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DANICA SEAFARERS' SURVEY 2024

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As a leading crewing service provider Danica boasts a database of almost 70k applicants mainly from Eastern Europe, India, and the Philippines.

This year our annual survey celebrates its 5th year anniversary. The survey gathers information on seafarers' employment and work situation in the current year. Now with five years' worth of data, the survey provides a useful resource in relation to trends and developments in the crewing marketplace.

The 2024 survey collected data between May and October from within Danica's global database and throughout the wider shipping industry.

As the saying goes, 'The devil is in the detail'. We are pleased to share the results and analyses of our 2024 Seafarers' Survey with our maritime colleagues. We hope it will be a useful tool to enhance your HR-marine strategies and to shed light on the current status of the crew employment markets.

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

Email: jensen@danica-maritime.com Telephone +49 173 62 11 998.

Please also visit www.danica-maritime.com

Enjoy the reading!

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Henrik Jensen

Chief Executive Officer

www.danica-maritime.com

Highlights

- Wages continued to increase in 2024, although at a slightly lower pace. Wages for certain ranks went up by 10%.
- The crew employment market continues to fluctuate. As many as 82% of seafarers would change employer if they were offered a higher salary, and 99% of seafarers admit to scanning the job market during their vacation.
- The number of seafarers with a seniority of 48 months or more in the same company dropped by 24% from 2023 to 2024.
- The number of seafarers reporting that they felt mentally stressed during their last tenure continues to increase and is now at 35%.
- More seafarers contacted external mental health support services but fewer seafarers found the support provided useful.
- Internet access onboard ship is now widespread.
- Over the years the volume of company-sponsored training has increased, but, at the same time, the number of seafarers who find the training of value has dropped.

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- The number of Ukrainian seafarers who say they will not return to Ukraine has increased from 12% in 2023 to 22% in 2024.

Danica Seafarers' Survey 2024



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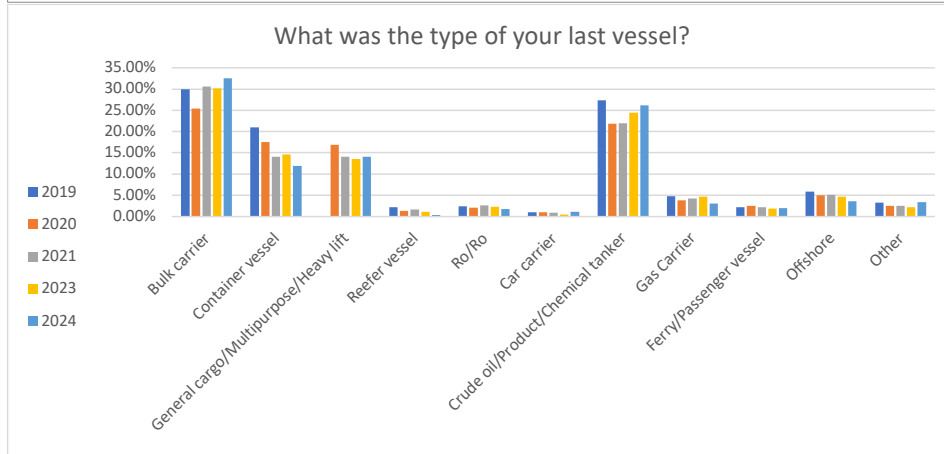
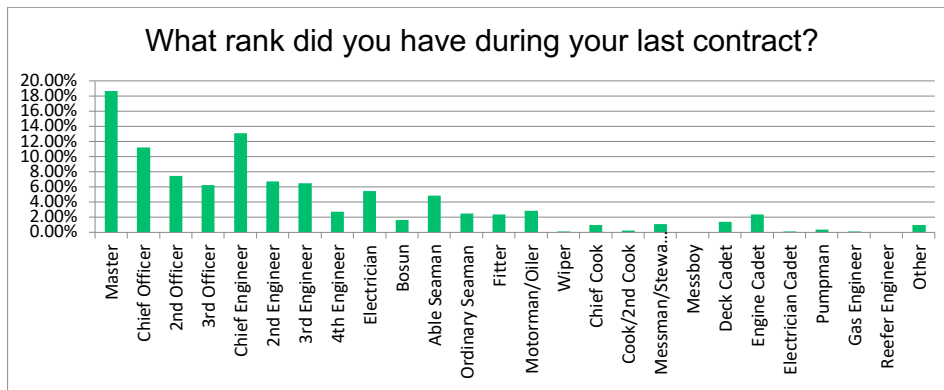
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1. Who Responded?

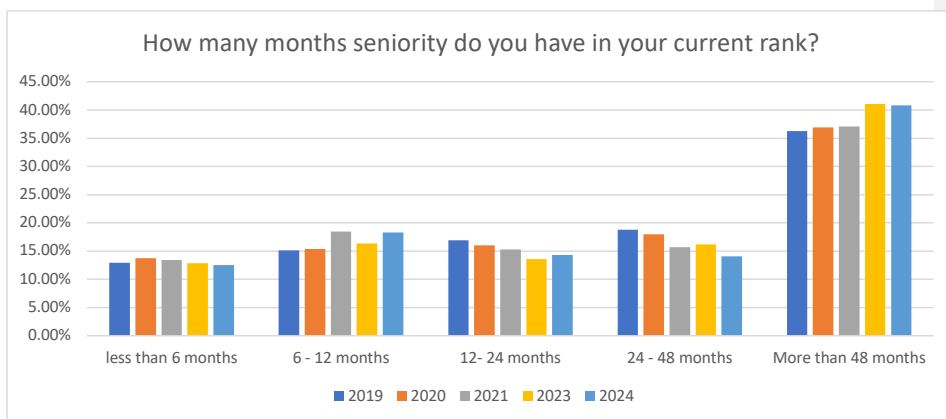
- The 69,333 seafarers in Danica's database of applicants were invited to participate in the survey.
- In total 4,868 seafarers responded to the survey. The number is lower compared to previous years because the survey tool we are using is no longer accessible from Russia.
- As with the previous surveys in 2019, 2020, 2021 and 2023, most of the responses came from senior officers.
- The data was collected between May and October 2024.
- This year the survey consisted of a total of 54 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 years we have done the survey
- For more demographic information: Please refer to page 23.





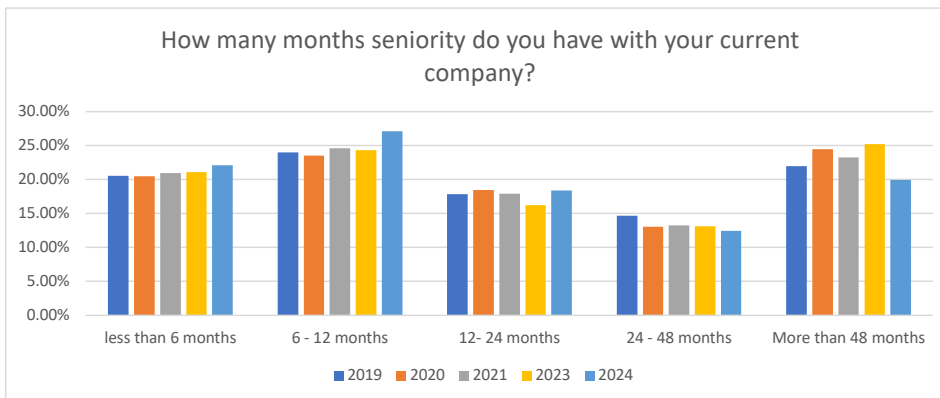
2. Seniority in Rank

- 55% of the respondents had 24 months or more seniority in rank. This is the same percentage as when we started the survey in 2021.
- Over the years there is a slight trend in seniority in the number of seafarers with a seniority of 48 months or more and the group of seafarers with a seniority between 24 and 48 months is declining.
- From the detailed result we can see that the group of respondents with seniority of 48 months or more are mainly senior officers and ratings over 40 years of age.



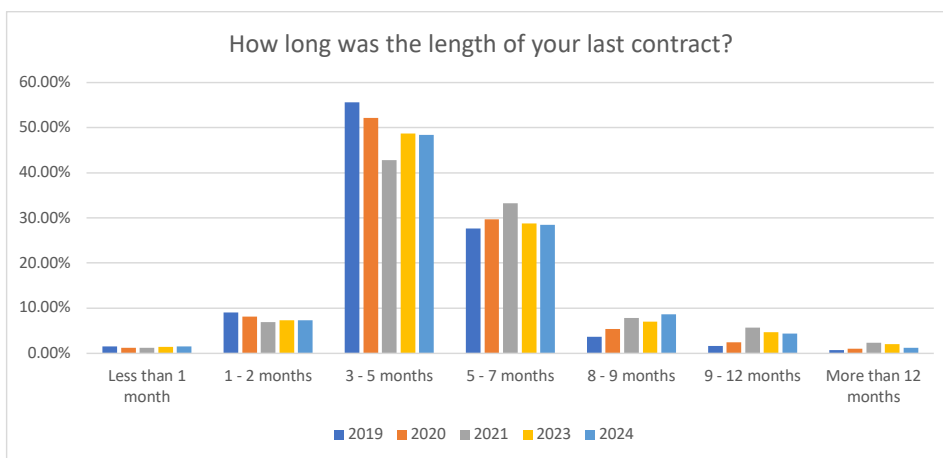
3. Seniority with current employer

- Seniority in rank is not earned with the same employer and the following graph shows the seniority with the present employer.
- Whilst the seniority with the employer did not change much in the period 2019 – 2023 there are significant changes from 2023 to 2024:
- Nearly half (49%) of the seafarers have less than 12 months' experience with the current employer compared to 45% in 2023.
- The number of seafarers with a high seniority (48 month or more) dropped by 24% by number from 2023 to 2024.



4. Onboard Period (Contract Length)

- Except for some disturbances during the COVID pandemic the contract length has remained the same over the years.
- We can see from the underlying answers that the tenure for senior officers is typically four months and six months for junior officers regardless of nationality, with a trend that European junior officers on wet fleet are employed on 4- or 5-months contracts.
- For EU ratings from the EU the contract length is 4-5 months, other Europeans 6-8 months, and Asian ratings do typically 9 months.



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5. Remuneration

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

The Danica survey, in combination with our in-depth knowledge of the crew employment markets, gives us a uniquely detailed insight about 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. In summary:

- The increase in wage levels for senior officers continued during the past 12 months, although at a slightly slower pace across all vessel types, with increases up to 10% for top-talented senior officers.
- The wage increases occurred on all vessel types except standard offshore vessels which only saw moderate increases.
- Indian senior officers on dry cargo vessels continue to have about 10% higher wages than their Eastern European peers.
- Eastern European and Filipino senior officers are remunerated at equal levels. However, Filipino junior officers are paid less than their Eastern European and Indian peers.
- Senior ratings (Bosun, Fitter, Pumpmen and cooks) remain in demand and also saw increasing wages.
- We see a steep increase of CVs with fake experience. Seafarers are using certain 'consultants' to help with crafting these fake CVs and the level of falsification is rather advanced.
- We see the shortage of senior officers encouraging some owners to accept new hands directly employed in a rank higher than their last rank with their previous employer.

As international recruitment experts across all vessel type, and with own 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 the details about wage levels for seafarers from the countries we recruit from.

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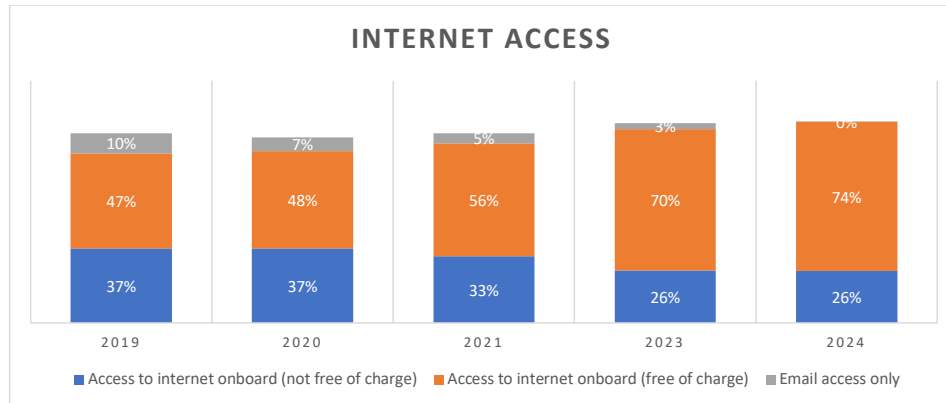
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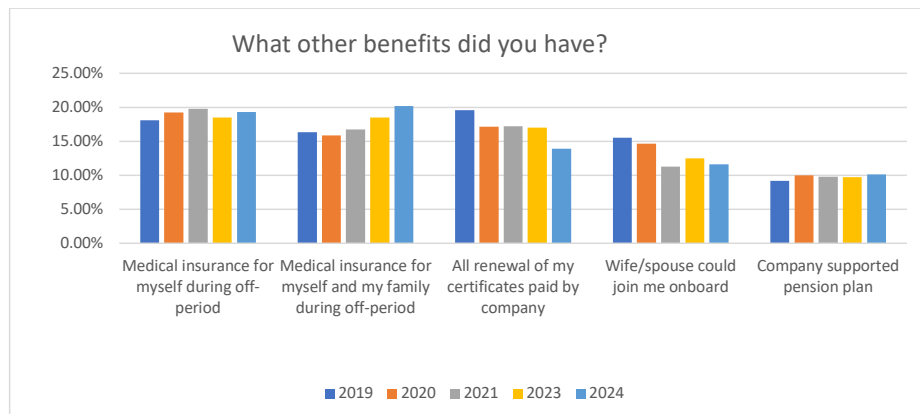
6. Internet and Email Access

- Everyone answering the Danica survey now has internet access!
- 74% of seafarers today have free access to the internet. This is a significant increase of 27% compared to 2019 when we began asking this question.



7. Fringes

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

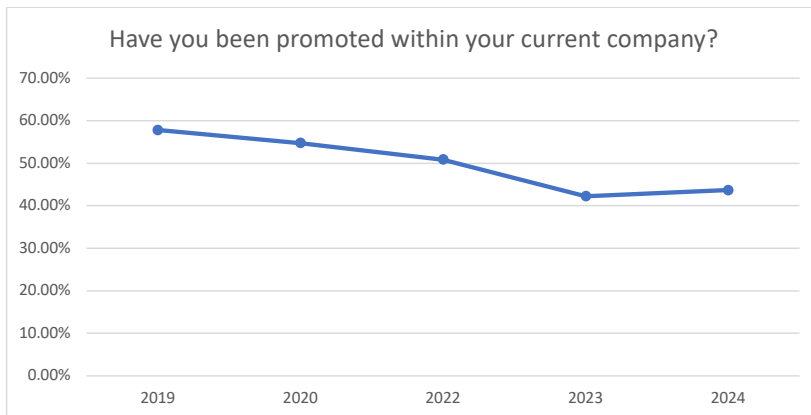


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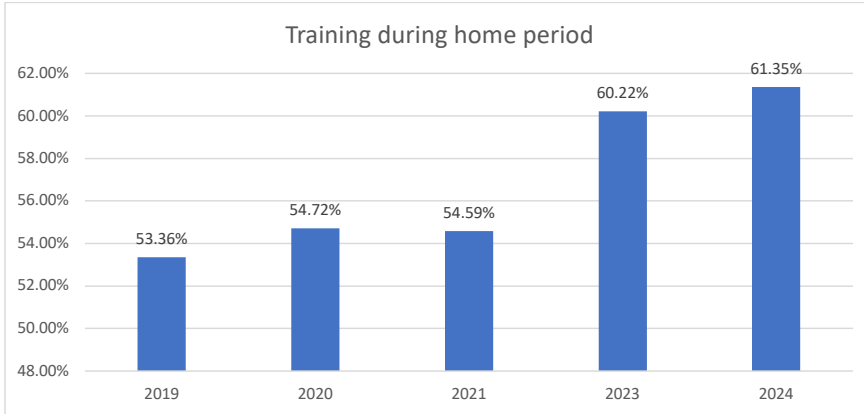
8. Promoted with current employer.

- The number of officers who are still with the employer who promoted them to a higher rank has significantly dropped over the years.
- In our 2019-survey 58% of the officers were still with the company where they had received promotion.
- In the 2023 and 2024-surveys that number has dropped to 42 and 43%.
- It seems that a promotion creates less loyalty with the seafarer than in the past and seafarers move on faster following a promotion.



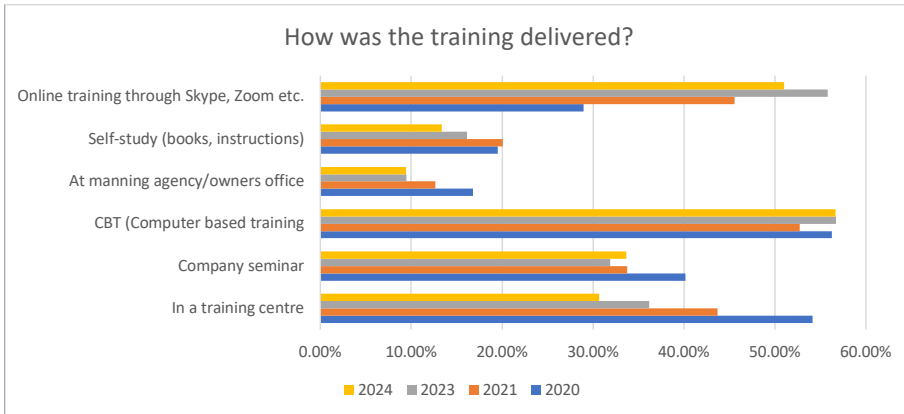
9. Training during home periods

- The % of crew members receiving training provided by the company during their home periods has increased over the years, but for 2023 and 2024 the number has stabilised around 61%



10. How was the training delivered?

- Since 2020 the physically attended training (in training centers and offices) has halved.
- It is not surprising that training during the Covid-19 pandemic was delivered online, but the use of online training has continued to expand in the post-Covid years.
- This question was not included in the 2019 survey.



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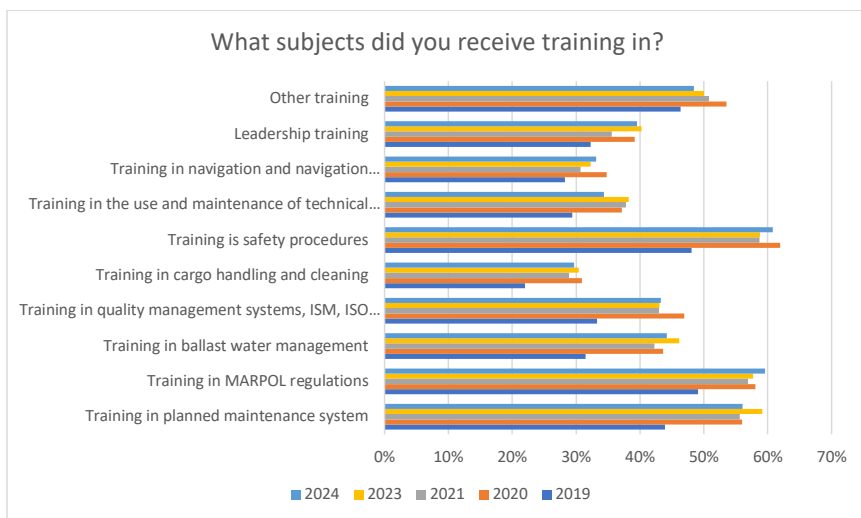
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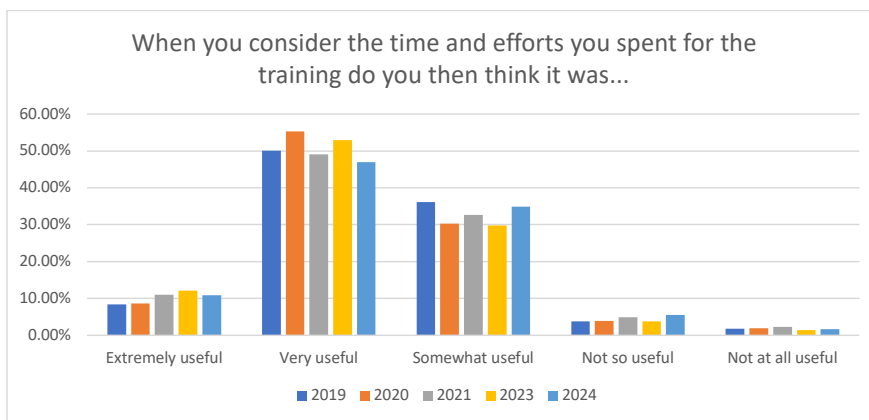
11. Training subjects

- Over the years 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.



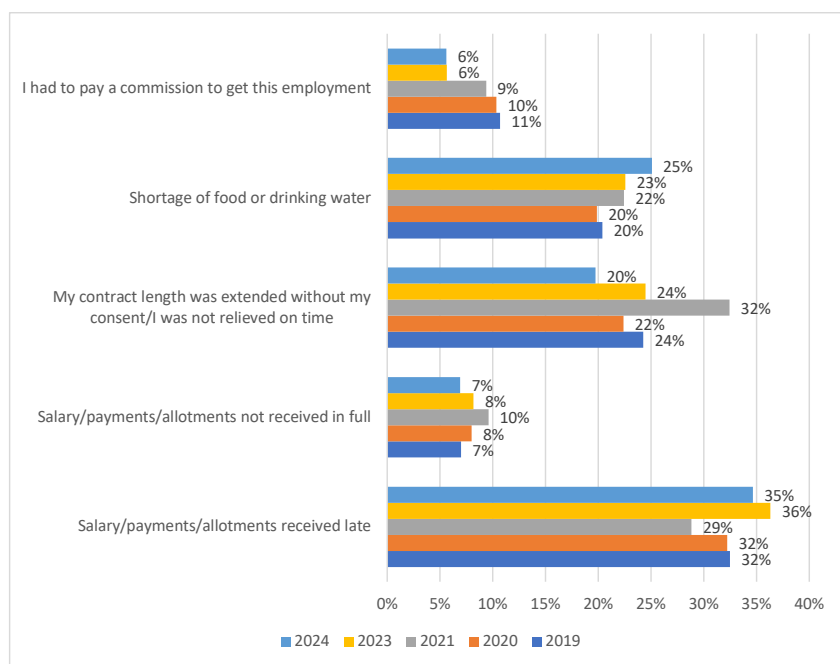
12. How useful was the training for the seafarers?

- Over the years there has been an increasing trend of volume of provided, company-sponsored training.
- Over the same period the number of seafarers who find the training useful is declining.
- In 2024 only 10% of seafarers found the provided company training to be extremely useful.
- As many as 42% of seafarers found the training only to be 'somewhat useful' or less valuable.
- 30% of 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?



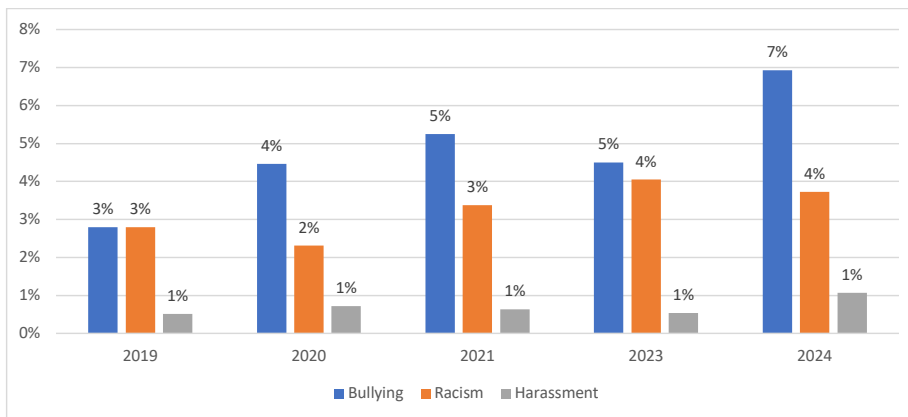
13. Allotments and repatriation, food, and commissions

- In 2024 the number of seafarers who reported that they were – without their consent - not relieved as contractually agreed, dropped to the lowest level since we started the survey in 2019.
- However, one out five seafarers still do not get home as agreed.
- The number of seafarers reporting that they have not been paid on time still remains alarming high at 36%.
- 7% of seafarers did not receive their salary in full.
- The number of seafarers reporting shortage of food and drinking water also continues to be alarming high at 25% and increased from 20% back in 2019.
- The number of seafarers who had to pay a commission to get a job remained at 6% and although it is a decrease from 11% measured in 2019 it is still an unnecessarily high number.
- From the detailed data we can see that the drop is caused by fewer Ukrainian seafarers paying a commission, probably due to the fact that few Ukrainian seafarers are in physical contact with their Ukrainian manning agencies as many 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 previous years.



14. Bullying, Racism and Harassment

- The number of seafarers who report bullying, racism or harassment has doubled since 2019.
- 1 in 8 seafarers report bullying, racism or harassment.
- 4% of seafarers feel they have been discriminated against because of their race.
- 1% of seafarers felt they have been exposed to harassment.
- This is an increasingly significant negative trend over the years.

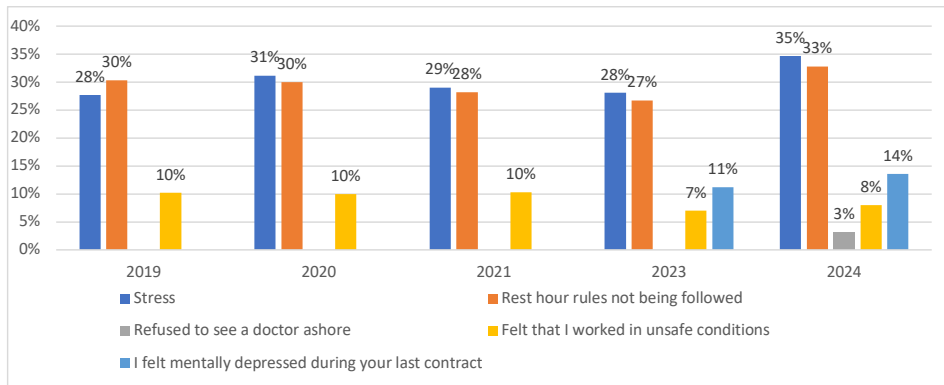


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15. Wellbeing

- Over the years more seafarers are reporting well-being issues.
- In 2024 more than a third of seafarers feel that they are stressed when onboard.
- While 28% of the seafarers in 2019 reported non-compliance with statutory rest hour rules, this number has climbed to 35% in 2024.
- In 2024, 8% of seafarers felt they have worked in unsafe conditions. This is a small drop compared to previous years.
- The number of seafarers who felt mentally depressed during their last contract increased from 11% in 2023 to 14% in 2024. (We have only included this question in the survey since 2023)
- For the 2024 survey we also questioned how many seafarers had been prevented from seeing a doctor ashore and 3% answered this was the case.

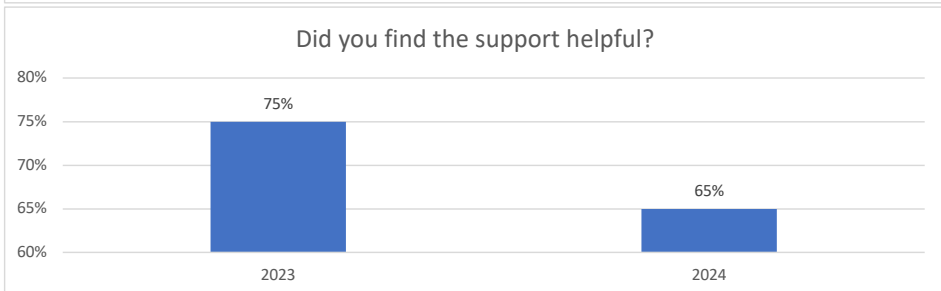
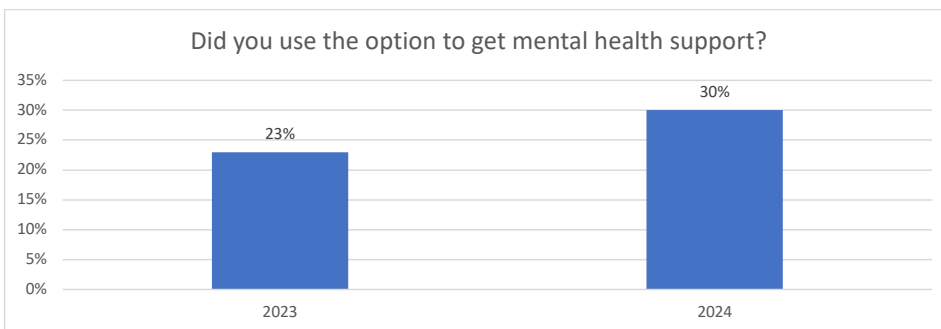
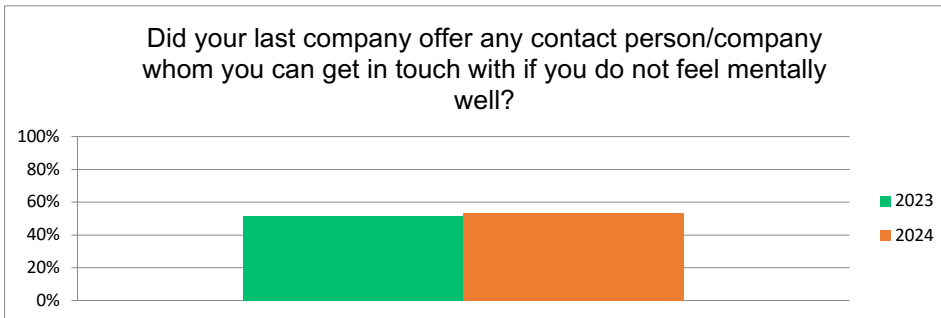


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16. Mental support

- A little over half of the seafarers have access to support if they do not feel mentally well. We have only included this question since the 2023 survey.
- The seafarers who had access to a mental support service made more use of it in 2024 (30%) compared to 2023 (23%)
- However, the percentage of seafarers who found the offered service useful dropped from 75% to only 65%.



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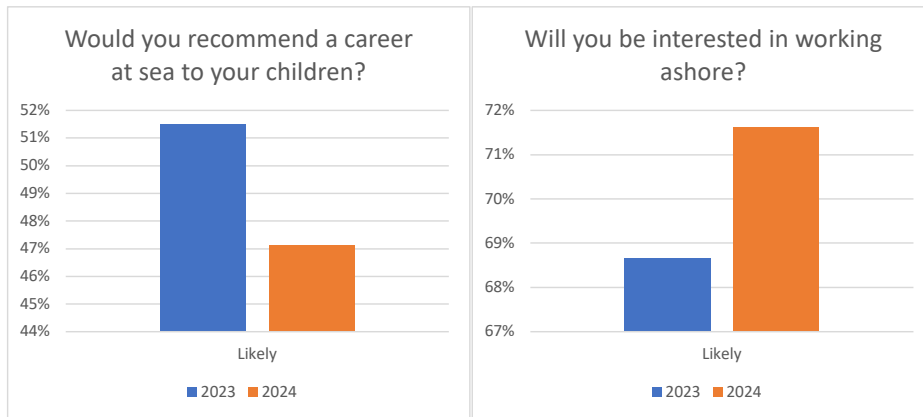
17. Experience with employer

- Since 2021 seafarers have become more positive in their view on their employer.
- In 2024, 76% of seafarers would likely or very likely recommend to a friend to work for their employer. This is a slight decrease from 2023 where it was 80%.



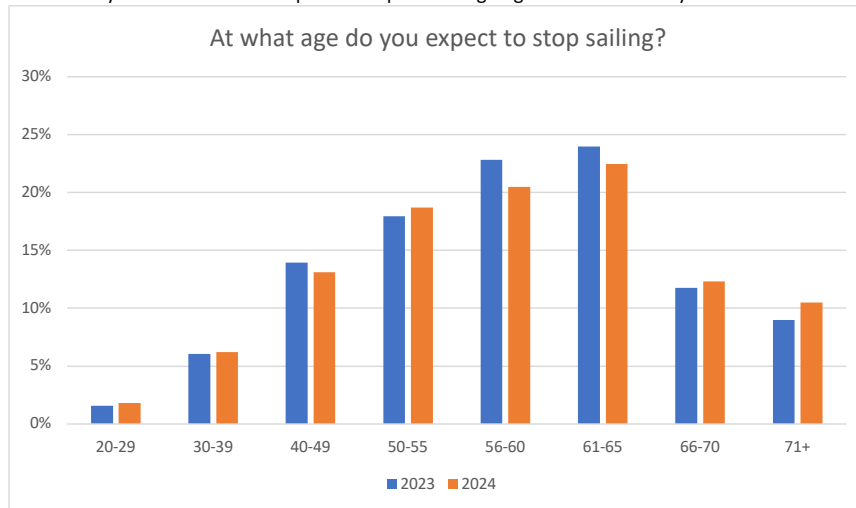
18. Experience with the career as seaman

- In 2024 a little below the half of the respondents would recommend a career at sea to their children – a slight drop of 4%.
- More than 2/3 of the respondents would be interested in working ashore.
- 72% of seafarers are satisfied with their life as a seafarer (no graph) – unchanged from 2023.



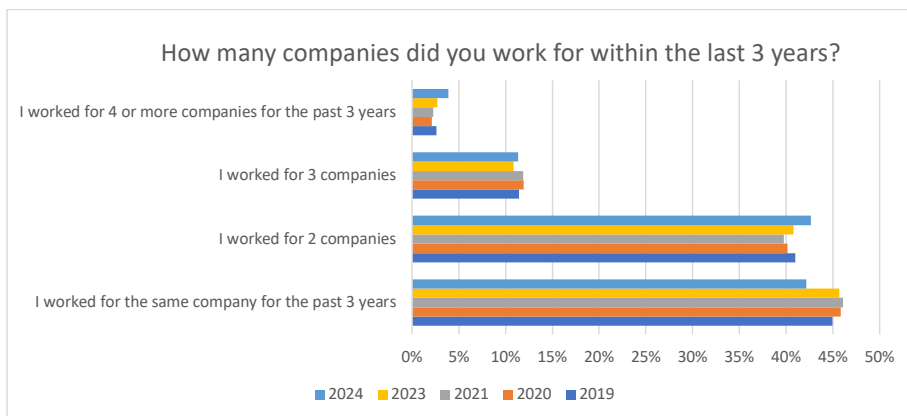
19. Retirement

- There are no significant changes in the desired retirement age.
- Most of the seafarers expect to stop sailing when they are between 56 and 65 years old.
- We can see that Filipino seafarers have a desire to retire earlier than their European peers.
- As many as 21% of seafarers' plan to stop their seagoing career before they become 50.

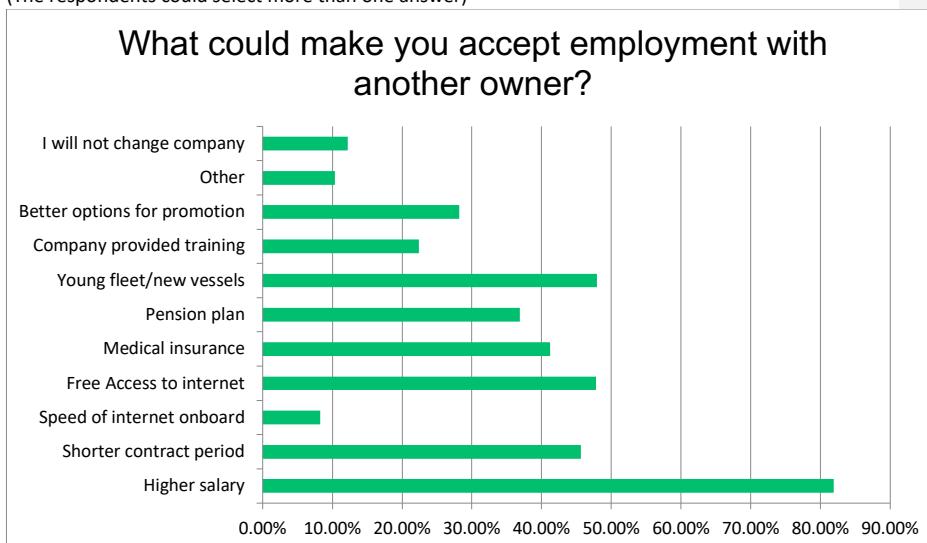


20. Retention

- 58% of seafarers changed employer at least once within a three-year period. There is a small increase in this number over the years as a whole.

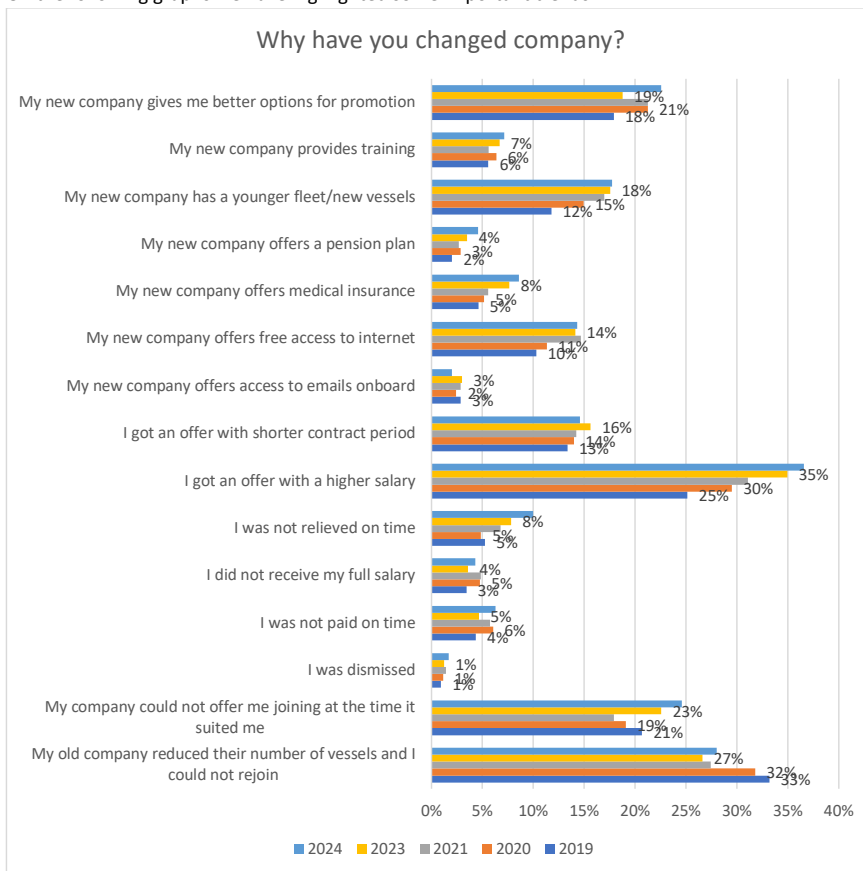


- We also asked the seafarers what could make them change employer:
- Salary remains the highest driver for change of employer, with a slight increase compared to 2023.
- Free access to the internet and internet speed are new drivers for change of employer.
- (The respondents could select more than one answer)



21. Reasons for changing employer

- We asked the seafarers who have 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 2024 is much like the previous years
- However, in 2019 25% changed employer for getting a higher salary, whereas in 2024 this number had risen to 37%.
- From 2019 to 2024 changing to work on newer vessels increased from 12% to 18% and not being timely relieved increased from 5-10 %
- On the following graphs we have highlighted some important trends.

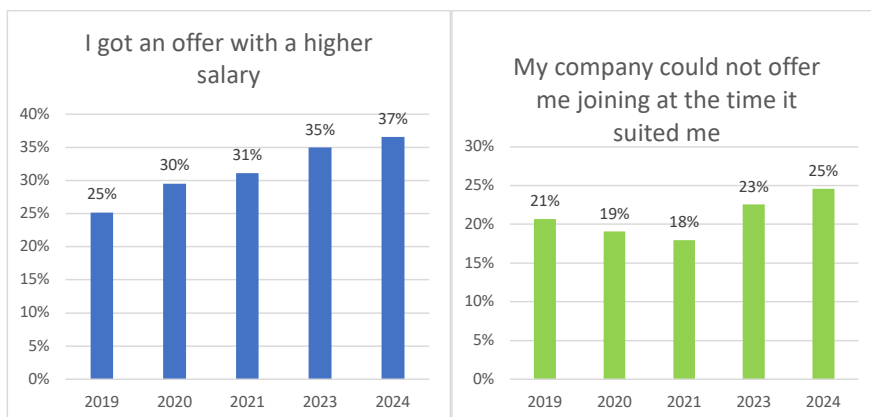


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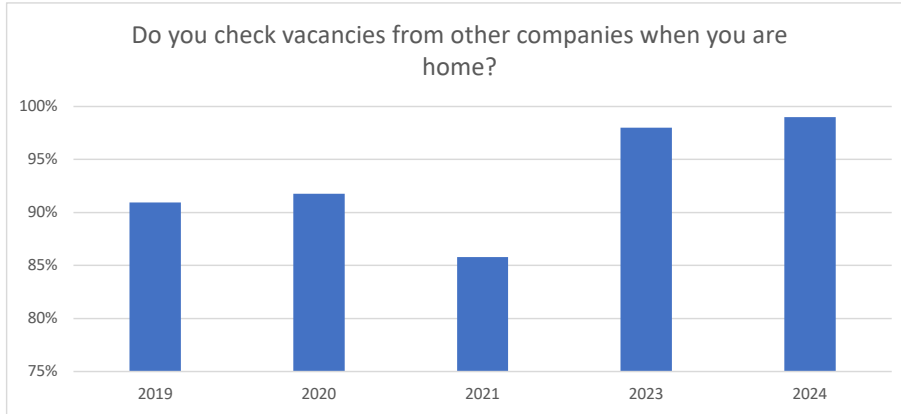
Reasons for changing employer, continued

- 37% of the seafarers accepted to join another employer as they got an offer with a higher salary.
- 25% changed employer because the new employer offered a joining date which suited better.
- Both are indicators that the crew employment market continues to be a seafarers' market.
- The combination of a general shortage of, and a hunt for, well-competent seafarers, along with a better financial situation for most vessel owners, is making employers more generous with their remuneration causing wages to continue to increase.
- With a surplus of job offers available, seafarers can be more picky. While the wage levels offered is a decision of the employer, an increasing number of seafarers are changing employer for reasons not under the control of their current company, like the new employer offered are more convenient joining date or has a fleet with younger vessels.



- 99% of seafarers are scanning the job market during their vacation. Recruitment platforms, social media and shipowners' homepages with job offerings makes the job market completely transparent.

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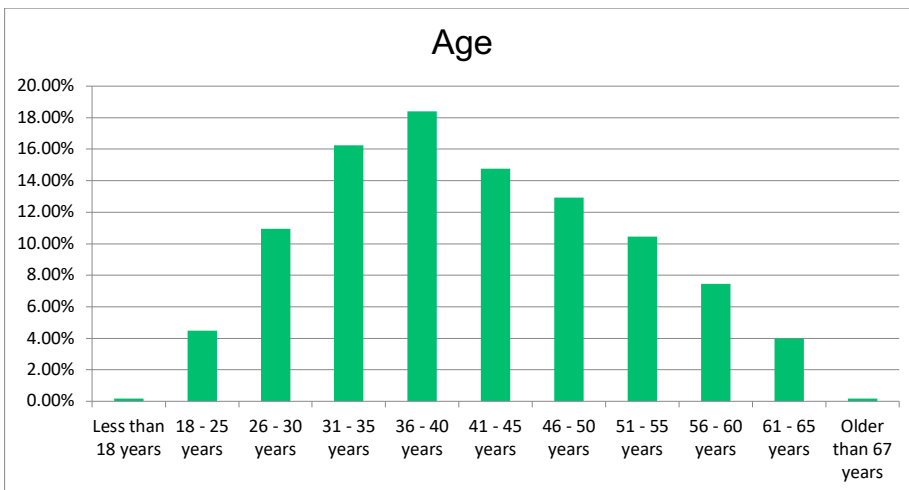
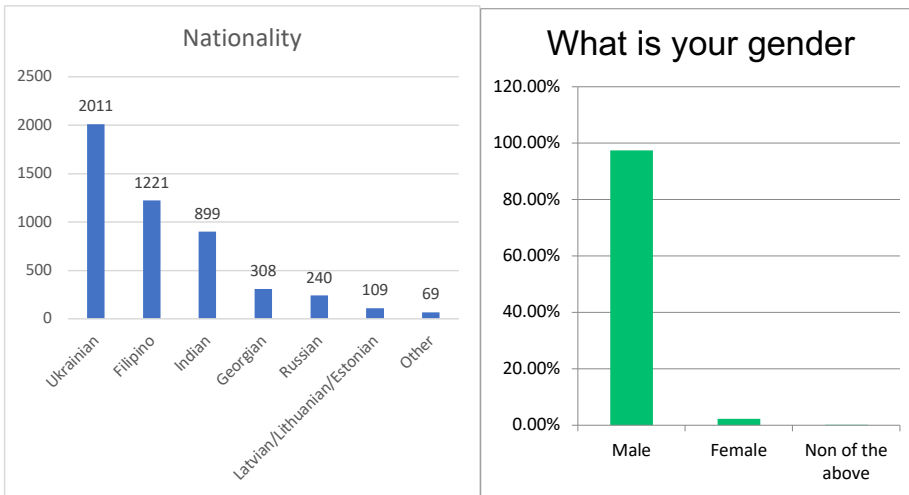


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22. Demographics

- The following shows the profiles of the respondents to the 2024 Danica Seafarers' Survey.
- We do not claim this survey is representative or scientifically correct, but we believe it gives a good snapshot of the seafarers' situation in 2024 and a benchmarking for previous years.
- 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!



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23. Ukrainian Seafarers

- The Russian war in Ukraine has created a special situation for the Ukrainian seafarers, and in 2023 we added a dedicated section to the Danica Survey for seafarers of Ukrainian nationality.
- In 2024, 22% of Ukrainian seafarers say they will not return to Ukraine, compared to 12% in 2023.
- The countries hosting most Ukrainian seafarer refugees are Romania, Moldova and Bulgaria.

