



The  
Seafarers  
Happiness  
Index

# Seafarers Happiness Index

Quarter 4 2022  
and Annual Review



IN ASSOCIATION WITH



Standard  
Club

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# Seafarers Happiness Index Quarter 4

The Seafarers Happiness Index (SHI) from the Mission to Seafarers, is the shipping industry barometer of sentiment at sea. Each quarter we examine the most pressing issues affecting those working on board ship, asking seafarers ten key questions about various aspects of their life and work.

The anonymous answers they give, in terms of data marking their mood out of ten and through their written responses, help those ashore to gain insight and understanding of the challenges faced and the opportunities for welfare improvements.

This most recent report covers both the results of the data from Q4 2022, but also the responses and issues that seafarers encountered in 2022. Once again we received messages from crews all over the world, and we are indebted to each and every one of them. Their contributions allow us access to vital data and insights.

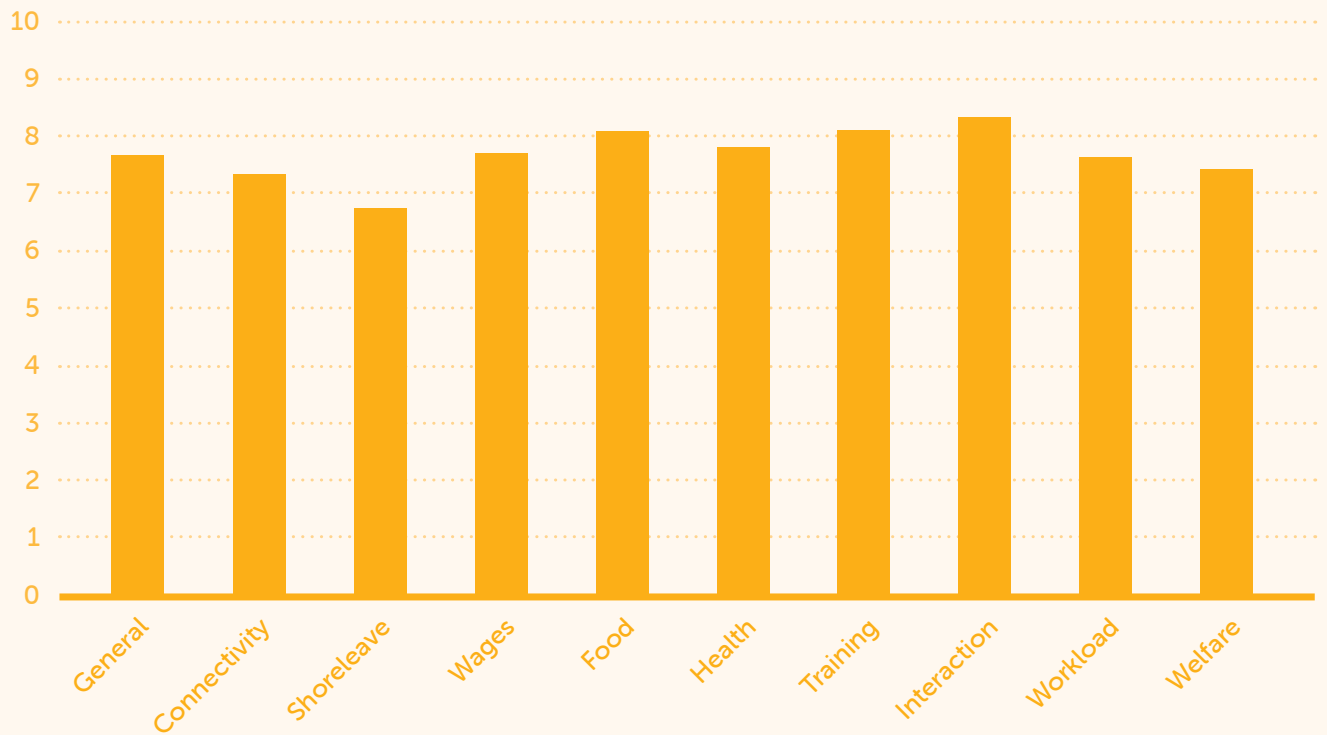
We hope that by giving seafarers a place to talk about their experiences, we can make sure that the voices of workers on ships can be heard. In addition to our survey, we also had a variety of online interactions with thousands of seafarers through the Mission to Seafarers network of centres and through their social channels.



# Q4 2022

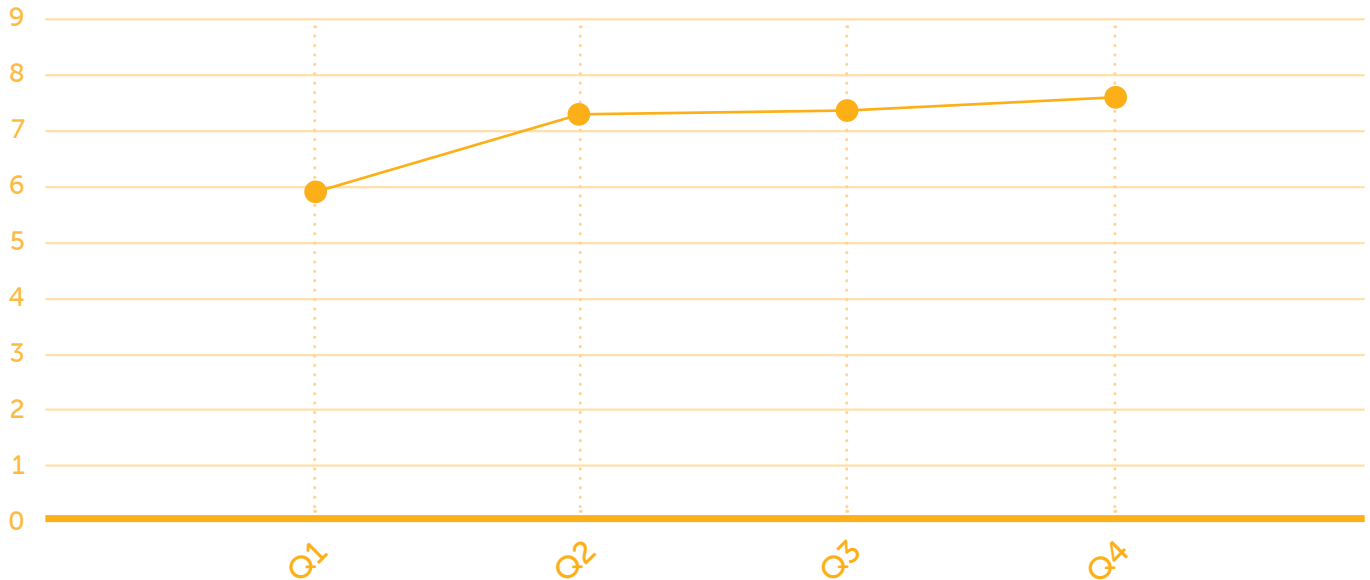
The average Seafarers Happiness Level in Q4 reached 7.69/10, and this reflected a growing trend over the year. The data appears to be a flattening across the question set. As such, issues tend to be clustering closer together. Even the historically most problematic areas, such as shore leave and access to welfare ashore, have recovered and this has help drive the average upwards.

## Q4 2022



# How happy generally when at sea?

7.72 ↑ from 7.3



It appears that morale at sea is currently fairly high, and the general levels of happiness of seafarers have continued to rise positively. According to the data, most aspects of sea life are trending upwards than they have in the past year. However, it was noticeable that a significant number of seafarers appeared to have recently switched employer or trading patterns.

From the responses we received there seems to have been a surge in seafarers switching jobs. As such there was more talk involving short sea or even inland waterways, reflecting the new trades that some have switched to. According to their feedback, seafarers decided to move jobs to either sail closer to home in the event of additional travel restrictions, or to better ensure trip rosters and schedules could be maintained.

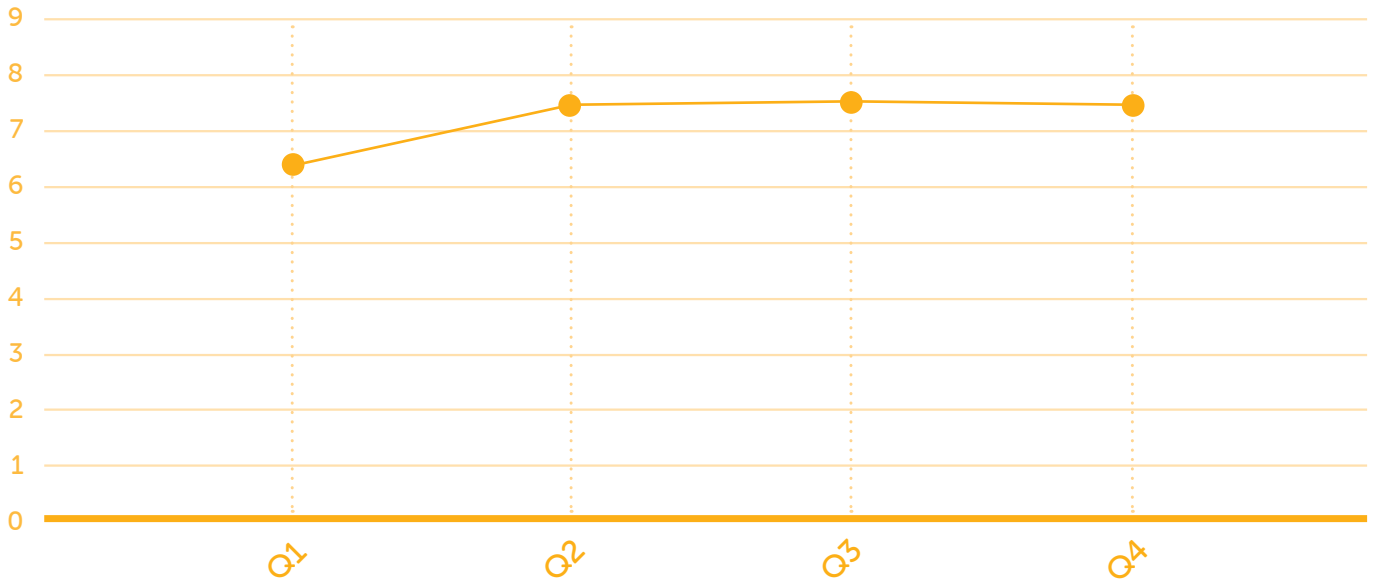
We also heard from a number of seafarers new to the industry – both as trainees or crew. These seem to be from nations which were traditionally not major maritime labour markets, with the likes of Pakistan, Bangladesh and Sri Lanka coming to the fore.

As in previous reports, crew members continued to express their relief at the return of freedom of movement, as well as their increased sense of certainty and stability.

Despite the positive data, there are still issues that need to be fixed, and although seafarers appear to be more optimistic than we have previously seen, there remain persistent issues, such as workload, mental health impacts, and the stresses of a difficult job to contend with.

# How happy about contact with family at sea?

7.4 ↓ from 7.56



Connectivity was the only area in which there was a decline this time around. Quality and cost are still a concern, and there is a growing demand for free or inexpensive access. The demand for faster and better quality access also reflects this.

The message remained the same in so many responses: "we want free access to the internet". Additionally, seafarers have a strong desire for better access to high quality entertainment and content. In keeping with the trend ashore to stream content there is a growing demand for the same access at sea. Indeed, the days of straining shelves full of counterfeit DVDs appearing to be over, and seafarers want a more modern approach to onboard entertainment.

In fact, many seafarers believe that such access and resources would improve social life at sea. Responses like: "we gathered to watch live world cup football, and the atmosphere on board was fantastic." Another added, "A good day at sea included a barbecue while watching the World Cup final on television".

Seafarers want to connect, and the message is loud and clear that they want it to be free or cheap to do so. Unsurprisingly, they want access similar to that which they would expect on land. This seems to be at a real crossroads, and as expectations rise, the level of contentment in shipping companies which don't live up to their promises rapidly decreases.

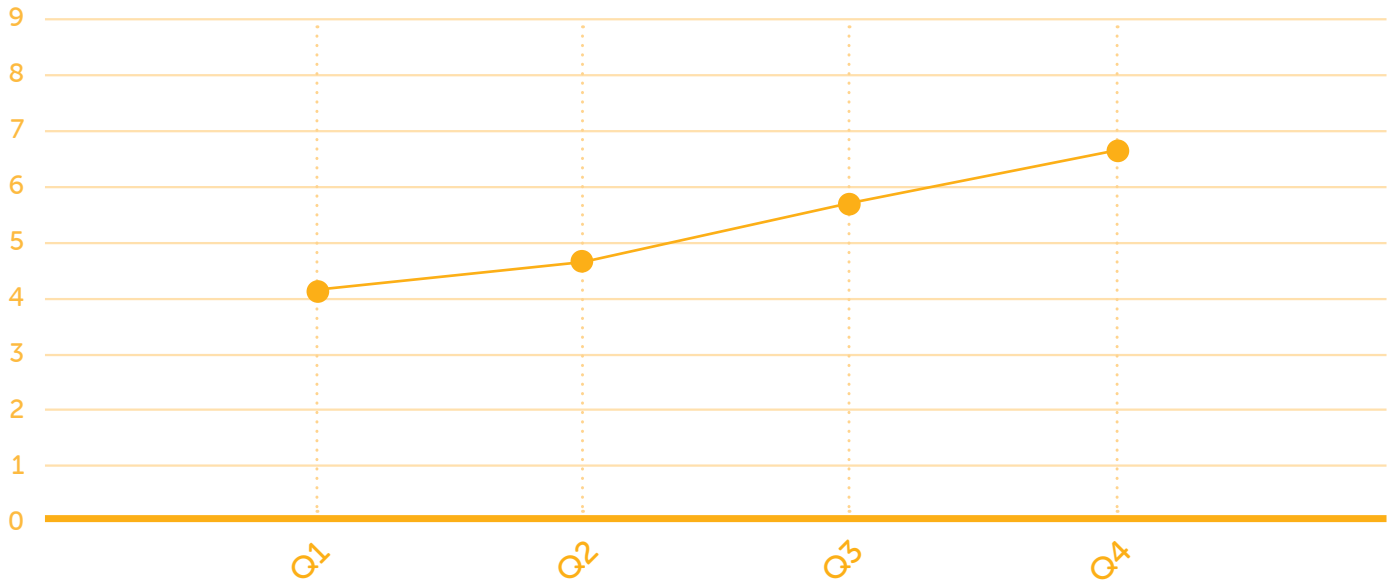
Where we hear from crews contending with costly, subpar, and sluggish connections, there is growing frustration. Seafarers are increasingly unwilling to accept the situation. Indeed, as we heard in question 1, many are doing so by switching companies to those who do prioritise connectivity, or where they can more readily remain connected.



**We want internet access.**

# How happy about access to shore leave?

6.76 ↑ from 5.87



Shore leave is more than just a problem about getting off the ship; it has developed into a sense of conflict and something of a power struggle. We are seeing that seafarers do not necessarily always want to go ashore, indeed they frequently don't – not least because of cost and work load. They do, however, want to feel that they can make their own decisions, and so want to feel more certain of their options, and have a sense of choice.

So seafarers feel deprived of the opportunities for recreation and relaxation they ought to have, and there is frustration about having to pay over the odds to get ashore, or to even have to "beg" officials, superiors or employers for shore leave. There is a feeling that access to shore leave should be a right and a choice, not seen as some kind of benefit.

Whilst the COVID pandemic brought this issue to the forefront, things appear to be evolving. As such, we see that the current uptick in sentiment is not necessarily that seafarers are suddenly heading ashore, but rather that they feel they increasingly have the option to do so. "As soon as I am told I cannot go ashore, then this makes me angry and frustrated," one seafarer wrote. "I need to make a choice." Another said: "I don't go ashore very often, but when I want to it means a lot to me to have the chance if I want it."

The message from seafarers is primarily about the trust and respect they feel is missing. Indeed, if immigration or port officials, management ashore or on board, decide not to allow shore leave, it can lead to conflict, annoyance, and damage good relationships.

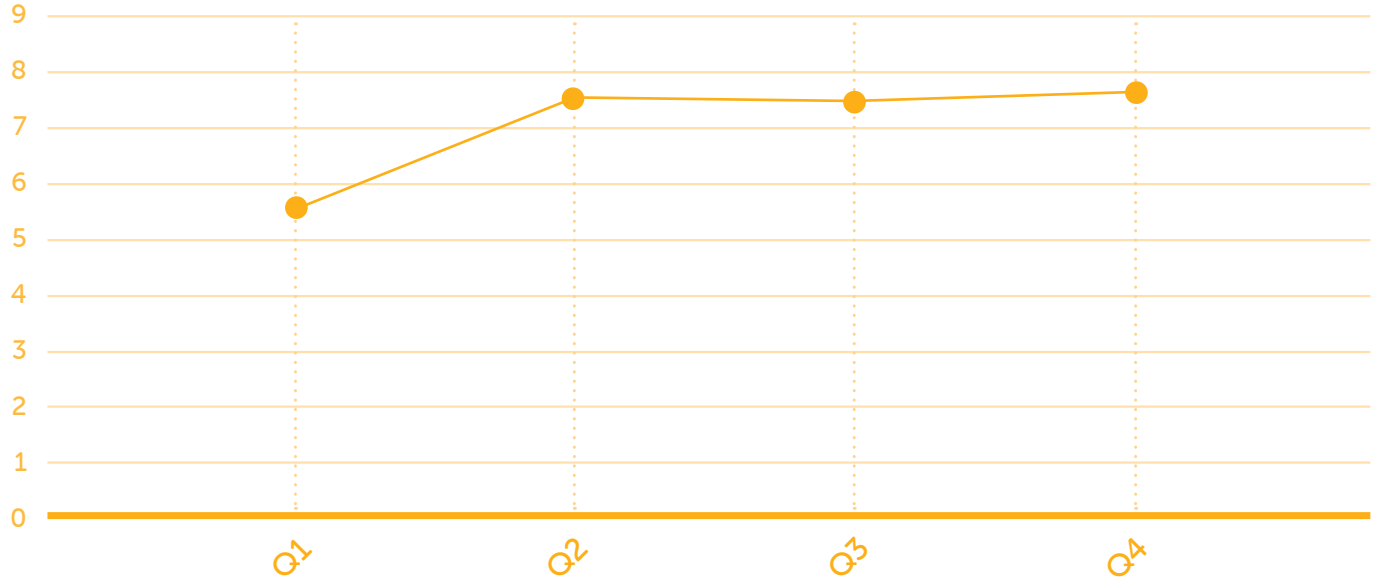
We also heard in Q4 about the effects of port strikes on seafarers; those trading into affected ports experienced delayed or cancelled port calls and frequently encountered restrictions that prevented them from going ashore.



**As soon as I am told I cannot go ashore, then this makes me angry and frustrated**

# How happy about wages/salary?

7.71 ↑ from 7.42



The issue of wages/salaries has risen ever so slightly across the year, though seems based more on the sense of relief of getting paid at all in such turbulent times, rather than the rates of pay. As stated by one seafarer: "The money I earn has become even more important as many jobs have been lost in my home country". This sentiment perhaps captures the overlooked reality for many seafarers, that they bear the weight of so much for their families and communities.

During the past couple of years, as many seafarers' family members have had to adapt to a pandemic and search out new opportunities, it has been the seafarers who have often continued to be providers. This is a burden proudly borne by many, and seafarers often tell us of the pride they have in providing.

We note the positivity has levelled out after a significant jump from the first quarter. Indeed, seafarers' perceived decline in living standards has long been a source of discontent in many nations.

There is some frustration still evident about wider industry earnings, and at a time when many seafarers hear their employers talking about record profits, crew feel that they should also reap the benefits that are borne by them.

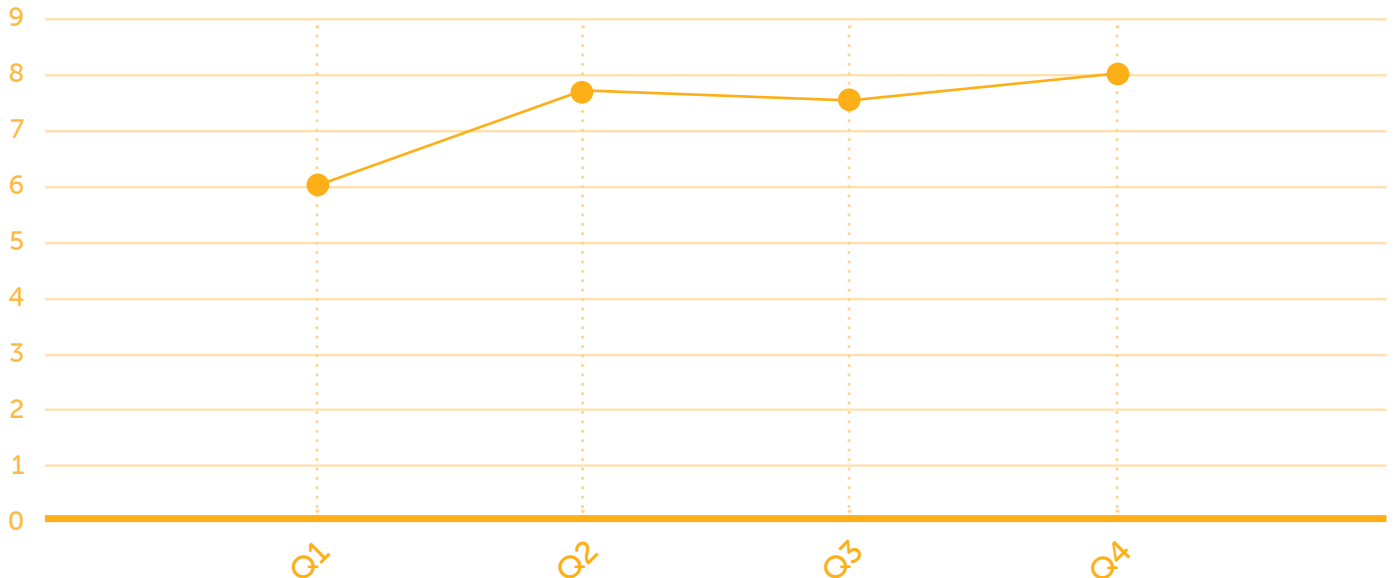
Additionally, it was the belief of many on board that a shipowners' talent war could break out, and this may lead to an increase in wages due to a lack of skilled seafarers. In 2023, this might be something to keep an eye on, especially as we hear of a potential exodus from deep sea trades.



**The money I earn has become even more important as many jobs have been lost in my home country.**

## How happy about the food on board?

8.09 ↑ from 7.53



It was seen over these most trying times, that food and the routine of meals on board took on even greater importance and significance. The dining experience, the social elements, as well as nutrition, have all come to the fore. Fortunately, it appears that happiness levels have been rising, and the food has continued to be well received by many respondents.

However, there were also critics, one of whom stated: "The food quality on board is getting worse and worse." As global inflation increases, budgets are constrained, and suppliers select low-quality food for vessels in order to maximise profits, meaning that seafarers consume a lot of junk food.

Interestingly, the job migration from deep sea to short sea/inland roles appears to impact diet too. It seems that seafarers perceive the food closer to home has been of higher quality. One seafarer stated: "The food is always so much better now that I am working around my home waters." Another added: "We get fresh provisions on a regular basis, and they are of excellent quality, because we work in between short port calls."

Thus, it appears that the dining experience is also benefiting from the demographic shift. However, regardless of where a seafarer works, the cook and catering staff will ultimately determine the overall standards.

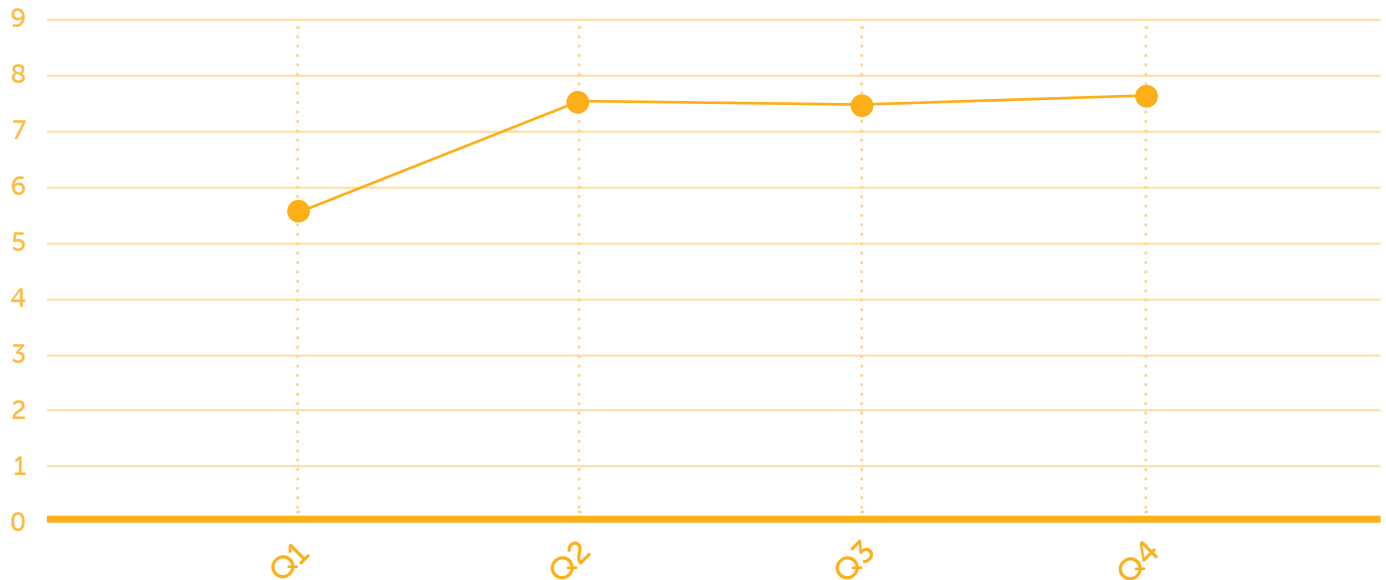
In previous reports, we have seen that seafarers who enjoy their food generally have higher levels of happiness than those who do not. As a result, the satisfaction of crew and the overall atmosphere aboard can be significantly impacted by using high-quality ingredients and creating imaginative and culturally appropriate menus.



**The food is always so much better now that I am working around my home waters.**

# How happy about your ability to keep fit and healthy on board?

7.83 ↑ from 7.61



The issue of fitness and exercise on board ship often sits in tandem with a range of other concerns. It is obviously and intrinsically linked to good nutrition, but so too the issue of workload and even access to shore leave.

Where we hear negatives, these are usually prefaced with one of the other factors – such as the fact that eating poor food impacts a sense of health and fitness, so too that fatigue means seafarers feel they have no time or energy to use the gym. There are also those who feel unable to take a stroll and get some fresh air away from the vessel, making shore leave a part of the health and wellbeing triumvirate.

There is a definite interrelated aspect to this issue: if there is no time to exercise, then we see problems. If crew feel so drained and fatigued, then obviously physical health is impacted. Then there is the issue of equipment too: a vessel that is well equipped usually reflects a positive approach to health and wellbeing. Where there is a commitment and resources for health, then there will usually be a positive leadership mindset too.

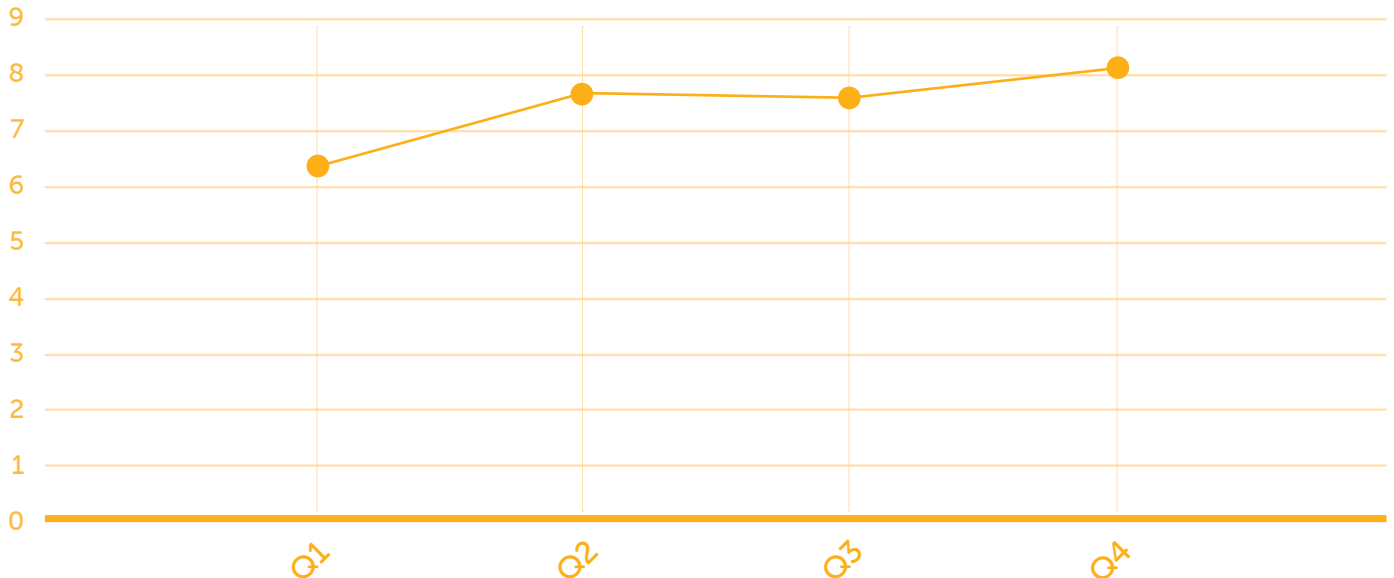
Seafarers who have opportunity and time to exercise show an increased level of happiness across a wide range of questions. It is clear that the impact of keeping fit and active is not just physical, there are major mental health and well-being improvements too.

According to one seafarer: “The gym is your friend! I am extremely pleased to have one aboard”. While lack of equipment becomes a management concern for other crews: “There is no fitness equipment aboard, and the subject has been brought up at meetings with management and safety. During a recent Flag State audit crew concerns were raised, but neither the flag nor management took any action. Shore management dismissed all concerns regarding the physical and mental well-being of crew members”.

The issue of health and fitness is not only intrinsically linked to other aspects of “happiness,” but it is also illustrative of wider aspects of good, bad, or poor management. Where this is lacking, then other issues will probably become problematic as well.

## How happy about the training you receive?

8.12 ↑ from 7.74



As with the majority of other aspects of the Seafarers Happiness Index, the issue of training has steadily tracked higher over through 2022. Though whatever the data, as we have often heard in the past, there remain varied responses relating to training.

From some vessels we hear extremely positive responses about training regimes which are delivered with enthusiasm and commitment, through investment and a focus on positive end results. Whereas on other vessels, unfortunately, training and development seem to be something of a chore, with no real energy or impetus to improve.

It is always disappointing to hear from seafarers who claim: "Training is a waste of time". It would seem that if training, learning, growth and development are seen as negatives, then perhaps they are being delivered in the wrong way? If they lack the framework and sense of positivity, then perhaps it is all too easy to overlook value?

Though, perhaps the real-world situation is more nuanced... As one respondent stated this year: "Seafarers are busy with their work, they work very hard and they do not have time for rest, who wants to lose 2 hrs in front of a computer course when they have only 7 total hrs of rest before going back to work?"

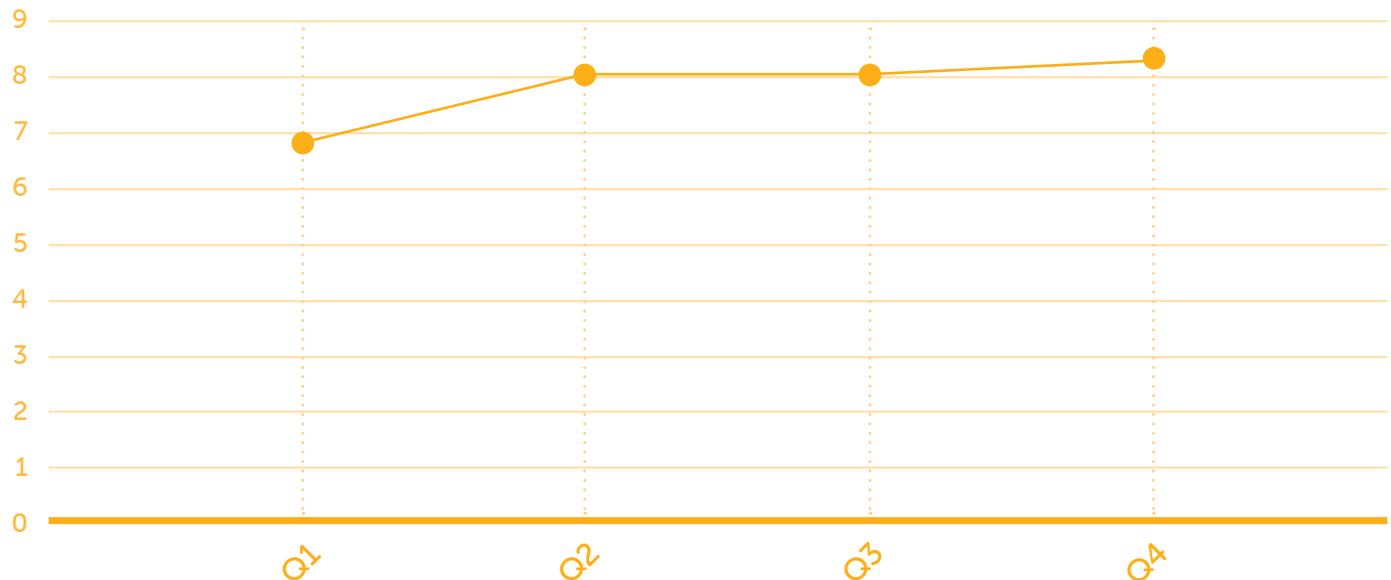
Time for training must be included in the shipboard schedule, just like the issue of health and exercise. If seafarers feel rushed and unable to complete all their tasks, the impact of adding more and more training is cause for concern. It is not good for learning and improvement if it is rushed or seen as competing with other demands on time. This is not a demand in and of itself, rather, it is a component of the larger reality at sea.

Additionally, we received interesting remarks regarding the issue of future fuels. "I read that seafarers will need to be trained and a part of the green change. I am Chief Engineer but my company doesn't tell me anything, and I'm never asked to share or be a part of the plans for the future".

If this approach is mirrored on other vessels or within companies, it is worrying as seafarers will need to learn how to handle, store, bunker, and use a variety of new fuel options in a short amount of time. This could be a problem in the future if the industry does not outline the strategy and justification for involving those at sea in the discussion and process.

# How happy about interaction with crew on board?

8.34 ↑ from 8.08



Onboard interactions have almost universally been the highest performing aspect of the Seafarers Happiness Index. Across years of reporting, whether in good times or bad, it has so often been the relationships on board which have sustained people, making life bearable where crew have been struggling, or made for even better times when things have been going well.

It was therefore extremely concerning through COVID when we started to see major dips in the relationships and interactions data on board. We were beginning to see real tensions growing - this took a big toll on board and was extremely worrying. This issue was also seriously impacted by the fallout of conflict and schisms on board between Russian and Ukrainian crews, as well as those who "supported" the different sides in the debate.

Thankfully, we have seen clear signs of recovery throughout the year in this regard and the data indicates that interactions on board are once again the most important factor in seafarer satisfaction.

There were numerous remarks about having "good friends" and "good relationships and cooperation" from seafarers who had positive interactions. Despite the positive responses, remarks like "most seafarers remain isolated" were also made.

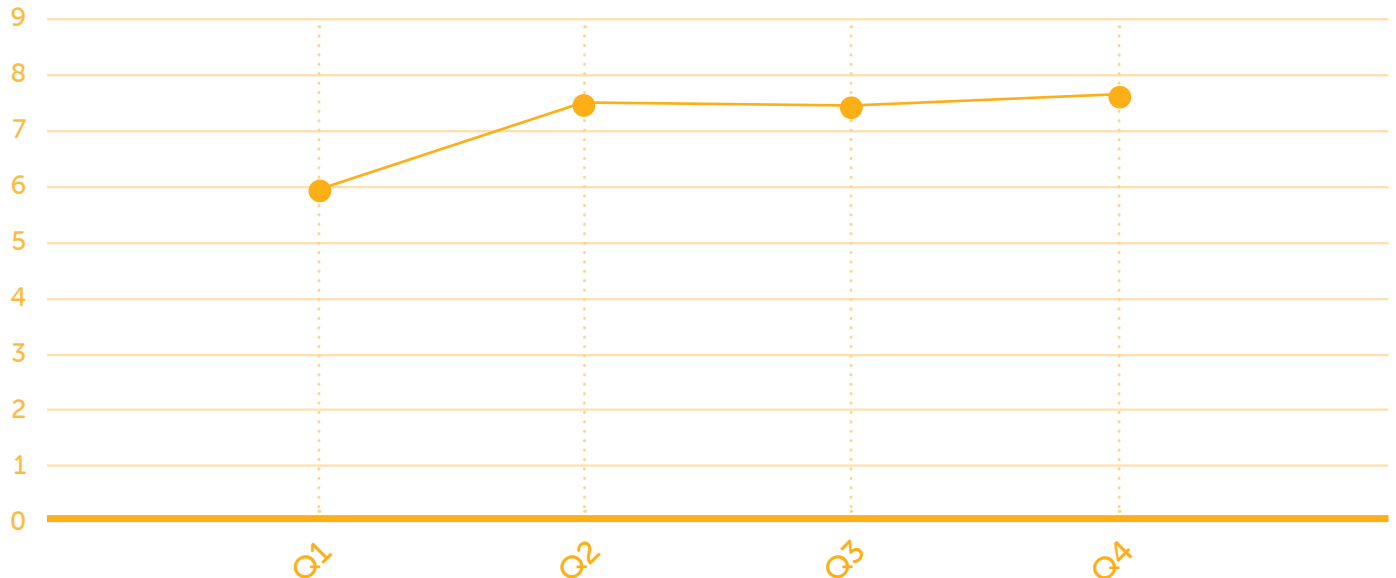
It remains a concern that seafarers often choose to return to their cabins rather than engage in conversation, and there are still issues on board concerning the retreat into isolation. However, this is strongly believed to be a symptom rather than a cause of a lack of social cohesion.

If there is nowhere to go and no reason to go there, it should come as no surprise that the focus will shift back to individuals who simply shut the doors to their cabins and watch movies or video games by themselves. This results in a decreasing likelihood of social interaction, which sends more into retreat – it is a self-fulfilling prophecy.

Seafarers, on the other hand, are happy to participate whenever there is time and space for them to do so. Good interactions therefore develop from a solid foundation of camaraderie, positive interactions, and an open, friendly, and leisurely workplace on board. Making sure there is a positive social element and focus is the answer to this problem, ensuring that seafarers have the time and energy to interaction, and then the opportunities to do so. As we heard earlier in 2022: "We should have movies and games to make people more happy, as the ship is dead at night." Adding: "Like would it kill to have a party even once a month?". Well, would it?

# How happy with your workload?

7.6 ↑ from 7.38



None of the building blocks of seafarer happiness or shipboard job satisfaction sit in isolation; every part of the life on board interacts and impacts the rest, and one of the more pivotal aspects is workload.

We saw a massive drop off in satisfaction with workload during COVID – as vessels wrestled with the ways and means of managing a host of new hygiene, administrative and procedural demands. Put simply, there was a paperwork pandemic as well as a viral one.

The happiness data plunged as seafarers were faced with new ways of operating, and we heard reports such as: “I have to clean all my boilersuits after each shift. I spend more time in the laundry room than my cabin!”.

Then there was the impact of not only having more work to do on board, but also having to extend trips meaning seafarers had to keep up with the extra work for a much longer time. Fortunately, there are indications that this is easing: the COVID requirements have decreased or become more automated and there is also a sense that the length of the trip is returning to some sense of normality.

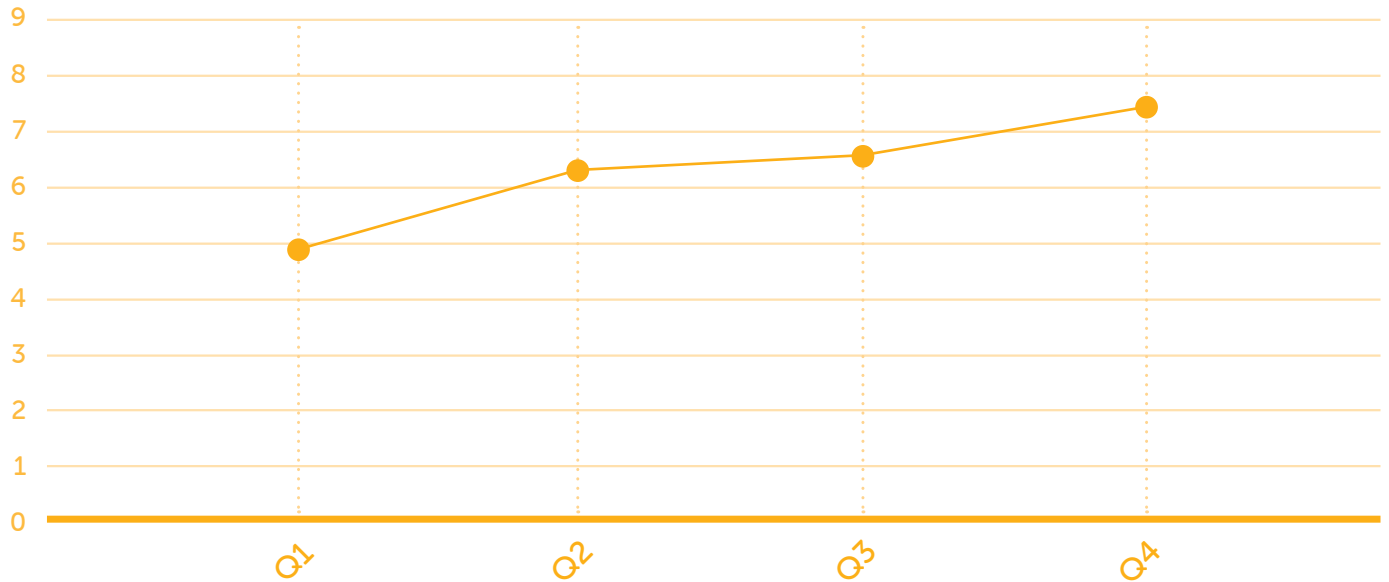
However, not all of the news is positive, and seafarers continue to be frustrated by workload issues. The problem of paperwork seems a constant, one seafarer remarked: “The paperwork can be overwhelming,” something we hear time and time again.

In this technologically advanced age, the shipping industry’s inability or unwillingness to resolve these administrative issues is disappointing. The issues that arise from having too much paperwork reverberate throughout our happiness data on a consistent basis, whether for lack of will or ideas. It seems to be getting worse as shore executives constantly ask for information.

There is a double edged sword to this data and digitalisation debate. It seems that without a united industry-wide approach to data management and sharing, then some companies have fantastically advanced systems, while others are still far behind the curve. The net result is often seafarers under pressure to assist their short colleagues in reporting, “I get asked the same questions about shipboard matters, and they should already have this information in the office”.

## How happy with welfare facilities when you are ashore?

7.41 ↑ from 6.57



During the height of COVID, the issue of access to shore welfare facilities frequently received a low score - which was understandable considering accessibility issues and the frequent inability of seafarers to actually visit centres.

As a result, some resources ashore were unavailable to seafarers. Thankfully, the doors have reopened through 2022, and the increasing number of seafarers returning to centres is having a positive effect. Crews are once again able to make use of the welfare centres and facilities, taking the opportunity for rest, recreation, and hospitality.

When they do get to make use of facilities, seafarers are frequently extremely grateful: "Always fun to visit proper seafarer's missions and centres. We can unwind by playing pool or drinking something. It is beneficial to your mind."

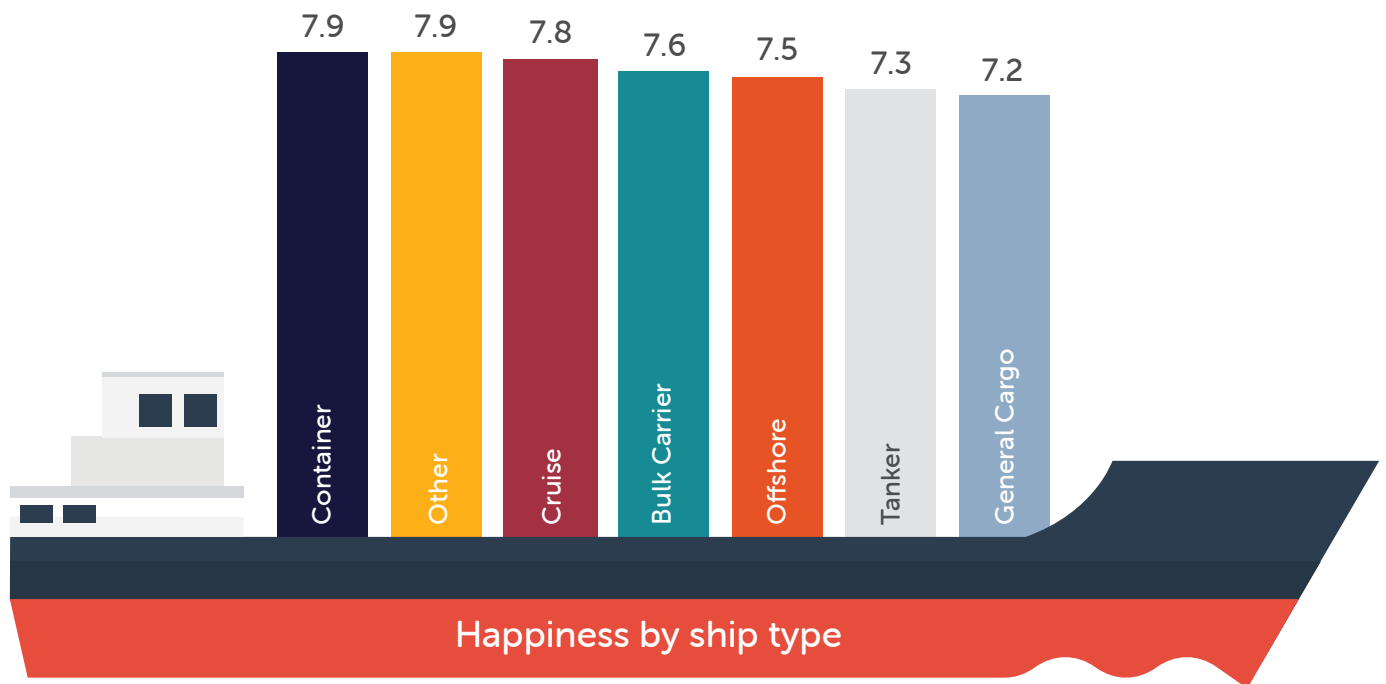
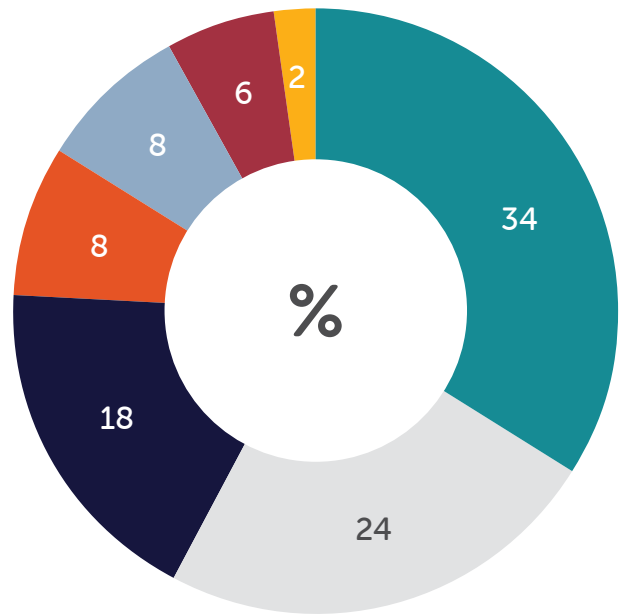
There was praise for specific centres but so too for the people who volunteer to run centres and visit vessels. Seafarers said this provides "a chance to talk to someone who doesn't judge and who just provides support". It may not always be the most visible part of the industry but a smiling face arriving on board, carrying phone cards, perhaps even a box of treats means so much. These are the human interactions which make life better. For a fleeting moment, problems on board melt away, as the juice of a KFC rolls down the chin, or the sugar from a Krispy Kreme powders the front of a rust streaked boiler suit.



**Always fun to visit proper seafarer's missions and centres. We can unwind by playing pool or drinking something. It is beneficial to your mind.**

# Ship Type

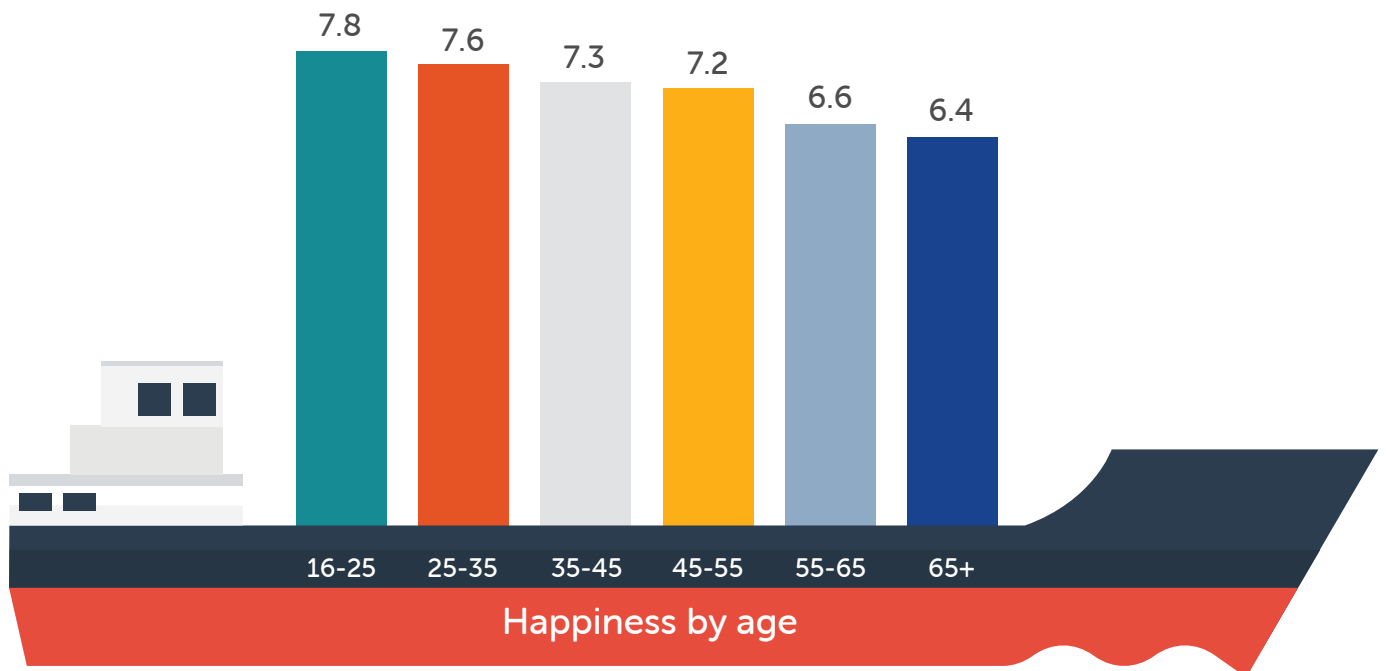
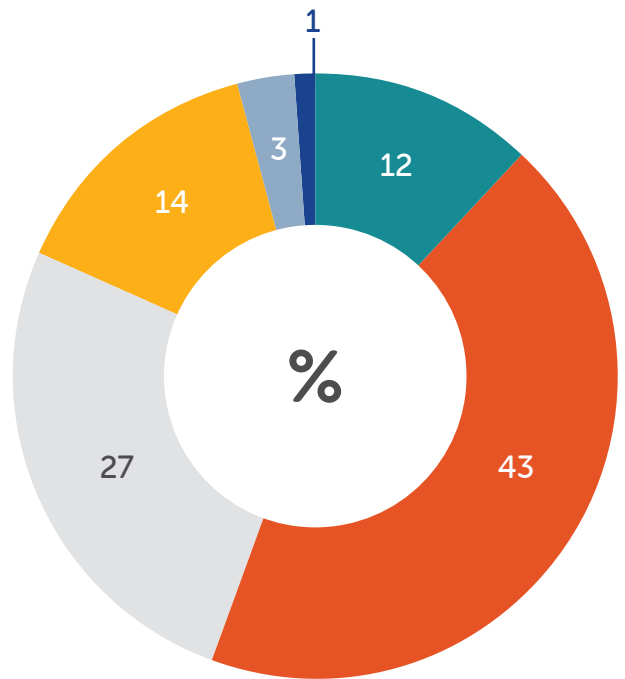
- Bulk Carrier
- Tanker
- Container
- Offshore
- General Cargo
- Cruise
- Others



Happiness by ship type

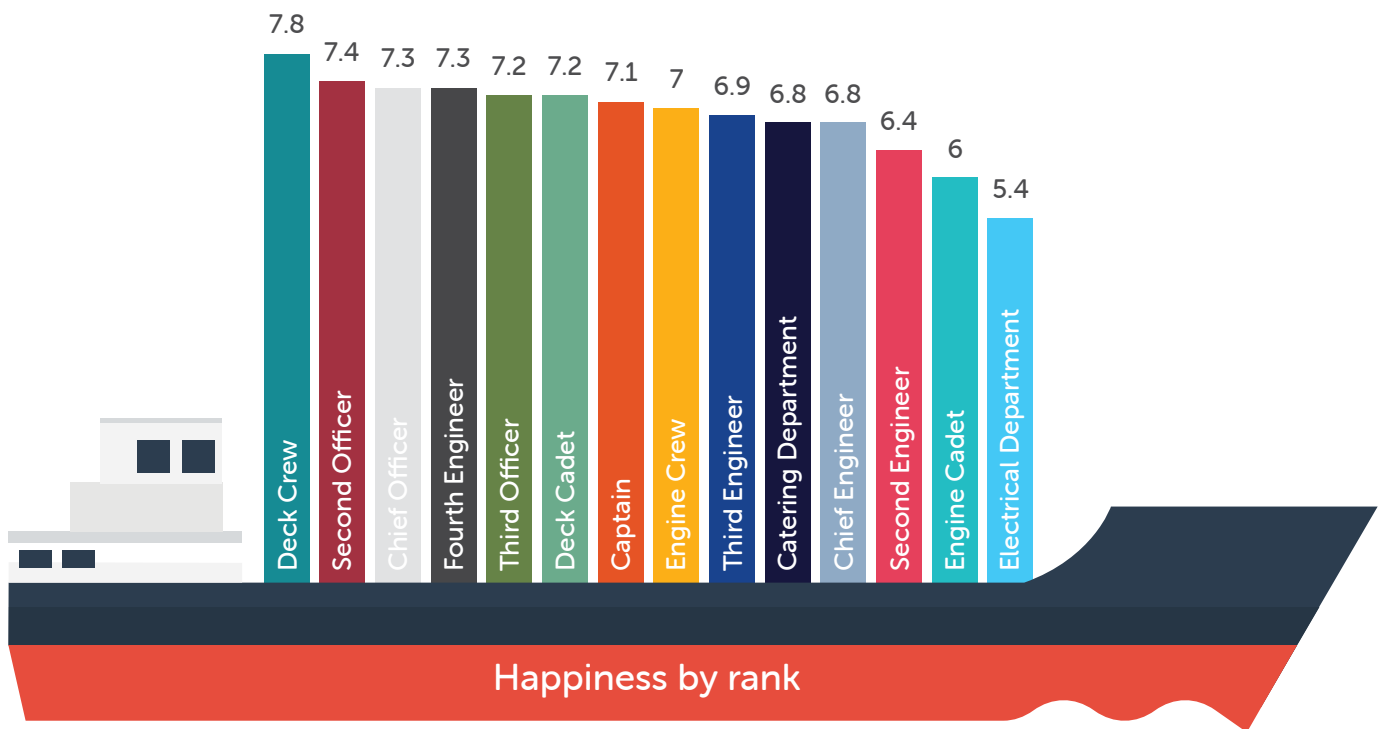
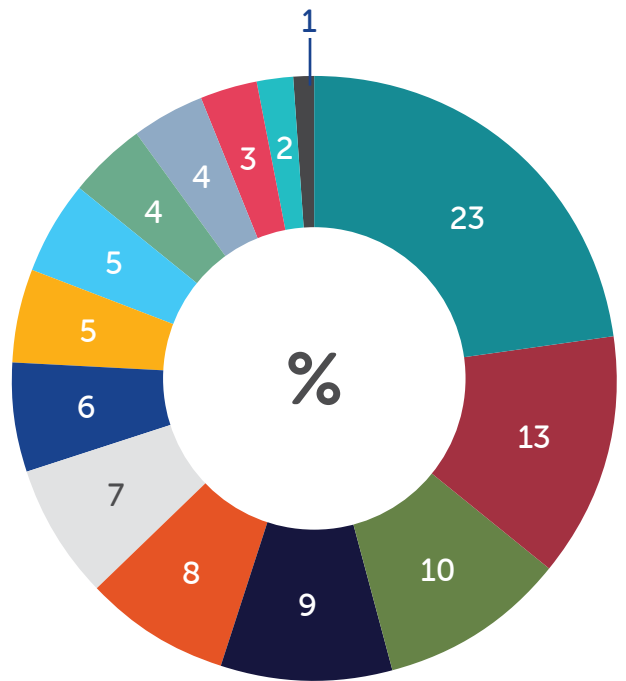
# Age Range

- 16-25
- 25-35
- 35-45
- 45-55
- 55-65
- 65+



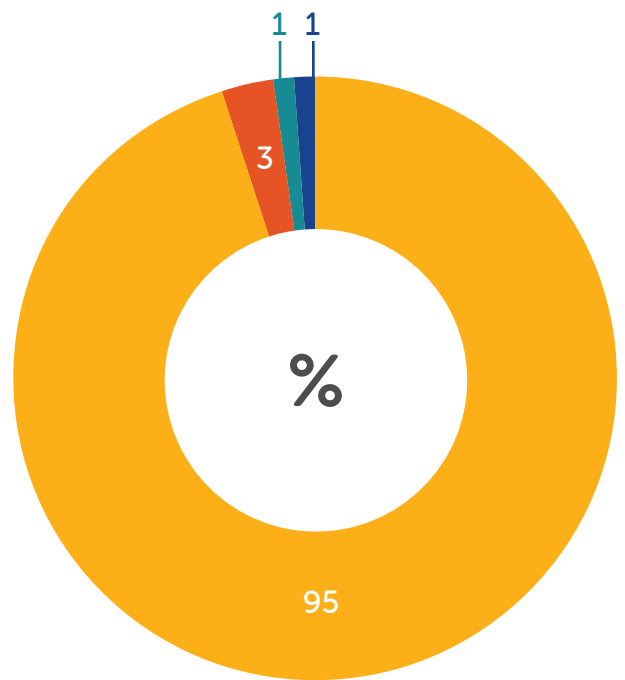
# Ranks

- Deck Crew
- Second Officer
- Third Officer
- Catering Department
- Captain
- Chief Officer
- Third Engineer
- Engine Crew
- Electrical Department
- Deck Cadet
- Chief Engineer
- Second Engineer
- Engine Cadet
- Fourth Engineer



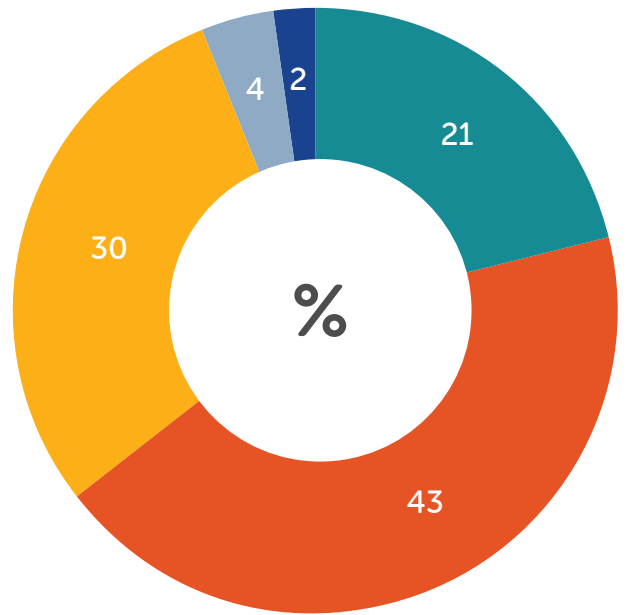
# Gender

- Male
- Female
- Prefer not to say
- Other

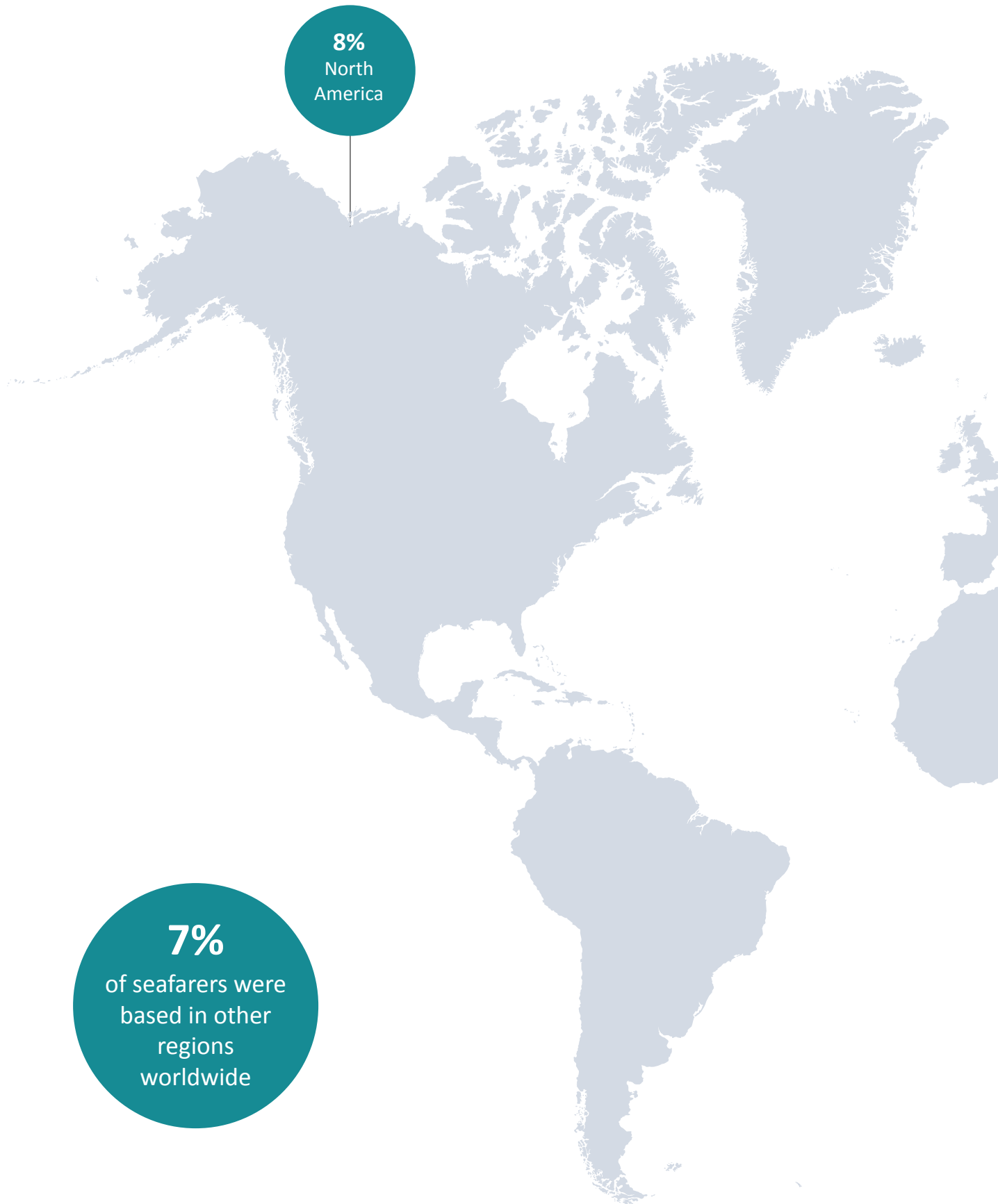


# Trip Length

- 1-3 months
- 3-6 months
- 6-9 months
- 9-12 months
- Over 12 months



# Where



**8%**  
North  
America

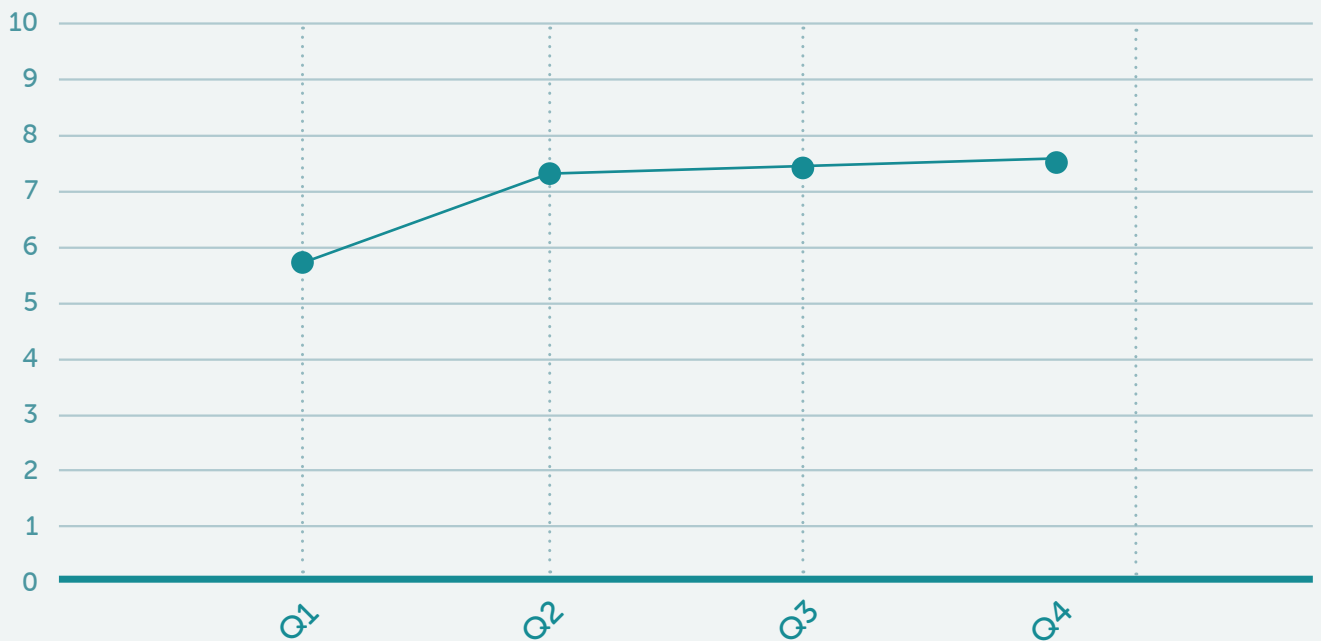
**7%**  
of seafarers were  
based in other  
regions  
worldwide



# A year in Review: 2022 – From Low to High

In 2022 the satisfaction of seafarers has steadily grown, and this continued into the fourth quarter of 2022. We saw levels of happiness increase from their lowest point in Q1 2022 reaching something of a high water mark at the end of the year.

## 2022 Seafarers Happiness Index Averages



### Q1 2022: The Low Point

The beginning of 2022 was not a happy time for seafarers. The overall average had fallen to 5.85 by Q1 2022, and the industry was filled with dejection and pessimism. The impact of COVID’s ongoing yo-yo effect on seafarers was hitting hard.

Not only was this the lowest level of satisfaction yet recorded, but it was also only the second time that all question areas had fallen. Seafarers were once more in the crosshairs of the COVID “Omicron” variant, which was sweeping through numerous nations at the time.

The mood of the seafarers reflected the scale of the wave of problems they were facing. We referred to a “confluence of concerns” as COVID, conflict, and contracts, all contributed to an unprecedented state of low morale and deflated mood.

As if things couldn’t get any worse, suddenly Russia’s invasion of Ukraine meant that seafarers were worried about tensions on board, and some had to think about the safety of their families back home.

Where so many issues combined and collided, seafarers opened up and shared their feelings, experiences and impressions of what it is to be at sea today. One particularly compelling message captured the tough reality which is felt by many: “Life at sea is getting increasingly depressing each day, not much being done about the seafarer’s

welfare the so-called key workers running the whole industry. Hectic work schedules, no social life, with so much technological advancement getting a basic internet connection is still a luxury for most seafarers when it's almost a basic necessity these days. The workload is getting increasingly high with minimum crews on board, rest hours are only complied with on paper, yet none of the authorities pay heed. **Shipping has become a floating jail**, where you're just expected to work endlessly like robots without questioning the work scenario. If money was not a concern, I don't see a single seafarer willing to come back to sea."

The fact that the first quarter of 2022 saw the lowest ever happiness index results suggested that things could only get better and, thankfully, progress did begin.

## Q2 2022: Rising Hope

The report for the second quarter of 2022 was titled "A New Hope" because the levels of happiness increased significantly during that time period, rising from the low of 5.85 to 7.21/10. This jump was extremely reassuring to see, and was captured by a positive rise in all categories.

It felt at the time that we were witnessing the beginning of the end of COVID issues, as the world began to reopen, something which had a significant positive impact on seafarer sentiment.

At the time, we wrote that seafarers had a far more relaxed outlook when they are confident and certain about how long they will be aboard. They are able to deal with many of the difficulties they encounter at sea with significantly improved resolve because they believe they will return on time. A trip is much better when there is certainty, assurance, confidence, and a sense of control.



## Q3 2022: More Relief

It was with an even greater sense of relief that we saw the overall Q3 2022 average climb again. This time up to 7.3/10 up from 7.21 in Q2. There was a sense of positive impetus and we heard of real progress as welfare lessons were being learnt and brought into effect, with shipping companies investing in their people on board.

These actions were making life better at sea, and the sentiment expressed by seafarers reflected this. While there were a number of welfare initiatives coming to the fore, the actual rise in sentiment was very much driven by improvements to shore leave and access to welfare facilities.

Indeed, in contrast to Q2, which was driven by micro aspects of changes on board, in Q3 the rise in overall sentiment was shaped by the macro aspects of life outside the vessel.



**Human beings are part of nature, and to be called normal is to have access to our natural habitat. //**

Perhaps of all the quotes we received, it was one about the importance of shore leave that best summed up the mood. One seafarer told us: "Crew should be entitled to shore leave regardless of the challenges of COVID19 restrictions. Human beings are part of nature, and to be called normal is to have access to our natural habitat. Being on the shore once in a while, seeing other people, experiencing normal activities like eating in a restaurant, crossing the street, walking along the shore, feeling the breeze of the shore winds, all are good refreshments for a seafarer that has been away for quite some time."

## Management Issues

Despite the positives, in 2022 seafarers were also exceedingly concerned and frustrated by the relationship with their colleagues ashore, especially when information was demanded without much consideration for where a vessel was or what it was doing. Additionally, there were also concerns that the Master is becoming more of an "office worker".

The demands made by shore-based staff are a major source of dissatisfaction, especially when they appear to be related to insignificant errands or information that those ashore can access without having to resort to asking officers aboard.

## Minimum Crewing Concerns

Seafarers' mental health and well-being are inextricably linked to the amount of work they have to do. Sadly, despite standards, legislation, and regulations, it is becoming increasingly apparent that too many ships are operating with too few people aboard.

Fast turnarounds, multiple ports in a short period of time, the effects of bad weather, the need for cargo care, maintenance and repairs, security concerns, and measures to control diseases and hygiene, all add additional demands that can see the idealised world best case crewing models left floundering in the face of the real world.

The calculations of what is required fall apart when anyone is ill on board, if there are mechanical issues, or if a Maritime Security Level is raised. The real world on board a ship is not reflected in the "lean crewing" that is becoming the norm, and the impact of this is heightened dissatisfaction through to serious safety risks. Minimum Safe Manning Levels do not adequately reflect the realities of life at sea, they assume a flat distribution of tasks and pressures on the vessel.

It seems obvious that more must be done to move away from operating vessels with an eye toward the smallest possible number of people we can legally get away with. This has a negative impact not only on the life of those who are on board but also on the image of shipping. For the time being, the industry is still relatively shielded from shore-based attention, which tends to focus on fuel and emissions issues.

However, change is coming and with the likes of the Sustainable Shipping Initiative Code of Conduct, no longer will compliance alone be enough. There is pressure to excel and that is not something which the lowest allowable crewing levels facilitates.

## Q4 2022: Final Leap Forwards

This brings us to Q4 2022, which was viewed as a true test of the trends. Could the aspects of life aboard, enhancements to shore leave and access to support ashore translate into further increases in sentiment? Could we sustain positive growth? Fortunately, the response was yes. The improvement to 7.69/10 up from 7.3 suggests that the positives have further stabilised.

There is now a higher level of expectation that the systems supporting seafaring practices will continue to deliver. Things seem to be going well for the time being, and, after last year, there is a sense of relief that fewer seafarers are having to endure complications. We can only hope that this pattern will continue in 2023.



# Happiness, welfare and vessel standards

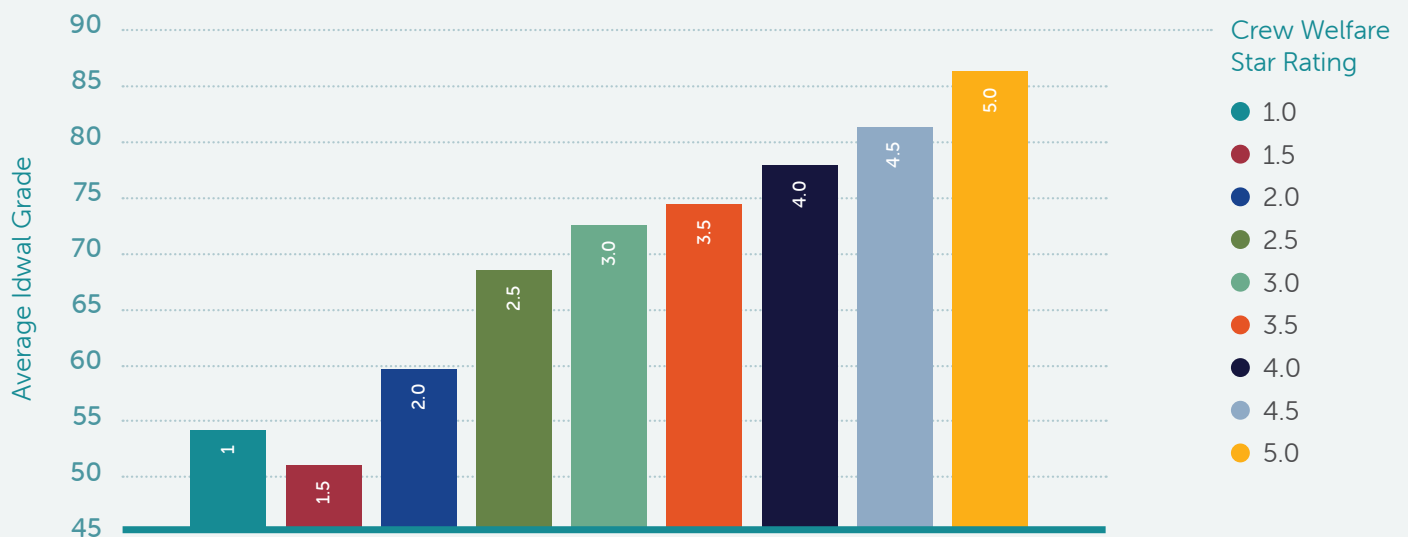
While the Seafarers Happiness Index assesses the sentiment and views of crews, it has long been clear that a deeper understanding of the physical realities on board would build a real-world welfare picture.

In Q2 2022, one of the lead Seafarers Happiness Index sponsors, Idwal, began exploring the welfare conditions of seafarers. As part of this approach, they introduced a new inspection approach of 12 objective-based questions investigating crew welfare conditions.

The graph shows the vessel condition (the Idwal Grade) on the Y axis and the crew welfare grade on the X-Axis. Crew welfare is broken down into 10 point segments – with 20 being the lowest score and 100 being the highest.

## Average Idwal Grade Across Crew Welfare Ratings

May 15th to December 1st 2022



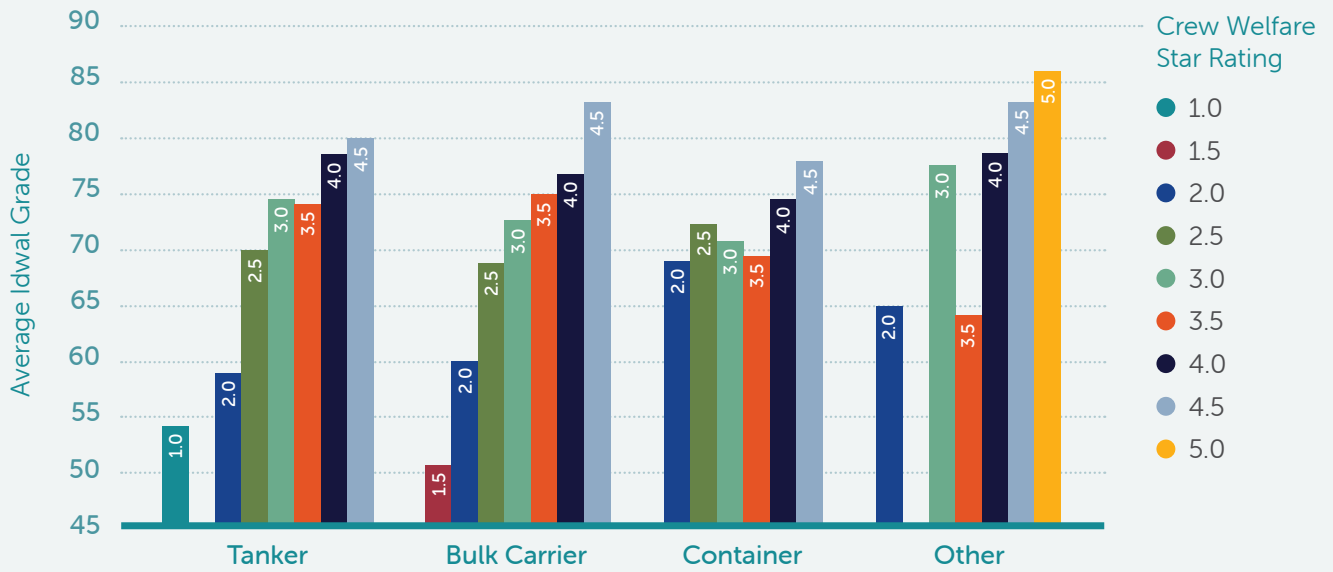
As can be seen, as the Crew Welfare Grade increases so too does the vessel condition, and vice versa. Therefore, we appear to see a definite trend/correlation between the overall condition of the vessel and the welfare conditions on board.

## The Idwal Grade

The Idwal Grade for the crew welfare has been carefully designed and calibrated to ensure the algorithm is objective and fair. The algorithm is made up of 21 subsections, with crew welfare one of the lowest weighted items. This means the correlation is not because the welfare grade is pulling up or dragging down the Idwal Grade.

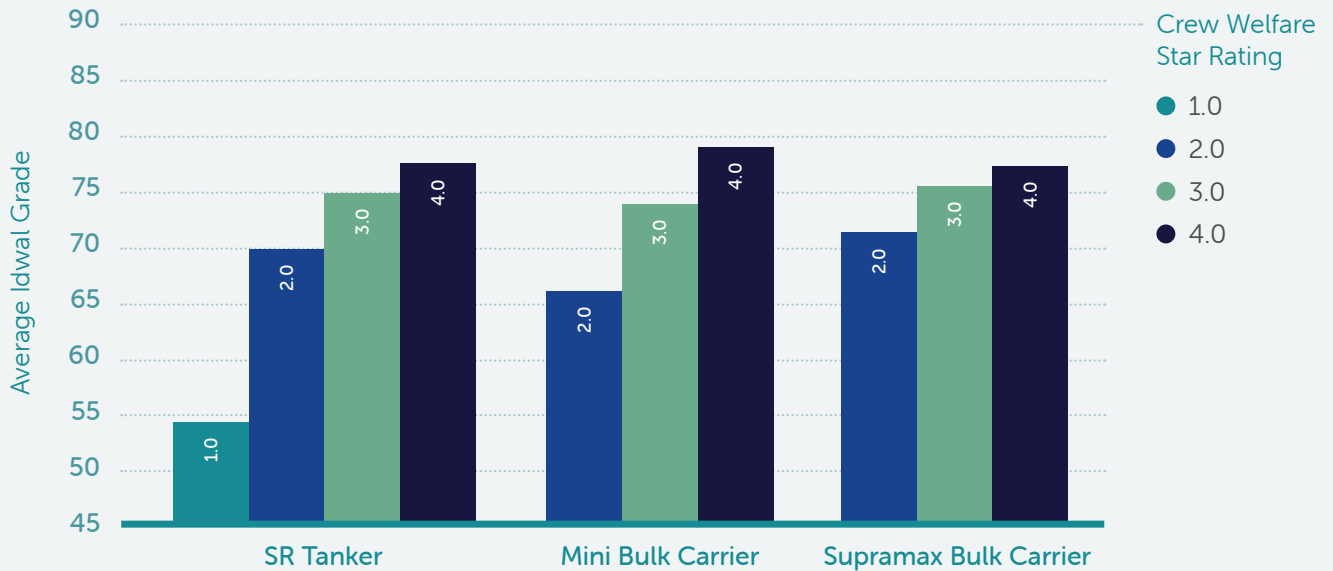
This supports the view of welfare/condition correlation, but does this trend continue when the data is further refined? To explore this, 4 generic vessel types – bulkers, tankers, containers and other (ro-ro, offshore, etc) were studied. It can be seen that the trend between the Idwal Grade, and as such the vessel condition and potential risk, and crew welfare is still present. This is particularly noticeable for Bulkers – where we see there is a clear increase at every stage - but the trend is noted for all.

Average Idwal Grade across vessel types, grouped by their Crew Welfare Rating  
 May 15th to December 1st 2022



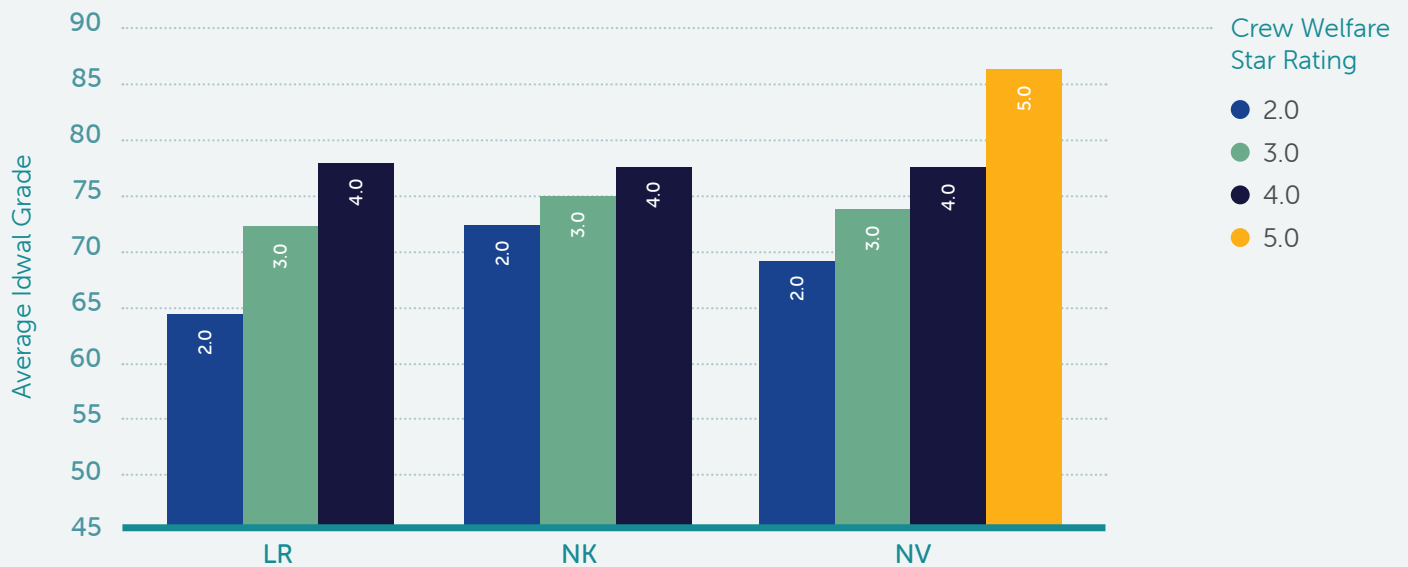
Further breaking the data down into more specific vessel types, including SR Tankers, Mini-Bulk Carriers, and Supramax Bulk Carriers still shows the clear correlation.

Average Idwal Grade across a sample of sectors, grouped by their Crew Welfare Rating  
 May 15th to December 1st 2022



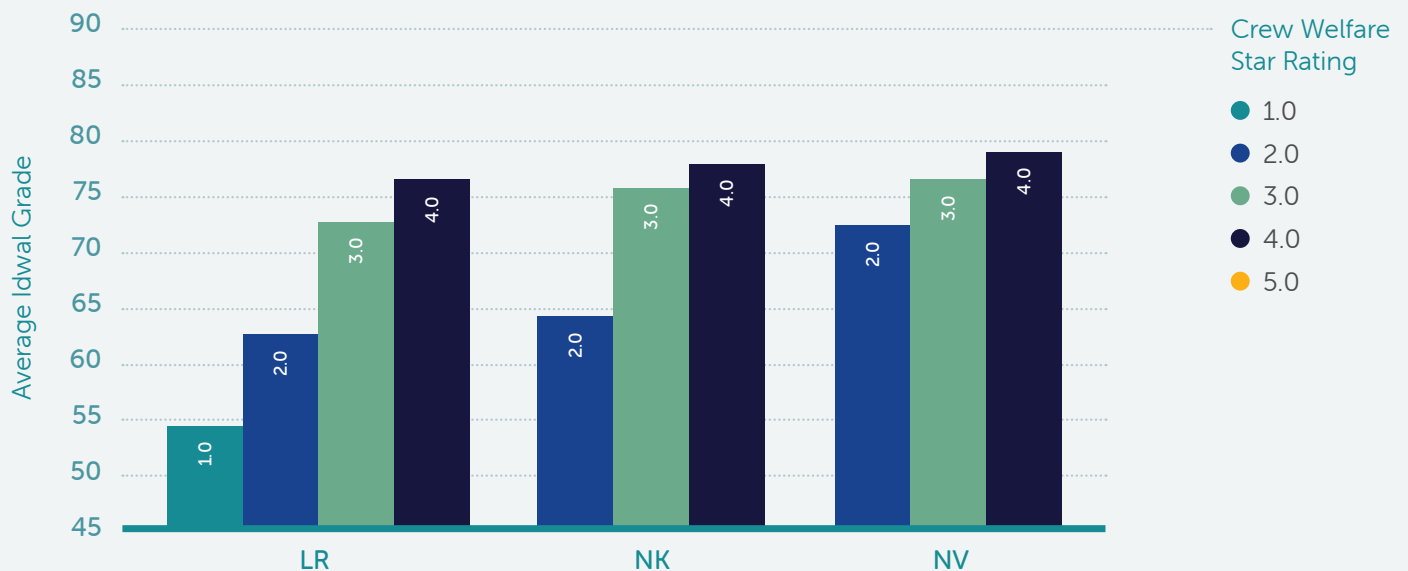
While the trend remains across vessel types, what of other factors? Idwal sampled 3 Classification Societies to assess whether Class impacted on this trend – these were Lloyd’s Register (LR), Class NK, and Det Norske Veritas (DNV). Again, this has no impact with the trend, it is still present. The better the welfare, the better the ship.

### Average Idwal Grade across sample of classification societies, grouped by their Crew Welfare Rating May 15th to December 1st 2022



Additionally, three vessel Flag States were then examined to assess the impact of registration. These were Panama, China, and Singapore. Again, as with Class, the issue of flag shows no impact, the trend is still being present.

### Average Idwal Grade across sample of flags, grouped by their Crew Welfare Rating May 15th to December 1st 2022



The data steadfastly indicates a correlation between vessel condition and the crew welfare conditions on board - and when we view a vessel as an asset, this is a risk.

There seems a clear correlation between the vessel condition, and as such the vessel risk, and the crew welfare grade. As one increases, so does the other and vice versa. This is extremely important when it comes to understanding the significance of seafarer welfare, and the role this seemingly plays in improving the standard of vessels.

This positive symbiotic relationship continues as we see seafarer happiness tracks higher with enhanced welfare standards. Indeed, where the quality of life and the experience on board is better, then we see higher levels of satisfaction. As such, happiness becomes the "canary in the coal mine". Where we find happier seafarers we see better welfare standards, and where we see better welfare, we find higher standard ships.

# Conclusion

**In 2022 the satisfaction of seafarers has steadily grown, and this continued into the fourth quarter of 2022. We saw levels of happiness increase, the average in Q4 reached 7.69/10, and this reflected a growing trend over the year.**

The fact that sentiment has risen is significant, as the year got off to a bad start. The Seafarers Happiness Index Q1 of 2022 saw the lowest happiness levels yet recorded. It was abundantly clear that seafarers were bearing the brunt of a multitude of issues.

At that time, levels of shipboard happiness had all decreased as a result of the persistent issues of shore leave, connectivity, food, and exercise. This toxic cocktail had a devastating effect on seafarers, and when these factors were combined with external factors like COVID, deteriorating relationships on board and a worrying rise in potential abandonments it was obvious to see why morale was struggling.

We were pleased and relieved to observe a rise in optimism throughout the year, and our reports began to depict significant positive progress. Indeed, as we began to stem the ever-dwindling tide of sentiment, there was a collective brow-wiping.

This brought us to the year's final report and the crucial question of whether we were experiencing peaks and troughs or whether there appeared to be a growing sense of optimism. We were pleased to be able to report that, with the exception of connectivity, the mood appeared optimistic once more.

The positivity continued to be evident, and it has been clear to see the impact of the major trends on crew. Where there is fair treatment, reasonable pay, compassion and understanding, then these are platforms on which a more positive outlook can be built. These factors translate to a better mood on board, and this also fosters better relationships and even a chance for seafarers to think about enjoying their time, not merely existing until they can get off the vessel.

Complexities remain and, all too often seafarers are the first to suffer when seemingly arbitrary decisions are made about immigration. Seafarers often feel like pawns and they are not allowed to make their own choices or to plot their own positives, and this has a detrimental impact.

There remain too, issues of abandonment, non-payment or delayed payment of wages. This puts seafarers in an invidious position, they become trapped in a spiral of needing the money owed to them - with families reliant at home, they are forced to pursue what is rightfully theirs, but with no guarantee that what is owed will be paid.

The year end also hinted at a new recruitment trend, as we heard from seafarers who have remained at sea, but with a different career path. There seemed a tendency to move from deep sea to short-sea or even inland waterways. There was a sense that if this trend continues, we could see a recruitment and retention crisis in 2023.

## Onboard Analysis

The Seafarers Happiness Index remains a sentiment barometer, one that listens to the words from those at sea and affords some intersubjectivity to a complicated and ultimately very individual concept and context. As such in 2022, we were pleased to see one of our major supporters, Idwal, embark on a welfare research approach which delivered new clarity to the debate.

Idwal took their view of standards on board vessels, though their global surveyor network, and produced data and empirical evidence to highlight the interrelationship between better standards of welfare and of the quality of ships themselves.

This combination of sentiment, systems, and standards enables a deeper comprehension of the actions taken, their effects, and the human implications. It is incredibly powerful to state the welfare factors that come together as key components of the seafarer welfare/ship standard equation - a view made all the more compelling when tied into the responses which seafarers share as part of our research.

Now we can better see how welfare impacts ship values and commercial drivers, allowing the shipping industry to look through either a moral or a financial lens, and understand the value of good welfare through both.

## THANK YOU

We are grateful to the seafarers who take the time to discuss the reasons behind their own experiences and share their thoughts with us. This enables us to continue to develop the right responses and make a profession worthy of the fantastic people who operate ships, who make the industry work, and whose efforts deliver trade and prosperity globally.

We are also indebted to the shipping companies and managers ashore who encourage their seafarers to engage and to have their say. We always want to hear from more seafarers, to have even more data to build upon and to hear more stories and experiences. Please encourage your shipmates to share, or your crews to complete the survey. The more we know, the greater power to shape positive change.

## The Mission to Seafarers

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