



Seafarers Happiness Index

Quarter 3 / 2019



The
Seafarers
Happiness
Index

IN ASSOCIATION WITH



SHIPOWNERS

SECURITY FOR SMALL & SPECIALIST VESSELS

In association with the Shipowners' Club

The Shipowners' Club is a mutual insurance association which offers Protection & Indemnity (P&I), Legal Costs Cover and associated insurances to small and specialist vessel owners, operators and charterers around the world.

The Club is committed to promoting the positive health and wellbeing of the seafaring community and as part of this endeavour, is proud to support the Happiness Index.

Seafarers Happiness Index Quarter 3

The shipping industry needs to know how seafarers feel about the challenges facing them at sea, so data from seafarers and dialogue with those at sea is incredibly important. The Seafarers Happiness Index (SHI) exists to provide an ongoing study into how people at sea feel about a range of key areas.

The Seafarers Happiness Index from the Mission to Seafarers is a vital tool in measuring how happy people are about the various elements of their working life, providing a picture of the real successes but also highlighting problems within seafaring, delivering opportunities to improve and develop.

The Index is made up of a standard set of ten questions and these cover key areas, such as mental and physical health, diet, rest, workload, connectivity, training, access to shore leave, as well as relationships at home and onboard. These are answered anonymously, and seafarers are encouraged to complete their answers during each trip.

By sharing their feelings on a scale of one to ten, and by providing some written insight, the Index gives a voice to seafarers and addresses the fundamentals of why people are happy to go to sea, or not as the case may be.

General happiness levels have risen this quarter, quite dramatically in some questions. There seemed to be positivity across the board. While once again we received compelling and fascinating insights into life at sea, there were still frustrations voiced and seafarers did not hold back with their opinions from the global fleet.

Every quarter, seafarers provide their input and insight. We would encourage people at some point during each trip to sea to just take a few minutes to share their thoughts. The Seafarers Happiness Index can be completed at www.happyatsea.org

So please, whether you are a seafarer or whether you work with seafarers – we need to hear the real-life tales onboard ships today. We urge you to complete the Index during every trip, that way we can build data and weave the stories of what is truly being experienced during life at sea.

Executive Summary

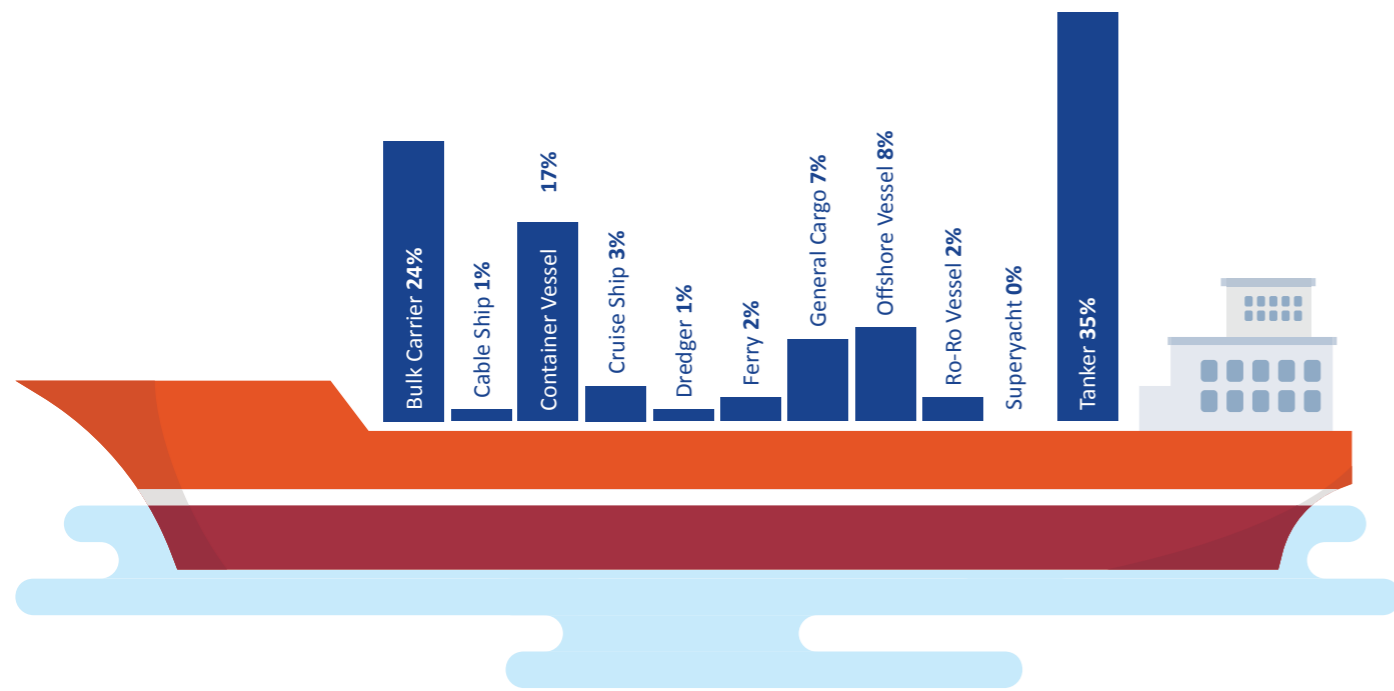
Overall seafarer happiness has risen to **6.59** from **6.27/10**. Incredibly, we came close to increased happiness across all categories, but alas connectivity slipped slightly. This is positive news. It shows that it doesn't have to be doom and gloom, that seafarers can share and be open about the good and bad they experience. The Mission to Seafarers has also been working hard to help support seafarers, and we hope that the raised happiness levels reflect the effort to improve the lives of those at sea.

The number of seafarers sharing their thoughts with us has risen too. Across our website, enhanced survey function, social media channels, and by those visiting our seafarer centres globally, we received comments and input from over 2,500 seafarers. In addition to the numbers, many of these also took the time to share their thoughts and the reality of their experiences at sea. The data and feedback are both extremely valuable, and we thank all who have contributed. As ever, this report is our way of repaying that investment of time and effort, and we hope we can continue to make life better for seafarers, and to make their time at sea happier.

SHIP TYPE

As is perhaps to be expected, the largest number of respondents come from bulk carriers, container ships and tankers. Of the “big three” in global fleet terms, rather surprisingly the seafarers on bulk carriers were the most satisfied according to the data, something which has not been the usual pattern. The bulk crews reported an average general happiness level of 6.53, with container ships at 6.16 and tankers 6.14, respectively.

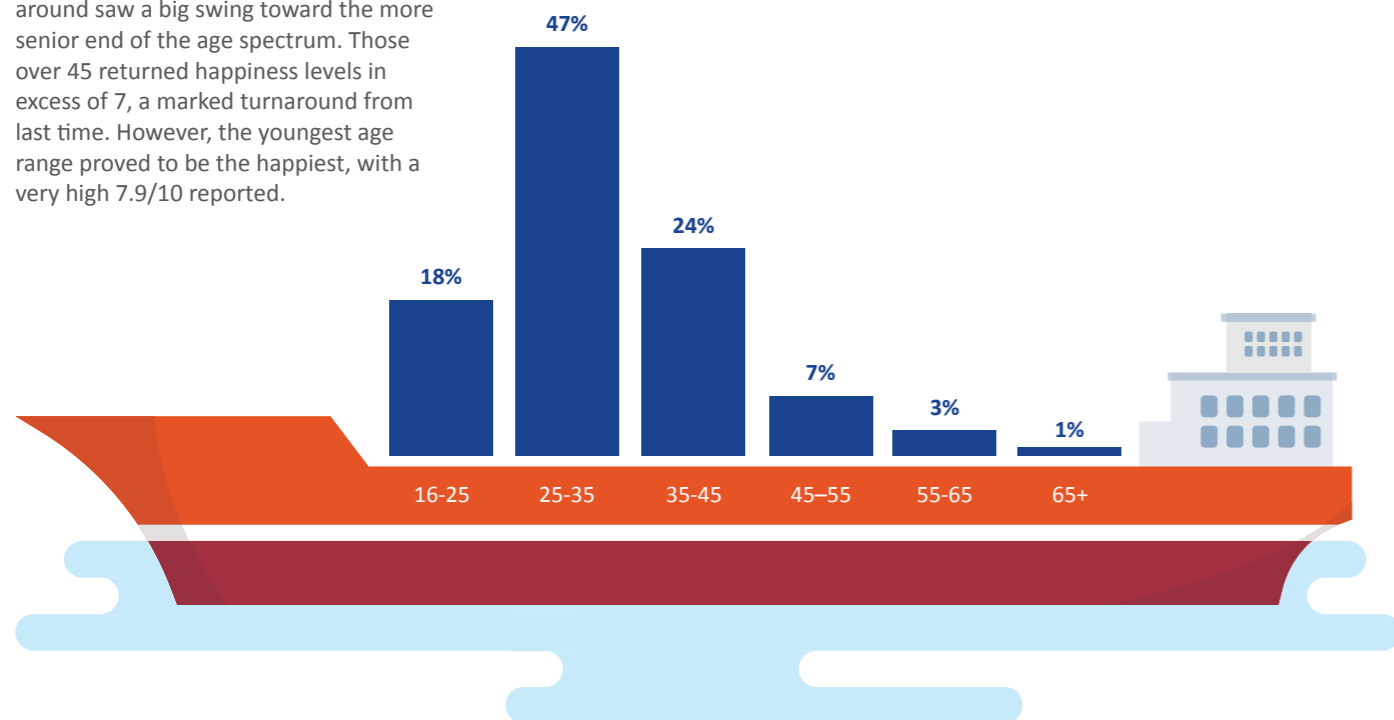
Of the less well represented vessel types, Ro-Ro vehicle carrier crews were the most reportedly upbeat. It was reassuring to note that ferry and cruise ship crews were feeling a little happier with their lot this time around – their happiness levels jumped up a full point from 5.3/10 in the last quarter to 6.3 this time round. We had contact from cruise ship operators in light of the Q2 results, and it is positive to note that some of the insight we gave them may have had a rapidly improving effect, an area to monitor closely.



AGE RANGE

Once again, 25-35 was by far the best represented age group.

When it came to satisfaction, this time around saw a big swing toward the more senior end of the age spectrum. Those over 45 returned happiness levels in excess of 7, a marked turnaround from last time. However, the youngest age range proved to be the happiest, with a very high 7.9/10 reported.

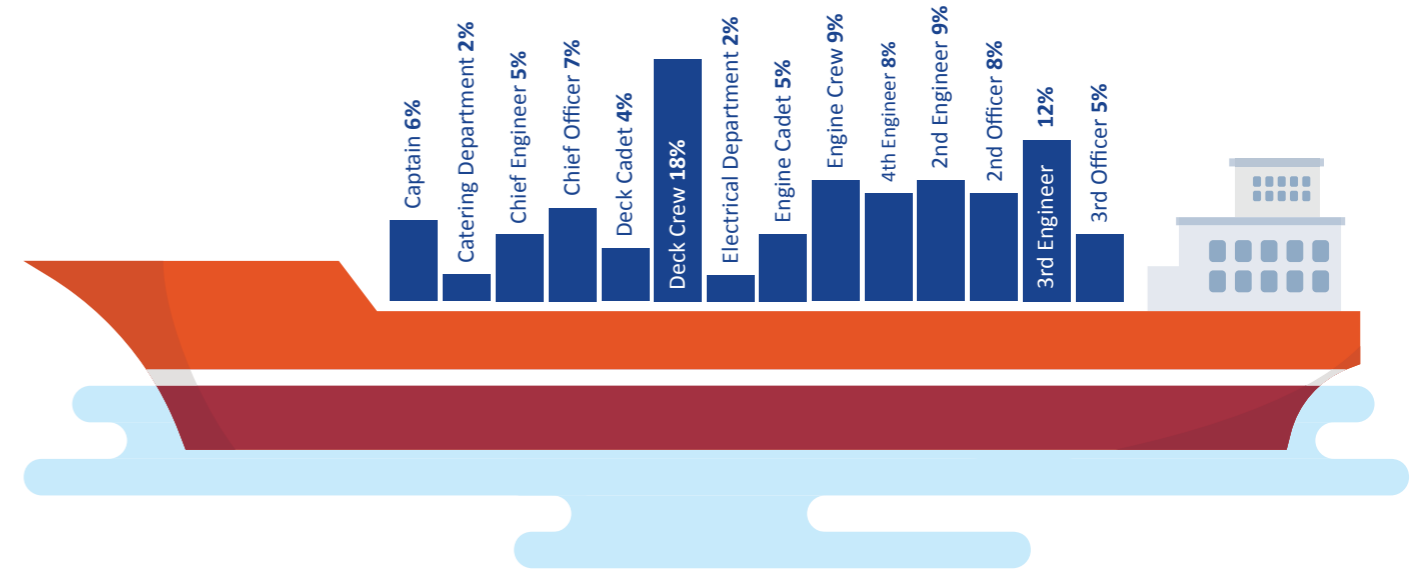


RANK

Once more we saw an incredibly diverse, fairly evenly spread set of seafarers across all ranks and departments. This is encouraging, as it shows that there is a desire to improve and share across all phases of a seafarer’s career journey. There was a surprising leap in happiness for Masters – breaking through the 7 mark – heightening the disparity between Captains and Chief Officers. The Mates registered a lowly 5.79, which was a climb on last time, but still by far the lowest in the deck department.

There was again a gap between the sentiment of Chief Engineers and Second Engineers. The Chiefs came in at 6.92, which was a positive jump in the figures, while Second Engineers also saw a leap to 6.17/10.

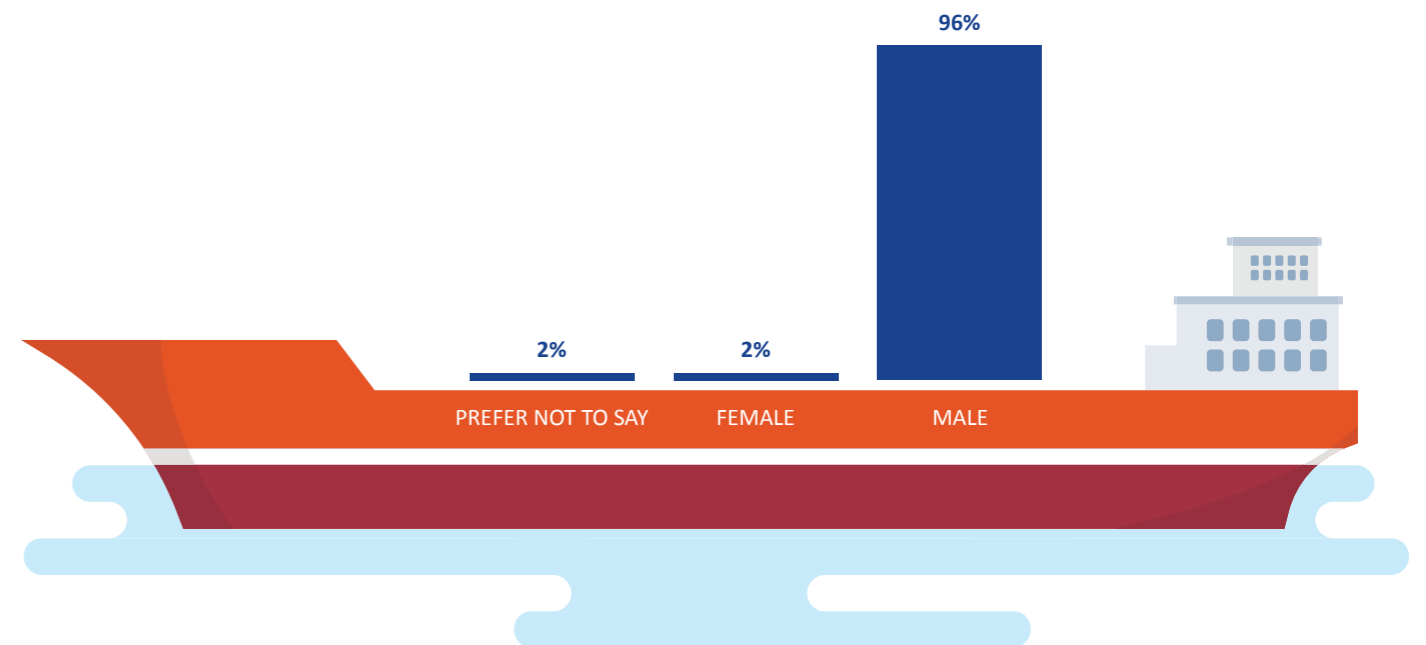
As has been the norm, the deck department appears to be more satisfied than the engine department, and we saw a pleasing leap in catering staff happiness, up to 6.54/10. These reports have been stressing the importance of good quality catering staff and cooks, so perhaps the message is making them feel more valued? We certainly hope that is the case.



GENDER BALANCE

Unfortunately, once more the spread of genders in the responses was woeful. Over 96% of respondents were male. This is something that we will work hard to address, but it does appear to be symptomatic of an industry with a diversity problem. While the fact that we do not hear from enough female seafarers is a

negative, on the flip side we are pleased to see that those who do engage with the Seafarers Happiness Index are generally feeling more satisfied with their jobs and life at sea than their male colleagues. Indeed, the results this quarter even saw a rise in female seafarer happiness, as their responses climbed to 6.58/10.



How happy generally when at sea? -

6.37 ↑ from 6.21

Despite the climb in general happiness, and the fact that a number of seafarers talked about their pride in being at sea and that this was a career which had always been an ambition, sadly there were some rather fundamental grievances laid out by the seafarers who took time to write their thoughts.

The issue of criminalisation was something which seafarers raised. They asked questions of who will protect them if things go wrong and expressed concerns that they do not always have the information to make the right choices. Reading between the lines of some responses, it seems that some seafarers may have been caught in issues relating to sanctions toward certain flags and feel they have been punished for the mistakes of others. In a similar vein, seafarers voiced concerns about the incoming low sulphur fuel rules (IMO2020). They were worried that they may not always have the correct data, and indeed, that tough inspections can get them into trouble with the authorities. There are real fears about drones sniffing funnel emissions and the crew being found guilty.

There was also rather pointed criticism of some management styles onboard, especially where there was felt to be favouritism. Some complained of harassment from senior officers, and reports of draconian punishment with threats of jobs being lost in some cases. On the other side, however, there were concerns from some officers that the standard of crew has been falling of late.

According to one respondent, seafaring is not what it used to be in the early 2000's. Wages have reduced or stagnated, while there have been drastic cuts in budgets, as well as the crew on board. There was also a sense of frustration that seafarers are invisible to the world economy despite the key role played. Another spoke of the "death by a thousand cuts" that was experienced, something illustrated by the use of budget airlines for repatriation, and very slow paths to promotion.

There were still concerns about shore leave, while issues relating to office support for spares and stores were also on the rise. It was stressed repeatedly that sailing is better than port stay unless there is sign off. In port there are so many demands, that it gets exhausting for crews having to deal with cargo operations, inspections, stores, surveys and visits from office personnel.

Life is difficult at sea, but once more the benefits and importance of connectivity was stressed. There was also much talk of entertainment facilities and service onboard, and the pleasure these can bring.

How happy with your work load? -

6.16 ↑ from 5.73

This question has usually seen a succession of large drops in the data, but uncharacteristically this time round we are seeing improvements. Those who expressed positives, praised their shipmates for rallying together to get things done and those ashore who recognised when support was needed and made sure the vessels received it.

That is not to say that all responses were positive. Those who shared their opinions did not hold back. There was more frustration at the proliferation of paper work and administrative tasks, while the fact that work load often precludes access to "decent shore leave" was heard again, numerous times. The demands of vetting and internal audits are also leading seafarers to be stressed, not only preparing for them but for fear of mistakes.

There are seen to be high expectations from those in management and the constant pressure to perform perfectly is being felt at sea. This kind of top down approach from the shore is seen as increasing bureaucracy, and there were concerns about "nonsense requests" which travel down the chain of command.

It was stated that crew are left feeling they have no voice and no power to help guide or improve the situation. Respondents also claimed that pressure from managing offices is the most common reason for seafarers, especially senior officers, to feel distracted and annoyed.

Structurally it is felt that the workload is too heavy, with too many hours worked despite what official records may state, and with too small crew. Given that there is unending flexibility expected by many external parties, some seafarers report feeling demotivated, fatigued, stressed and frustrated. Cost cutting, attempts to shift blame to vessels and down manning were major concerns for crew.

How happy about the training you receive? -

6.91 ↑ from 6.53

Data on the issue of training saw a rise this quarter, and there were many positives sentiments about the importance of training and the enhanced employment opportunities and career progression it can bring.

Where the feedback was less positive, the issues of cost and time were mentioned repeatedly and the specific demands of some sectors arose as a contentious issue. Some respondents felt that they were too busy concentrating on training than actually learning how to do their jobs, something which is a concern and which stresses the difference between certification and competency.

There were reports that spikes in workload made it extremely difficult to train, and a number of seafarers felt that the demands to complete administrative task such as sending reports and e-mails to the company offices ate into any time that they could reasonably expect to use for training.

Critics raised the point that all too often they perceived training as being simply a "tick box" exercise. This perhaps explains the view also taken by the same respondent that nowadays the number of poorly educated seafarers is increasing owing to the reliance in some nations on government run institutions, colleges and academies.

There was a marked difference in happiness levels between seafarers who felt that their companies were investing in their careers versus those who were left to fend for themselves. The companies who invest in training clearly have happier crew, and this was also felt across other questions too. The issue of personal and professional development is one that was mentioned more this quarter than in previous questionnaires.

How happy about interaction with other crew on board? - 7.28 ↑ from 6.85

Another big climber in the Happiness Index was interaction with crew – in fact 7.28 is one of the highest figures in the five years the report has been running.

Those who had good feelings about their fellow crew spoke in terms of positive interaction, older seafarers being willing and able to share experiences and to teach others. There was also a big focus on the importance of regular social events to build camaraderie and boost morale.

Whether a barbecue, games nights, sporting challenge, karaoke competition, or movie night, the seafarers who shared experiences of enjoyable events and interactions were far happier than those on vessels which did not provide a social focal point.

On the negative side, it was unsurprising that the usual concerns were covered. Ships with empty recreation rooms, or where there are rifts between departments, ranks or nationalities are where seafarers struggle the most, and where happiness is in very short supply.

Interestingly, there was a comment by someone whose company had recently just slashed an entertainment budget. The seafarer saw first-hand how morale quickly plummeted and the atmosphere onboard changed for the worse.

It seems an obvious conclusion, but is important to state, that the seafarers who felt they had some time to interact, and some focus to do so, were more engaged and reported positive interactions and a good lifestyle onboard, and felt energised by their sense of shipboard community. Time, space, and a sense of belonging make the difference.

How happy about access to shore leave? - 6.16 ↑ from 5.97

Another question which saw positive movement was access to shore leave. Seafarers who shared their satisfaction, and scored highly, spoke of how important it is to them to be able to get ashore. Being off the ship and being able to unwind and relax made the rest of the trip far more bearable.

A host of younger seafarers spoke of the excitement of seeing new places, and even of feeling privileged to sample the excitement of different countries and cultures. This again highlights the importance to seafarers of the wider benefits that were traditionally associated with the job, but which have seemingly been eroded over time.

Given that stress, fatigue and mental health are significant issues and the fact that senior officers suffer greatly from heightened pressures, it was very concerning to read some responses from senior ranks. A number felt that as part of the vessel's Senior Management that it was next to impossible to go ashore. This was a response that was particularly prevalent on tankers.

These responses stated that it was made impossible by the terminal regulations, inaccessible port areas, country regulations or by the sheer number of surveys/audits/inspections/stores/bunker operations being completed in every port. There was also a sense that if anything did go wrong onboard, then being ashore on shore leave would not be an answer received well by the office.

Time and time again the seafarers who shared their stories spoke of incredibly troubling figures when it comes to shore leave, "twice in the last 4 years at sea" said one as an example. It seems seafarers are struggling to get ashore, and the realities of ports, pressures and the shortage of people onboard mean that they often do not even want to try.

How happy about wages/salary? - 6.57 ↑ from 6.23

Yet another climber in the Happiness Index is wage satisfaction. This is surprising as salaries have often been one of the more contentious and problematic areas of concern for seafarers. There seemed to be a general level of contentment across the board, with responses saying that they felt the pay they received was satisfactory.

However, there were certainly no seafarers who reported feeling wealthy in their home nations, as has so often been the longstanding myth. That said, many felt that they were able to look after their families, to save and to buy the things they wanted, so salary levels seem to be delivering to an extent.

Naturally, there were many who were less circumspect and effusive, and the majority of written responses were unfortunately negative. Of particular concern was the fact that many junior officers felt that their salaries were too low and they felt unsure of whether they would still go to sea by the time their ranks and wages rose.

There were comments that call centre staff in their home nations were on as much money as they were, something which hints at potential problems ahead if the best and brightest talent can be poached by other industries.

The usual concerns about stagnation of wages were voiced, and this is often against a backdrop of rising living costs and increases in taxation, or changes in exemption rules. While there are small increases which have been negotiated between employers and unions, it seems that they may not be felt adequately in the pockets of seafarers.

How happy about the food on board? - 6.77 ↑ from 6.34

Satisfaction with onboard catering and the standards of cooks and ingredients saw a rise this quarter, which again, has not always been the case.

Happiness, in this regard, seems to constantly rest on three key issues: the skill of the cook, the budget allocated, and the quality of the food which comes onboard. Even the best cook cannot make good meals if the budget is low and there are only below par stores to deal with.

Time and time again, the issue of the cook was key. There were those who felt their cooks were fantastic and praised them enthusiastically, which, as may be expected, meant their happiness levels were very high. There is real respect from seafarers towards good cooks, and crews who feel their cooks are not good enough do not hold back on saying so.

Rather unusually this quarter, there were a number who praised the creativity of the catering crew. They seemed respectful of their efforts to make occasionally mundane ingredients into a feast to be enjoyed. There was also a suggestion that sometimes cooks sail too long, and they should be rotated more frequently so that different menus are available.

Spending and budgets figured highly in this category. Seafarers know where corners are cut and the impact that this has on their life onboard. Some were critical of the systems in place, and of how chandlers worked. There were accusations that some chandlers, who deliver via sub-chandlers, are charging fees at levels which leave the crew with insufficient and lower quality food.

There was also condemnation of owners who do not invest sufficiently in healthy food, but who conversely expect their crews to be fit.

How happy about your ability to keep fit and healthy on board? - 6.84 ↑ from 6.45

It seems that many seafarers are beginning to feel the benefits of keeping fit onboard, and there were positive responses about equipment. There was a clear divide between those who feel they have the time and inclination to exercise, and those who felt that the pressures of the job would not allow them such activities.

With good recreational and gym equipment onboard, and with some time to use it, that is what makes seafarers happy. They feel relaxed, recharged and reinvigorated. On the other hand, those who had no access or no time felt unfit, put weight on, and felt increased stress.

There were criticisms that some owners put poor quality gym equipment onboard to simply convince auditors and inspectors that they were looking after the health and best interests of crew. Often these were broken, and so proved of no benefit to the seafarers.

Some felt that spaces for gyms were being reduced, and there was a trend towards smaller accommodation blocks, which meant that any recreation areas are squeezed and become either unfit for purpose or unappealing to use.

Combining the issue of nutrition and health with physical fitness, there were some calls for owners to provide dietary supplements to help ensure crew were kept in good condition.

How happy with welfare facilities when you are ashore? - 6.05 ↑ from 5.50

We are naturally pleased to see a rise in these figures. We have been working hard to address the issues raised in the Seafarers Happiness Index, and always seek to ensure that we are able to deliver the best we can for the crews who visit our centres.

There were many positive reports from seafarers who had visited a range of seafarer centres all over the world, and they heaped praise on the staff and volunteers who they saw doing so much to make them feel welcome and supported.

Unfortunately, this question is intrinsically linked to the issue of shore leave, and there are a range of frustrations evident when it comes to the ability to get off the vessel, and to then exit the port in a cheap and effective manner. The Mission to Seafarers does provide transport in many ports, though unfortunately not all. Where this service exists, the happiness levels of the crew increased, a positive testament to the work we do.

As with so many facets of seafarer life, those at sea want to feel they are not being taken advantage of, and they need support to make their experiences in port as pleasant as possible. So, whether it is a visit to the vessel and the opportunity to get online or to receive some morale boosting basics, or whether there is a chance to get ashore properly and have some rest and relaxation, all these things make a huge difference to the mental wellbeing and welfare of seafarers.

Respondents felt that it feels that sometimes the world has forgotten that ships are manned by humans with human needs just like anybody else. So, it is vital that we do all possible to support these needs, and to ensure that the welfare facilities available deliver.

How happy about contact with family when at sea? - 6.82 ↓ from 6.88

In a historic Seafarers Happiness Index of positive results, the issue of connectivity and contact with family was the only downward trend recorded. Those who have access to the internet, Wi-Fi and calls are “very, very happy”. Sadly, there are simply too many who do not.

As one respondent stated, “Sailing for 22 years now and unfortunately, life at sea doesn’t get any better. There is wider and wider gap in communication possibilities between shore and ships, regarding mails and internet is feels like shipping industry still stands in 1990.”

This was a thread which ran through many of the responses. There is frustration, incredulity and resignation to the fact that contact with home is too expensive, connections are too slow or poor, and the matter is not given enough attention by companies.

Often satellite phone and Wi-Fi is readily available onboard, but on many vessels the data allocations per month given to each crew are not matching the needs and desires of those onboard.

Time and time again, respondents said that they would not hesitate to move companies if they were to be given better, cheaper and more effective communication with home. Respondents said how overall the effect of being able to contact their friends and families made a positive difference to their standard of life onboard.

However, it should be noted too that not everyone felt the same. According to some responses, it was sometimes more upsetting to make contact especially if there is a problem at home. This is an important issue, and there were calls for welfare organisations to assist in helping those at home to better support crew while they are away.

Where

The majority of seafarer respondents were from the Indian Subcontinent, with South East Asia the next best representation, a natural reflection of the global manpower picture. Neither of these large groups performed particularly well when it came to happiness. Indian seafarers scored a below general average score of 6.16/10, a drop from the last report, and SE Asian seafarers 6.39.

The joint happiest seafarers with an impressive average of 8/10 were once more from Oceania. The high water mark of 8 was also matched by seafarers from Central America, the Middle East, and South America. Unfortunately the rising happiness of Eastern Europeans came to a crunching end. The figures for this group were a lot lower than the others at just 5.84/10. Their Western European counterparts saw happiness drop too, but not as dramatically, with fairly average results of 6.58.

- Indian Subcontinent **45%**
- South East Asia **24%**
- Western Europe **9%**
- Eastern Europe **9%**
- North Asia **5%**
- North America **3%**
- Oceania **2%**
- Africa **1%**
- Central America **1%**
- Middle East **1%**
- South America **0%**



Conclusion

Overall seafarer happiness has risen this quarter to 6.59 from 6.27/10. Once more we must thank all those seafarers who took the time to share their thoughts with us. We are extremely grateful. We also hope that finally we can see some positives across industry as this snapshot begins to show an increase in happiness and satisfaction levels. We may see changes next time round, but for the first time it feels like some of the improvements we have been communicating may be gaining traction. This is down to crews talking to us and our translating their concerns into opportunities for the industry to improve. So, thank you to those who contribute and those ashore who are then taking the lessons and applying them.

Despite the positive figures, there are naturally concerns raised by crew when they write in more depth and there were a number of stand out issues in this quarter's returns.

With the turbulent political situation globally, some seafarers are concerned with the risks of getting caught in sanctions disputes. Whether it is vessels of a certain flag or cargoes from nations which are subject to barriers, it is the seafarers who have real concerns about what happens to them if they are caught in the crosshairs of global disputes.

This was also mirrored in the concerns about the incoming low sulphur fuel rules (IMO2020). With reports of tough inspections and penalties, seafarers are beginning to sense that once more they may be the ones who have to run the gauntlet of disputes.

There are several key concerns which often feature in the Seafarers Happiness Index, and while the data showed some progress, there were once more concerns about shore leave. The demands on crew while in port are taking their toll on the wellbeing of seafarers, and there are calls for things to be improved.

When it comes to workload, it is not just that there is so much to be done which is the issue. There are increasing pressures to "perform perfectly". Respondents said that with data and statistics playing such a key role in any company's evaluation by shareholders or clients, even the slightest blip in performance can cause real problems. Crew are therefore concerned about the pressure to perform and are burdened with forms of top down management which just mean more for them to do, as bureaucracy, and "nonsense requests" emerge from offices ashore.

There were positives when it came to training, and many spoke of enhanced employment opportunities and career progression. However, pressures of cost and time were repeatedly mentioned as serious concerns.

Another big climber in the Happiness Index was interaction with crew which received a 7.28, one of the highest figures in the five years the report has been running. Again, another seemingly high-water mark of positivity. There was talk of positive interaction onboard, especially when it came to older seafarers being willing and able to share experiences and teach others. There was also a big focus on the importance of having regular social events to build camaraderie and to boost morale.

Food is an important part of this morale aspect, and happiness, in this regard, seems to constantly rest on three key issues: the skill of the cook, the budget allocated, and the quality of the food which comes onboard. Time and time again, the issue of the cook was key. It was good to see a rise in the happiness of catering staff this time round, perhaps reflecting the status they hold onboard.

It was also hugely positive to see a significant jump in the satisfaction of seafarers when it comes to welfare provisions ashore. The Mission to Seafarers and other welfare organisations work hard to ensure the best for crews, and it is very rewarding to hear when things go well. However, we always accept the need for improvement and hope that we are responding well to any concerns voiced by seafarers.

In a historic Seafarers Happiness Index of almost across the board positive figures, alas there was one area which did not match the positivity elsewhere. This was the issue of connectivity and contact with family, which was the only downward trend recorded. Those who have access to the internet, Wi-Fi and calls are "very, very happy", but sadly, there are simply too many who do not. Cost, quality and access remain key, and all too often seafarers are simply not getting the service they want or need.

Another issue of importance this time round was that of wage disparity. Despite the issue of wages being an overall climber in the Happiness Index, unfortunately junior officers feel their salaries are too low, and they are unsure whether they will be able to wait until their ranks and wages rise.

This should be hugely concerning to the industry, as without a pipeline of experienced junior officers to climb the ranks we could well be facing a real shortfall of manpower, skills and knowledge to come. If one combines the concerns about criminalisation, shore leave, the lack of enjoyment and the fact that many seemingly feel they can get better reward by not going to sea, then we seem to be storing major human resource problems in the near future.

We always need more data, and to hear the stories of more seafarers...and for those who have already done so, to share again. We are building new online capabilities and applications to process the data, and to make sure the voices at sea are heard. So please visit www.happyatsea.org to find out more, and to complete the survey. We also want to get these reports spread far and wide across shipping, so please do pass this on. We must also thank the companies which have approached us about setting up bespoke happiness surveys for their own fleets, and those who see the value in benchmarking their own performance against the wider population of seafarers.

What makes your crew happy at sea?

The Mission to Seafarers is now able to run bespoke Happiness Surveys for your crew, so you can benchmark your quality of care against the international survey.

If you're interested in finding out more, contact ben.bailey@missiontoseafarers.org

www.happyatsea.org



The Mission to Seafarers
St Michael Paternoster Royal
College Hill
London
United Kingdom
EC4R 2RL

Tel: +44(0)20 7248 5202
Fax: +44(0)20 7246 4761
Email: info@missiontoseafarers.org

www.missiontoseafarers.org

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