



# Maritime Barometer

2024

**Nautilus International polling on the UK public's attitudes  
to the maritime industry and maritime careers**



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General Secretary  
Nautilus International

## Executive **summary**

As we delve into the insights provided by the **Maritime Barometer 2024** report, it becomes evident that there is an urgent need for concerted efforts to bridge the gap between the UK public's perception and the reality of the shipping industry.

This is the third time Nautilus International has published its Maritime Barometer report and the results underscore the challenges and concerns surrounding careers at sea, with financial considerations, working conditions and safety being key factors that influence individuals' decisions. Addressing these concerns is paramount to ensure a sustainable and skilled workforce for the evolving maritime industry.

With the industry poised for significant transformations driven by technology, regulations and sustainability goals, it is crucial to focus on attracting and retaining talent that is adaptable, diverse, and adequately rewarded.

It is heartening to see a considerable portion of the population showing support for political initiatives promoting the interests of the UK Merchant Navy, emphasising the need for Nautilus International to continue its advocacy at various levels.

This report highlights the vital role of the Merchant Navy in global trade and the career opportunities it offers.

# Introduction

Shipping is often referred to as an invisible industry, with seafarers being out of sight and out of mind. But the maritime sector has driven world trade for centuries and will remain central to the global economy.

Supporting more than one million jobs and adding £46.1bn to the UK economy, maritime is responsible for facilitating 95% of UK global trade, worth more than £500bn per year. In fact, maritime makes a greater contribution to the UK economy than rail and air combined.

So, just how much does the average person on the street know about the maritime sector – what it does, how environmentally friendly it is, and which countries have the biggest merchant fleets? Is shipping an industry in which they would consider working, or has a career on the ocean waves never crossed their mind?

In support of its mission to raise the profile of the maritime sector and those who work in it, Nautilus International commissioned strategic insight agency Opinium to survey more than 4,000 UK adults in June 2024, to find out what they know and think about the sector.

The results, published in this third Maritime Barometer, make for interesting reading, and show that there is still much work to do before the measuring hand can move to ‘fair’ when it comes to the public’s perception, knowledge and appreciation of the shipping industry.



#### **SAMPLE AND FIELDWORK DATES:**

2,000 UK Adults, aged 18+ (weighted to be nationally representative)  
4 June 2024 – 7 June 2024

2,052 UK Adults, aged 18+ (weighted to be nationally and politically representative)  
18 June 2024 – 21 June 2024

Research conducted by **Opinium Research**



## Low awareness of maritime trade persists

While the UK public's awareness of maritime trade has improved over the four-year period (2021-2024) in which the Nautilus International Maritime Barometer has been running, still only 1% of respondents in this latest survey correctly reported that more than 90% of all goods imported to the UK arrive by sea.

In 2022, that was just 0.1% of respondents.

Fast forward to 2024, and 40% of people believe that less than half of goods enter the UK via sea, while another 42% believe between 50% and 90% of goods enter via sea.

This suggests that the UK public is becoming more aware of the importance of maritime trade and that better education could raise awareness further.

On average, UK adults believe that around half (51%) of imported goods arriving in the UK do so by sea, with those aged 55+ estimating a slightly higher percentage than other age groups (55%). However, this changes drastically depending on the type of goods. Most UK adults believe that at least some coffee and rice imports arrive by sea (80% and 79% respectively). People also believe that at least some furniture (77%), wheat and t-shirts (both 73%) arrive by sea. Respondents were least likely to think that flowers (56%), games consoles (66%) and medicines (66%) arrive by sea.

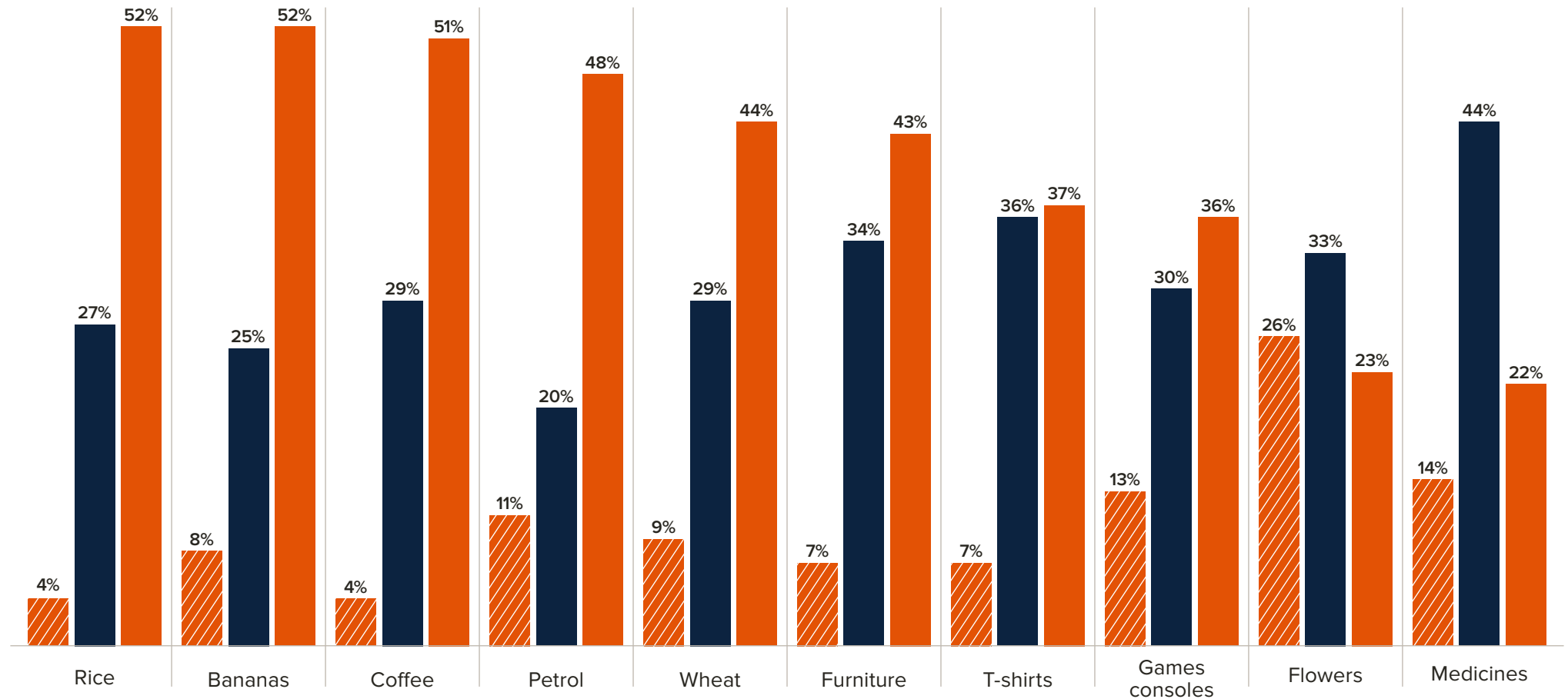
*See data overleaf.*

# 1%

of respondents to this latest survey correctly reported that more than 90% of all goods imported to the UK arrive by sea

# What proportion of the following items do you think **arrives by sea?**

None Some Most



Base: All UK adults (2,000)



## Shipping is seen as less polluting than air and road freight

Shipping is a complex industry, and one that is expected to undergo huge regulatory and technological change in the next 10 years as it transitions towards 'net zero' carbon to reduce greenhouse gas emissions by or about 2050.

The good news for the maritime sector is that shipping is seen as less polluting than air and road freight.

Just under half (45%) of UK adults

believe that goods transported by air freight cause the most environmental damage. This is followed by road transport (28%), shipping (11%) and rail (3%).

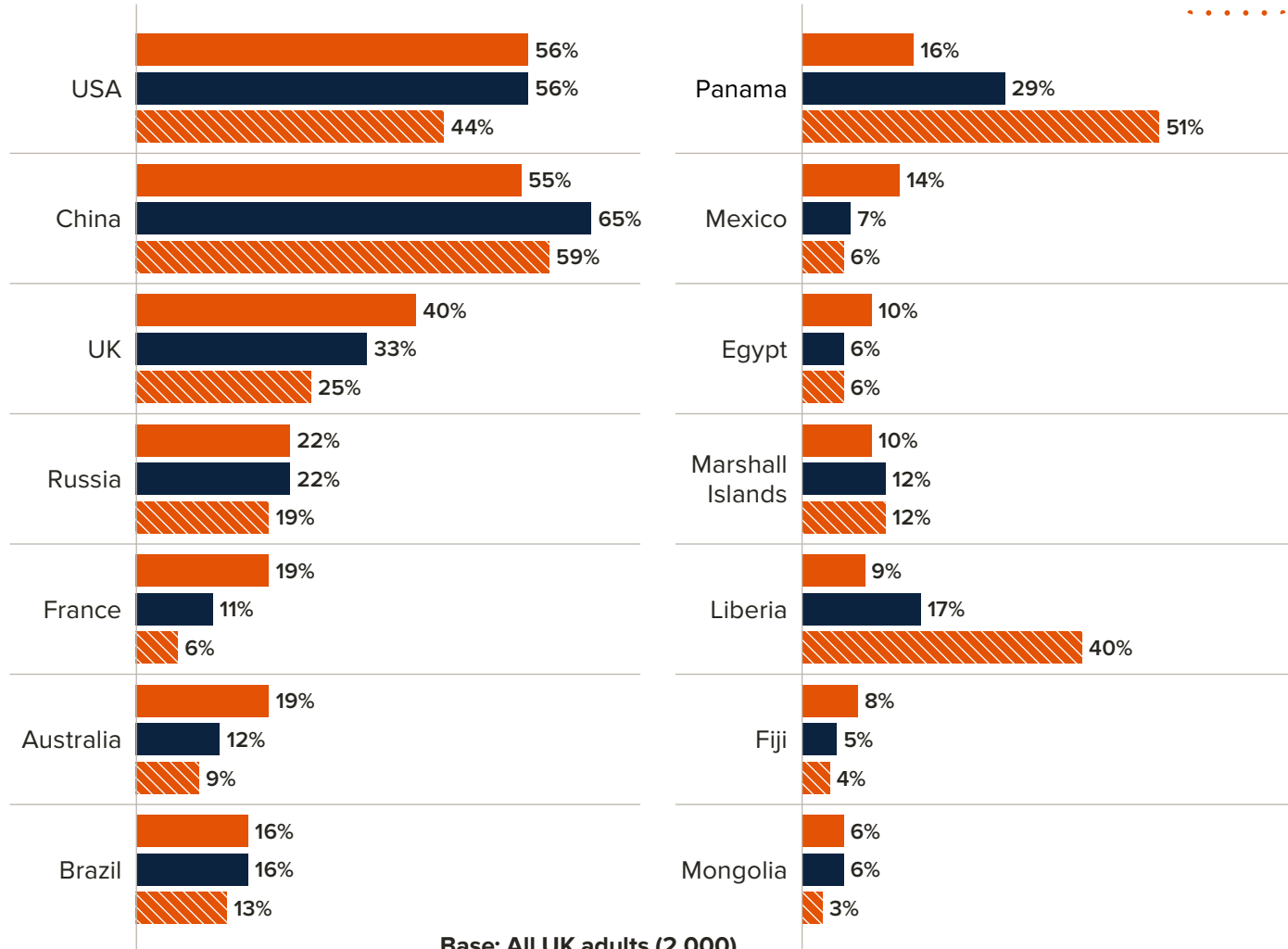
Meanwhile, when asked which methods of transporting goods cause the least environmental damage, half (52%) said rail, followed by shipping (21%), air (6%), and road (4%).

# 45%

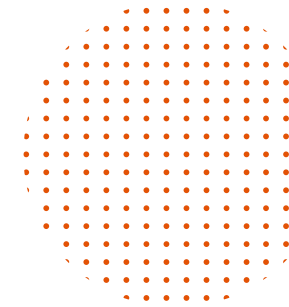
of UK adults believe that goods transported by air freight cause the most environmental damage

# Which three countries do you think have the most merchant ships registered?

Ages: 18-34 35-54 55+



Base: All UK adults (2,000)



## People have an outsized idea of the UK flag's prominence

When asked which three countries have the most merchant ships registered to them, UK adults ranked China (60%), the USA (51%) and Panama (34%) at the top of their list. The UK was close behind, at 32%. The flag flown by the ship represents its 'nationality' – i.e. the ship is under the control of the registered country and its flag.

Seventy-five years ago, the term 'flags of convenience' (FOCs) came into existence when the International Transport Workers' Federation began its campaign against shipowners registering their vessels in countries other than the country of ownership. This practice was particularly prevalent in the post-Second World War period, when US shipowners began registering their vessels in Panama to avoid US labour and tax laws.

Since then, FOCs have been on a steady upward trajectory, becoming commonplace within the global maritime industry. Three FOCs – Panama, Liberia and the Marshall Islands – 'represent' over 40% of the world's fleet of merchant ships.

## The number of people willing to consider a career at sea is in decline

A lack of awareness of the opportunities working at sea remains a barrier to recruitment in the UK.

In 2022 more than a third (35%) of respondents to the survey said that they would consider a career at sea 22% (8% and 14%). In 2024 less than one quarter (30%).

One in seven (15%) reported that they know someone who works in the maritime sector, with one in eight (12%) saying this was a family member and 5% a friend.

When it came to whether they themselves would consider a career at sea, more than three-quarters (77%) of the working-age adults said that this is not something they would consider. See [pages 9 and 10](#) for more details.

61%



## Would working-age adults consider a career at sea?

Definitely would not consider it

Not something they would consider

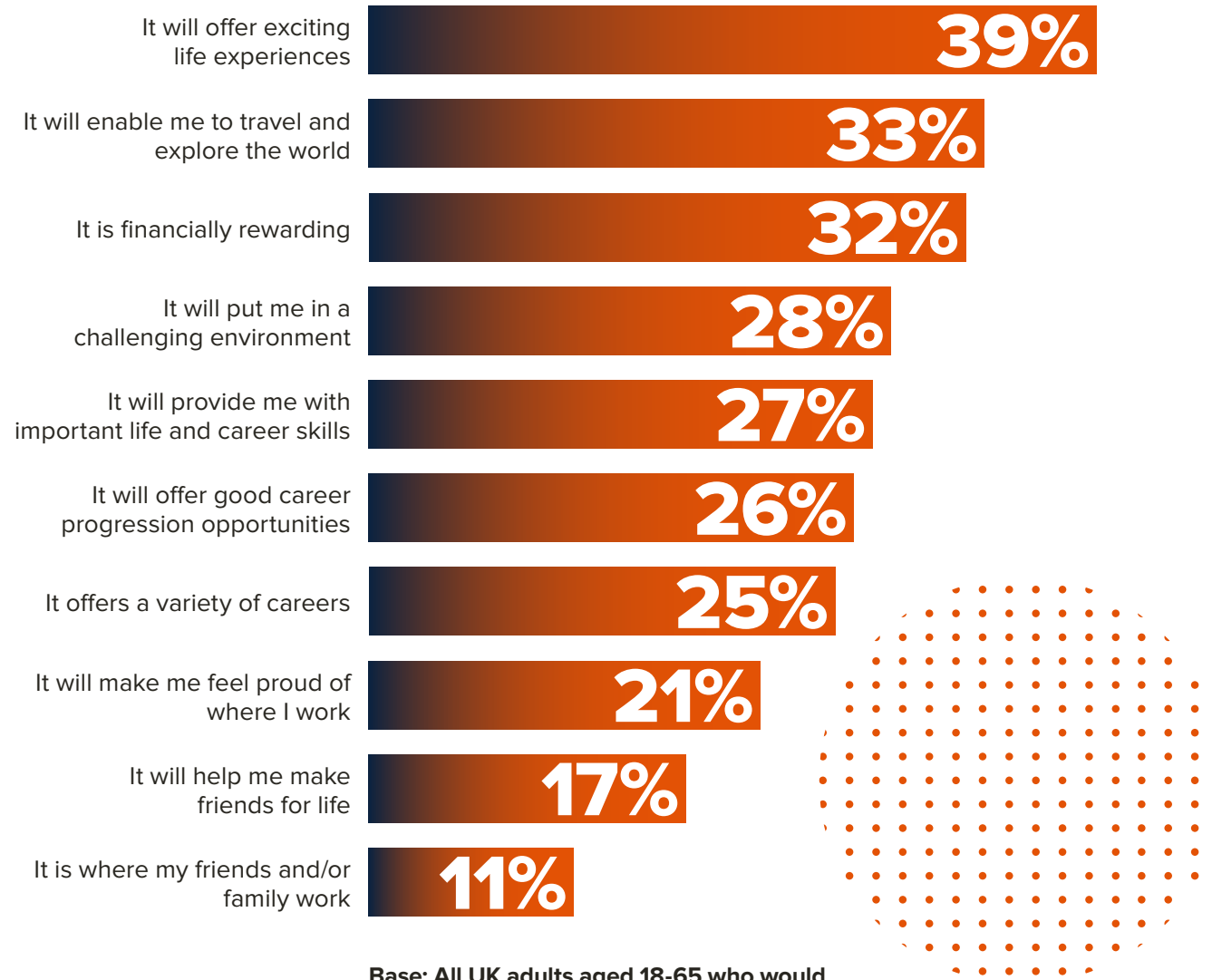
Something they would consider

Definitely consider it

I already work at sea



## Reasons to consider a career at sea



Base: All UK adults aged 18-65 who would consider a career at sea (339)

**Exciting life experience is the number one reason to consider a career at sea**

For those who would consider a career at sea, most attributed this to it being an exciting life experience (39%). Other reasons cited were the ability to travel and explore (33%) and the perceived financial reward (32%). Others liked the idea of a challenging environment (28%), and the life and career skills it could offer them (27%).

Working-age adults from London (43%), the West Midlands (25%) and Scotland (25%) were most likely to consider a career at sea. Just 1% of respondents said they are already seafarers.

On average men were much more likely to consider a career at sea than women (27% vs 17%). This is perhaps unsurprising considering respondents believe, on average, that just 9% of seafarers worldwide are women.

In 2022, respondents estimated that on average 18% of seafarers were women.

In reality, just 2% of the global seafaring workforce are women.

## Being away from home is the strongest reason to be discouraged from a career at sea

For the majority of respondents who wouldn't consider a career at sea, a third said it was because they wouldn't like to be away from home for too long (33%) or that they get seasick (33%). Others felt they don't have the skills or training (29%), that it is too dangerous (28%), or that they just prefer a different career (24%).

Men were more concerned that a career at sea wasn't a financially lucrative enough career (13%) or that the working conditions weren't good enough (20%).

Women were more likely to be concerned about getting seasick (35%) or that a career at sea would be too dangerous (30%).

This concern about sea sickness is borne out in the research, with women more likely to suffer from motion sickness than men.

## Reasons *not* to consider a career at sea



Base: All UK adults aged 18-65 (1,196)



## 71% agree that shipping companies that benefit from government investment should be required to provide training for their UK workforce

When asked what they believe the primary role of the Merchant Navy is, more than half (52%) of UK adults felt it was commercial shipping and trade. This rises to seven in 10 (71%) among those aged 55 and over, but drops to 31% of 18 to 34-year-olds. Men are more likely to believe this than women (61% vs 44%).

A quarter (23%) believe its primary role is defending territorial waters, which is more likely to be selected by women than men (30% vs 16%).

On average, nearly two-thirds (63%) agree that shipping companies that benefit from government investment (such as financial incentives and state support) should be required to hire UK Merchant Navy seafarers. Similarly, seven in 10 (71%) agree that shipping companies that benefit from government investment should be required to provide training for their UK workforce.

Half (49%) agree that shipping companies employing UK Merchant Navy seafarers should benefit from more government investment. Across the board, men are more likely to agree with these statements than women, by roughly 10%.

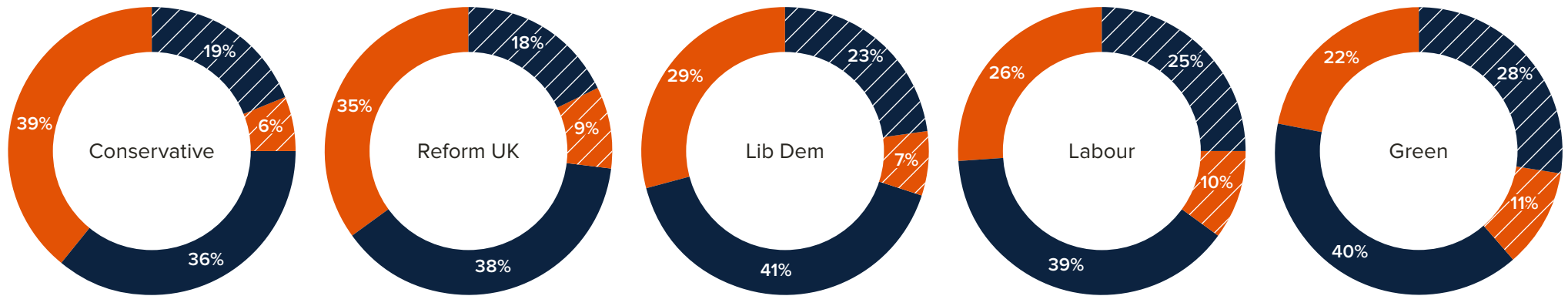
For the most part, UK adults agree that 'fire and rehire' can never be justified (65%), with more than a third (36%) strongly agreeing. Those aged 55+ were most likely to share this sentiment (71%), compared with 64% of those aged 35-54, and 57% of those aged 18-34.

# 65%

of UK adults agree that 'fire and rehire' can never be justified

# 26% are in favour of a political party or candidate promoting the interests of the UK Merchant Navy

Not sure
  Dislike
  Neither like nor dislike
  Like



Base: All UK adults (2,052)

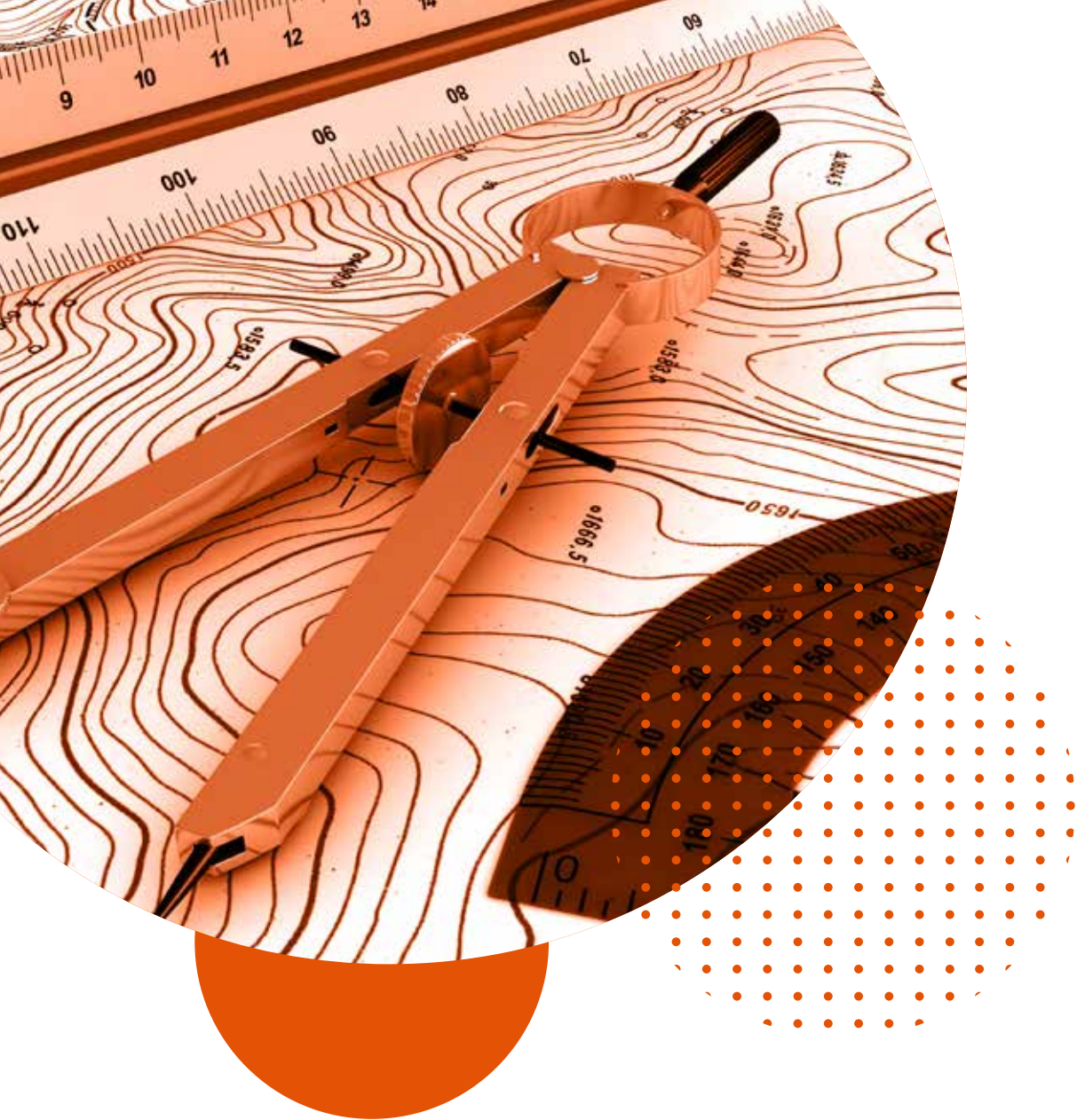
When asked if they liked or disliked the idea of a political party or candidate promoting the interests of the UK Merchant Navy, one-quarter (26%) of UK adults reported that they liked it, with one in 10 (9%) saying they disliked it.

Those whose main constituency voting intention was Conservative were the most

likely to be in favour (39%), followed by Reform UK (35%), Liberal Democrat (29%), Labour (26%) and the Green Party (22%).

There was also a distinct difference between genders, as men were nearly twice as likely to show favour compared with women (34% vs 19%); there was no obvious disparity between ages, however.

Those in Scotland (31%) were most likely to show a favourable preference, followed by the South of the UK (29%) and Wales (28%), with those from Northern Ireland (18%) and London (22%) being the least likely to be in favour. Just over a quarter (27%) were not sure where they stand on the topic.



## Navigating the language of seafaring is not a problem for 78% of UK adults but more than half would not set sail on a Sunday!

The Nautilus International Maritime Barometer seeks to understand the UK public's general awareness of the maritime industry, which can include popular cultural references in media and society.

When asked about the language of seafaring, more than three-quarters (78%) of UK adults are aware that latitude and longitude are the correct terms used in navigation for defining coordinates, while a fifth (22%) either answered incorrectly or did not know. Those aged 55 and over were most likely to be aware of this (88%), followed by 78% of those aged 35-54, and 63% of those aged 18-34. Men were also slightly more likely to answer correctly compared with women (82% vs 74%).

Many sailors believe Friday' is a day of bad omens due to its association with the crucifixion of Jesus Christ. Thursday, named after the god of storms, Thor, is another day deemed ill-fated for setting sail. In contrast, many believe that the only auspicious day for embarking on a journey was Sunday.

# 78%

of UK adults are aware that latitude and longitude are the correct terms used in navigation for defining coordinates

## What's next?

Nautilus International's third Maritime Barometer is a vital and timely snapshot of the public's impression of – and attitude towards – the maritime sector.

New technologies, fuels and regulations are set to transform the way vessels operate, and this transition will require a workforce that is highly skilled, motivated, diverse and appropriately rewarded.

It is a concern, therefore, that only one in five people would consider a career at sea. Men are also still much more likely than women to think about working in the maritime sector.

Being away from home for too long is a concern for many of those who wouldn't consider a career in the Merchant Navy, but 13% of men and 6% of women didn't think it would be financially lucrative enough, while 20% of men and 11% of women thought the working conditions would not be good. A sizeable proportion of both sexes thought it would be too dangerous.

Addressing such concerns is essential if the sector is to overcome the predicted global shortfall in seafarers. That is why Nautilus is working hard to ensure the environmental and technological changes earmarked for the industry go hand in hand with good jobs for the future that are safe, attractive and inclusive – in other words, the Union is working for a Just Transition.

With the survey also indicating some confusion among the public about what the Merchant Navy actually does, it is essential that the variety of career opportunities it offers – and the key role it plays in the global movement of essential goods – are championed at the highest levels.

The Merchant Navy plays a role in protecting our nation's interests in times of conflict. It also supports the Royal Navy. With 25% of respondents believing the Merchant Navy's primary role is national defence, it is perhaps not surprising – and heartening – that the same percentage also look favourably on the idea of a political party or candidate promoting the interests of the UK Merchant Navy.

Nautilus is tireless in its efforts to raise the profile of the shipping industry with governments, external organisations and the public.





## About Nautilus International

Nautilus International is an independent, influential, global trade union and professional organisation, committed to organising and campaigning for a future for maritime professionals, delivering high quality services to members, and maritime welfare support.

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**Members** include shipmasters, officers, cadets, ratings, yacht crew, VTS officers, harbourmasters, river boatmen, nautical college lecturers, maritime lawyers, and even ship-based medical personnel.

Our cross-boundary nature gives us unparalleled knowledge, insights and influence in the maritime sector at national and global levels, as we are represented at a range of maritime decision-making bodies, forums and training institutions.

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