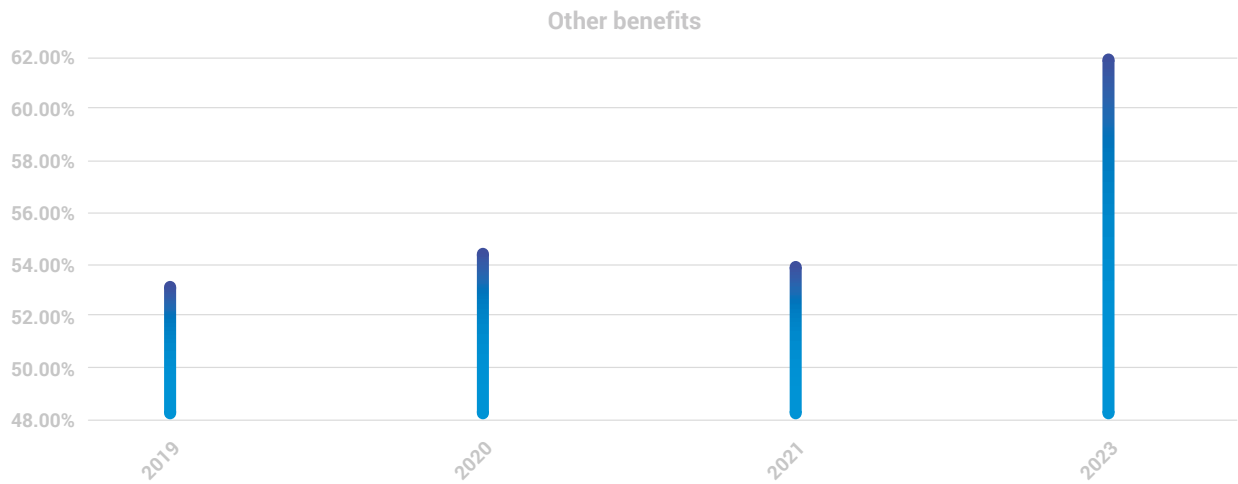
Wellbeing



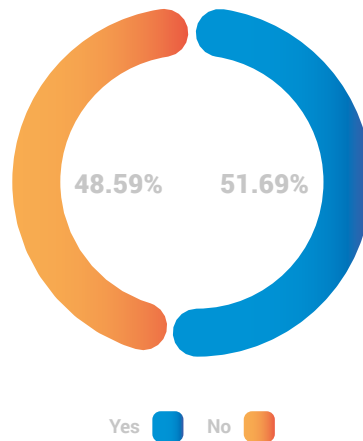
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Mental support

- A little over half of seafarers have access to support if they do not feel mentally well. We have only included this question in the 2023 survey.
- 20% of the respondents who had access to external mental health support made use of the service.
- 70% of the seafarers who were in contact with this external support found it useful.



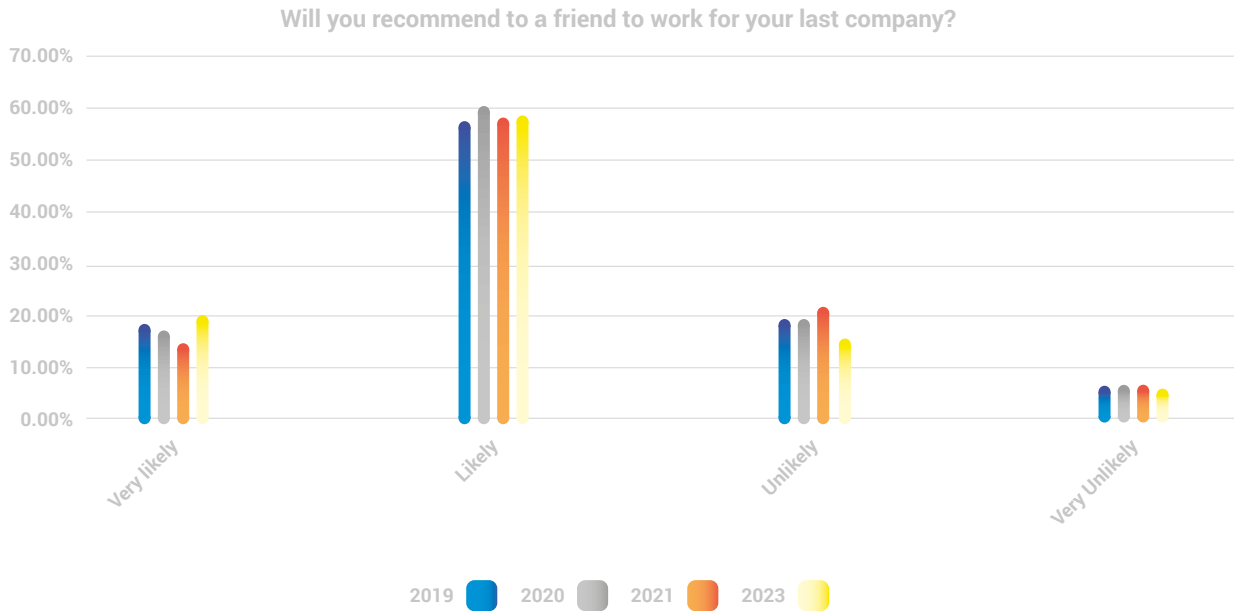
Did your last company offer any contact person/company whom you can get in touch with if you do not feel mentally well?



17

Experience with employer

- Since 2021 seafarers' positive view of their employer has increased.
- In 2023, 80% of seafarers would likely or very likely recommend to a friend to work for their employer. In 2021 this was only 72%.

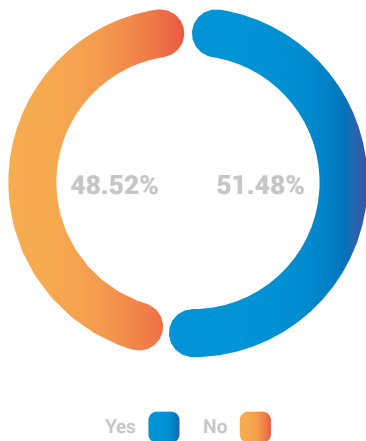


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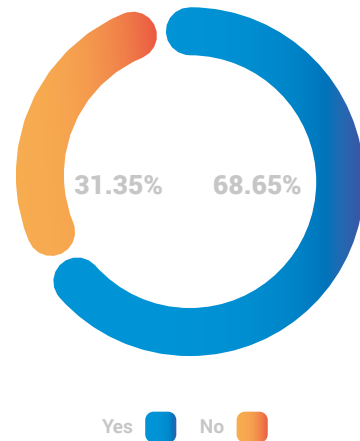
Experience with the career as seafarer

- A little over half of seafarers would recommend a career at sea to their children.
- 68% of seafarers would be interested in a position ashore.
- 70% of seafarers are satisfied with their life as a seafarer (no graph).

Would you recommend a career at sea to your children?



Would you be interested in working ashore?



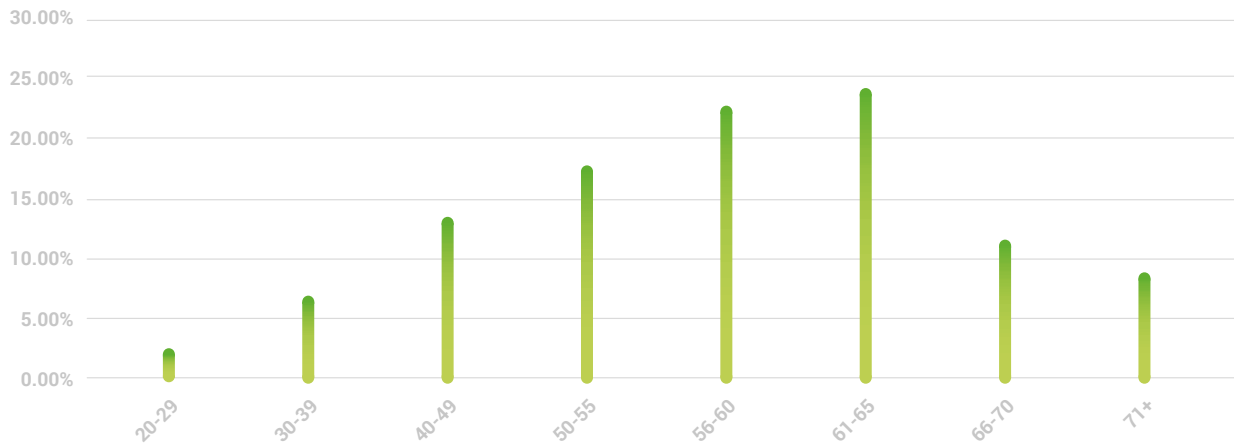


19

Retirement

- Most of the seafarers expect to stop sailing when they are between 56 and 65 years old.
- We can see, that the Filipino seafarers have a desire to retire earlier than their European peers.
- As many as 20% of the seafarers plans to stop their seagoing career before they become reach 50.

At what age do you expect to stop sailing?



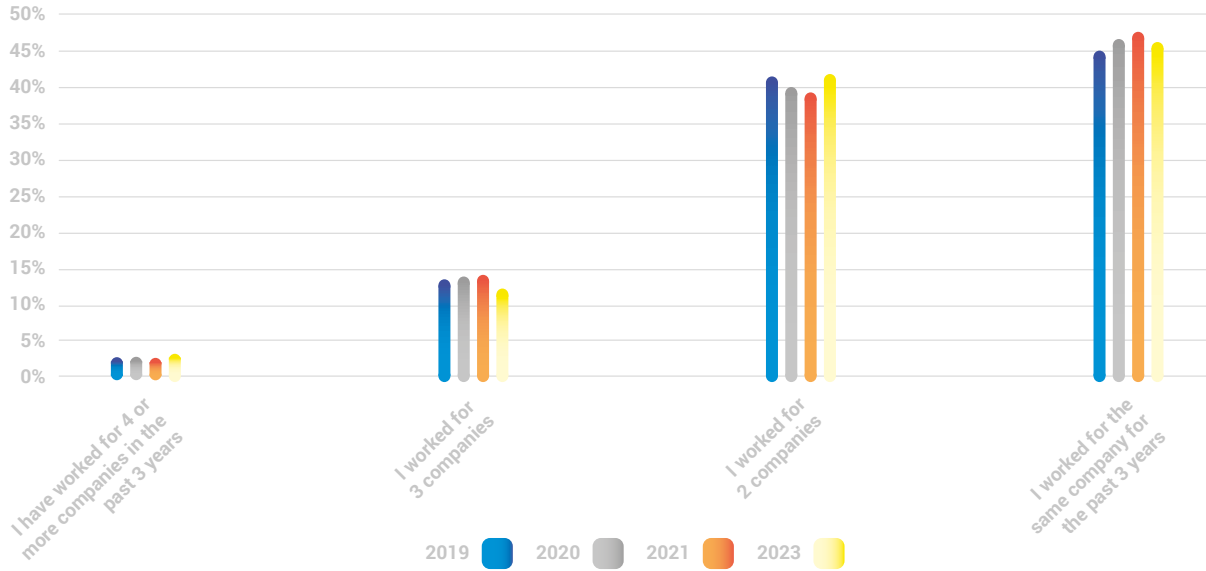


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Retention

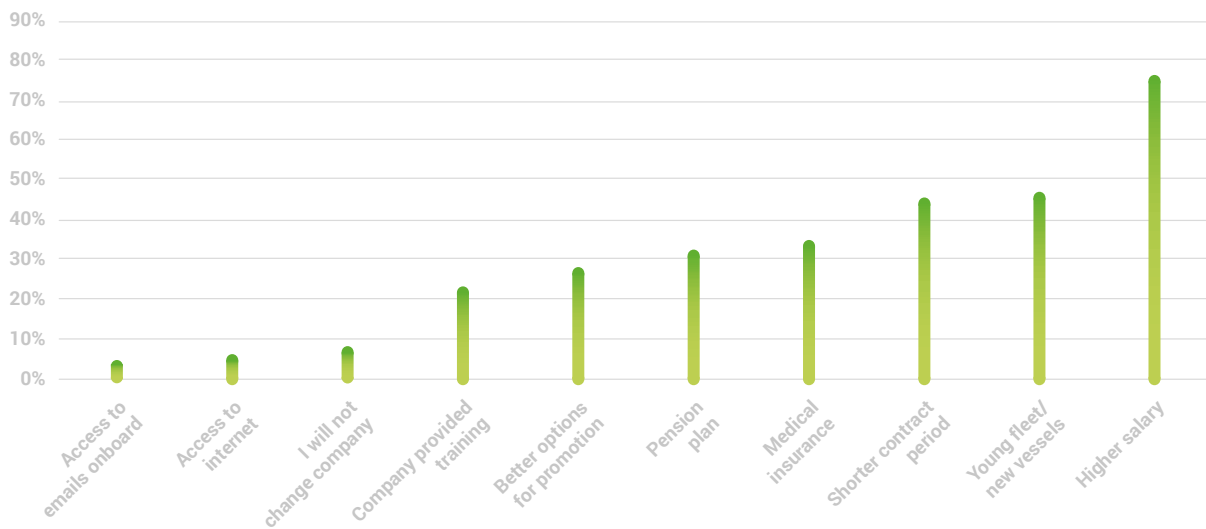
- 55% of seafarers change employer at least once within a three-year period.
- The seafarers' steadiness with the same employer has not changed over the years.

How many companies did you work for within the past 3 years?



- We also asked the seafarers what could make them change employer:
- The pattern is the same as in previous years except for higher salary has increased by 10% and access to emails and the internet is no longer a parameter for changing employer, most probably because it is now widely available.

What could make you accept employment with another owner?

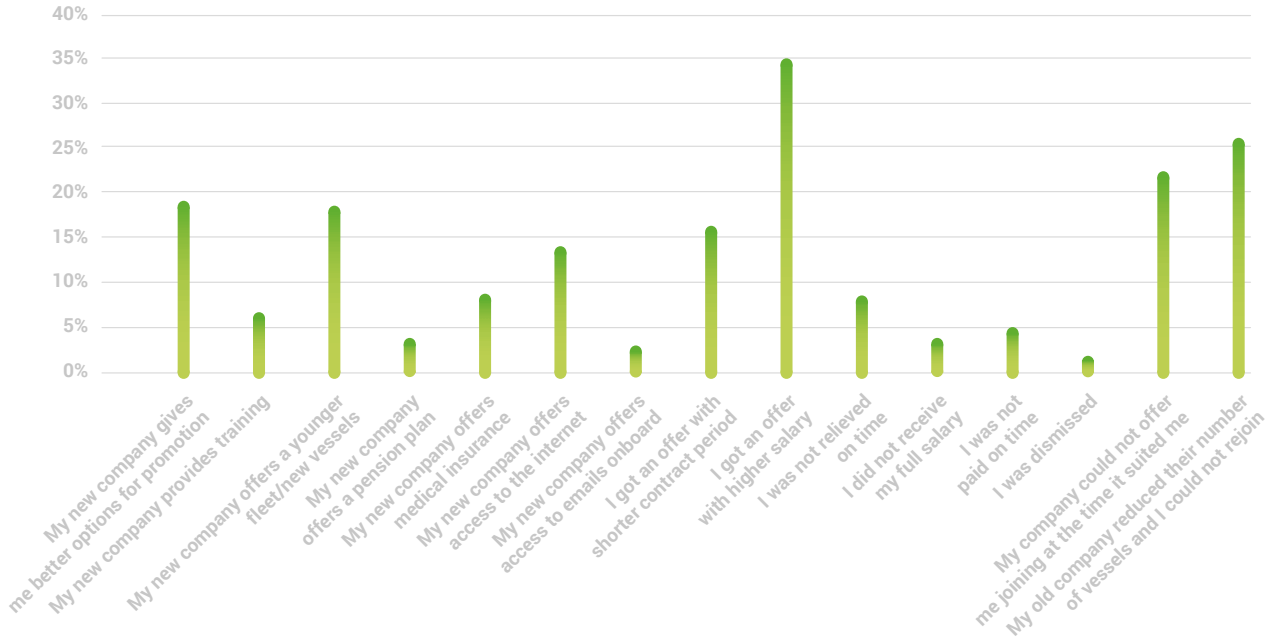




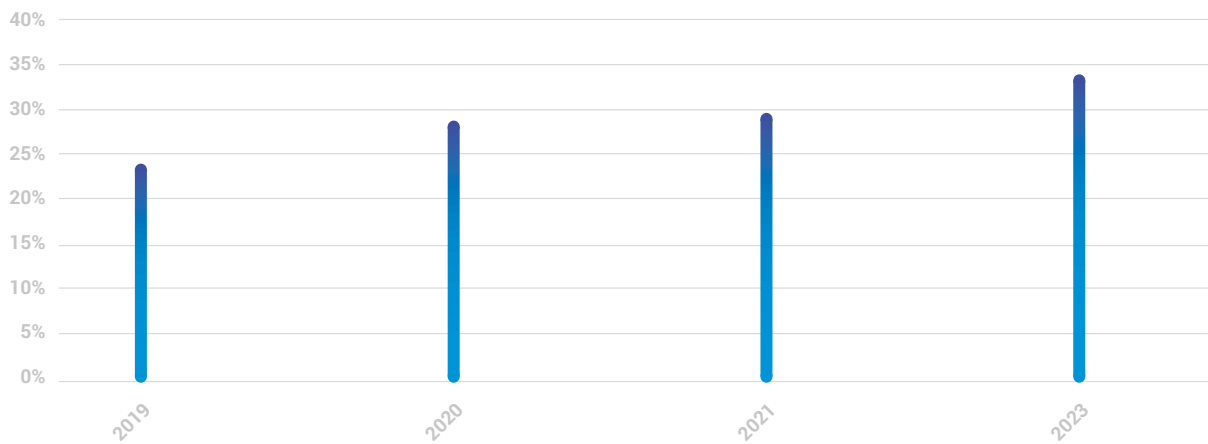
Reasons for changing employer

- We asked the seafarers who changed company within the past 12 months for their reasoning. The respondents could select more than one reason.
- The reasons the seafarers have stated for 2023 are much like in previous years.
- On the following graphs we have highlighted some important trends.

Why have you changed company?



I got an offer with a higher salary



Reasons for changing employer, continued

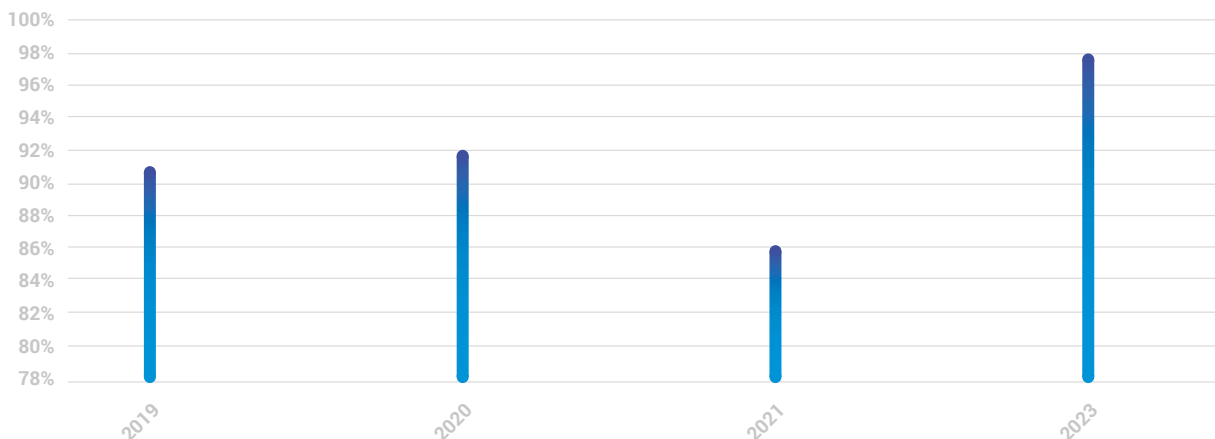
- 35% of the seafarers accepted to join another employer as they got an offer with higher salary.
- 35% of the seafarers accepted to join another employer as they got an offer with higher salary.
- 26% changed employer because the new employer offered a joining date which suited better.
- Both are indicators of that there the crew employment market has tipped to be the seafarers market.
- We see a wage spindle spiral like what was seen up to the financial crises. The root cause for these wage increases is the combination of a general shortage of well-competent seafarers and a better financial situation for most vessel owners which is making employers more generous with the remuneration. is the root cause for the wage increases.
- With a surplus of job offers the seafarers can be more picky.
- Whilst the wage levels offered is a decision for of the employer, an increasing number of seafarers are changing employer for reasons not under control by the employer, such as like the new employer offeringed are more convenient joining date.

My company could not offer me joining at the time it suited me



- The number of seafarers scanning the job market when they are home has increased over the years and today practically everyone is checking the vacancies.

Do you check vacancies from other companies when you are home?

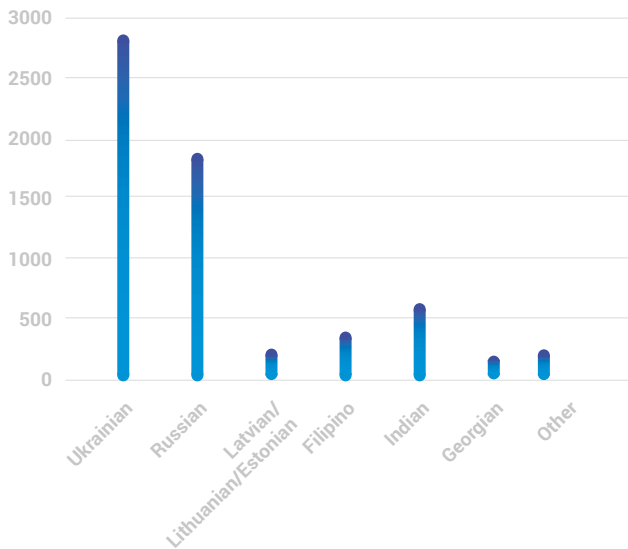




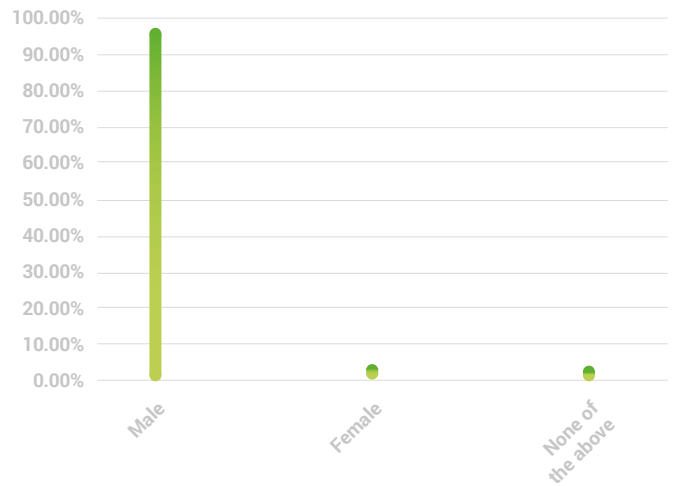
Demographics

- The following shows the profiles of the respondents.
- We do not claim this survey is representative of scientifically correct, but we believe it gives a good snapshot of the seafarers' situation in 2023.
- Statistics are always to be read and applied carefully: A man with one leg in a fireplace and the other leg in a bucket of ice water is from a statistically point of view in an average good condition!

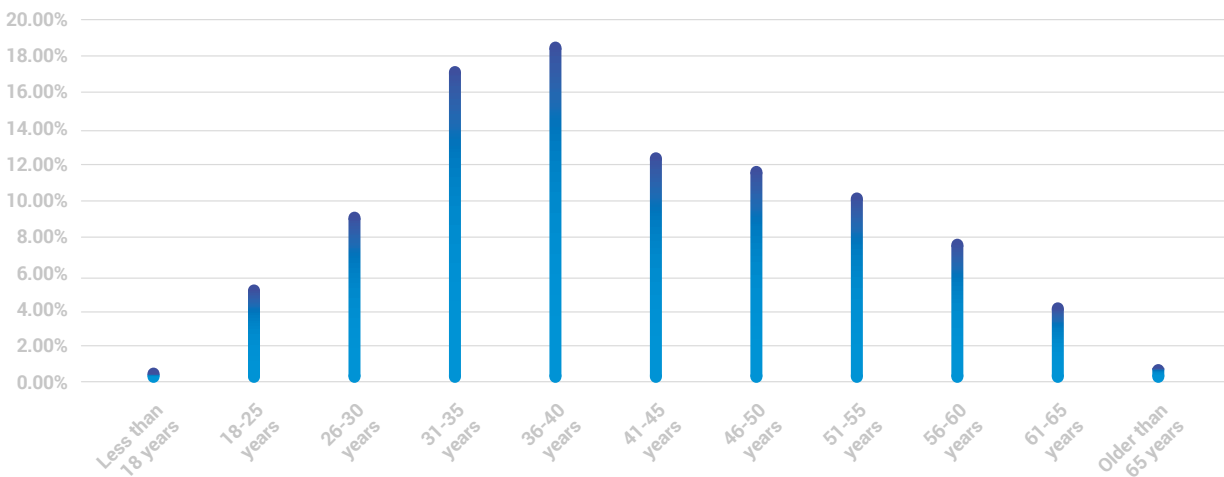
Nationality



What is your gender



Age

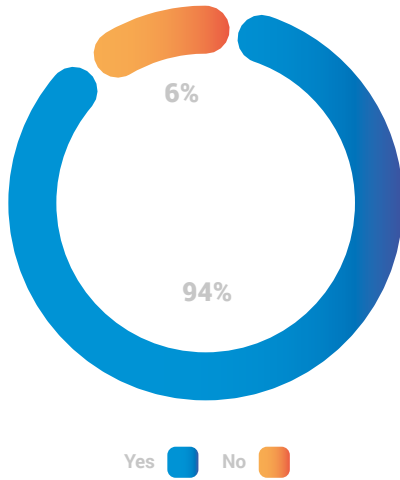


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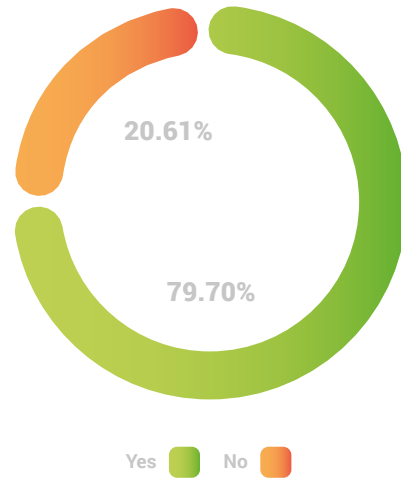
Ukrainian Seafarers

- The Russian war on Ukraine has created a special situation for the Ukrainian seafarers, and this year we added a special section for seafarers of Ukrainian nationality to the Danica Survey.

Have you fled from Ukraine?



If you have fled: Is the family together with you?



Do you plan to return to Ukraine?



DANICA 2023
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SEAFARERS' SURVEY RESULTS



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