



# Social Conditions Report 2022

**NAUTILUS**  
INTERNATIONAL

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# Helping positive change happen

**W**elcome to the Nautilus International Social Conditions Survey Report 2021 – the latest instalment of a decades-long research project to measure how our members are being treated in the maritime workplace.

Comparing the results from 2021 and 2010, I see that many of the same challenges are still high on members' agendas, from unpaid wages to bullying to crew connectivity.

We know our strategic campaigning and industrial negotiations over this decade have improved matters for many members – and substandard employers are starting to realise that skilled maritime professionals can 'vote with their feet' and move to a better company if they are not well treated. The skills of our maritime professionals remain in demand and I can only see this intensifying in the aftermath of the pandemic.

I am thinking particularly of members in the superyacht sector, where our survey shows that many employers are behind the times when it comes to respecting employees' rights. We are determined to improve matters, and are seeing increasing numbers of yacht crew joining Nautilus as they hear about our success in winning compensation in employment cases and combatting criminalisation.

For tracking purposes, our 2021 survey largely used the same questions as our 2010 and 2001 surveys, but we felt it important also to ask this time how members had fared during the Covid-19 pandemic.

The responses confirm how tough things have been for maritime professionals, and it's not just because of the crew change crisis. Our members are telling us how despondent they feel at the lack of public appreciation for their work during the pandemic, and we know that we and our industry partners must redouble our efforts to tackle 'sea blindness'.

One of the biggest challenges now facing our industry is to play our part in decarbonising the world economy. Nautilus strongly backs this effort, but we are also working hard to ensure that the transition to a net-zero maritime sector is just and human-centred.

The focus should be on creating high-value work, from which the current workforce, as well as tomorrow's recruits, can benefit. Retraining is vital as green technology is introduced, so that a fast-changing industry doesn't end up consigning generations of highly skilled seafarers to the scrap heap.

This survey provides us with valuable data to help your Union to make these positive changes happen, and I would like to thank all the members who took part.

Let's build back fairer after the pandemic and ensure the industry's investment in decarbonisation comes with a commitment to good-quality jobs for our expert maritime workforce.

**Mark Dickinson**  
**General Secretary**  
**Nautilus International**



# Fit for heroes



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**T**his latest Nautilus International Social Conditions Survey comes on the back of one of the biggest global upheavals in the past 100 years: the coronavirus (Covid-19) pandemic.

The Covid-19 crisis has exposed the fragility of the global economy in responding to an event that was unexpected and rapidly engulfed the world.

It has revealed how shockingly unprepared we all were to cope with the challenges it brought. It has also exposed the weaknesses in the governance, structure and regulation of the shipping industry.

The reaction from governments worldwide saw measures introduced to prevent the disease spreading that failed to appreciate the crucial role that the shipping industry and our seafarers play in the global economy.

While punishing crews, turning their ships away, denying them shore leave, closing their seafarer centres and denying them medical assistance, the very same states expected them to continue to carry on providing the essential services that keep supply chains open.

As people panic-bought food and essential supplies, seafarers and other maritime professionals were among many key workers expected to keep working to fill up our supermarket shelves again.

Seafarers, all 1.6 million of them around the world, are among the many heroes in this crisis. Even in the darkest days of the pandemic, they never stopped transporting the essential goods to keep the global supply chains open.

**As people panic-bought food and essential supplies, seafarers and other maritime professionals were among many key workers expected to keep working to fill up our supermarket shelves again**

Throughout the pandemic, Unions and employers, along with many international organisations, have worked tirelessly to ensure that the dedication of our maritime professionals is recognised.

Through the Nautilus International Social Conditions Survey, now in its fourth decade, the Union is receiving direct feedback from its members about conditions in the maritime industry today.

## Mental health

Hearing from members about their experience at sea is a golden opportunity to tell their story about the precarious situations they have encountered before, during, and after the pandemic. Long contracts at sea and being thousands of miles away from families and friends – often with inconsistent or no internet access – has been incredibly isolating and challenging.

That seafarers are at acute risk of mental health issues has been well documented. An Australian study found that almost 6% of deaths at sea are attributable to suicide, rising dramatically if probable suicides – seafarers going missing at sea under suspicious circumstances – are considered.

During the pandemic, there were many reports of an increase in anxiety, depression, suicides and hunger strikes. There were reports of resignations, refusals to sail, of unions backing their members to take action because it is unsafe to keep working under these conditions.

This should be an alarm bell for all of us. Seafarers are professionals, but they are human beings too – they work to provide their families with a living.

They must not be deprived of the basic human rights from which everyone else benefits. Their contractual rights must be respected, because the line between denial of workers' rights and forced labour is a very thin one.

Some of the issues that Nautilus is hearing from its members concern physical health too. Members are now more likely to be actively interested in healthy eating and fitness. Like many of their contemporaries, they want healthy eating options at work.

This should be good news for employers. Taking a vessel off-charter to care for a sick crew member can cost huge sums of money. This is a win-win situation: a happy, healthy crew is a win-win for everyone.

**Employers and governments must understand that there is no alternative to treating workers well and ensuring that they can retire at the time of their choosing, with a decent income**

## Connectivity

Nautilus is hearing also how important staying connected with loved ones ashore is for seafarer mental health and wellbeing.

The Union has campaigned for all seafarers to have access to free internet services at sea – connectivity such as that enjoyed by those who go home to loved ones every night, because, after all, the ship is a seafarer's home for many months of the year.

The Maritime Labour Convention (MLC) recommends that reasonable access to ship-to-shore telephone communications, as well as email and internet facilities, should be made available to seafarers, with any charges for the use of these services being reasonable in amount.

CREDIT: Danny Cornelissen



**Seafarers are among the many heroes in this crisis. Even in the darkest days of the pandemic, they never stopped transporting the essential goods to keep the global supply chains open**

According to the 2017 Nautilus Crew Connectivity survey, nearly two-thirds of respondents would consider moving company if it provided better onboard connectivity. Nautilus has since heard anecdotally that the demand for connectivity from seafarers is such that owners not providing it are struggling with crew retention. Seafarers will avoid signing on with vessels that have no internet access, or whose operators charge for internet access.

## Supporting members

That is why the Union will continue to work with our social partners and stakeholders in the shipping industry to improve wellness and mental health for maritime and shipping professionals onboard and onshore. Employers and governments must understand that there is no alternative to treating workers well and ensuring that they can retire at the time of their choosing, with a decent income.

Seafaring is a unique and rewarding career that benefits 1.6 million workers across the maritime industry globally. Like many industries, it is experiencing a significant and rapid transition as new technologies emerge and countries seek to achieve environmental and social goals.

Seafarers are used to change and are, by nature, highly adaptable. But they must have fair access to training opportunities to ensure there is a skilled maritime workforce in the coming years.

Nautilus urges governments to develop proactive policies to maximise the employment of seafarers and equip them with the skills required to take advantage of future opportunities. This report explains – often in the words of the seafarers themselves – why this is important.





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# Time for reflection

**N**autilus International is an independent, influential, global trade union and professional organisation, committed to campaigning for maritime and shipping professionals, delivering high-quality services to members, and offering maritime welfare support.

We represent 20,000 maritime professionals, including ship masters (captains), officers, officer trainees (cadets) and other shipping industry personnel, such as ship pilots, inland navigation workers, vessel traffic services operators, harbourmasters, seafarers in the oil and gas industry, and shore-based maritime professionals.

Nautilus International has branches in the UK, the Netherlands and Switzerland, and is affiliated with the International Transport Workers' Federation (ITF) and the European Transport Workers' Federation (ETF).

## Taking the pulse

The Nautilus International Social Conditions Survey is a key piece of work for the Union, and will underpin much of our campaign and lobbying efforts for the coming decade. It is used to influence both national and international forums, and shapes the discussion around working conditions onboard and ashore for thousands of seafarers globally.

This is the fourth time that Nautilus has conducted research into members' views and experiences of conditions at sea, with previous surveys taking place in 1991, 2001 and 2010.



**Almost half of respondents expressed dissatisfaction with shore leave, followed by stress levels, workload, recreational facilities onboard and morale**

As a consequence, we are now able to track detailed perceptions of critical aspects of seafarer employment over a period of three decades – providing some very interesting insights into the issues that governments and industry need to address.

Every 10 years, Nautilus asks members for their feedback on the following broad areas:

1. Conditions onboard
2. Safety onboard
3. Respect for the roles of maritime professionals
4. Life onboard
5. Life in the maritime industry

The 2021 survey also took into consideration the significant and ongoing upheavals brought about by the global Covid-19 pandemic.

Seafarers played a critical role in keeping global supply chains open during the pandemic, but their efforts were too often unappreciated. While people around the world celebrated essential workers, it was rare to hear the efforts of seafarers commended alongside those of doctors, nurses, delivery drivers and shopworkers. This has had a profound effect on the people working at sea, with many now reconsidering their future careers in the industry.



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## Key findings

### Coronavirus pandemic

- Only one in 50 members felt that there had been a significant increase in awareness of their job role during the pandemic
- More than two-thirds (68%) of members felt that there had been no increase in recognition for the vital work of the maritime industry and the professionals working within it
- Four out of five (81%) members felt that the pandemic will have a long-term impact on the sector
- More than half of members (54%) said that the crew change crisis has impacted how they feel about working in the maritime industry

### Conditions onboard

- More than a fifth (22%) of members do not believe that there are sufficient people onboard to safely operate their vessel, showing no improvement from 20 years ago
- Almost half of members (49%) expressed dissatisfaction with shore leave, followed by stress levels (43%), workload (35%), recreational facilities onboard (34%) and morale generally (33%)
- A new category of connectivity for personal use saw more than a third (34%) of members stating that they were dissatisfied
- More than one in 10 (12%) seafarers have experienced unpaid wages; a disproportionate number of those work in the superyacht sector

### Safety onboard

- 14% of members do not believe that they or their colleagues were treated fairly after reporting an accident
- There was a decline in the proportion of members who could say with certainty that an accident was properly recorded, with the percentage saying 'yes' falling from 87% in 2001 to 69% in 2021
- 7% have not received any safety training. This appears to be particularly problematic in the superyacht sector
- More than a third (35%) of members have not received any cyber security training
- Half (51%) of members believe that there is a 'good variety of sizes for all' in personal protective equipment, a figure that falls to just 26% among female respondents

### Respect for the role of maritime professionals

- Just more than half (56%) of members saw themselves as integral members of the management structure
- Nine out of 10 members believe they should be given the opportunity to influence fleet company policies
- In 2021, only 38% said they were involved in finance and policymaking decisions relating to the ship, compared with 94% in 2010

**Only one in 50 members felt that there had been a significant increase in awareness of their job role during the pandemic**



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### Life onboard

- The survey shows that improved pay (60%) and a reduction in paperwork (53%) are key priorities for members, alongside connectivity for personal use (51%) and access to gym facilities (38%)
- Nearly a third (28%) of members have experienced bullying or harassment onboard, rising to 42% who have witnessed bullying or harassment onboard
- More than a third (36%) have experienced pressure to alter or adjust hours-of-work-and-rest records

### Life in the maritime industry

- 27% of those responding to the survey are looking to leave their current role, including 11% who would like to leave as soon as possible
- 60% of those considering leaving their current role want to remain within the maritime industry
- A majority (57%) of members were 'positive' or 'very positive' about the use of automation to manage repetitive or routine tasks
- Just 12% would support vessels being remote-controlled from a land-based virtual bridge

## Our commitment

Nautilus International has committed to tackling the issues raised by members through its strategic campaigning. The Union will campaign for fair pay and good terms and conditions for members and aims to have as many members as possible covered by collective bargaining agreements.

Nautilus will continue to fight for an end to exploitation, abandonment, and owed wages, which continue to affect far too many of the world's seafarers, creating a race to the bottom for all.

Our members deserve to be treated fairly in all aspects of their work, including when accidents occur, and Nautilus will continue to fight against criminalisation and support members who are unfairly blamed when something goes wrong at sea.

The Union will continue to promote access to maritime training for young people and mature students from all backgrounds, and advocate for equal opportunities to career progression for all maritime professionals.

Nautilus will put inclusion at the heart of the solution so that no maritime professionals are left behind and the profession is respected by the public and legislators. And efforts will continue to ensure safe, secure workplaces that acknowledge the ship is also a home for those who work at sea.



# Moving forward



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**T**he Nautilus International Social Conditions Survey is unrivalled in its depth of insight into the working conditions of our members onboard the vessels that keep our global supply lanes open. Spanning four decades of data and feedback from the maritime professionals we represent, no other research paints such an accurate picture of life onboard, as experienced by our highly skilled and diverse membership.

This report highlights measures that are required to safeguard the supply of a skilled pool of maritime professionals now and in the future.

Our members have spoken, and we are listening. We urge governments and the shipping industry to take note of our members' concerns and act.

Based on the survey findings, here are our conclusions and recommendations to governments and the maritime industry:

## **1. Address the problem of Sea Blindness**

Sea Blindness has consequences that are far reaching and complex to address. However, at its heart it represents a complete lack of recognition for seafarers, and shipping, and what they do to sustain our lives. As such Nautilus will continue to push for the United Nations to convene an inter-agency task force to consider what happened during the pandemic and what needs to change in this global industry.

We must all work together to ensure seafarers and all maritime professionals are designated as key workers in every country and ensure that trade continues to flow. We must never again allow crew changes to be disrupted, for access to medical care and shore leave to be denied and we must never allow States to ignore their obligations as specified under the Maritime Labour Convention (MLC) 2006, as amended.

Our contribution to address the issue of Sea Blindness has begun with a survey of public opinion in both the UK and the Netherlands to inform an awareness campaign.

## 2. Reform the ship registration “business”

The experience of the Covid-19 pandemic has brutally exposed the system of ship registration and the inability of flag States to adhere to their obligations to the seafarers and shipowners. This is a deep-rooted structural problem and the growth of ‘flags of convenience’ (FOCs), which now account for over 50% of the world fleet, is well documented. These flag States are unable to exercise effective control over the ships on their register and as such they cannot fulfil their obligations to ensure seafarers their social and employment rights. This corrodes the governance of the shipping industry with implications for any bona fide flag State.

Nautilus believes that a review of ship registration practices is now needed. The goal should be to ensure that the United Nations Convention on the Law of the Sea (UNCLOS) Articles 91 (Nationality of Ships) and 94 (Duties of the Flag State) must be enforced and a genuine link established between the shipowner and the country of registration.

Nautilus also believes that the UN Convention of the Registration of Ships (UNCRS), 1986 should be reviewed, revised and promoted for wider ratification.

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## 3. Commit to the continuous improvement of decent work

The ILO Maritime Labour Convention (MLC), 2006 as amended – often referred to as the ‘Seafarers’ Bill of Rights’ – is the minimum acceptable conditions for the employment of seafarers. The MLC covers all aspects of working and living conditions onboard, such as wages, hours of work and rest, paid annual leave, repatriation, crewing levels, accommodation, food, medical care, welfare, training, recruitment and placement. Currently ratified by 98 states representing over 91% of global shipping the MLC is seen as a passport to decent work and is therefore capable of being amended with the aim of continuously improving the minimum standards that it enshrines.

Governments, shipowners, and seafarers’ trade unions must therefore work to deliver that promise of continuous improvement to enhance and extend the protections that the MLC provides.

In the spirit of tripartism that the International Labour Organization (ILO) represents – governments, seafarers’ and shipowners’ representatives must now work together to learn the lessons of the global pandemic.

Looking at the experiences of our members there are many areas that should now be addressed in the MLC including the provision of healthy and nutritious food and free potable water; improved internet connectivity for personal use on board and the provision of personal protective equipment that is fit for purpose.

However, the past two years has also shown us that the MLC requires an extension to the financial security provided to seafarers in repatriation and from unpaid wages especially in cases of abandonment, together with improved information rights for seafarers about how to make a claim.

Together, these amendments will represent a serious step towards improving the wellbeing of seafarers, and tackle some of the weaknesses in the MLC exposed during the pandemic and highlighted in this survey's findings.

#### **4. Fair pay and decent working conditions**

Members are clear, improved pay is a key priority. We believe that pay and other benefits must improve for all key workers not least the seafarers and maritime professionals who kept, and keep, supply chains moving.

The terrible treatment of seafarers during the pandemic will have long-term consequences. Our members' experience reveals a strong majority reporting that they were 'hugely impacted' by the pandemic, with many now reconsidering a career at sea.

Nautilus will continue to push for improvements to working conditions for our members that reflect their commitment and professionalism and to extend the scope of collective bargaining in the maritime industry as we see this as the best way to make a difference.

We urge the industry to support this goal and we urge governments to support social dialogue and collective bargaining.

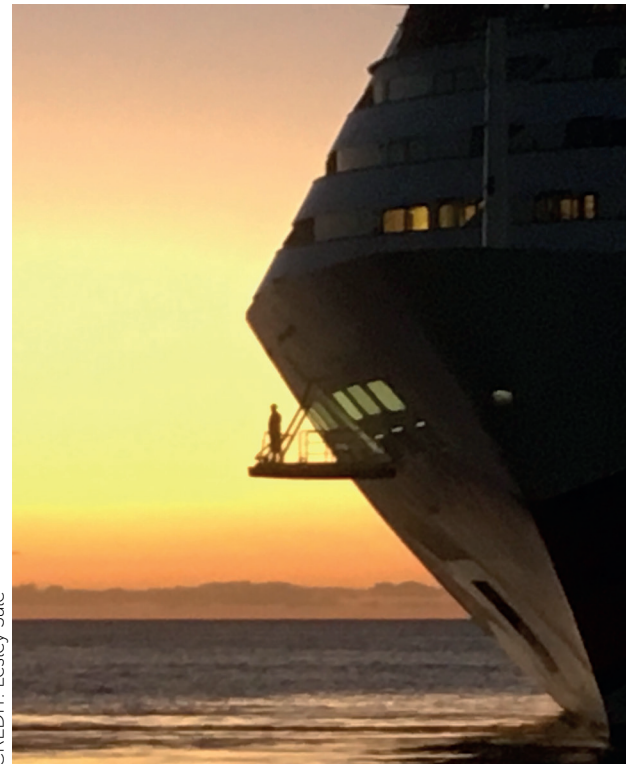
#### **5. Stamp out bullying and harassment**

Bullying and harassment has no place at sea or in any workplace. The MLC incorporates the International Transport Workers' Federation (ITF) and International Chamber of Shipping (ICS) 'Guidance on eliminating shipboard harassment and bullying'. Nautilus was instrumental in developing that guidance but our work to eradicate bullying and harassment is not done.

Nautilus will therefore continue to provide support and advice to any member who encounters bullying and harassment in their work and we will redouble our efforts nationally, regionally, and internationally to ensure that all seafarers can live and work without fear of harassment and bullying.

#### **6. Action on crewing levels and hours of work**

The survey results give a clear indication that action on crewing levels, hours of work and administrative burdens placed on our members, is long overdue. It is alarming that one third of respondents to this survey confirmed that they have come under pressure to adjust hours of work records – these results chime strongly with the evaluation of the current maritime regulatory framework on rest and work hours carried out by the World Maritime University and should be a wakeup call for flag States and the shipping industry.



CREDIT: Lesley Sale

## Conclusion

If action is not taken on the findings of this survey and on the recommendations we make, Nautilus fears that maritime professionals will leave the maritime industry in their droves. Notwithstanding that, we have a serious challenge ahead to convince young people that a career in maritime continues to be worthwhile and rewarding.

We must treat our maritime professionals as the key workers that they are. The industry must engage with them, value, and nurture them and treat them as the assets that they undoubtedly are and can be to their businesses.

The Covid-19 pandemic, and wider experiences of our members, as this survey has illustrated, has exacerbated a feeling among our members that maritime professionals are not respected or appreciated for the work they do. Too often ignored by management ashore and all too often denied their basic employment and social rights by governments. A looming recruitment crisis will surely follow.

The survey results present a challenge for Nautilus – one we gladly accept. We will campaign loudly to highlight our members' concerns and promote attention to the actions necessary to address the issues that this survey has revealed.



# About the survey and participants

This is the fourth time\* that Nautilus has conducted research into members' views and experiences of conditions at sea, with previous surveys taking place in 1991\*\*, 2001 and 2010



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## Participation

The survey was completed by 1,623 Union members, compared with just less than 1,200 members in 2010 – an increase of more than a third.

Of those who completed the survey, around 94% were male and 6% were female, which broadly reflects the gender divide among the Nautilus membership, and shows a stronger female presence than in the wider maritime industry, in which only 2%-3% are women. A small number of respondents either did not wish to share information about their gender or selected 'other'.

There was a broader representation of ages than in previous surveys, with a more even spread of members represented across the age groups.

\*NB Not all questions are the same for all years

\*\*Not all data for all years adds up to 100%



## What is your age?

	2021	2010	2001
20 or younger	1%	1%	2%
21-29	13%	16%	11%
30-39	22%	14%	14%
40-49	21%	23%	38%
50-59	24%	37%	32%
60 or older	19%	9%	3%

## Rank/job role

The 2021 survey gathers data from a wider range of ranks and job roles than previously, with 77% of respondents working as ship's officers (including masters, chief engineers, ETOs, deck and engine officers) compared with 85% in 2010. This change reflects the Nautilus policy in recent decades of embracing all maritime professionals.



## Type of vessel

There were notable increases in the proportion of members working on superyachts, cargo ships and container ships compared with the 2010 survey. Of those responding in 2021, 16% work in the superyacht sector, compared with just 2% in 2010.

## Vessel type:

	2021	2010
Bulk carriers	3%	1%
Car carriers	2%	–
Cargo ships	10%	1%
Chemical tankers	3%	1%
Container ships	10%	6%
Cruise ships	17%	8%
Dredgers	5%	–
Ferries	16%	12%
Gas carriers	7%	7%
Offshore installation/MODU	5%	–
Oil tankers	9%	–
Offshore supply vessel	8%	–
Offshore support vessel	13%	23%
Shore-based	2%	–
Tugs	5%	–
Superyachts	16%	2%
Other	20%	34%

## Flag of ship registration

This was an open question, with a wide range of responses provided, which is reflective of the modern maritime industry. The UK and Netherlands were the largest responses, which is interesting because most Nautilus members are British or Dutch, and this indicates that a large proportion of them still work on ships flagged with their own country. However, flags of convenience put in a strong showing in the rest of the flags cited, which were Bahamas, Cayman Islands, Bermuda, Bahamas, Singapore, Cyprus, and Isle of Man.

Bahamas	97
Bermuda	87
Cayman Islands	104
Cyprus	36
Isle of man	62
Netherlands	107
Singapore	58
United Kingdom	385
Other	338

## Employment

There has been a significant increase in the number of respondents who are directly employed compared with 2010, returning to levels similar to 2001.

Of those selecting 'other', the most common responses were 'retired', 'Ministry of Defence/RFA' and 'self-employed'.

## How are you employed?

	2021	2010	2001
Directly by the shipowner or ship operator	71%	58%	68%
Via a third-party ship manager or crewing agency	17%	40%	26%
Other	10%	2%	6%



CREDIT: Danny Cornelissen

There was a significant decrease in the proportion of members who have their conditions determined under a Nautilus collective bargaining agreement. However, some of this proportionate decrease could be explained by the substantial increase in the number of members working in the superyacht sector, which is not organised in the same way.

## How are your conditions determined?

	2021	2010	2001
<b>Under a Nautilus collective bargaining agreement</b>	45%	56%	54%
<b>Under an ITF agreement</b>	4%	4%	4%
<b>Under individual contract terms</b>	33%	30%	29%
<b>Don't know</b>	10%	–	–
<b>None of the above</b>	9%	–	13%



CREDIT: Nautilus International

# Covid-19

Despite their efforts in keeping global trade moving through the most difficult period in recent history, maritime professionals were left brutally exposed by the international response to Covid-19.

Measures introduced to prevent the disease spreading failed to appreciate the crucial role that seafarers play in the global economy.

With borders closed and shore leave cancelled, the International Transport Workers' Federation (ITF) estimated that, at one point, up to 400,000 seafarers were trapped at sea beyond their contractual obligations, leading to accusations of conditions tantamount to forced labour.

Conditions onboard rapidly deteriorated for many. Medical care ashore was often denied, which added to the physical and mental strain. Reports of suicides and attempted suicides shot up.

Countless other seafarers were left out of work and often unable to access the kind of financial support from which other workers have benefited.

Seafarers played a critical role in keeping global supply chains open during the pandemic, but their efforts were too often unappreciated. While people gathered on their doorsteps to celebrate key workers, it was rare to hear the work of seafarers commended alongside that of doctors, nurses, delivery drivers and shopworkers.

Our survey results confirm that, despite being hugely impacted by the pandemic, members do not feel that their work was adequately recognised. This has led to many changing their view on how they feel about their careers.



**While people gathered on their doorsteps to celebrate key workers, it was rare to hear the work of seafarers commended alongside that of doctors, nurses, delivery drivers and shop workers**



CREDIT: Nautilus International

## Experiences of Covid-19

Some 94% of respondents were affected in some way by the pandemic, with a majority (53%) saying they were 'highly' or 'very' impacted. Only 6% stated they were not impacted.

Despite this impact and the sacrifices made by Nautilus members, just 6% thought that the work of seafarers as key workers was 'widely recognised' and a further 21% thought that it was 'somewhat recognised'. Almost three-quarters of seafarers (73%) thought that their efforts were 'not at all recognised' (29%) or recognised only by those in the maritime industry (44%).

While some maritime commentators argued that a 'silver lining' to the pandemic was an increased recognition of the industry among the public, just one in 50 members felt that there had been a significant increase in awareness. More than two-thirds felt that there had been no increase in recognition for the vital work of the maritime industry and the professionals working within it.

Despite many countries focusing on returning to normality, four out of five (81%) members felt that the pandemic will have a long-term impact on the sector. This suggests that greater emphasis is needed on long-term planning for the recovery of the industry than we have seen to date.

Worryingly, more than half of members (54%) said that the crew change crisis has impacted how they feel about working in the maritime industry, a deeply concerning figure at a time when the retention of skilled and experienced professionals in the maritime workforce is more important than ever.

## How impacted were you by the pandemic?

Highly impacted	28%
Very impacted	25%
Somewhat impacted	29%
Slightly impacted	12%
Not at all impacted	6%

## Do you believe the work of seafarers as key workers was recognised during Covid-19?

Yes, it was widely recognised	6%
Somewhat recognised	21%
Recognised only by those in the maritime industry	44%
Not at all recognised	29%

## Do you believe the coronavirus increased the public's awareness of maritime professionals and the maritime industry?

Significant increase	2%
Slight increase	30%
No increase	68%

## Do you believe Covid-19 will have a long-term impact on the maritime sector?

Yes	81%
No	19%

## Has the crew change crisis impacted on how you feel about working in the maritime industry?

Yes	54%
No	46%

Other comments about the impact of Covid-19 on the maritime industry:

**'Only impacted [by] it in a negative way. It has accelerated the erosion of terms and conditions, which was already under way'**

**'With the crew change crisis, it has only highlighted to people in the maritime industry how much the industry is unrecognised and disregarded by the general public and governments worldwide'**

**'The Ever Given containership incident increased public awareness of the maritime industry more than Covid did'**

**'Covid-19 has been used as an excuse to decrease pay and increase trip lengths'**

CREDIT: Nautilus International





CREDIT: Danny Cornelissen

# Conditions onboard

## Size of crew

The results show an increase since 2010 in the proportion of members employed as part of smaller crews of one to 15, as well as in the proportion employed in the largest crews of above 40. It is difficult to determine whether this is reflective of wider changes in the industry or changes in the structure of the Union's membership (e.g. increase in respondents from superyacht and cruise sectors).

## How many seafarers are onboard your ship?

	2021	2010	2001
1–15	32%	28%	34%
16–25	23%	27%	29%
26–40	13%	18%	16%
More than 40	32%	27%	21%

More than a fifth of members do not believe that there are sufficient people onboard to safely operate their vessel, showing no improvement from when participants were first asked this question 20 years ago.

## Do you feel you have sufficient persons onboard to safely operate a vessel?

	2021	2010	2001
Yes	78%	76%	79%
No	22%	24%	21%

## Nationalities onboard

Nautilus members work on vessels with a larger number of nationalities than in previous decades, with the proportion of respondents working with people from just one nationality falling from almost a quarter in 2001 to one in 10 in 2021. There has also been a notable increase in the proportion of members working with six or more nationalities onboard.

## How many different nationalities are there onboard your ship?

	2021	2010	2001
1	10%	13%	24%
2	10%	10%	26%
3	15%	22%	19%
4	15%	16%	11%
5	12%	10%	7%
6 or more	36%	30%	13%

When asked what the predominant nationalities were onboard their vessels, most members responded with British and Dutch, followed by Filipino, Indian, Indonesian and Polish.

This was reflected when members were asked about the predominant language spoken onboard vessels, with the vast majority stating English, followed by Dutch, Polish, Tagalog and Russian.

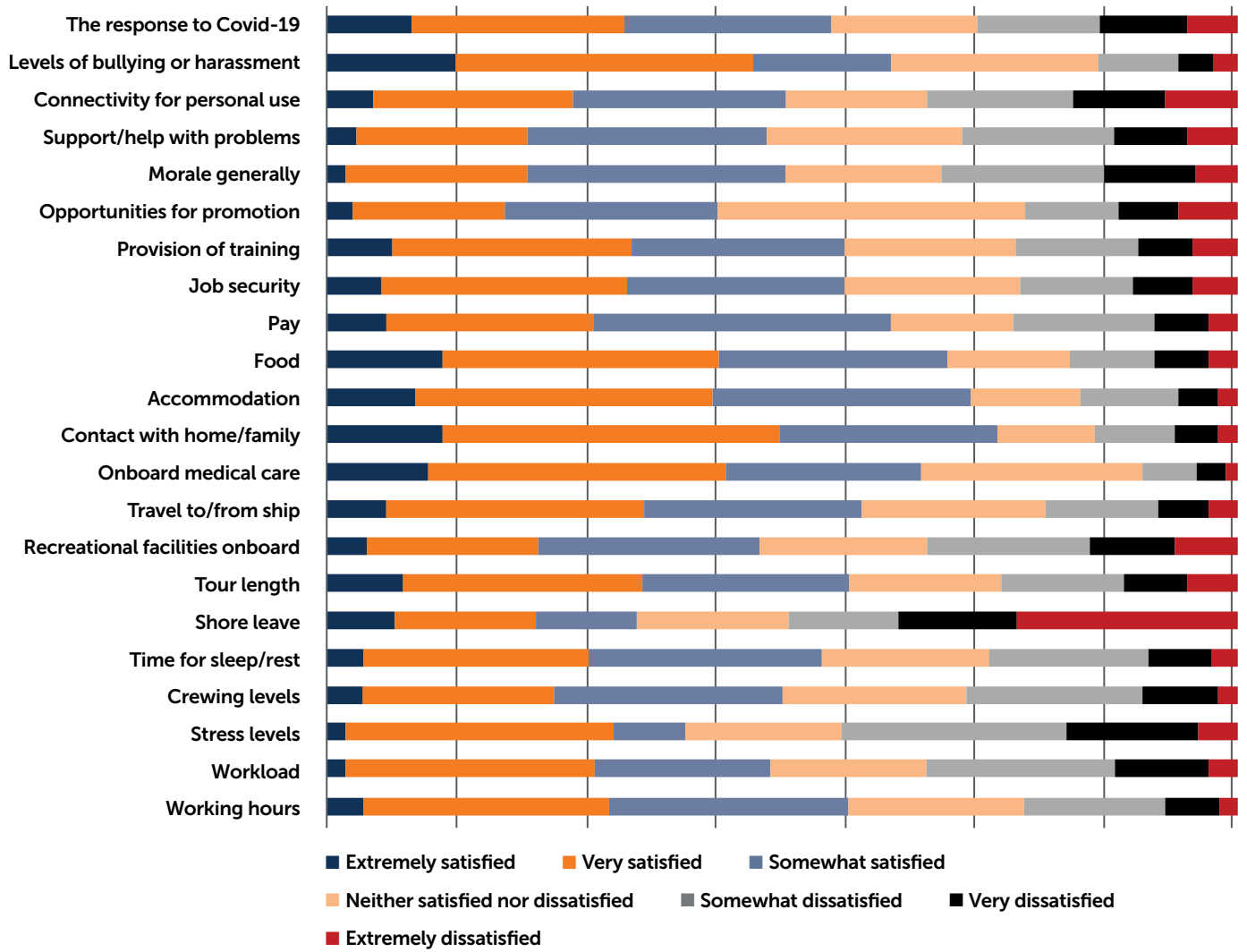
## Satisfaction with life onboard

Members were asked for their satisfaction with various aspects of life onboard. In 2001 and 2010, the highest levels of dissatisfaction were recorded on recreational facilities onboard, shore leave, stress levels, general morale, workload, and pay.

The 2021 survey shows that little has changed in the past two decades, with almost half of respondents (49%) expressing their dissatisfaction with shore leave, followed by stress levels (43%), workload (35%), recreational facilities onboard (34%) and morale generally (33%). A new category of connectivity for personal use also resulted in more than a third of members stating that they were dissatisfied (34%).



## Here are a number of aspects about life onboard your ship. How satisfied are you with each aspect?



There was also a decline in the proportion of members who felt that the conditions onboard reflected their status as a professional seafarer, reversing what had been a positive trend in recent decades.



**22%**

do not believe there are sufficient people on their vessel to operate it safely

**36%**

of respondents work on ships with six or more nationalities onboard

**Do you believe the conditions on your ship reflect your status as an experienced professional seafarer?**

	2021	2010	2001	1991
Yes	68%	74%	67%	36%
No	32%	26%	33%	62%

**Unpaid wages**

More than one in 10 members (12%) reported that they have experienced issues with unpaid wages, a deeply concerning figure that it is difficult to imagine occurring in other industries.

The open responses suggest that this problem is particularly notable in the superyacht sector.

Other comments about life onboard include:

**'Lack of skilled/experienced personnel means people not suitable or ready for promotion are being stepped up prematurely'**

**'The workload goes up, but the wages do not'**



CREDIT: Simon Lowden

# Safety onboard

In the 2021 survey, there was a concerning increase in the proportion of Nautilus members who told us that safety incidents had occurred on their ship. Indeed, the levels now appear to have returned to those experienced in 2001, after an improving situation was found in 2010.

However, fewer of the incidents occurred within the previous 10 months than in the 2010 and 2001 surveys.

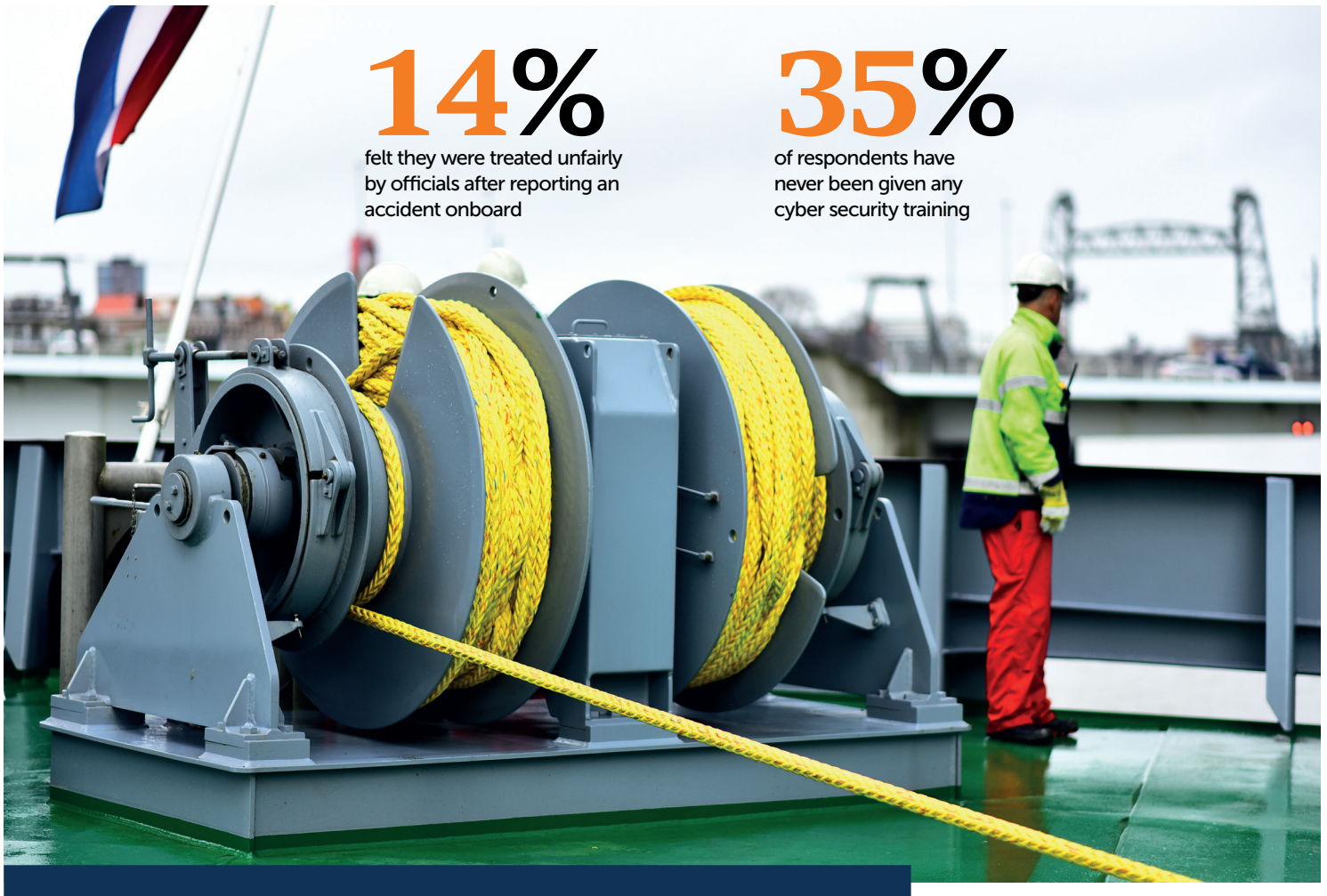
## Have any of the following incidents occurred on your ship?

	2021	2010	2001
<b>Fire</b>	48%	12%	42%
<b>Collapse of equipment/structure</b>	15%	11%	32%
<b>Crew member slipping/falling</b>	71%	35%	73%
<b>Rope accident</b>	20%	9%	29%
<b>Incident during loading/off-loading in port</b>	25%	14%	35%
<b>Other</b>	18%	2%	0%

## How long ago did the most recent accident onboard your ship occur?

	2021	2010	2001
In the past month	8%	15%	13%
2-5 months ago	19%	33%	40%
5-10 months ago	11%	17%	18%
Over 10 months ago	35%	18%	18%
No accidents	14%	10%	6%
I don't know	13%	7%	5%

There was a further decline in the proportion of members who could say with certainty that the accident was properly recorded, with the percentage saying 'yes' falling from 87% in 2001 to 69% in 2021.



**14%**

felt they were treated unfairly by officials after reporting an accident onboard

**35%**

of respondents have never been given any cyber security training

## Was the accident properly recorded in an official book?

	2021	2010	2001
Yes	69%	80%	87%
No	4%	5%	4%
I don't know	12%	15%	9%
Not applicable	15%	0%	0%

Given the potential for serious injury or death when accidents occur at sea, it is deeply concerning that 14% of members did not believe that they or their colleagues were treated fairly after reporting an accident.

## Do you feel you and/or the crew were treated fairly by officials following any accidents reported?

Yes	86%
No (please give details)	14%

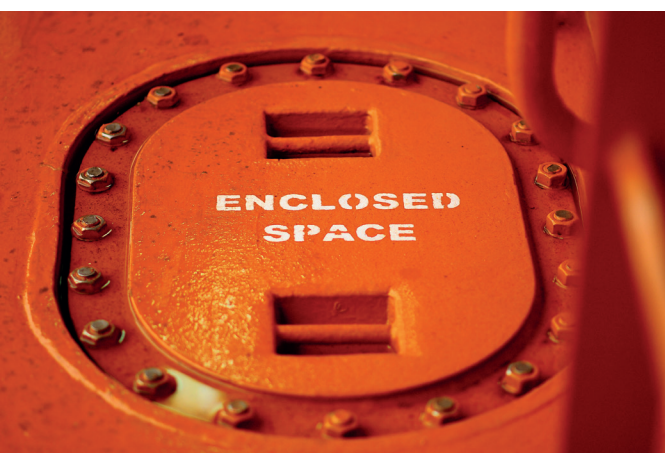
Comments from members who responded with 'no' include:

'I believe the captain was pressurised to putting positive spin on it'

'One incident (fire) was not reported and kept quiet, the other incident regarding the rope... I was blamed until I could prove otherwise'

'The accident happened to me on a previous boat and my contract was terminated the next day'

'If officials get involved, then the goal is not to learn from an accident, but they look for someone to blame'



CREDIT: Danny Cornelissen

## Training

There has been a decline in the proportion of members who said they had received safety and other kinds of training within the previous five months when compared with 2010.

Around 7% of members said they have never received safety training, and 9% said they have never received any other training – both notable increases on previous years. Further analysis of open responses indicates that this appears to be particularly problematic in the superyacht sector.

Given the importance of cyber security as the industry continues to digitise, it is worrying that more than a third of members said they have not received cyber security training.

## When were you last given safety training?

	2021	2010
In the past month	44%	47%
2-5 months ago	24%	25%
5-10 months ago	10%	8%
Over 10 months ago	15%	17%
Never	7%	2%

## When were you last given any other training?

	2021	2010	2001
In the past month	33%	35%	29%
2-5 months ago	26%	27%	23%
5-10 months ago	10%	13%	14%
Over 10 months ago	22%	23%	29%
Never	9%	2%	4%



CREDIT: Danny Cornelissen

## Have you ever received cyber security training?

Yes	65%
No	35%

## Safety equipment

Most respondents said that various safety aspects, as well as the overall safety condition of the ship, were 'good' or 'average'.

## How would you rate each of the following safety aspects onboard your ship?

	Good	Average	Poor
Fire-fighting equipment	70%	26%	4%
Lifeboats	66%	29%	5%
Engine room	71%	25%	3%
Structure/hull	70%	25%	5%
Ladders/railings	70%	26%	4%
Deck/other surfaces	67%	29%	4%
Work supervision	65%	30%	5%

## How would you rate the overall safety condition of your ship?

Good	74%
Average	24%
Poor	2%

Nautilus has previously highlighted issues with poorly fitting personal protective equipment (PPE) for safety-critical tasks onboard, such as fire fighting. Those concerns are backed up by the responses to the 2021 survey, which found that only half of seafarers believe there is a 'good variety of sizes for all' – a figure that falls to just 26% among female respondents.

## How well fitting do you find the personal protective equipment onboard your ship?

Good variety of sizes for all	51%
Some variety of size and fitting	33%
Some crew cannot find PPE that fits	12%
Limited variety of sizes/many crew cannot find PPE onboard that fits	5%

Comments about safety included:

'The company is changing approach annually in an attempt to reduce accidents, which is causing confusion in the ranks and stressing senior officers'

'There is a lack of training in the superyacht industry'

'Being on a cruise ship, safety is an important matter that's been taken care of by the safety officer'

'Safety is taken seriously onboard. There is a good understanding of the Near Miss and Accident reporting onboard, and we receive office feedback for all reports'



Nautilus has been surveying its members for 30 years on the respect given to them in the vital roles they play at sea. The Union believes these measures act as a barometer upon which wider conditions in the profession can be judged.

It is pleasing to see improvements on a number of these key measures, both this year and over previous decades.

Despite modest progress, however, the proportion of members who feel able to influence fleet company policies remains far too low, despite nine out of 10 respondents believing they should be given this opportunity.

It is also disappointing that fewer members now see themselves as integral members of the company's management structure, despite the critical role that they play on their vessel. While the responses reflect a wider cohort of maritime professionals than just those in the most senior positions, the 40-60 split also exists across deck and engineer officer roles. Even among shipmasters, only a little over half (56%) saw themselves as integral members of the management structure.

**Do you consider you are given the resources required to meet the responsibilities expected of you as a skilled maritime professional?**

	2021	2010	2001	1991
Yes	76%	62%	62%	39%
No	24%	38%	38%	60%

**Do you consider you are given the authority to meet the responsibilities expected of you as a skilled maritime professional?**

	2021	2010	2001	1991
Yes	78%	68%	71%	59%
No	22%	31%	29%	40%

**Do you believe you are provided with sufficient opportunity to influence fleet company policy as it affects your employment?**

	2021	2010	2001	1991
Yes	39%	34%	28%	23%
No	61%	66%	72%	77%

**Do you believe you should be given this opportunity?**

	2021	2010	2001	1991
Yes	89%	95%	82%	78%
No	11%	5%	18%	18%



**28%**

believe their employer doesn't act fairly when it comes to career progression

**38%**

are involved in finance and policymaking decisions about their ship

**83%**

believe they should be involved in such decisions about their ship



## Are you regarded by your employer as an integral member of the company's management structure?

	2021	2010	2001	1991
<b>Yes</b>	40%	50%	50%	38%
<b>No</b>	60%	50%	50%	60%

The decline in the proportion of respondents who feel they are regarded as members of the management structure is accompanied by a considerably starker drop-off in involvement in key decisions. This situation remains consistent among officers, including chief engineers and masters.

There is a clear risk that this decline in the influence of frontline seafarers on company policy will lead to a disconnect between management decision-making and the operation of vessels.

## Are you involved in finance and policymaking decisions relating to...?

	2021	2010	2001	1991
<b>Your ship</b>				
<b>Yes</b>	38%	42%	42%	48%
<b>No</b>	62%	58%	58%	52%
<b>Your fleet</b>				
<b>Yes</b>	9%	8%	7%	7%
<b>No</b>	91%	92%	93%	90%
<b>The company</b>				
<b>Yes</b>	7%	6%	5%	6%
<b>No</b>	93%	94%	95%	92%

## Do you consider that you should be involved with such decisions relating to...?

	Yes	No
<b>Your ship</b>	83%	17%
<b>The fleet</b>	42%	58%
<b>The company</b>	30%	70%

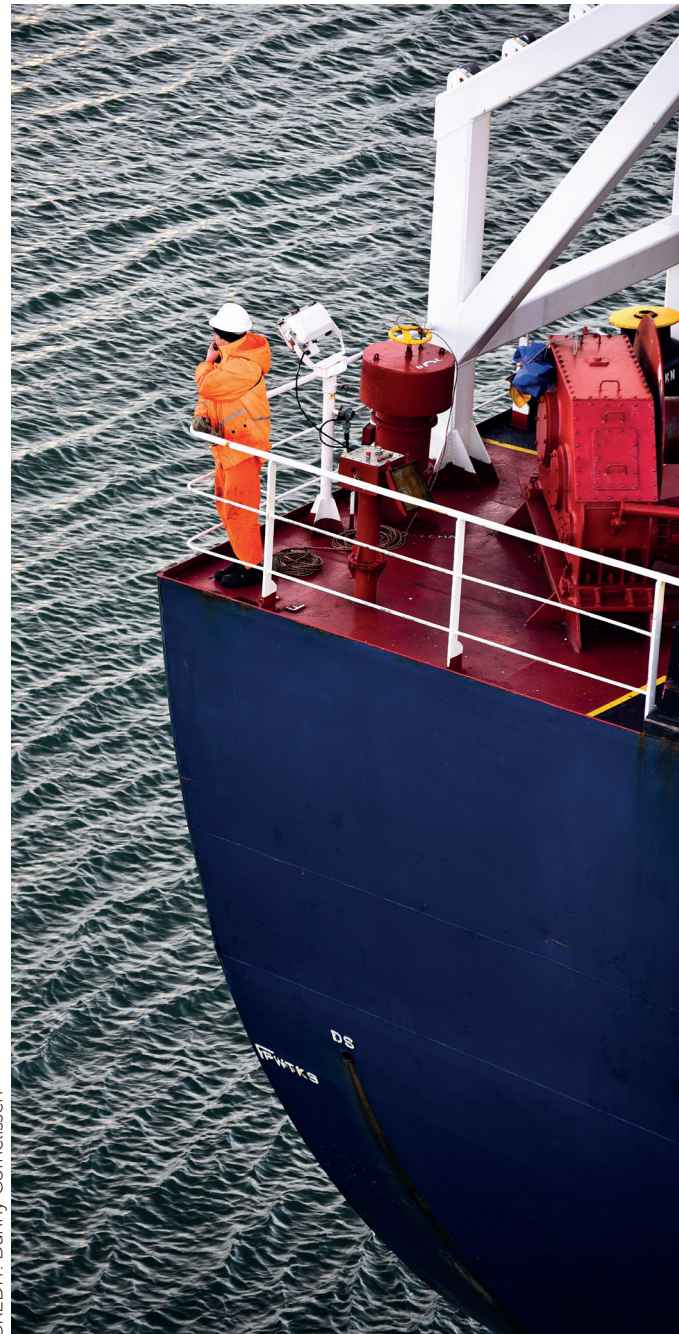
## Health, wellbeing, and equality

In the wake of a public health crisis that has had a profound impact on the physical and mental health of the maritime workforce, it is deeply concerning that almost a third of members do not believe that their employer takes positive action on their health and wellbeing.

## Do you believe your employer takes positive action on the health and wellbeing of crew?

<b>Yes</b>	57%
<b>No</b>	31%
<b>Don't know</b>	12%

It is also problematic that just 58% of members reported that their employer acts in a fair and non-discriminatory way when considering career progression.



CREDIT: Danny Cornelissen

**Do you believe your employer acts fairly with regard to career progression/promotion, regardless of ethnic background, gender, religion, sexual orientation, disability or age?**

<b>Yes</b>	<b>58%</b>
<b>No</b>	<b>28%</b>
<b>Don't know</b>	<b>14%</b>

Other comments about respect for the role of maritime professionals include:

**'The divide between shore-side and sea-going staff still exists (us and them)'**

**'More diversity, unconscious bias training, inclusion of LGBT+ is needed, as well as more awareness of bullying and harassment'**

**'Engineers are not respected by company management. Deck officers are more respected'**

**'As chief engineer, we have the responsibility but zero authority to implement actual policy change, or even to suggest policy changes'**

**'Yacht management company with no yachting experience making shipboard decisions on a daily basis'**





CREDIT: Danny Cornelissen

# Life onboard

## What first inspired you to work at sea?

This was an open-response question, which generated several common themes, as illustrated in the word cloud below. Romantic notions of travel, adventure and seeing the world were the most common themes, alongside money and career opportunities.

A significant number of members said that a family history in the maritime industry inspired them to undertake their own career at sea. This perhaps illustrates the need to provide inspirational role models and mentoring for young people who are not fortunate enough to grow up in a seafaring family.

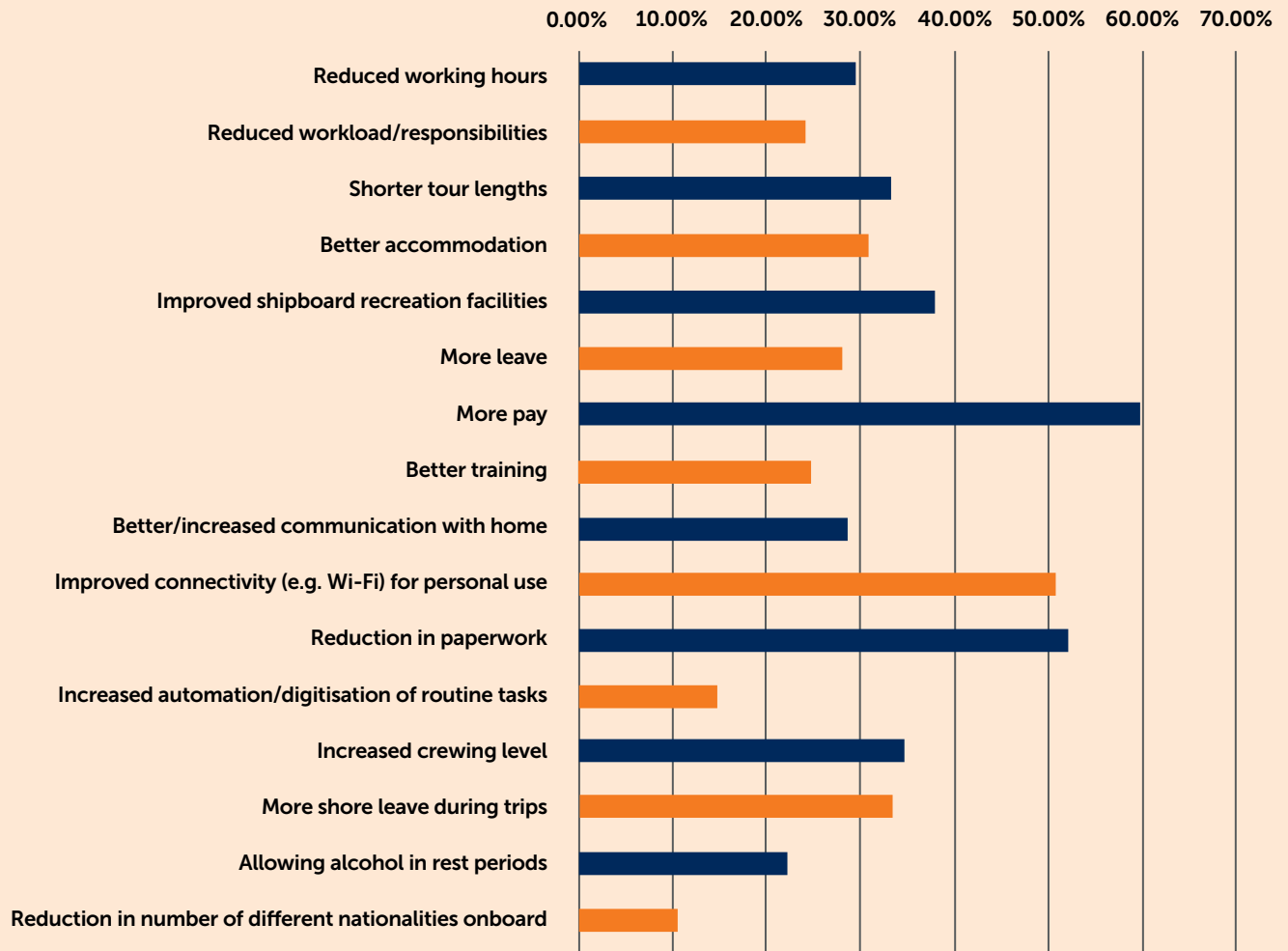
**time** seeing **career** grew **ships** wanted **Adventure** Family history **job**  
interest **see world** worked **sea** **Family** **Money** **Travel**  
good **farther** travel world **sea** love sea **work** love sailing  
opportunity travel **engineering** living **opportunities**

## Facilities and improvements to life at sea

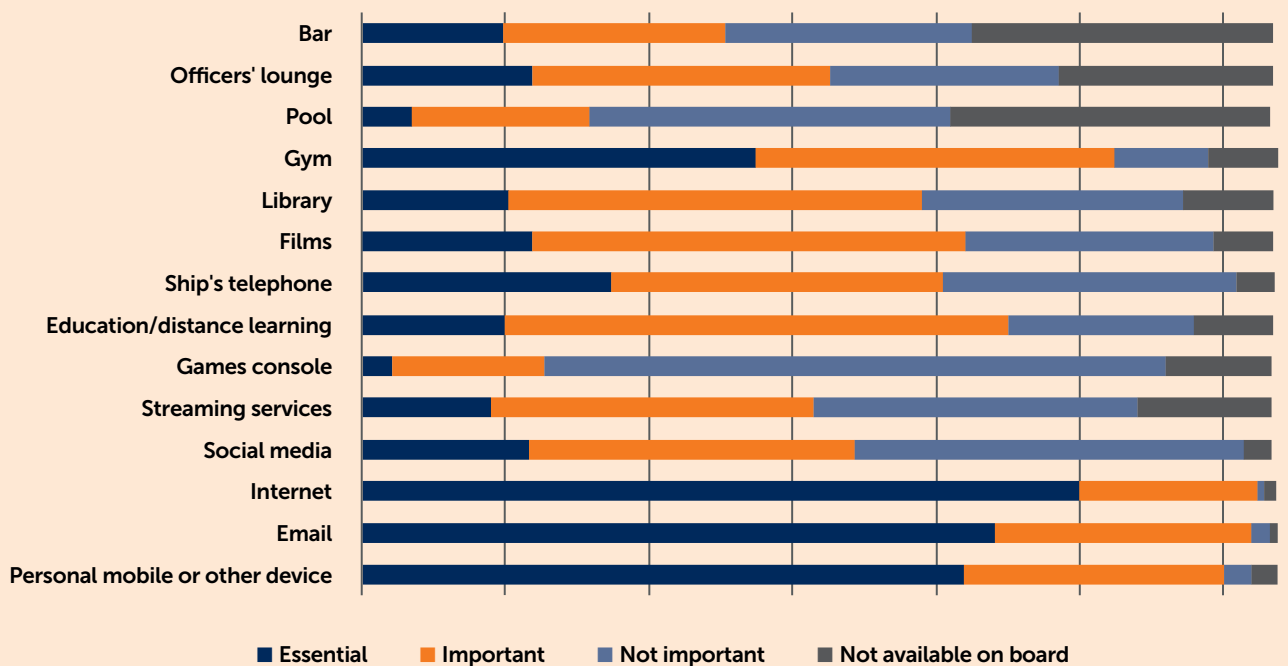
The survey clearly shows that improved pay and connectivity are key priorities for members, alongside a reduction in the level of paperwork and access to gym facilities.

Given the potential improvements to physical and mental health that could be generated if improved connectivity and better recreation facilities were made available, there is a clear case for employers to make further progress.

## Thinking about your job, what changes would most improve your life at sea?



## Below is a list of shipboard facilities. How important is each to you?



## Bullying and harassment

There were numerous references to bullying and harassment in the open-comment section of the 2010 survey, leading to specific questions being added in 2021.

### Have you experienced bullying or harassment onboard from colleagues, managers or others?

No	72%
Yes (give details if you would like)	28%

### Have you witnessed bullying or harassment onboard from colleagues, managers or others?

No	58%
Yes (give details if you would like)	42%

It is deeply concerning that such a substantial proportion of members have either experienced (28%) or witnessed (42%) bullying or harassment. This appears to indicate that bullying and harassment is an ingrained part of day-to-day life in a large part of the maritime workforce.

The details that were provided by those who have experienced or witnessed bullying and harassment set out behaviour ranging from deeply unpleasant to illegal, or even life-threatening.

The clearest possible message has to go out from every part of the industry that bullying and harassment will not be tolerated, and that any concerns raised will be appropriately investigated and acted upon.



CREDIT: Danny Cornelissen

Comments about the behaviour experienced or witnessed include:

**'Senior officer using rank privilege and company connections/status within the company to enable bullying'**

**'Senior officers often talking to people with disrespect/shouting/swearing'**

**'Homophobia'**

**'Sexism and racism'**

**'Apprentices were bullied by chief engineer'**

**'Male guests harassing female crew'**

**'Threatened with a knife (myself), seen someone get stabbed'**

## Hours of work and rest

A 2020 World Maritime University (WMU) report found that a systemic underreporting of work and rest hours has normalised fatigue among seafarers.

Shipowners have sought to discredit the WMU report, but Nautilus's survey findings substantiate the WMU's research. Despite a significant proportion of respondents working in senior roles on UK- and Netherlands-flagged vessels with higher than average standards, more than a third of respondents told us that they have experienced pressure to alter or adjust hours-of-work-and-rest records.

## Do you have confidence in the accuracy of hours-of-work-and-rest record-keeping?

Always	33%
Sometimes	45%
Never	20%
Don't know	2%

## Have you ever felt under pressure to alter or adjust hours-of-work and rest records?

No	64%
Yes (give details)	36%

Comments about hours of work onboard included:

'There is no social life onboard. Due to the minimum amount of crew on board, people are either working or sleeping'

'In my career I have seen the "life" sucked out of going to sea and now it is just work/sleep, to a degree where I sometimes feel I am becoming institutionalised'

'Even though accidents and near misses are treated seriously, there is a blame culture in the company'

'Free Wi-Fi will improve the whole atmosphere and job motivation'



# Life in the maritime industry

## Are seafarers considering leaving?

It is concerning to note that 27% of those responding to the survey are looking to leave their current role, including 11% who would like to leave as soon as possible.

While a clear majority (60%) of those who are considering leaving want to remain within the maritime industry, only 17% want to stay with their current company. This raises the possibility of employers facing issues with staff retention soon if they do not take steps to improve the pay and conditions of their employees.

## Do you agree with these statements?

I would be happy to remain with my current organisation for the foreseeable future	39%
I sometimes consider leaving my current employer	34%
I will probably look to leave my current role in the next 12 months	16%
I want to leave my employer as soon as I can	11%

## If you were to consider leaving your current job, what would be your most likely destination?

I would want to move to another job/be promoted within my current company	17%
I would want to move to a job in a different company within the maritime industry	43%
I would want to move to a job outside of the maritime industry	15%
I would take a career break	2%
I would retire	17%

## Automation

Although automation is often used as a blanket term, the reality is that it refers to a vast array of processes, many of which were automated decades ago. Despite the impression given by some in the media, automation does not just refer to fully autonomous or remotely controlled vessels, but also to more modest changes such as electronic forms and satellite navigation.

Members' response to automation remains broadly similar 10 years later. A Nautilus Federation 2018 survey found that concerns around job security and safety dominated much of the feedback, with nearly 84% of respondents saying they see automation as a threat to their jobs. However, members were not wholly hostile to the concepts and the underpinning systems – many of them noting the potential to use technology in a way that could improve seafarers' lives by reducing or even eliminating a lot of routine tasks, and to make maritime jobs safer, more skilled and more satisfying.

The Nautilus Social Conditions survey found that a majority (57%) of members were 'positive' or 'very positive' about the use of automation to manage repetitive or routine tasks, with just 10% feeling 'negative' or 'very negative'.

A smaller proportion (43%) were supportive of the increased use of automation to supplement or support onboard decision-making, with 17% opposed.

The concept of vessels being remote-controlled from a land-based virtual bridge won much less support from members, with just 12% saying they would support such a change, compared with more than two-thirds (67%) voicing their opposition.



CREDIT: Lee Patten

**44%**

feel 'very negative' about a ship being controlled remotely from a land-based bridge

**43%**

of seafarers surveyed are positive about increased use of automation to manage repetitive or routine tasks

### How do you feel about the increased use of automation to supplement or support onboard decision-making?

<b>Very positive</b>	<b>10%</b>
<b>Positive</b>	<b>33%</b>
<b>Neutral</b>	<b>36%</b>
<b>Negative</b>	<b>13%</b>
<b>Very negative</b>	<b>4%</b>
<b>Don't know</b>	<b>4%</b>

### How do you feel about the increased use of automation to manage repetitive or routine tasks?

<b>Very positive</b>	<b>14%</b>
<b>Positive</b>	<b>43%</b>
<b>Neutral</b>	<b>30%</b>
<b>Negative</b>	<b>8%</b>
<b>Very negative</b>	<b>2%</b>
<b>Don't know</b>	<b>3%</b>


### How do you feel about the concept of vessels being remote-controlled from a land-based virtual bridge?

<b>Very positive</b>	<b>3%</b>
<b>Positive</b>	<b>9%</b>
<b>Neutral</b>	<b>17%</b>
<b>Negative</b>	<b>23%</b>
<b>Very negative</b>	<b>44%</b>
<b>Don't know</b>	<b>3%</b>



Comments about automation in the maritime industry include:

**'Some automation is good and improves safety and work efficiency, such as for admin or repetitive tasks. However, some automation has increased the workload, as it requires extra monitoring and is often a distraction, as it has not been properly integrated with other systems'**





# ABOUT NAUTILUS INTERNATIONAL

Nautilus International is the trade union and professional organisation for maritime professionals at sea and ashore. We represent 20,000 maritime professionals, including ship masters (captains), officers, officer trainees (cadets) and shipping industry personnel, such as ship pilots, inland navigation workers, vessel traffic services operators, harbourmasters, seafarers in the oil and gas industry, and shore-based staff.

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