

'Navigating Change' two years on: A 2019 Update

Context of the research

In 2005 the Maritime Charities Group (MCG) members agreed that there was a need to examine the support provided by maritime welfare charities matched against potential future needs. To achieve this, members jointly funded and managed a major research project covering the Royal Navy, Merchant Navy and the fishing industry: (*Supporting Seafarers and their families: Challenges for the Future*, 2007).

The research concluded that existing charity practices were, in many respects, inadequate to meet the current and future needs of the seafaring community, and included a large number of recommendations which were intended to inform the development of new working methods and standards in the planning and provision of services for seafarers and their families. This led to a further review ten years on: (*Navigating Change: A review of the UK Maritime Welfare Charity sector*, 2017).

The 2017 review *Navigating Change* brought together an update of the changes in demographics and needs of the maritime beneficiary populationⁱ with a larger piece of work commissioned from *The Researchery* which aimed to understand the supply side of the maritime equation – the maritime welfare charities which support maritime beneficiaries – and how well this meets the demand. This programme included: An online survey which achieved responses from 46 maritime welfare charities and 20 tri-Service (Armed Forces) charities; plus 37 in-depth interviews with a quota sample of maritime welfare charities.

The 2017 research concluded that: ***'While many maritime welfare charities are anticipating an increase in demand over the next 5 years, only a quarter believe that the sector is in 'a good position' to respond'***; suggesting that *'the MWC sector needs to overcome a number of challenges to put itself in a better position going forward...maritime welfare charities now need to face some of the fundamental questions raised by this report (and indeed, the 2007 Supporting Seafarers report) – addressing them with a cohesive and co-ordinated strategy - before changes in the maritime world and beneficiary population force the sector's hand. Such things cannot wait another ten years.'*

The current research aims to discover what progress has been achieved in the intervening two years since the *Navigating Change* study took place.

Methodology

A total of 64 targeted organisations responded to the 2019 survey (two fewer than in 2017). Of these, 45 were identified as being maritime welfare charities (MWCs) as defined by the 2017 *Navigating Change* study, while 19 were identified as being tri-Service providers (serving the Armed Forces including RNRM (Royal Navy and Royal Marines) and sometimes MN (Merchant Navy)). Thirty MWCs responded to both the 2017 and 2019 surveys, allowing us to examine a panel of organisations for specific changes over the two yearsⁱⁱ. In addition, six telephone interviews lasting around 30 minutes took place to further explore some of the changes seen in the quantitative results.

Executive Summary

Meeting overall need

It appears that there is a perfect storm of swelling demand combined with a sector feeling ill-equipped to deal with this.

In 2019, fewer than 1 in 10 MWCs feel that maritime charities are successful in reaching all of the beneficiaries that they might be able to assist, a fall since 2017 (when it was nearly two in ten).

- Half (48%) actively disagree that MWCs are successful in reaching all potential beneficiaries

There has also been a significant increase in the proportion disagreeing that MWCs are in a good position to respond to all future beneficiary needs (from 18% in 2017 to 30% in 2019).

Alongside the increased demand seen over the last five years, the next twelve months are perceived to be a crunch time in terms of increasing demand for services/support, with 68% expecting to see an increase.

- Two-thirds (66%) believe that this increase will continue into the next five years

It should be borne in mind however that:

- **This is a similar picture to that seen in 2017, in other words, increasing demand is not new to the sector**
- **The increases in demand are not evenly spread across the sector. Increases in demand were perceived to be greatest for MWCs primarily serving RNRM**

Targeting service provision

Despite the 2017 report highlighting the need for a greater focus on older MN and FF beneficiaries, in 2019 the greatest increases in service provision are to RNRM and working age beneficiaries.

In 2019, the provision of services to RNRM (Royal Navy & Royal Marines), MN (Merchant Navy), and FF (Fishing Fleet) all show a net increase, although the greatest increases were to RNRM, followed by MN then, lagging further behind, FF.

- This is an overall pattern that has continued from 2017 (despite some notable individual efforts to change focus)
- It is also noticeable that for tri-Service organisations, the trend is towards decreasing any service provision to Merchant Navy and increasing provision for Naval Service

Provision has increased most dramatically for serving seafarers (seen across the whole sector) and younger retired seafarers of working age (driven mainly by the RNRM-facing MWCs).

Provision amongst MN/FF and tri-maritime facing MWCs for older retired seafarers remains static.

However, this overall finding may hide several underlying trends:

- The increase in support for working age RNRM appears to follow the Navy's renewed recruitment and the trend towards longer deployments
- There is also evidence of some working age people struggling more than some pensioners
- Some individual organisations have refocussed on MN and FF beneficiaries (e.g. Seafarers UK)
- Service provision is sometimes changing shape to meet more complex needs in older beneficiaries (rather than increasing in volume)

Despite the reported increase in support, nearly half of MWCs feel that provision for serving seafarers and younger retired seafarers of working age still remains inadequate.

- More than half also feel that provision is inadequate for dependent children and spouses / partners / widows / widowers

Indeed, more MWCs rated overall provision of support for maritime beneficiaries as inadequate in 2019 versus 2017, across all sectors and groups.

- Provision for FF and MN beneficiaries is seen as markedly more inadequate, less adequate and less abundant in 2019 than in 2017
- The proportion believing that provision for older retired seafarers is inadequate has remained static at 47%, although none in 2019 consider provision to be abundant, compared to the 1 in 10 believing this to be the case in 2017

In terms of service provision, MWCs are most likely to feel that there is inadequate provision or support for a number of 'modern' problems:

- Safeguards against modern slavery amongst seafarers (net inadequate 82%)
- Dealing with alcohol and drug issues amongst seafarers and their families (net inadequate 56%)
- The mental health and well-being of serving seafarers (net inadequate 48%)

And fewer MWCs feel that there is adequate provision for the following social and financial issues in 2019 compared to 2017:

- Money and debt advice for seafarers (29% rated as 'adequate' in 2019 vs 42% in 2017)
- Adequate emphasis on addressing social isolation (8% rated as 'adequate' in 2019 vs 16% in 2017)
- Emotional support for seafarers and their families (8% rated as 'adequate' in 2019 vs 13% in 2017)

Emotional health and well-being is certainly an area coming to the fore in the depth interviews, with some MWCs highlighting a perceived gap in services in this area, particularly for working age seafarers.

In terms of these results, it is also important to consider whether such perceived inadequacies are informed by actual changes in the sector, beneficiary need and support, or whether they merely reflect an increased level of awareness of the issues being faced and how they are addressed, driven in part by the 2017 *Navigating Change* report and other research undertaken across the sector.

[Service provision: accommodation](#)

In terms of the changing provision of accommodation for seafarers, there appear to have been some notable increases in provision of holistic care (43%ⁱⁱⁱ), individual living accommodation (29%^{iv}) and care within an individual's own home (29%^v).

- This reinforces and builds on the movement away from residential care seen in 2017
- Three-fifths of MWCs responding (n=18) feel that there is insufficient dementia care provision for retired seafarers

Service provision: financial assistance and welfare support to individuals

There appears to be a general shift towards the provision of one-off / ad hoc payments and away from regular payments.

- Increases in the provision of one-off / ad hoc payments to individuals, emergency grants and educational / school / training grants in 2019 follow uplifts in 2017

In 2019, of the MWCs providing financial assistance, nearly half (47%) have or will increase the amount they give to existing beneficiaries.

In terms of the eligibility of beneficiaries to receive welfare support from maritime welfare charities, over the last two years more MWCs have reduced or relaxed their criteria than have increased or tightened them.

- The proportion not imposing any eligibility criteria (other than an individual being a seafarer, dependant, or spouse/partner) has increased from 36% in 2017 to 48% in 2019
- Those that have changed their criteria have increased/tightened financial means-testing (n=2), reduced the minimum age limit (n=2), reduced the minimum time spent at sea (n=1) or the need for a beneficiary to already be receiving government financial support (n=1)

From the depth interviews, 'relaxation' of eligibility criteria appears to focus more on widening or refocusing the beneficiary profile, for example, the inclusion of RFA for an RNRM charity or beneficiaries working in fish-farming for an FF charity.

Impact measurement

The general consensus amongst MWCs surveyed in 2019 is that maritime charities are not so good at measuring their impact (46% versus 29% who think that they are good at it).

"It's more monetary evaluation than impact, and it's taken a long time to get [recipient charities] even to be able to fill in simple, 'these are the outcomes you were looking to meet, tell us how you've met those outcomes'...In terms of impact, we haven't even started asking about impact, because we're aware that we need to do more ourselves in training on impact" [MN, FF, RNRM (grant maker)]

Working together as a sector

In 2019, there has been a slight increase in the proportion of MWCs agreeing that MWCs collaborate effectively with each other and a stronger increase in the proportion of MWCs agreeing that MWCs collaborate effectively with non-maritime charities and other organisations.

- Collaboration – both within and without the maritime sector - tends to be viewed more positively by organisations serving primarily RNRM beneficiaries than those serving all maritime beneficiaries

Reflecting this, over half (56%) of MWCs surveyed in 2019 report that they have already collaborated or partnered with another organisation as a result of changes in demand.

- In addition, 15% intend to do so in the next twelve months, and a further 13% intend to do so at some point in the future - this is a small increase from 2017, especially with regard to future plans

For example, beneficiary mental health and well-being is one area identified in the depth interviews as being beyond the current skill-set of the maritime sector, with a need to collaborate / partner with the wider charitable sector in order to delivery effective solutions.

Despite improved collaboration, the proportion of MWCs agreeing that there is adequate signposting within the maritime sector pointing beneficiaries towards the right charity or service to meet their needs has decreased, with more MWCs being uncertain whether or not this is the case.

The proportion of MWCs thinking that the maritime charity sector is innovative has remained the same at just above one quarter (28%), although the proportion disagreeing has increased (from 8 organisations to 14).

Grant Making from MWC to MWC

Amongst MWC grant makers responding (n=13), there have been significant increases in co-funding/matched funding and project funding, and encouraging increases in capacity building grants and core cost funding, while other forms of funding generally hold steady.

The picture is one of increases in the number and size of grants. This was accompanied, however, by an increase in the information grantees are expected to provide.

Organisational changes in response to changing demands

Many MWCs are using charity reserves to cover income shortfalls and this proportion has increased markedly since 2017.

- In 2019, half (50%) of the MWCs surveyed have drawn down on their investments

From the depth interviews, some organisations have a set policy to draw down on their investments each year, whilst for other MWCs a reduction in alternative revenue streams and/or an increase in need have prompted this action. One charity mentioned the volatility of the financial markets and the potential impact this might have on investments and, in turn, the funds available on which to draw down in the future.

The most widespread organisational change is in offering new services or provision, with 7 in 10 having already done this or intending to so in the future.

- Following larger increases in 2017, one in two (51%) MWCs have revised the charity's mission/strategic direction or intend to do so, whilst two in every five (39%) have or intend to amend their beneficiary focus/eligibility criteria
- Almost three-fifths (59%) have or intend to increase front-line services delivered, with a similar proportion (57%) increasing / likely to increase staff numbers as a result, and 1 in 2 increasing their use of volunteers

In terms of operational changes that MWCs have made or plan to make in response to changes in demand, the most common changes are in new technology and marketing.

- 89% of MWCs surveyed in 2019 have already or intend to increase promotion / advertising / marketing of their charity
- 87% of MWCs surveyed in 2019 have already or intend to invest in IT/new technology & online solutions - this has become significantly more prominent since 2017

Future challenges

In 2019, the two greatest challenges seen to be facing the MWC sector are raising awareness of the charity or cause (56%) and identifying or finding beneficiaries (56%).

Following these, generating income / achieving financial sustainability (44%), and measuring and demonstrating impact (42%) were the most commonly cited.

- Since 2017 there has been some change in these priorities, with identifying or finding beneficiaries and measuring & demonstrating impact gaining more importance, while generating income / achieving financial sustainability has decreased slightly in importance in relation to other issues

Conclusions

At first glance the results outlined above do not appear to address some of the main concerns raised in *Navigating Change 2017*, particularly over provision for MN and FF beneficiaries, and especially older retired seafarers. As outlined above, however, this is not the case across the board and there are some notable exceptions. Looking at the evidence of individual organisations responding strategically to the changing circumstances and implementing innovative new services, it should be remembered that this is a very diverse sector where over-arching trends won't reflect the experiences of every individual organisation.

It should also be borne in mind that the world has moved on in the two years since this research was last undertaken. While the underlying demographic changes outlined in the 2017 report will not have changed, other factors in the immediate environment have impacted on beneficiaries. For example, renewed RNRM recruitment, longer deployments and working age beneficiaries struggling more than some pensioners due to continued austerity measures, and changes to benefit systems. Still the question remains whether the MWC sector is doing enough for older, retired MN and FF beneficiaries – a group still to hit its peak in numbers.

Sometimes it's necessary to look behind and beyond the overall results for the answers. For example, it may seem counter-intuitive that the sector in general sees increases in demand and at the same time feels the need to reach more beneficiaries; but when you look more closely it becomes clear that those who don't feel that MWCs are reaching all possible beneficiaries are those who see more increases in demand; while those who agree that MWCs are reaching all beneficiaries are those who see demand remaining the same or decreasing.

The evidence presented here indicates that in many areas the challenges raised two years ago are seeing some work being done to address them. In other areas, however, such as signposting, innovating and reaching out to more beneficiaries (particularly older, retired MN/FF), there is still considerable work to be done. And with the challenges presented by an everchanging world, including the complexities of the Brexit era, there is always more to do to keep up and get ahead of the curve.

"I do think that as a sector, we've made tremendous progress, but we are still behind the curve and we have an awful lot to do, and the only way that we'll do that is by working together" [MN, RNRM]

A more detailed summary of results

1. Change

One of the concluding chapters of the 2017 review *Navigating Change* noted that:

Significant changes to seafaring and the ‘sea-family’ may require many maritime welfare charities to reconsider their offer.

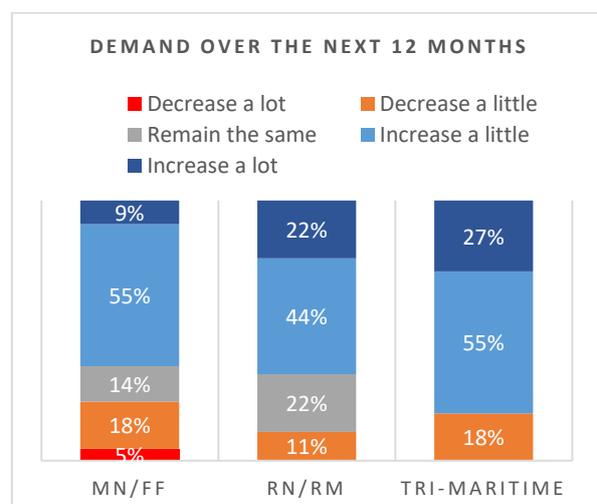
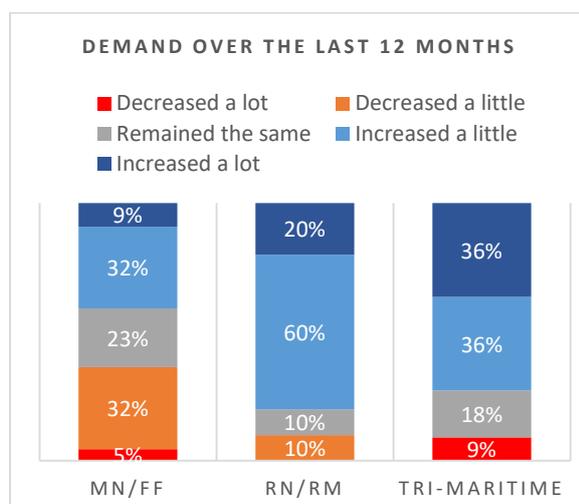
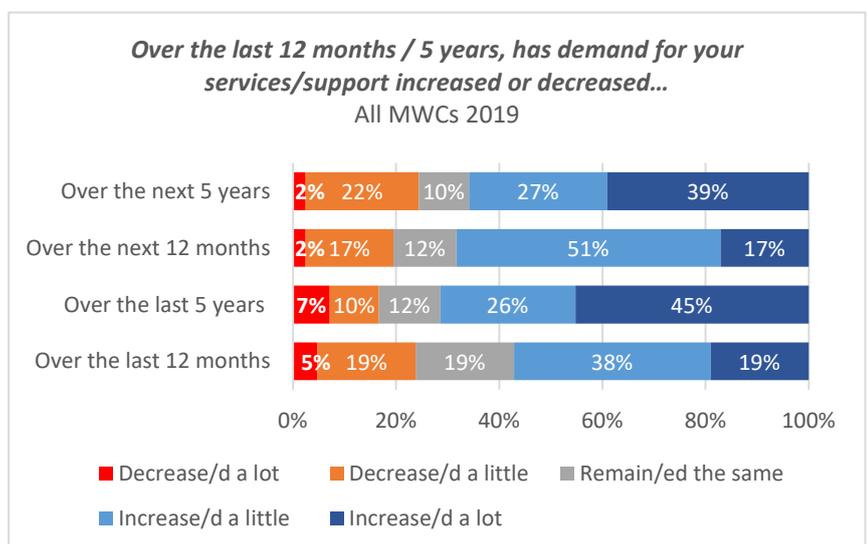
The chapter concluded that: ***It can no longer be ‘business as usual’ – the seismic shifts in the maritime world and society at large cannot fail to impact on maritime welfare charities and the support they provide. Maritime welfare charities will need to review the fundamentals of ‘who, what, where, when and how’ they serve, if they are to maximise their future impact.***

Changes in demand

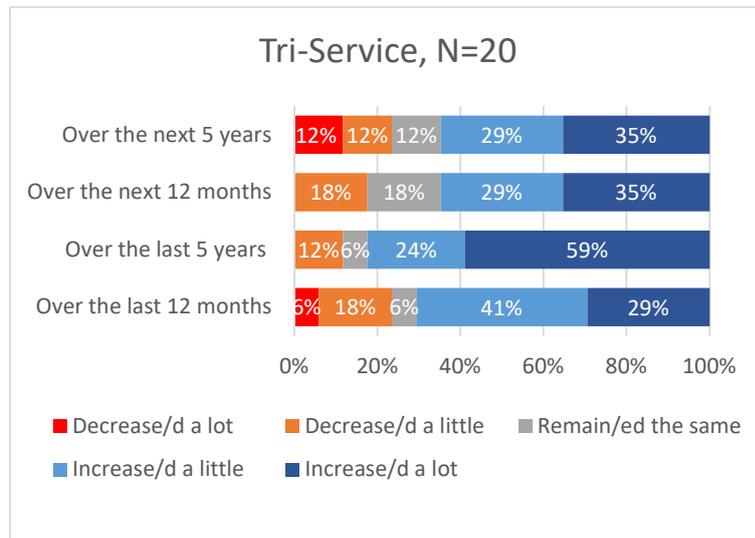
Overall, in 2019, MWCs report seeing greater increases for their services, rather than decreases. The increases are greatest looking back over the last 5 years (with 45% reporting a large increase). The next twelve months are also expected to be quite a crunch time, with 68% expecting an increase.

This is a similar picture to that seen in 2017.

The increases in demand over the last twelve months were perceived to be greatest for MWCs primarily serving RNRM (80% of which saw a little (60%) or a large increase (20%)). Over the next twelve months the increase in demand is anticipated to be greatest for MWCs serving all maritime sectors (MN, FF, & RNRM) and those primarily serving RNRM.



Tri-Service charities (serving RNRM as well as other Armed Services) saw the biggest increases in demand over the last five years (net increase 71%), slowing slightly in the last 12 months and more so in future years.



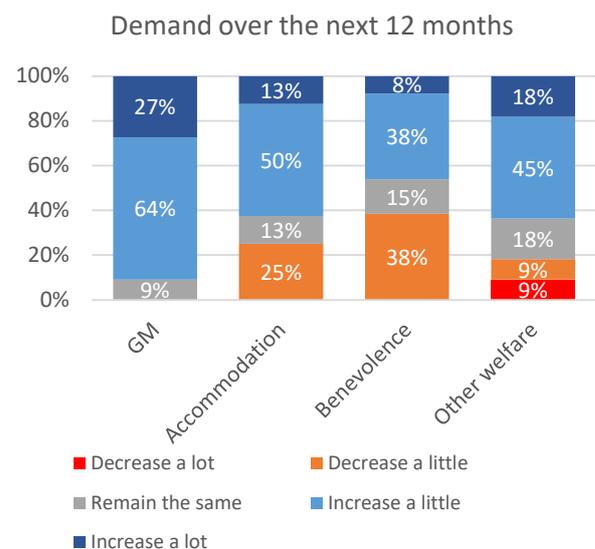
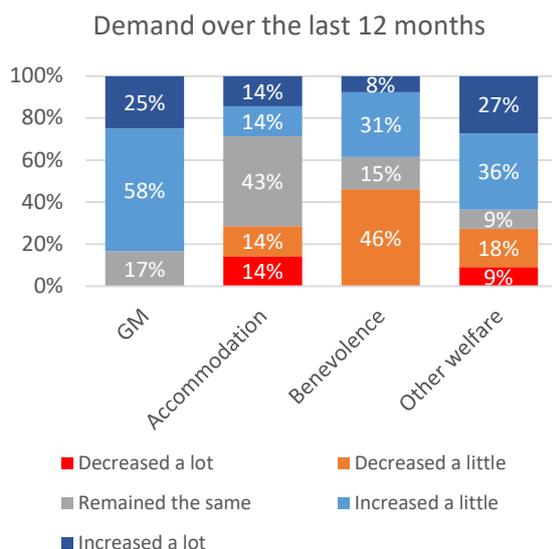
The increases in demand over all time periods were perceived to be greatest for MWCs providing grants to other organisations, and it is notable that no grant makers report any decrease in demand looking either backwards or forwards.

The next highest increases in demand were perceived by those MWCs providing other welfare services (e.g. support, advice, general welfare and seafarer centres).

Benevolent charities have seen the greatest decreases in demand over the last twelve months, and perceive this continuing over the next twelve months, although similar numbers also perceive increases. From the depth interviews, it is possible that this downturn reflects a moving away from a purely benevolent approach, with MWCs looking to support beneficiaries in a more holistic way.

Accommodation providers see more demand increasing in the next twelve months than the last twelve months.

“The original report [‘Supporting Seafarers’, 2007] talked about the great demise and almost no one being around by 2020, we, anecdotally, wouldn’t say that was the case, we’re still seeing people associated with the sea wanting accommodation” [MN, RNRM]



It is interesting that MWCs report an increase in demand, and yet still feel they need to reach out to more beneficiaries (only 9% agree that they are successful in reaching all beneficiaries that they may be able to assist). Looking at this more closely it becomes clear that those disagreeing that MWCs

are reaching all possible beneficiaries are those who see more increases in demand; while those who agree that MWCs are reaching all beneficiaries are those who see demand remaining the same or decreasing.

One respondent in the depth interviews also identified the importance of continually seeking new beneficiaries in order to replace the natural attrition being experienced in the ageing 'retired' seafaring population. The same MWC highlighted that some of the increase in support levels is due to the complexity of issues raised by beneficiaries, and not necessarily an increase in the number of individuals being assisted.

"The absolute number of beneficiaries hasn't gone up, but without sounding too gloomy about it, what outreach does is enable us to find one new beneficiary, just as one pops their clogs, because we're moving into that demographic where the lion-share of our beneficiaries...are starting to go quite rapidly, but we are still finding new beneficiaries"
[FF]

"There was also a comment within 'Navigating Change' which talked about "increasing needs due to extended life expectancy generating more complex issues". So, I think that numerically it may not be increasing, but the scale of the work will be increasing at least for the medium term" [FF]

2. Meeting changing demographics and beneficiary needs

The 2017 report noted that: *The population of seafarers and their families is currently larger and declining more slowly than previously thought, particularly in some areas of the beneficiary population.*

The 2017 report concluded: *The changing demographics point to a need for Maritime Welfare Charities (MWCs) to reassess their potential beneficiary population in light of the updated demographics, and establish whether support reflects demand. Without doubt, relatively more support will need to be focused on older MN/FF seafarers in the next 10-20 years.*

Changing beneficiary focus

In 2019 we find that provision of services to RNRM, MN, and FF all show a net increase, with the greatest increases being to RNRM, followed by MN then FF. Despite significant realignment / investment by some MWCs (in particular towards greater support for the Fishing Fleet), the general pattern remains similar to 2017, with an overall imbalance in provision, favouring RNRM beneficiaries over MN and FF.

It is also worth noting that for tri-Service organisations, the trend is towards decreasing service provision to Merchant Navy and increasing provision for the Naval Services.

Increases can be seen not only in the total number of organisations providing services to each sector, but also within the proportion of services allocated by those organisations.

From the depth interviews we know that this is partly because of increasing numbers of serving RNRM personnel:

"Because we know the Navy's recruiting again, it's looking to grow and they're also having problems with retention...because they're deployed more, and deployments are longer, people are away more often...As a result of that, we are going to be focussing on serving personnel, so what support they need" [RNRM]

There is most change in provision for the **Fishing Fleet** where for fewer than half (48%) of the MWCs surveyed, provision levels have remained the same over the past two years. Nearly one third (32%) of MWCs surveyed have increased or will increase provision, while 20% have decreased or stopped provision – so, a net increase of 12%. Certainly, from the depth interviews, examples are given of an increasing focus on the fishing community, for example, Seafarers UK.

Over one quarter (27%) of MWCs have increased or will increase provision for the **Merchant Navy**, while 12% have decreased or stopped provision (a net increase of 15%).

Over one quarter (29%) of MWCs have increased or will increase provision for the **Naval Service**, while 11% have decreased or stopped provision (a net increase of 18%).

While the vast majority of MWCs surveyed (70%) have maintained the same provision for **other maritime related services**, this may be changing slowly, with 5% having already increased provision and 15% intending to increase or start provision in the next two years.

“We’re now offering our services to those involved in the ‘wet end’ of fish-farming, so those that are actually on the water in a fish-farming endeavour, and that’s primarily focused on the very small operators whose income is fragile” [FF]

CASE STUDY: Seafarers UK

Seafarers UK is one of the major funders within the maritime welfare sector, which, in response to the findings from ‘Navigating Change’, decided to refocus much more of its grant-making on organisations supporting MN and FF beneficiaries.

“When we reviewed the money available in the sector...it made sense to concentrate our funds on those who have less access to charitable funding and often more need – the Merchant Navy and Fishing Fleet. We review this policy every year and we have an existing restricted fund for the Royal Navy.”

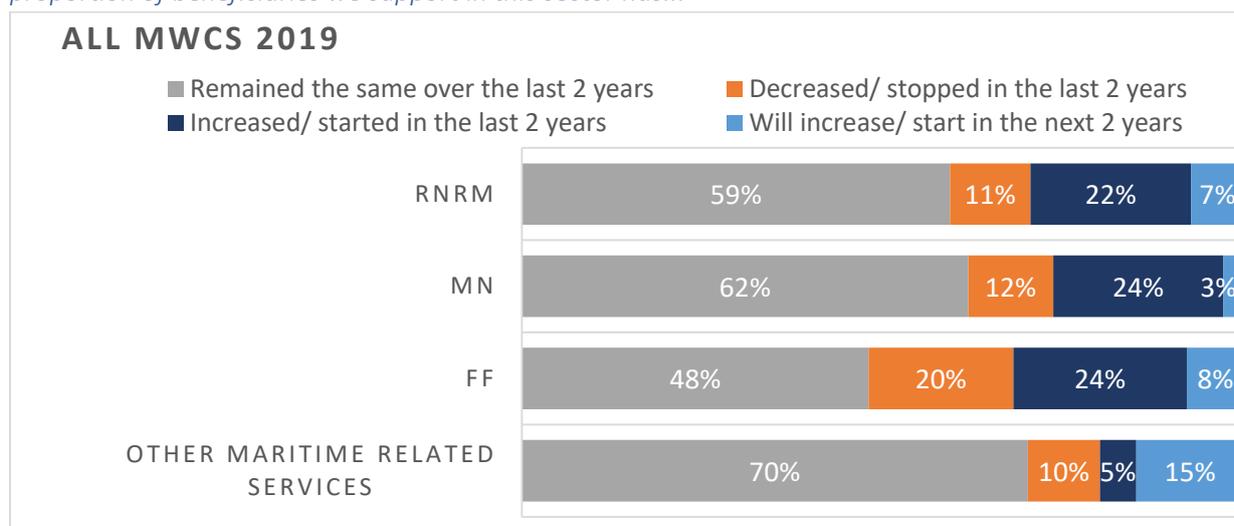
This refocus has already borne fruit, with SFUK funding the ‘SeaFit Programme’, a joint initiative by Seafarers Hospital Society and The Fishermen’s Mission which aims to deliver sustainable improvements in the health and wellbeing of fishermen and their families, including: **Access to mental health and wellbeing support to complement Big White Wall, and a network of physiotherapists trained to meet the specific needs of fishermen.**

In addition, following its ‘Fishing for the Future’ research, SFUK has established a Loan Guarantee Scheme in 3 different credit unions which will underwrite and guarantee loans to fishermen.

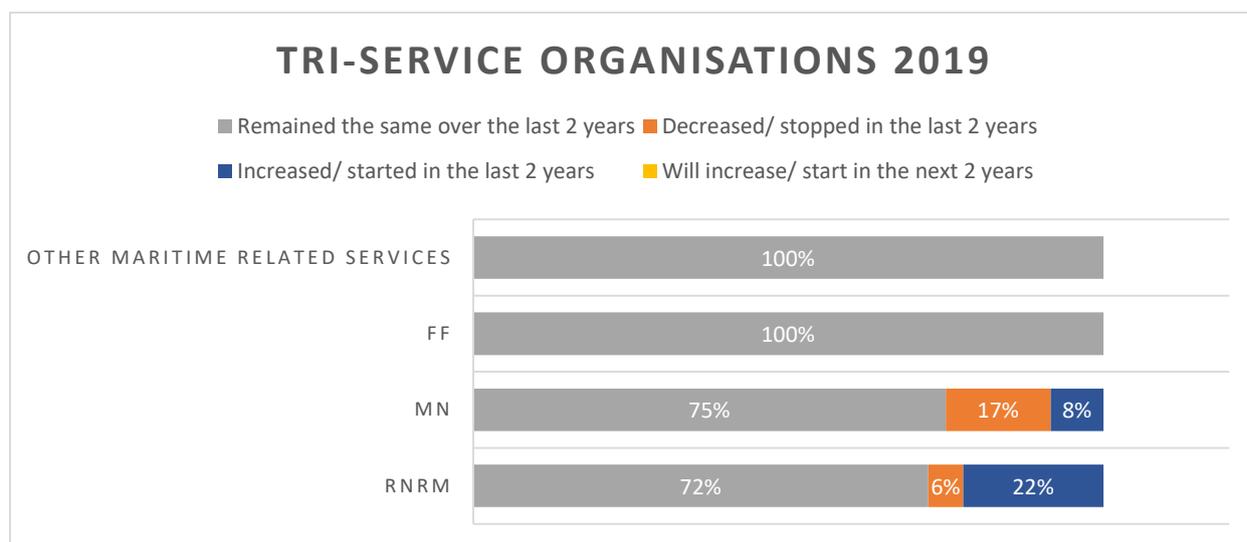
The increased emphasis on MN and FF has naturally led to a change in the profile of projects and organisations being supported by SFUK.

“[We’ve received] a much higher number of new applicants ... we used to get 2 or 3 a year, and it’s been 15 or 16, and that’s mainly from the fishing industry or more general Merchant...So, a lot more new organisations than before, which I think is exactly what the strategy wanted, we wanted to take more of a risk, be more innovative, and look at things that would make more of an impact...[whilst] also trying not to penalise those that are doing the same fundamental service that they’ve done for fifty years.”

Thinking about the last two years in particular, have you changed your beneficiary focus at all? The proportion of beneficiaries we support in this sector has...



For tri-Service organisations, the trend appears to be for decreasing service provision to Merchant Navy (net 9% decrease) and increasing provision for Naval Service (net 16% increase)^{vi}.



Beneficiary group

The depth interviews suggest that changes in beneficiary focus are largely in response to the need being experienced across the sector, rather than a wholesale redefinition of what constitutes a 'seafarer'.

"We have done more in ports, and more in safety, but we haven't actually had any applications from more broad, MLC2006 definition organisations" [MN, FF, RNRM]

Provision has increased most dramatically for serving seafarers (seen across the whole sector) and younger retired seafarers of working age (driven mainly by the RNRM-facing MWCs). Provision amongst MN/FF and tri-maritime facing MWCs for older retired seafarers remains static.

Overall, provision has increased rather than decreased in all areas (apart from RNRM Reserves and older retired seafarers where provision has remained at the same level).

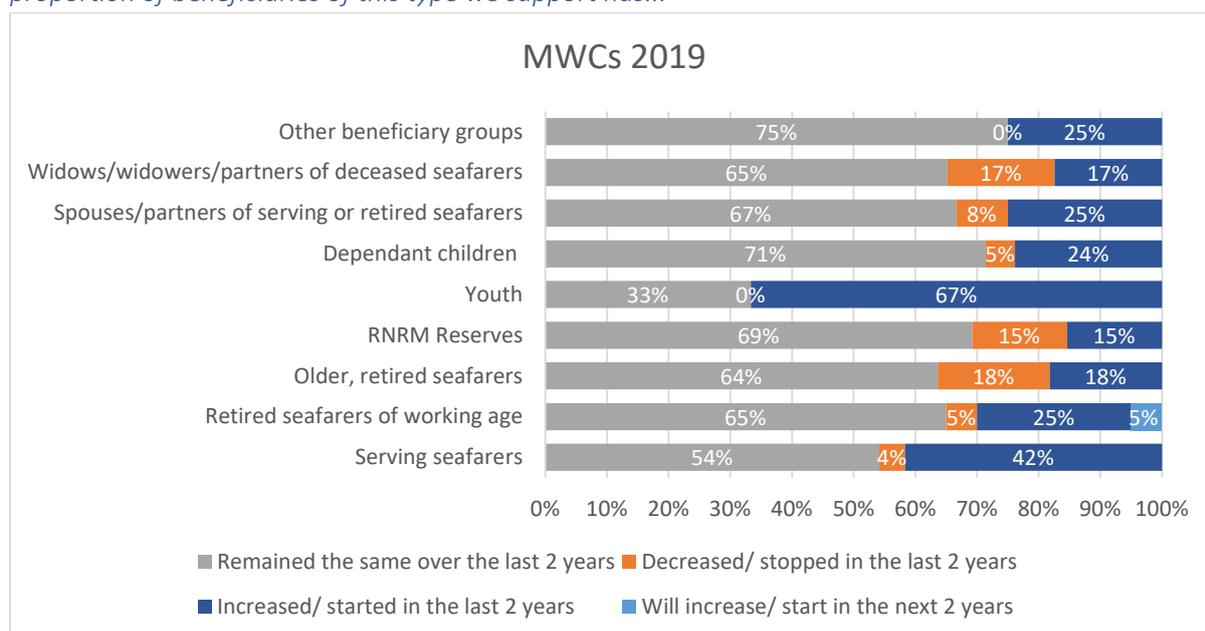
Provision has increased most dramatically for serving seafarers (42%) have increased provision over the last two years).

Provision has also increased markedly for younger retired seafarers (of working age), with one quarter (25%) of MWCs surveyed having already increased provision and a further 5% planning to do so in the next two years.

Provision for youth has also increased markedly (67%) although the numbers of MWCs providing services to this beneficiary group is a lot smaller than for other areas.

Around one quarter of providers have also increased provision for spouses/ partners of serving/ retired seafarers, dependent children and other beneficiary groups.

Thinking about the last two years in particular, have you changed your beneficiary focus at all? The proportion of beneficiaries of this type we support has...



The increase in provision for serving seafarers is seen across the sector (RNRM, MN/FF and tri-maritime facing MWCs), while **the increase in provision for working age seafarers no longer at sea is being driven mainly by the RNRM-facing MWCs**. Provision amongst MN/FF and tri-maritime facing MWCs for retired seafarers remains static, while for RNRM facing MWCs it has fallen slightly.

Some of the depth interviews talked about working age beneficiaries as ‘just about managing’ and the increasingly challenging environment they face:

“In this climate, people are struggling more – the ‘just about managing’ – it’s worrying that over 50% of people who come to us are serving, they’ve got a good wage, but they still need charitable help, they’re not on benefits, or veterans” [RNRM]

“We’re helping younger people [more] than we have done traditionally, working-age people, so that’s not a new initiative per se, but a change in emphasis...You look at the triple-lock on pensions that’s been in place for a number of years now, whilst pensioners haven’t done well out of austerity, they’ve done an awful lot better than anyone else on benefits, and therefore, that discrepancy lends itself to thinking, does a charity have to step more into supporting working age people because, to a degree, pensioners have been somewhat protected” [MN, FF]

Whilst others have refocussed on serving seafarers to stop mission-drift:

“Whilst we’ve never really drifted from our mission, we’ve kind of come back, we’d probably been put more into that category of being more about retired seafarers and we’ve now revisited our roots, which has been about working with serving seafarers ”

[MN, RNRM]

Some service provision is changing shape to meet more complex needs (rather than increasing in volume). Within the depth interviews, a couple of MWCs made the point that whilst the overall level of support provided to older retired seafarers remains largely the same, the offering itself is evolving as the needs of these individuals become more complex:

“We’re actually finding that the cases are slightly more complex, there’s a lot of issues going on and they need unpicking” [RNRM]

“A lot of [our increase in costs is] associated with an ageing population, more complex needs, and also the withdrawal of government funding...local authorities withdrawing money for disabled facilities, grants and us picking up the slack...I don’t know if we can say that it is still increasing, but we are maintaining an elevated level of spending on that issue. It’s certainly not getting any better!” [MN, FF]

Adequacy of the current level of support for beneficiaries

The situation overall is seen as worse than in 2017. Noticeably more MWCs rated overall provision as inadequate, and fewer rated overall provision as abundant in 2019 versus 2017, across all sectors and groups.

Provision for FF and MN beneficiaries in particular is seen as markedly more inadequate, less adequate and less abundant in 2019 than in 2017.

Provision of services for different groups of beneficiaries within the three sectors is generally seen as adequate rather than abundant in 2019 compared with 2017, and in many areas is seen as more inadequate.

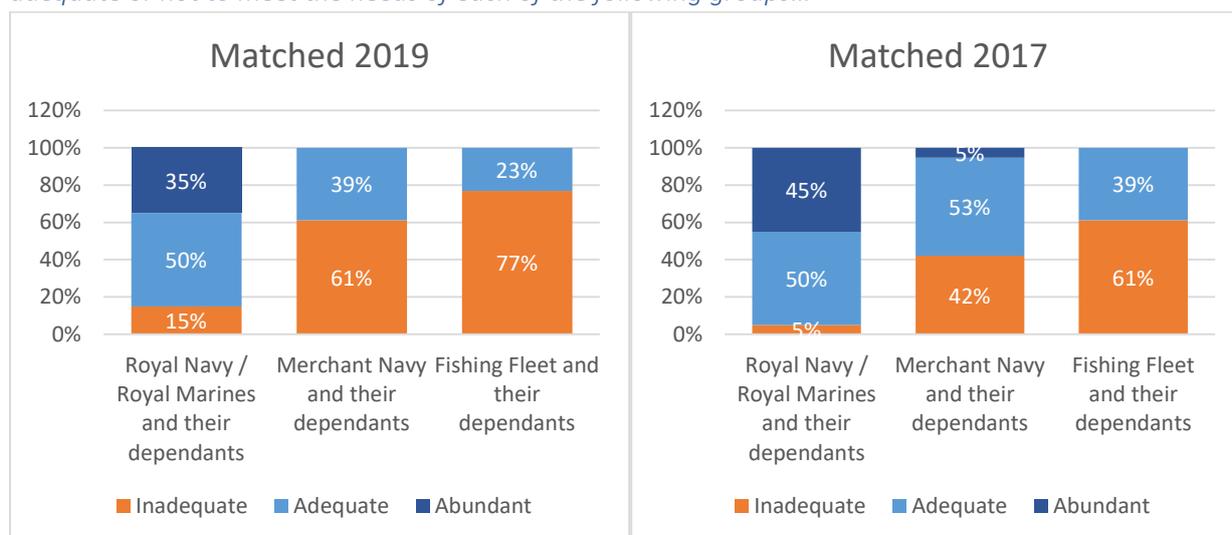
Sectors of beneficiaries

The Fishing Fleet is consistently seen as the most under-served sector. The greatest proportion (77%) of the matched group of MWCs surveyed felt that provision for the Fishing Fleet is inadequate in 2019, an increase from 61% in 2017. Less than a quarter (23%) felt that provision for beneficiaries from the Fishing Fleet and their dependants is adequate.

This is followed by beneficiaries from the Merchant Navy and their dependants, with 61% of the matched group of MWCs surveyed feeling that provision was inadequate in 2019, up from 42% in 2017. The proportion of those feeling that resources for Merchant Navy beneficiaries are adequate has similarly reduced from 53% in 2017 to 39% in 2019. And the 5% in 2017 which felt that provision for Merchant Navy beneficiaries was abundant, no longer believe so in 2019.

While the same proportion (50%) of matched MWCs surveyed feel that the provision of services for beneficiaries of RNRM is adequate in 2019 as in 2017, the proportion believing provision to be abundant has reduced (from 45% to 35%) and the proportion believing provision to be inadequate has increased (from 5% to 15%).

Do you think that the level of support and resources available across the maritime charity sector are adequate or not to meet the needs of each of the following groups...



Groups of beneficiaries

No groups of beneficiaries are seen to have an abundance of services in 2019, compared with 2017 when a proportion of respondents felt that there was an abundance in each area.

More than half of the matched MWCs surveyed felt that provision was **inadequate** in the following areas in 2019:

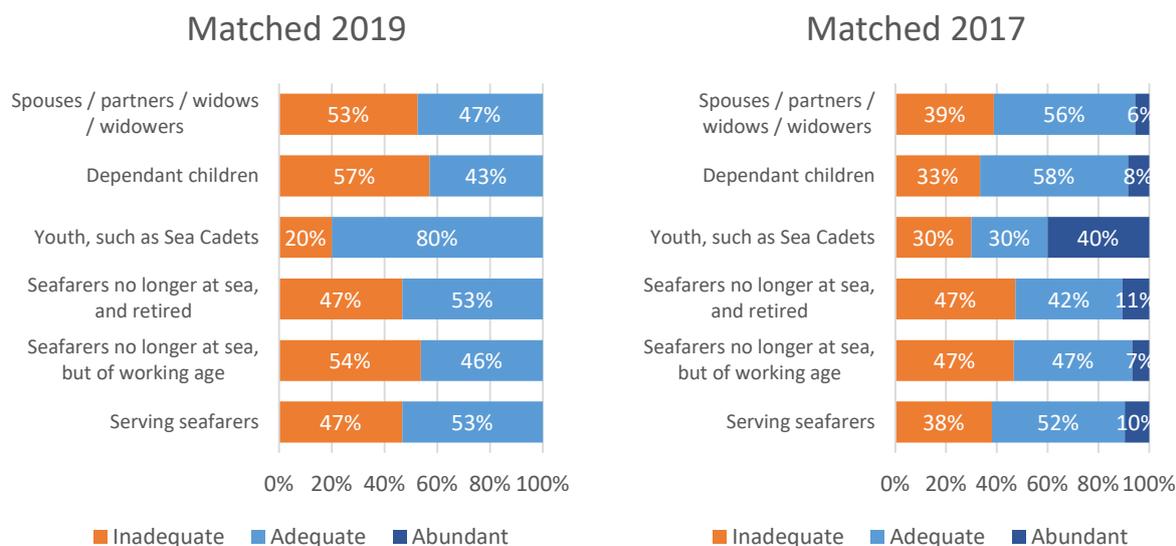
- Dependent children (57% in 2019 versus 33% in 2017)
- Seafarers no longer at sea, but of working age (54% in 2019 versus 47% in 2017)
- Spouses / partners / widows / widowers (53% in 2019 versus 39% in 2017)

In addition, nearly half (47%) felt that provision for **servicing seafarers** is inadequate in 2019 (versus 38% in 2017).

The proportion believing that provision for older retired seafarers is inadequate has remained static at 47%, although none in 2019 consider provision to be abundant, compared to the 1 in 10 believing this to be the case in 2017.

There is a question here over whether the perceived inadequacies are a result of increased awareness across the sector (driven, in part, by the 2017 and previous reviews published by the MCG) or whether it is a natural reaction to changes in the environment?

Do you think that the level of support and resources available across the maritime charity sector are adequate or not to meet the needs of each of the following groups...



Meeting needs

The 2017 report noted that: **While the overall picture of seafarers’ needs remains similar to ten years ago, some groups of beneficiaries require greater support and may have more complex needs – particularly older Merchant Navy / Fishing Fleet Seafarers and their dependants.**

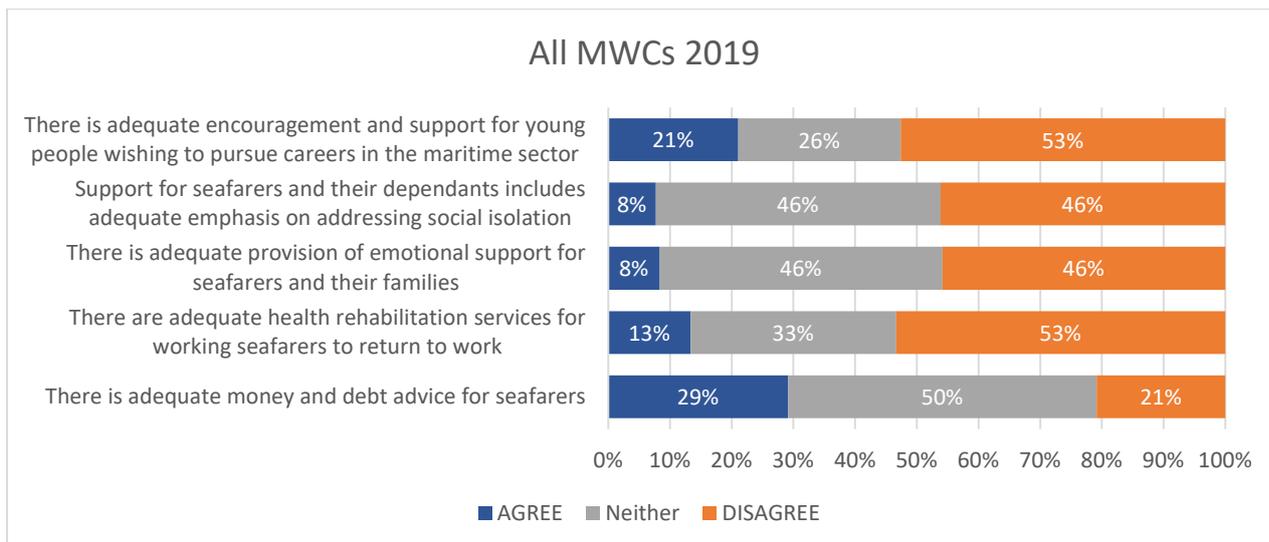
The chapter concluded that: **More support will be needed in the next 10-20 years around financial issues, loneliness and isolation, dementia, limitations with daily living and longstanding illness, with older MN/FF beneficiaries in particular having greater need than previously predicted.**

In 2019 fewer MWCs feel that there is adequate provision of the following compared to 2017:

- Money and debt advice for seafarers (29% rated this as ‘adequate’ in 2019 vs 42% in 2017)
- Support for seafarers and their dependants includes adequate emphasis on addressing social isolation (8% rated this as ‘adequate’ in 2019 vs 16% in 2017)
- Emotional support for seafarers and their families (8% rated this as ‘adequate’ in 2019 vs 13% in 2017)

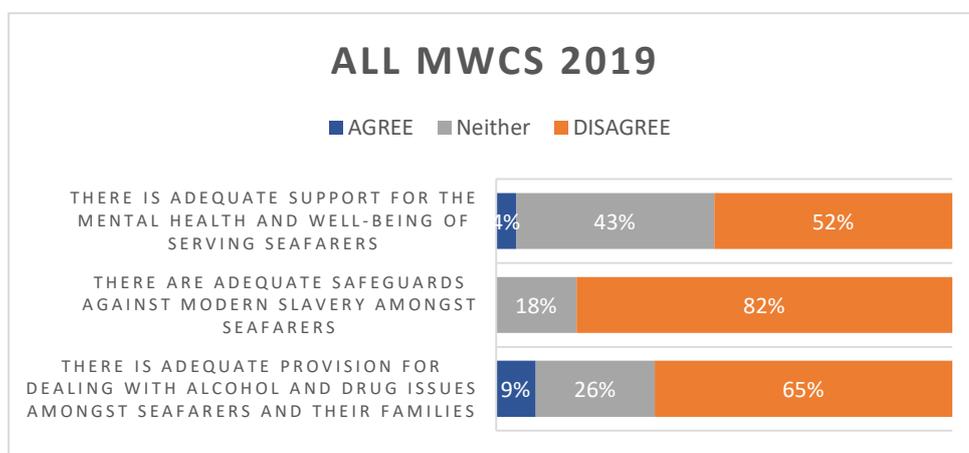
Financial advice available may be viewed as less adequate currently, due to an increase in need for such support resulting from ongoing austerity measures. Financial pressures can also be detrimental to emotional health and well-being, with an increasingly open attitude around mental health potentially encouraging more individuals to seek help. Emotional health and well-being certainly come to the fore in the depth interviews, with some MWCs highlighting a perceived gap in services and signposting in this area, particularly for working age seafarers.

“We are increasingly getting requests from shore establishments and ships for mental wellbeing activities...there’s a myriad of providers in the veteran space...but I think for serving seafarers, particularly the ones we look after... it’s just about who’s best placed to respond to that. I’ve also had requests from padres, from chaplaincy...and it’s just that feeling that if the chaplaincies don’t know where the support is, or can’t access support, then there’s clearly a gap” [RNRM]



Additionally, in 2019 we asked about the following pressing needs which were identified but not tested in 2017.

In general, it was felt that there is inadequate provision or support for:



- safeguards against modern slavery amongst seafarers (net 'inadequate' rating 82%)
- dealing with alcohol and drug issues amongst seafarers and their families (net 'inadequate' rating 56%)
- the mental health and well-being of serving seafarers (net 'inadequate' rating 48%)

“When you’re trying to get traction on mental health support, it’s not something that the ‘maritime’ charitable sector is particularly well set up to support...There’s lots of willing bodies out there that can help (but only if you know they exist!)” [FF]

In terms of these results, it is important to consider whether such perceived inadequacies are informed by actual changes in the sector, beneficiary need and support, or whether they merely reflect an increased level of awareness of the issues being faced and how they are addressed, driven in part by the 2017 *Navigating Change* report and other research undertaken across the sector.

“We’re told a lot within the Armed Forces sector, and in fact from the Maritime side, that isolation and dementia are real issues within the fishermen’s populations and many of the Merchant Navy populations that are isolated, so maybe [my low score] was just reflecting that I think that there’s still a lot of work to be done in those areas” [RNRM]

3. An MWC Sector?

The 2017 report noted that: *The maritime charity sector is diverse, loosely defined and unevenly spread across different seafarer groups.*

The report concluded that: *Having an acknowledged maritime welfare charity ‘sector’ and tighter bonds between organisations could be beneficial for both charities and beneficiaries.*

Collaboration

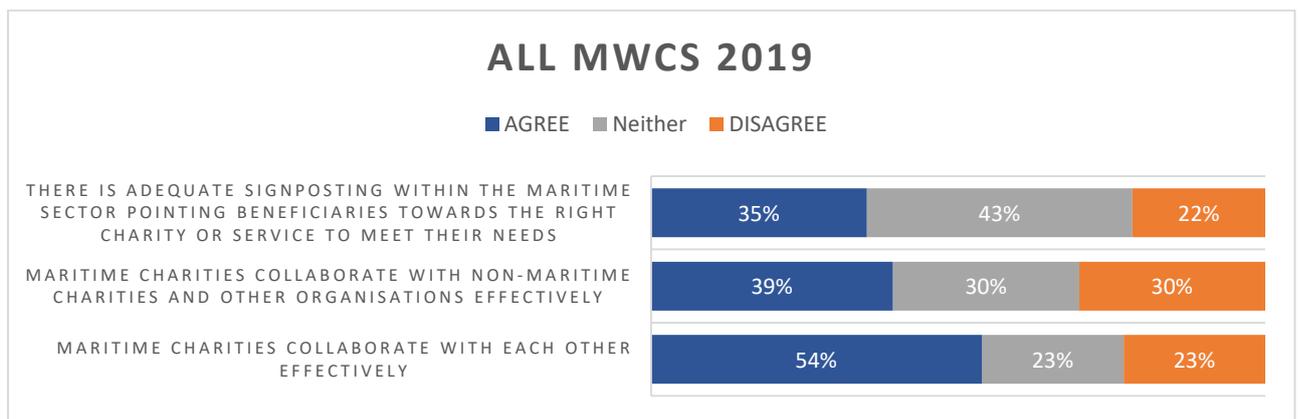
In 2017, we outlined a number of areas where the sector acting as a whole might be stronger. One such area is **greater co-operation and collaboration** - both across the sector and beyond – which could be key to unlocking a better shared future for maritime welfare charities. This includes sharing information and best-practice, and co-ordinating responses (e.g. via partnership working).

In 2019, there has been a slight increase in the proportion of MWCs agreeing that MWCs collaborate effectively with each other (54% agree in 2019 vs 46% in 2017) and a stronger increase in the proportion of MWCs agreeing that MWCs collaborate effectively with non-maritime charities and other organisations (39% agree in 2019 vs 18% in 2017).

Reflecting this, over half (56%) of MWCs surveyed in 2019 report that they have collaborated or partnered with another organisation as a result of changes in demand, 15% intend to do so in the next twelve months, and a further 13% intend to do so at some point in the future. This is a small increase from 2017, especially with regard to future plans.

However, the proportion of MWCs agreeing that **there is adequate signposting within the maritime sector pointing beneficiaries towards the right charity or service to meet their needs** has decreased (from 43% in 2017 to 35% in 2019), with more MWCs being uncertain whether or not this is the case^{vii}.

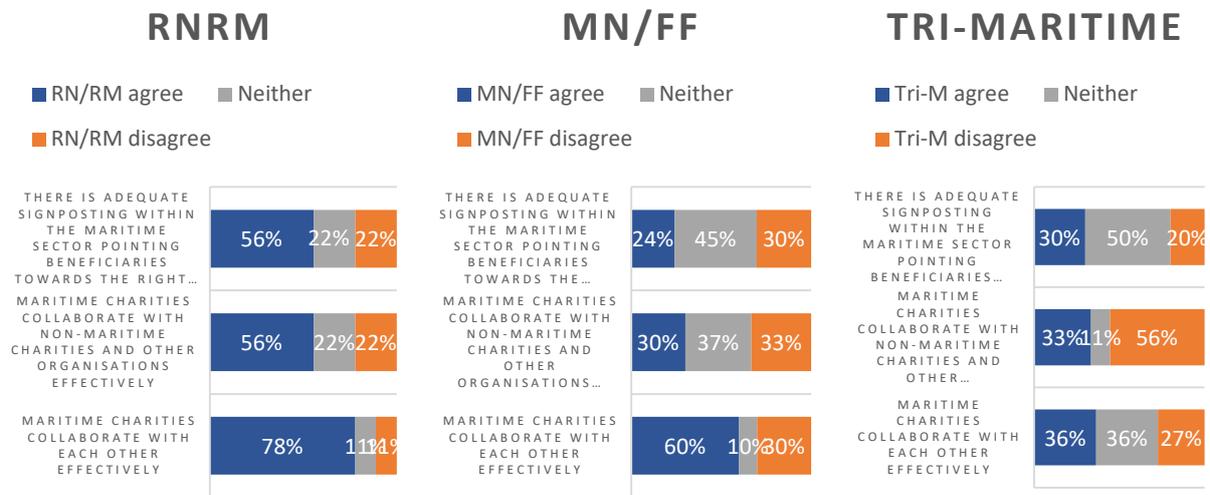
The increase in agreement that **MWCs collaborate effectively both with each other and with non-maritime charities and other organisations** has been most marked in the matched sample (17% and 29% agree in 2017, increasing to 62% and 42% in 2019).



Collaboration between MWCs is seen as strongest by those organisations serving RNRM beneficiaries (78% agree); while 60% of MN/FF facing organisations agree. Only 36% of tri-maritime MWCs agree.

“I think that the whole sector is trying to work better together. There’s just lots more recognition across the whole sector - charity, Maritime, Armed Forces - that we need to work together because that is the best thing for our beneficiaries” [RNRM]

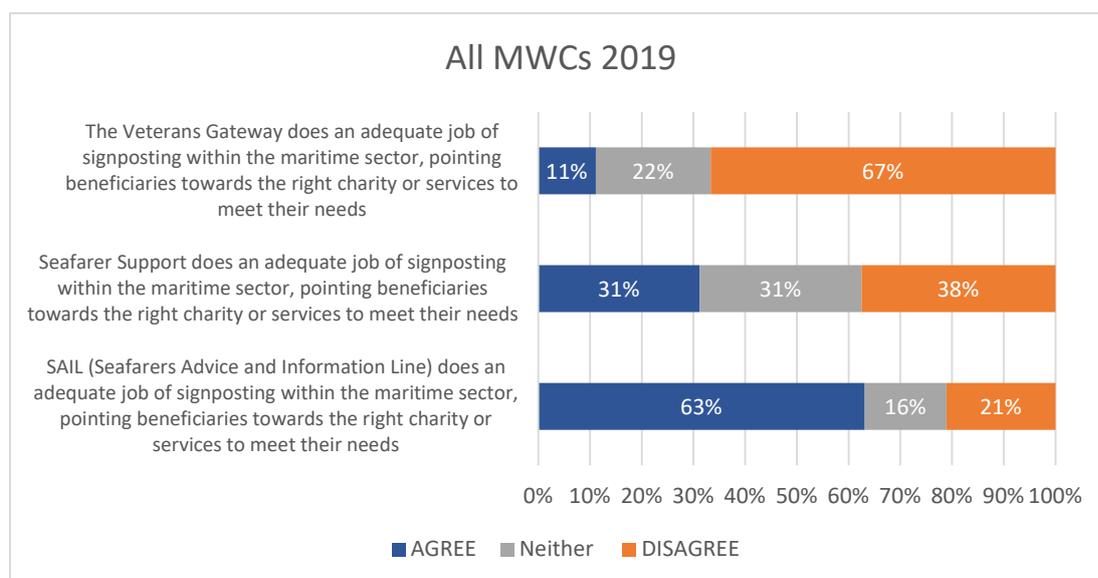
Tri-maritime charities also disagree strongly with the statement that *maritime charities collaborate with non-maritime charities and other organisations effectively*, with over half (56%) disagreeing. On the other hand, 56% of RNRM facing MWCs agree with the statement (30% of MN/FF facing organisations agree).



Signposting

Looking at the signposting in the sector in more detail, it is clear from the MWC respondents that the service felt to be doing the best job of signposting is SAIL (with nearly two-thirds (63%) agreeing it does an adequate job). This is followed by Seafarer Support, with nearly one third (31%) agreeing it does an adequate job, slightly outweighed by 38% who disagree with this. The Veterans Gateway is held to do an adequate job of signposting by just 11%, while 67% disagree.

“I think what’s less good in the collaboration, and people talk about it all the time, I still think people are very parochial...I think charities tend to set up because there’s a failing in the system somewhere and I sometimes think it’s a failing of communication rather than actual resource or service delivery” [RNRM]

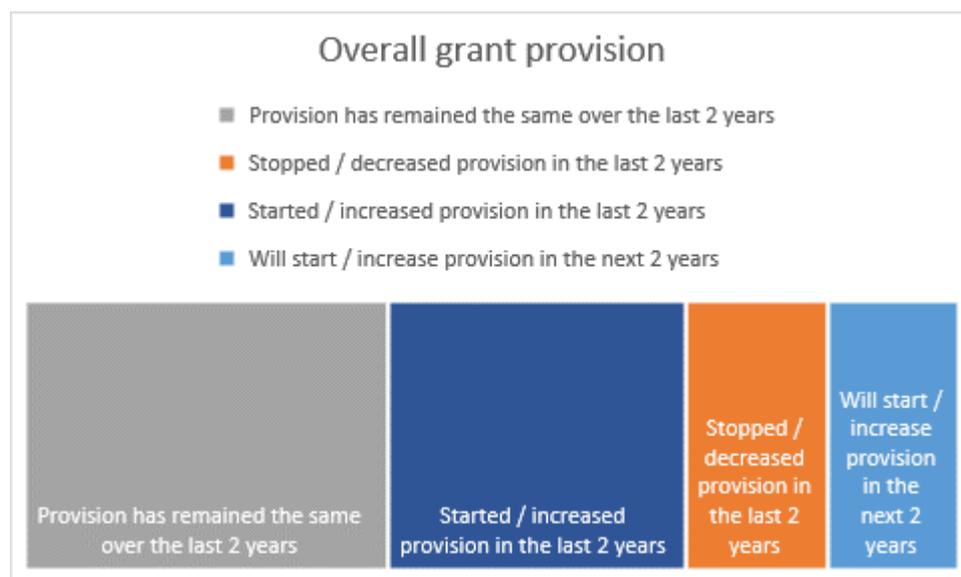


Grant Making from MWC to MWC

Looking at the provision of all types of grants together, the picture is one partly of maintenance, partly of dynamism – where more provision has been started or increased (or is planned in the near future) rather than decreased or stopped.

Significant increases in co-funding/matched funding and project funding, and encouraging increases in capacity building grants and core cost funding, while other forms of funding generally hold steady.

The picture is one of increases in the number and size of grants. This was accompanied, however, by an increase in the information grantees are expected to provide



Provision of different types of grants

There are significant increases in co-funding/matched funding and project funding, and encouraging increases in capacity building grants and core cost funding, while other forms of funding generally hold steady.

The greatest increase in provision over the last few years can be seen in **co-funding or matched funding**, with 36% of funders in 2017 reporting having already increased provision and a further 27% in 2019 also reporting an increase, with an additional 27% planning to increase provision.

The provision of **project funding** has also increased significantly. 20% increased project funding in 2017, while in 2019, 38% have increased provision in the last two years and a further 15% intend to increase project funding in the next two years.

The provision of **unrestricted funding** saw the largest decrease in 2017, with 27% of funders ceasing provision. At the same time, however, 27% of other funders increased or planned to increase their provision of unrestricted funding, balancing out overall provision. In 2019, the same equilibrium was achieved at a lower level, with 8% ceasing provision and 8% starting to provide unrestricted funding.

The provision of **capital funding** saw the largest proportion of funders ceasing provision in 2019 (25%). However, this was more than compensated for by the 33% of funders who have increased or plan to increase provision in the next two years. This is on the back of an overall increase in provision reported in 2017.

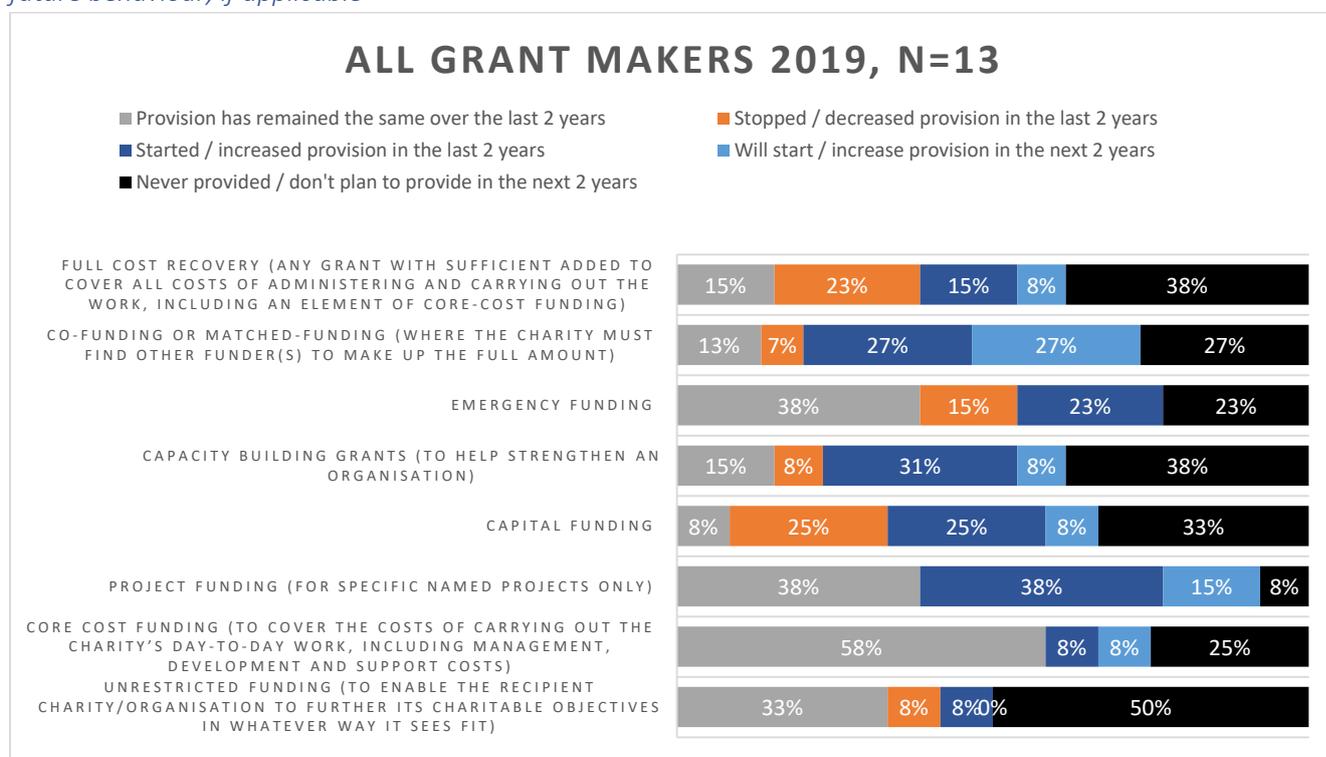
The overall provision of **full cost recovery funding** increased slightly in 2017 and remains the same in 2019 with 23% ceasing provision and 23% having increased or planning to increase provision.

While 15% of funders in 2019 report that they have stopped providing **emergency funding**, 23% report an increase in provision.

An encouraging increase in **capacity building grants** is reported in 2019, with 31% of funders responding having already increased provision and a further 8% planning to increase provision in the next two years.

The provision of **core cost funding** is also up, increasing in 2017 (with 40% of funders increasing or planning to increase provision) and this increase has slowed but continues at a lower level in 2019 (16% of funders have increased or plan to increase their provision).

Thinking about the type of financial support and grants that your organisation provides to other maritime charities and community groups, please tell us about your past, present or future provision of the following types of support...You may select more than one code per row in order to reflect past and future behaviour, if applicable



Changes to grant making in the last two years

“We took a decision to really try and focus on what our beneficiaries wanted from us – did they want capital funding, did they want core funding, did they want project funding – and they resoundingly came back and said that they wanted core funding, so the ‘unsexy’ bits like the Chief Exec or the FD’s salary, their insurance payment – all of those things that charities have to pay for, but often it’s much more difficult to get funding for that element...Also, the matched-funding of grants, some of those are capacity building. Trustees like the matched-funding opportunities that we get through the European Funds that we’re able to access for fishing...I would say that there’s been more focus towards matched-funding and more focus towards core funding” [MN, FF, RNRM]

The picture is one of increases in the number and size of grants to other MWCs.

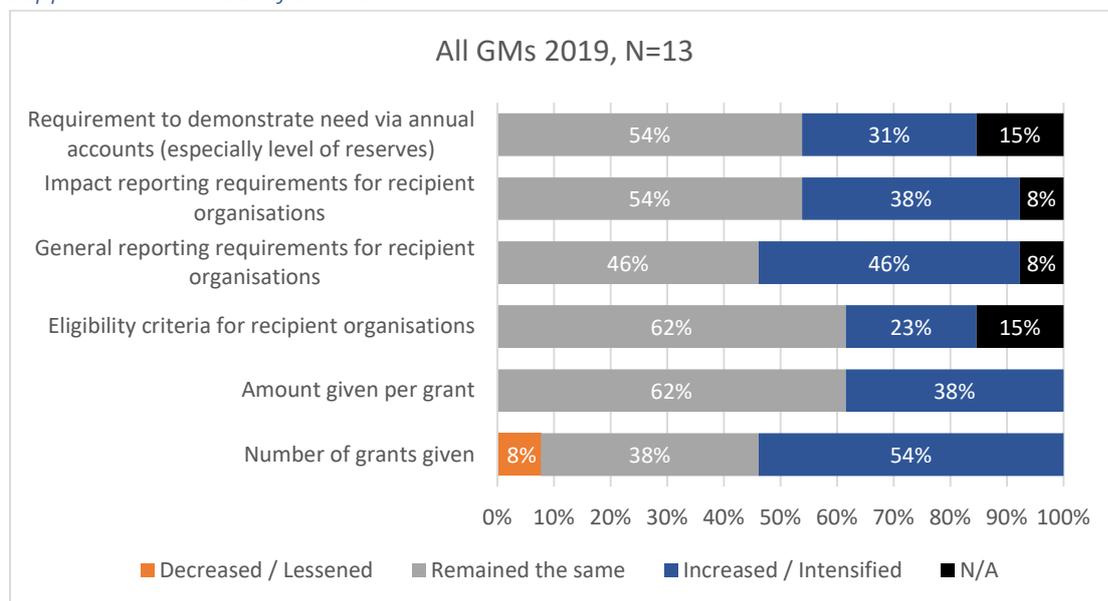
In 2019, 54% of funders have increased the number of grants they give to other organisations, and while 62% have maintained the same amount of their average grant, 38% have increased the amount they give. This is an increase on the 42% of funders who increased the number of grants they gave in 2017, while slightly more (45%) increased the amount in 2017.

This was accompanied, however, by an increase in the information grantees are expected to provide. Nearly half (46%) of funders in 2019 increased their general reporting requirements for recipient organisations; 38% increased the impact reporting requirements; 31% increased the requirement to demonstrate need; and 23% intensified the eligibility criteria for recipient organisations. All of these increases were seen in 2017 at higher levels, so requirements may now be plateauing.

The recipient charities spoken to in the depth interviews were generally accepting of the level of information requested, feeling that it is valid in most instances, although there was one comment about the inconsistencies in funder requirements which can make applications more onerous.

“When I came, you’d almost just go out for lunch with someone and if you spoke the same language you would get your funding, and to me that never felt right, it should be about need and making the case. I applaud the lead of Seafarers UK where they asked for more detail – at one point they asked for far too much detail! – but I think it’s come back through that refinement and now I think they ask for a reasonable amount of detail... We have seen more of the grant-makers come out to see what we are doing, and we welcome those visits, and we welcome any requirement to give any follow-up monitoring and statistics, because I think it’s very important that something isn’t just given on hearsay, it’s given because it’s going to make a real impact” [MN, RNRM]

In the last 2 years, has your organisation changed the way it gives grants to other organisations to support maritime beneficiaries?



4. Sector finances

The 2017 report noted that: *Overall, the maritime welfare charity sector has a healthy bank balance with plenty in reserve, (although some are still facing challenges around sustainability).*

The report concluded that: *A re-evaluation of the sector's financial position might be in order... With a big question remaining over whether, and what proportion of, reserves should be invested to provide a degree of self-sufficiency in long-term funding, or spent to provide more services for beneficiaries now?*

In 2019 in response to changes in demand, many MWCs are using charity reserves to cover income shortfalls and this proportion has increased markedly since 2017. In 2019, half (50%) of the MWCs surveyed have drawn down on their investments.

Financial changes to cope with demand

In 2019, just under half (46%) of MWCs surveyed had already **used some of their charity reserves to cover income shortfalls**, with a further 28% planning to do so in the near future.

Around the same proportion (45%) have **reduced their overheads**, with a further 21% planning to do so in the next twelve months

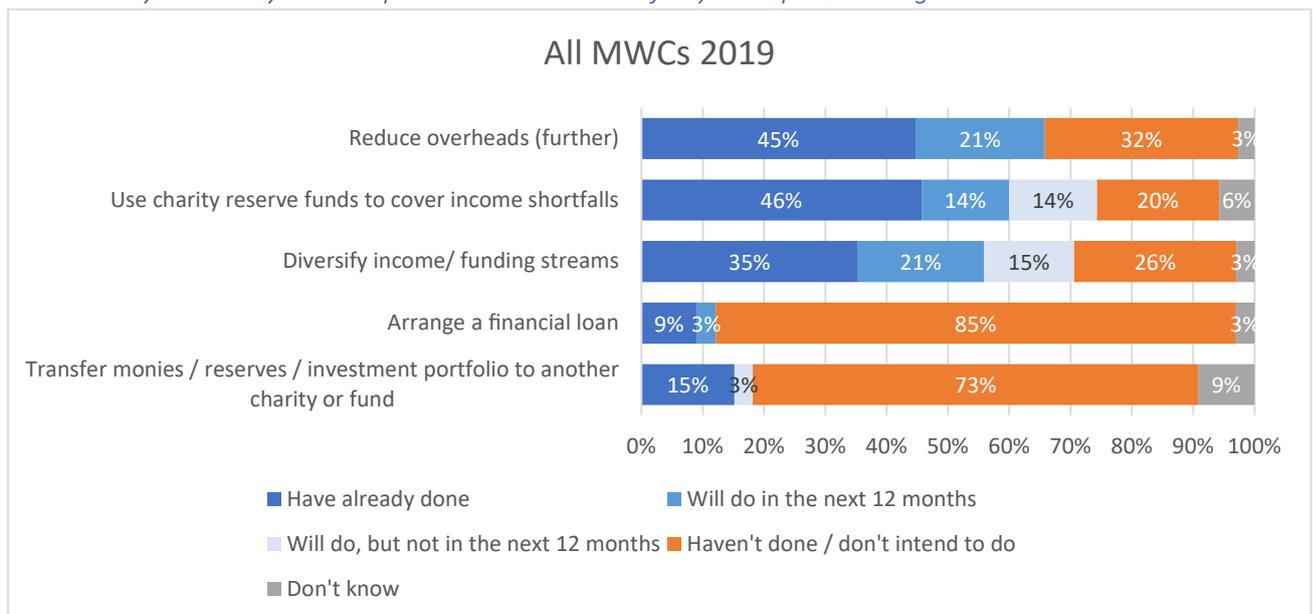
Around one third (35%) have **diversified their funding streams**, with a further 36% planning to do so in the near future

A minority (15%) have or plan to **transfer monies, reserves or investments to another charity or fund**, while even fewer (9%) have arranged a financial loan.

In terms of changes since 2017, the proportions **using reserves to cover income shortfalls** has increased the most in the last two years.

This is followed by an increase in the proportion diversifying income streams. The proportions arranging a loan or transferring monies to another charity are roughly similar, with a slight increase in the former and a slight decrease in the latter.

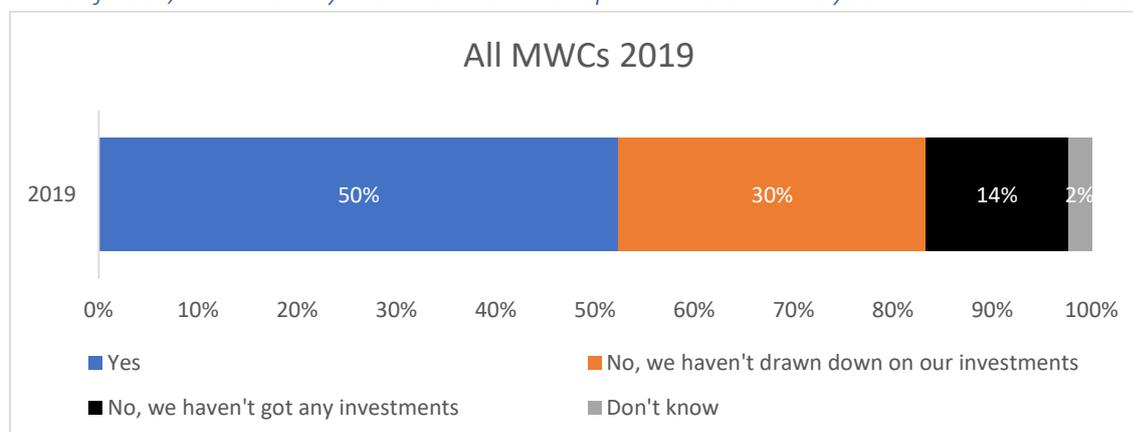
What have you already done or plan to do as a result of any anticipated change in demand?



Drawing down on investments

In 2019, half (50%) of the MWCs surveyed have drawn down on their investments. Looking at the matched sample, the proportion drawing down on their investments has remained at roughly the same level since 2017.

Some charities have financial investments from which they generate interest and receive an income. In times of need, charities may draw down on the capital invested. Have you done this in the last 2 years?



From the depth interviews, some organisations have a set policy to draw down on their investments each year, whilst for other MWCs a reduction in alternative revenue streams and/or an increase in need have prompted this action. One charity mentioned the volatility of the financial markets and the potential impact this might have on investments and, in turn, the funds available on which to draw down in the future.

“We have the money...invested, and we already draw down on that every year, both in income and draw down on the capital, whilst trying to maintain the capital as much as possible so that we’ve got sustainability.... At the moment, I’m in a reasonable position to balance all of this, but we will be looking at spending more of our reserves, our capital, our investments in order to meet need” [RNRM]

“We might need to start clipping our wings anyway, because of the sector-wide downturn in voluntary income. We’ve had to take a very close look at our budget for next year, which included elements of expansion...we’ve had to walk back on them, and delay them, until we can see which way the money is going...When big hitters like the RNLI are suffering, those of us smaller minions down the pile suffer as well” [FF]

One MWC (RNBT) told us that they had initiated a strategy change around using reserves following the 2017 *Navigating Change* report:

Directly after the conference, the Chair and CEO initiated a refresh of the Trust's strategy. An options paper led to a Strategy Day in 2018 that took as its starting point the observation that maritime charities have excessive reserves and have not responded to the increased needs resulting from austerity and increasing beneficiary numbers.

The outcome was a decision to 'do more of what we do well and to fill gaps in our capability to respond to best-guess future needs.' We agreed to fund this extra benevolence through a 25% reduction in our reserves funded from investment income (based on a reducing number of beneficiaries to support in future).

In addition, grant-makers within the sector are known to be looking at reserves held by charities, which can prompt a review of assets held and revenue usage:

“We’ve had those conversations with organisations and there’s been some wins in that, in that organisations have realised that some of the assets they’ve got are restricted and following conversations they’ve gone back to the Charity Commission and managed to get some of their reserves unrestricted, which has helped them anyway, and they know they can come back to us when their level of reserves is lower and we will be here to support them, and our joint beneficiaries...We’re looking at how we spend our money smarter and we expect those that we fund to do the same” [RNRM]

Of course, drawing down on reserves is not always the answer, and it can be an indicator of problems in a charity rather than solutions. So these results should be treated with caution and each MWC needs to respond strategically to maintain the correct balance of short-term and long-term spending for their beneficiaries.

5. Accommodation providers

The 2017 report noted that: *Some modernisation of seafarer accommodation was needed*

And concluded that: *Accommodation and social care provision needs to reflect a ‘life-cycle’ of care, looking beyond the essentials to ensure that evolving needs are met.*

In terms of changing provision of accommodation for seafarers, there have been some significant increases in provision in some areas to do with greater holistic care, individual living accommodation and care in the home of the individual.

MWCs are quite circumspect about rating whether current accommodation provision for retired seafarers is adequate or not: 19% agree that it is adequate while 25% disagree. Related to this, three-fifths of MWCs responding felt that there is insufficient dementia care provision for retired seafarers (with just 11% (2/18)) agreeing.

Three accommodation providers have started delivering holistic care, provided in-house, which takes into account a person's social and psychological well-being, as well as their physical health.

*“It’s just looking at a wider well-being agenda. We’re looking at health and fitness, we’ve developed an onsite gym where the residents can use a gym facility...We’ve created a couple of spaces that are just quiet spaces...where people can just go and read and reflect and sit...We’ve got a number of surgeries and workshops, some of them are about weight management, some are about looking at life in general, a talk-shop where people can just talk about things. Some of those are run by the local health service, some by volunteers”
[MN, RNRM]*

Two providers have started offering care support packages to allow people to remain within their own homes, with a further one provider planning to do this in the next two years.

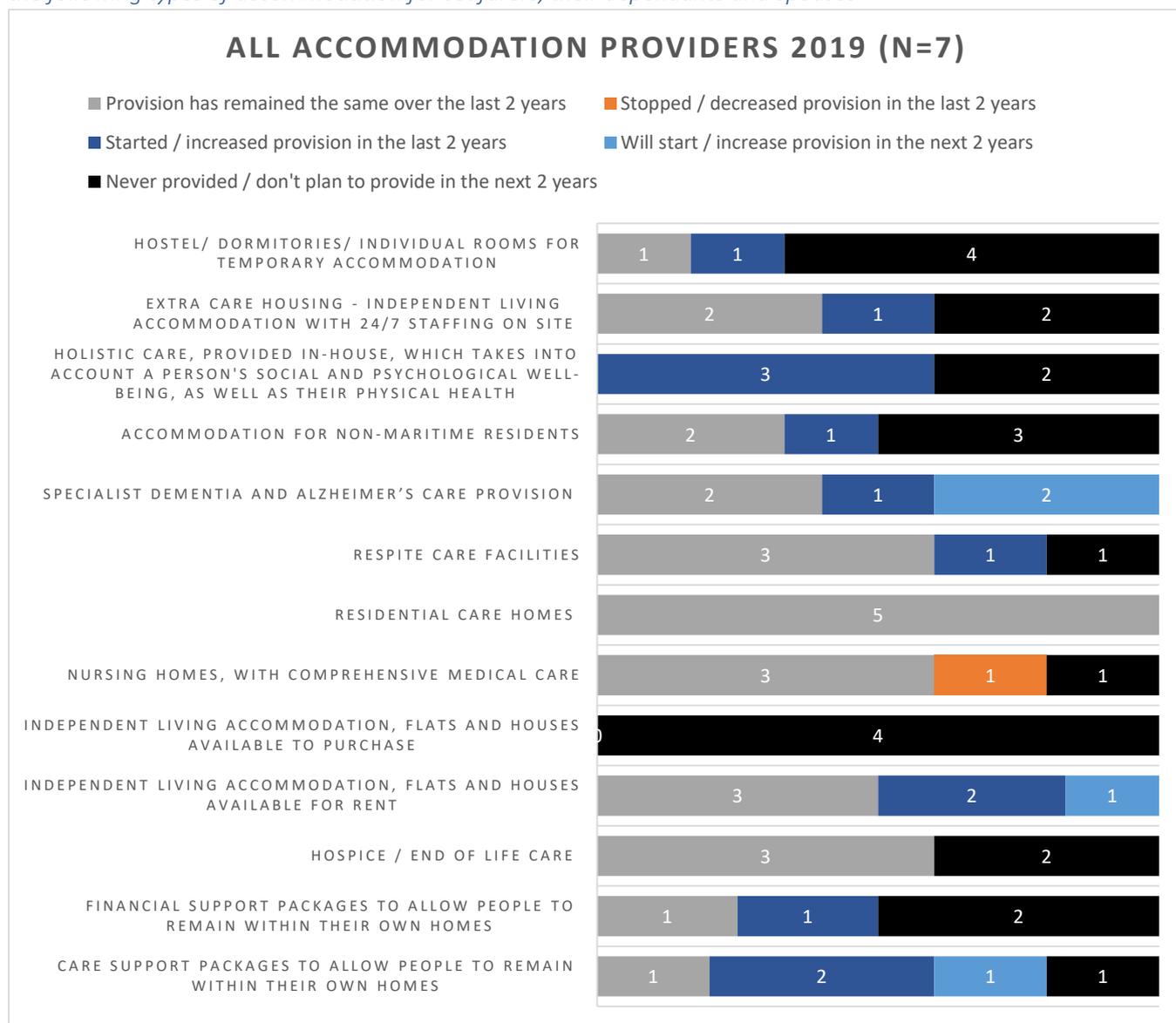
Two providers have established independent living accommodation, flats and houses available for rent, with a further one provider planning to offer this in the next two years.

One provider has instigated specialist dementia and Alzheimer’s care provision, with a further two providers planning to establish this in the next two years.

One provider in each case has started to offer the following forms of accommodation: Extra care housing - independent living accommodation with 24/7 staffing on site; Hostel/ dormitories/ individual rooms for temporary accommodation; Accommodation for non-maritime residents; Respite care facilities; and Financial support packages to allow people to remain within their own homes.

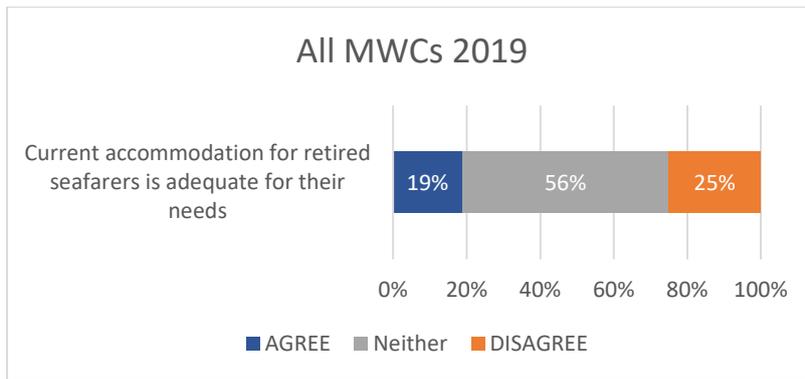
One accommodation provider has stopped providing nursing homes with comprehensive medical care.

Thinking about accommodation provision, please tell us about your past, present or future provision of the following types of accommodation for seafarers, their dependants and spouses



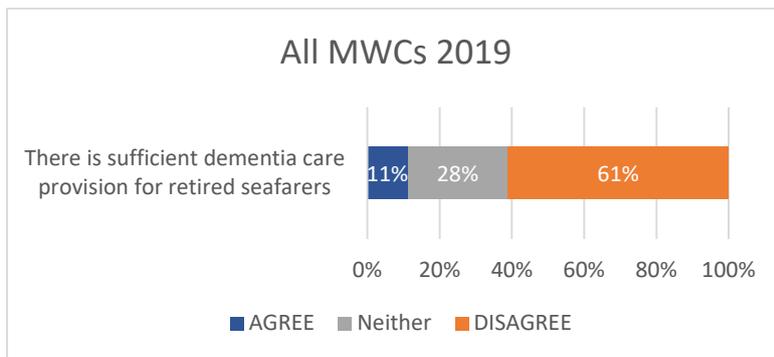
And how strongly do you agree or disagree with these statements about the Maritime Charity Sector and its beneficiaries?

MWCs are quite circumspect about rating whether current accommodation provision for retired seafarers is adequate or not: 19% agree that it is adequate while 25% disagree. This may reflect the ambivalence which many maritime beneficiaries (as many other older people) evince around going into residential accommodation.



Looking at the matched sample, the proportion of MWCs agreeing that current accommodation needs are adequate for retired seafarers has decreased between 2017 and 2019 (from 32% in 2017 to 17% in 2019, although a greater proportion are unsure (from 37% in 2017 to 58% in 2019)).

Related to this, three-fifths of MWCs responding felt that there is insufficient dementia care provision for retired seafarers (with just 11% (2/18)) agreeing. This is despite the addition by 2017 of 54 specialist dementia-care units, primarily provided by Nautilus Welfare Fund at Mariners' Park in Wallasey, and Royal Alfred Seafarers' Society in Banstead, Surrey.



6. Benevolence

The 2017 report noted that: *In many cases benevolence is just one part of a wider support solution.*

The chapter concluded that: *Much can, and should, be done to initiate preventative measures to try to reduce future beneficiary need. However, direct monetary assistance, particularly for emergency relief, will always be needed, and maritime welfare charities should make suitable provision for this.*

In 2019 the picture is generally one of moving towards greater provision of one-off / ad hoc payments (including emergency grants) and away from regular payments. The increases in the provision of one-off / ad hoc payments to individuals, emergency grants and educational / school / training grants in 2019 is the second large increase in two years.

Of the MWCs providing financial assistance (24) nearly half (47%) have or will increase the amount they give to existing beneficiaries (14% have already done so, 14% will do in the next 12 months and 19% intend to do so later), compared with 38% who haven't and do not intend to do this.

The proportion not imposing any other eligibility criteria has increased from 36% in 2017 to 48% in 2019 in the matched sample. More organisations have reduced or relaxed their criteria than increased or tightened them in 2019.

Changes to benevolent support given over the last two years

The picture is generally one of moving towards greater provision of one-off / ad hoc payments (including emergency grants) and away from regular payments.

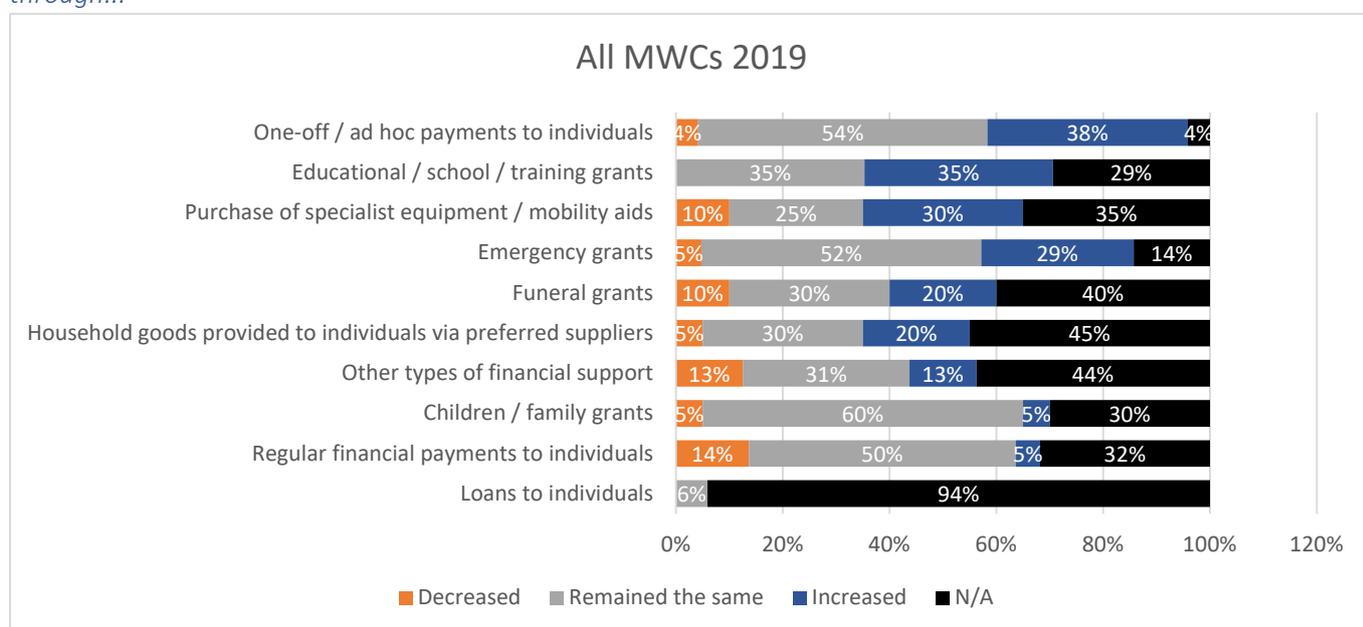
The greatest net increases (in terms of the proportion of benevolent MWCs reporting increases minus those reporting decreases) have been seen in the provision of **one-off / ad hoc payments to individuals** (34%, N=8) and **educational / school / training grants** (35%, N=6).

There have also been notable net increases in the provision of **emergency grants** (24%) and the **purchase of specialist equipment / mobility aids** (20%).

The provision of **household goods provided to individuals via preferred suppliers** has risen by a net 15%, while provision of **funeral grants** has risen by a net 10%.

On the other hand, there has been a net 9% decrease in the provision of **regular financial payments to individuals**.

In the last two years, has your organisation increased or decreased the amount of total support it gives through...



The increases in the provision of **one-off / ad hoc payments to individuals**, **emergency grants** and **educational / school / training grants** in 2019 is the second large increase in two years. In 2017 there was a net increase of 54% in the provision of **one-off / ad hoc payments to individuals**, 50% in the provision of **emergency grants**, and 38% in the provision of **educational / school / training grants**. Thus 2019 results indicate a slight slowing in any increased provision.

The net decrease in the provision of **regular financial payments to individuals**, however, comes on the back of a net increase of 10% in provision in 2017.

Provision of different types of benevolent support

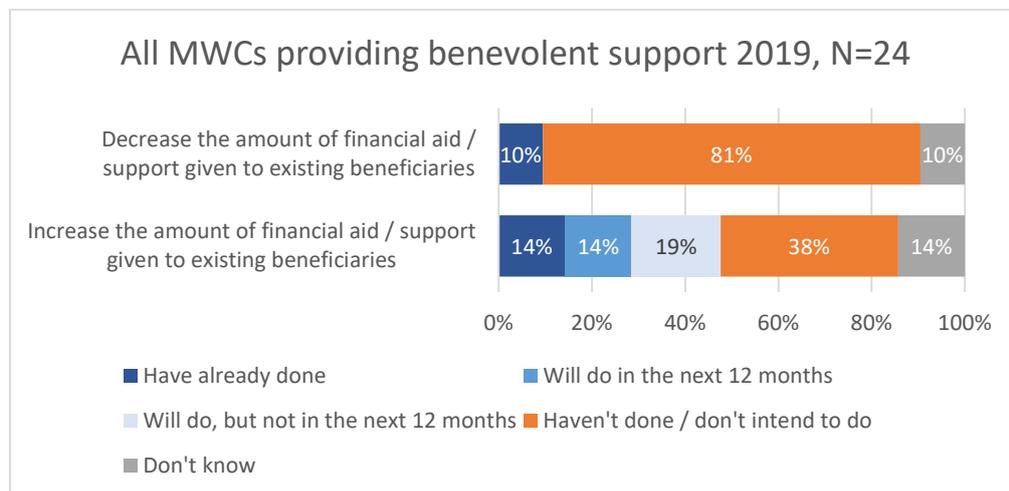
From the MWCs responding to the survey in 2019 some of the other types of benevolence provided were:

Food bank or supermarket vouchers; Debts, Housing costs; Removals; Travel expenses; Convalescence & respite; Household repairs; Training.

Looking forwards – increasing provision in line with needs?

In 2019, of those MWCs providing financial assistance (24), nearly half (47%) have or will increase the amount they give to existing beneficiaries (14% have already done so, 14% will do in the next 12 months and 19% intend to do so later), compared with 38% who haven't and do not intend to do this.

Just 10% have decreased the amount of financial aid given to existing beneficiaries.



Changing eligibility criteria

Other than being a seafarer, a dependant or spouse, do your end beneficiaries need to meet any other eligibility criteria in order to receive welfare support?

Of those MWCs providing services directly to beneficiaries in 2019 (32), one half (50%) impose eligibility criteria (other than just being a seafarer) on potential beneficiaries. However, in the matched sample, the proportion not imposing any other eligibility criteria has increased from 36% in 2017 to 48% in 2019.

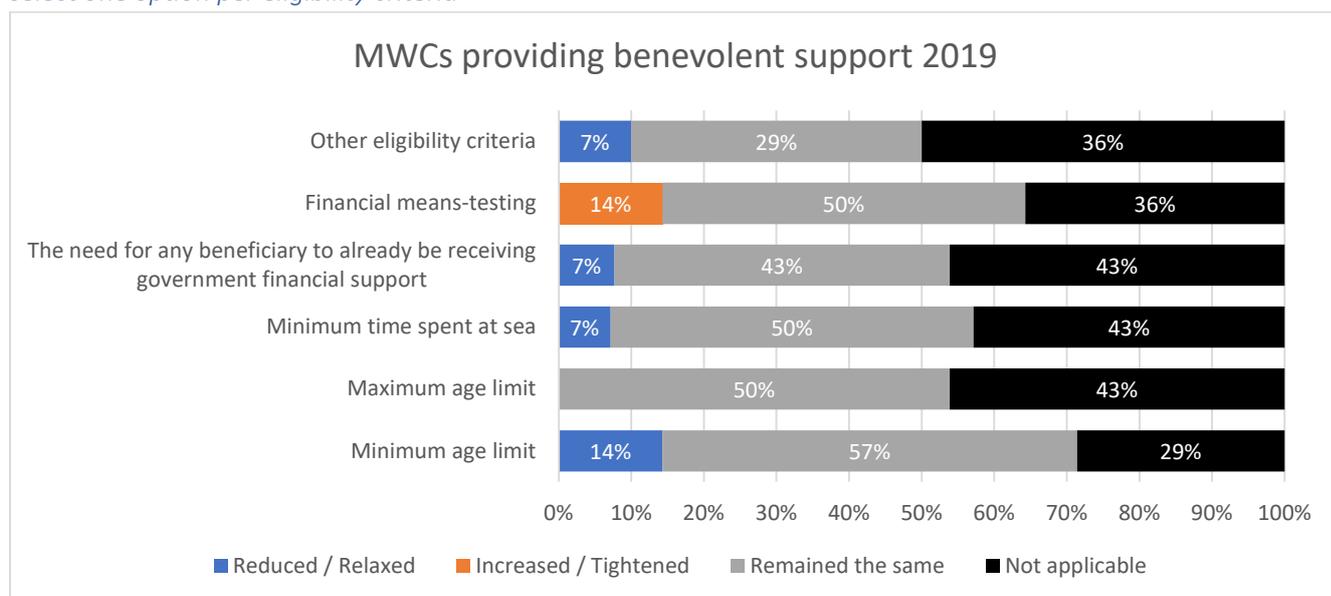
Very few MWCs providing benevolence have changed their eligibility criteria since 2017.

More organisations have reduced or relaxed their criteria than increased or tightened them in 2019.

Two organisations (14%) have increased/tightened their financial means-testing.

Two organisations (14%) have relaxed or reduced the minimum age limit, while three further organisations have reduced/relaxed their eligibility criteria with regards to the minimum time spent at sea, the need for any beneficiary to already be receiving government financial support (e.g. housing benefit, council tax reduction, DLA or PIP), and other eligibility criteria.

Have you made any of the following changes to your eligibility criteria in the last two years? Please select one option per eligibility criteria



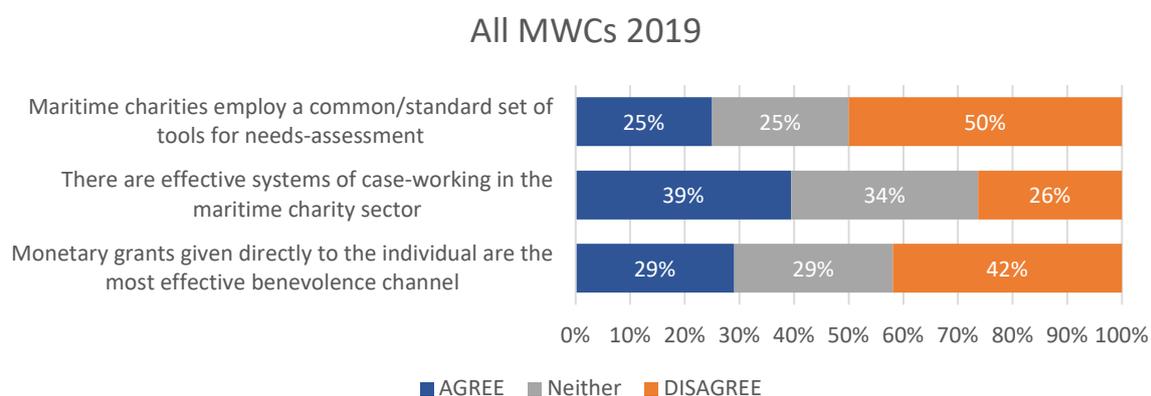
The most effective forms of benevolence

Two-fifths (39%) of MWCs surveyed in 2019 feel that *there are effective systems of case-working in the maritime charity sector*, while one quarter (26%) disagree. This is a much smaller proportion than in 2017 (51%)^{viii}.

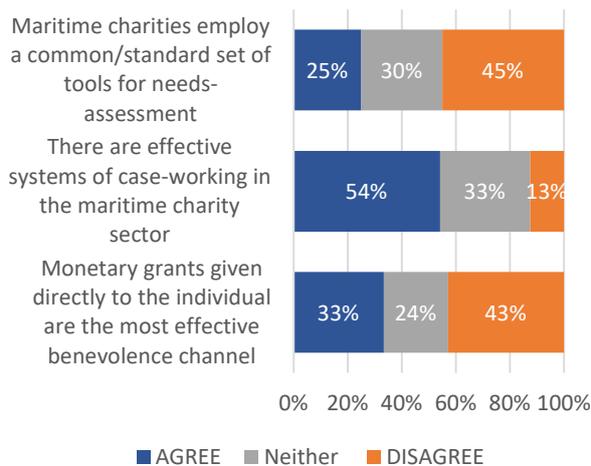
Just under one third (29%) of MWCs surveyed in 2019 think that *monetary grants given directly to the individual are the most effective benevolence channel*, while over two-fifths (42%) disagree. A greater proportion of the matched sample disagree with this statement in 2019 than in 2017 (43% vs 30% respectively).

Only one quarter of MWCs surveyed in 2019 think that *maritime charities employ a common / standard set of tools for needs-assessment*, while half (50%) disagree.

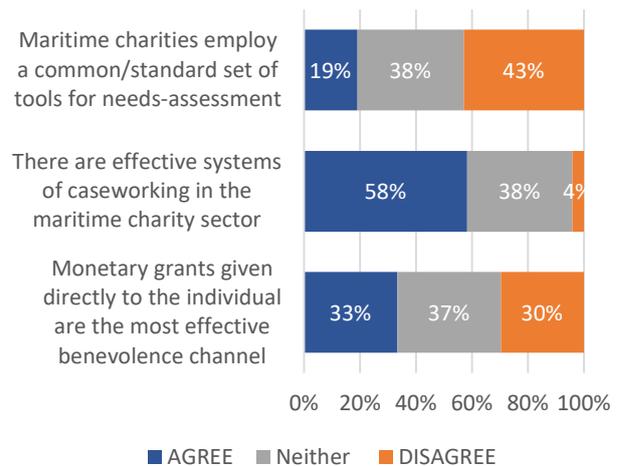
How strongly do you agree or disagree with each of the statements about the Maritime Charity Sector listed below?



Matched MWCs 2019



Matched MWCs 2017



Holistic and preventative support

The depth interviews indicate that some MWCs are looking to support beneficiaries in a more holistic way:

“I don’t think quite frankly, that just chucking money at a problem is the right answer...I’m asking my staff to look beyond the immediate need – the lady might be asking you for a new cooker, because she can’t afford it and her current one’s bust, but actually her real need is that she’s lonely, you’re the only person that she’s seen in five weeks, that sort of thing - more of an holistic approach” [FF]

In addition to this, some indicated that they were doing more early intervention or preventative work:

“What we’re doing is responding to the fact that we’re seeing young people coming to us individually wanting support with counselling and mental health issues, so can we do anything preventative, that would help?” [RNRM]

7. Measuring Impact

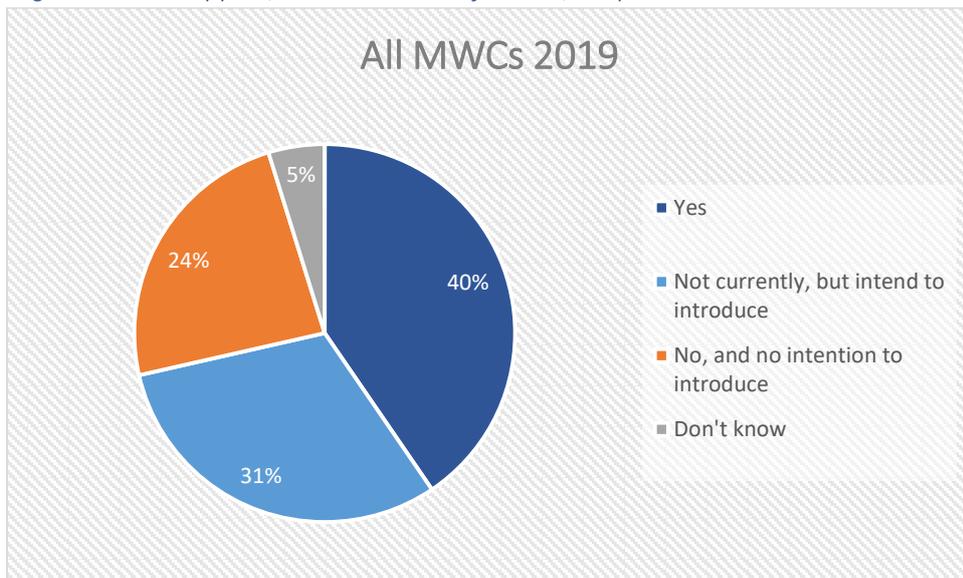
The general consensus amongst MWCs surveyed in 2019 is that maritime charities are not so good at measuring their impact (46% versus 29% who think that they are good at it).

Formal impact reports

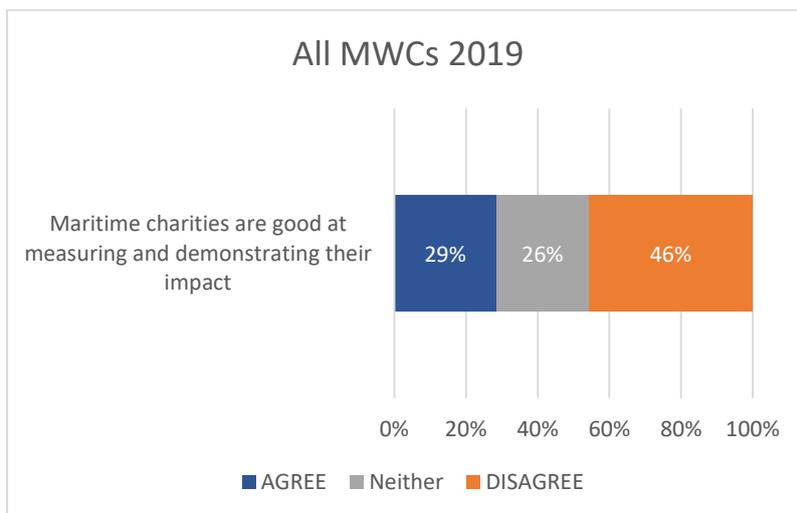
Two-fifths of MWCs surveyed in 2019 (40%) produce a formal impact assessment.

In general, the picture is roughly similar to 2017.

Does your organisation produce a formal impact assessment report which details the impact of your organisation's support/services on beneficiaries/recipients?



The general consensus amongst MWCs surveyed in 2019 is that maritime charities are not so good at measuring their impact (46% versus 29% who think that they are good at it).



While the proportion agreeing that maritime charities are good at measuring their impact in the matched sample (31%), hasn't changed since 2017, the proportion disagreeing has increased (from 29% to 38%).

8. Changing needs

In 2019, fewer than 1 in 10 MWCs feel that maritime charities are successful in reaching all of the beneficiaries that they might be able to assist, while around half (48%) actively disagree. The number of MWCs agreeing is a drop from 2017 (from 6 to 3).

Conversely, there has been a small increase in the number of MWCs feeling that maritime charities are in a good position to respond to all future beneficiary needs (from 11 to 13, 33% in 2019), but this is tempered by a significant increase in the number disagreeing that this is the case (from 6 to 12, 30% in 2019).

The proportion of MWCs thinking that the maritime charity sector is innovative has remained the same at just above one quarter (28%), although the number disagreeing has increased (from 8 to 14).

In 2019, the most widespread change is in offering new services or provision (69% in total: 28% have already done this, 22% intend to do so in the next twelve months, and a further 19% intend to do so at some point in the future).

In terms of collaboration and alliances, over half (56%) of MWCs surveyed in 2019 report that they have collaborated or partnered with another organisation as a result of changes in demand, 15% intend to do so in the next twelve months, and a further 13% intend to do so at some point in the future. This is a small increase from 2017, especially with regard to future plans.

In terms of operational changes MWCs have made or plan to make in response to changes in demand, the biggest changes in 2019 have been seen in new technology and marketing.

A massive 89% of MWCs surveyed in 2019 responded that they have or will increase promotion / advertising / marketing of charity (36% have already done so, 42% intend to do so in the next twelve months, and a further 11% intend to do so at some point in the future).

Whilst 87% of MWCs surveyed in 2019 responded that they have or will invest in IT/new technology & online solutions (38% have already done so, 38% intend to do so in the next twelve months, and a further 11% intend to do so at some point in the future. This has become significantly more prominent since 2017.

59% have or intend to increase front-line services delivered.

57% have or intend to increase staff numbers/up-size the organisation.

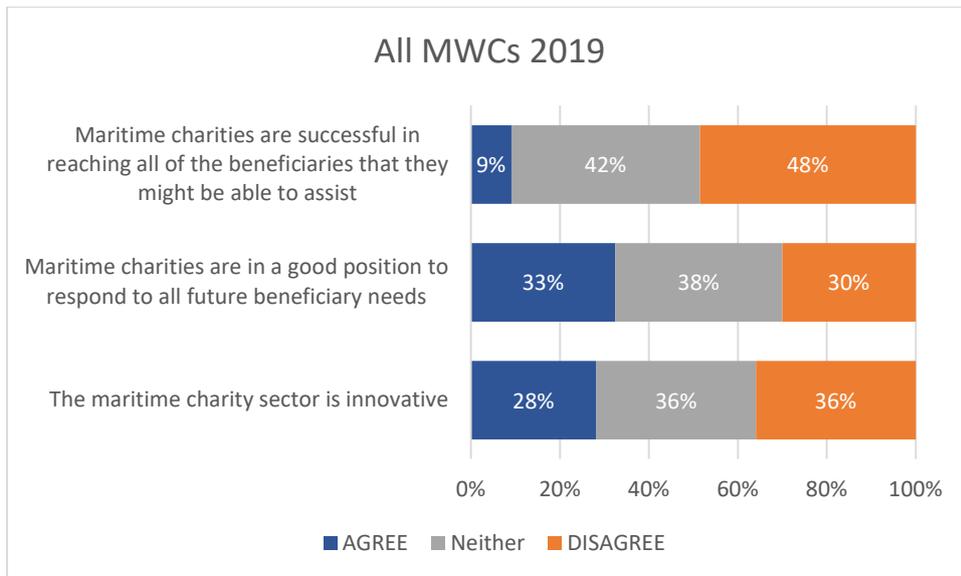
Additionally, in 2019, 49% have or intend to increase use of volunteers.

Attitudes to the sector

In 2019, fewer than 1 in 10 MWCs feel that **maritime charities are successful in reaching all of the beneficiaries that they might be able to assist**, while around half (48%) actively disagree. The number of MWCs agreeing is a drop from 2017 (from 6 to 3).

Conversely there has been a small increase in the number of MWCs feeling that **maritime charities are in a good position to respond to all future beneficiary needs** (from 11 to 13, 33% in 2019), but this is tempered by a significant increase in the number disagreeing that this is the case (from 6 to 12, 30% in 2019).

The proportion of MWCs thinking that **the maritime charity sector is innovative** has remained the same at just above one quarter (28%), although the number disagreeing has increased (from 8 to 14).



Responses to changes in demand

What, if anything, have you already done or do you plan to do as a result of any anticipated change in demand?

Many MWCs report having changed the way that they work in response to changes in demand. Actions are seen across a number of areas, including: **financial, operational, charitable focus, and collaboration / alliances.**

Charitable focus

In 2019, the most widespread change is in **offering new services or provision** (69% in total: 28% have already done this, 22% intend to do so in the next twelve months, and a further 19% intend to do so at some point in the future).

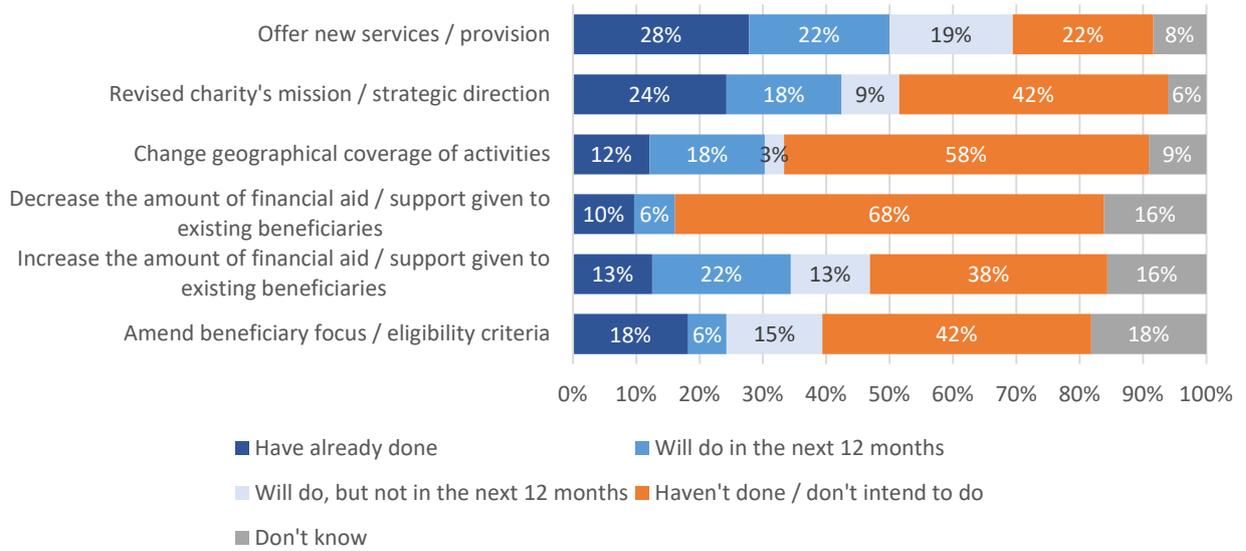
The second most widespread measure is **revising the charity's mission or strategic direction** (51% in total: 24% have already done this, 18% intend to do so in the next twelve months, and a further 9% intend to do so at some point in the future).

48% have or intend to **increase** the amount of financial aid / support given to existing beneficiaries, whilst 16% have or intend to **decrease** the amount given.

39% have or intend to **amend their beneficiary focus or eligibility criteria.**

33% have or intend to **change the geographical coverage of activities.**

All MWCs 2019



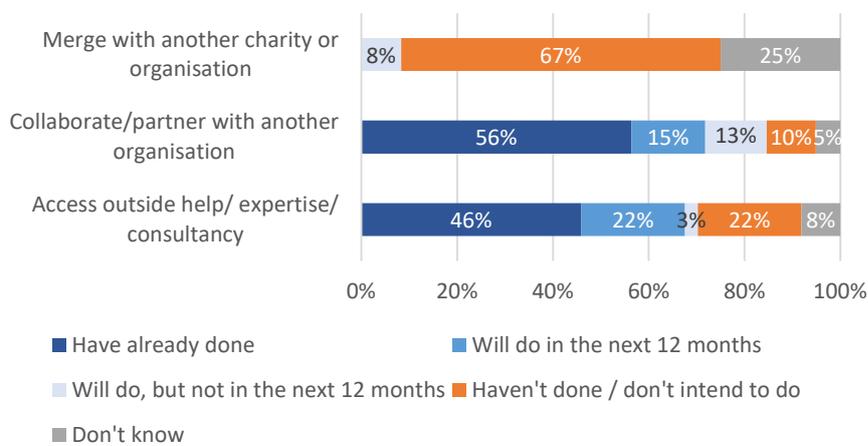
Collaboration / Alliances

In terms of collaboration and alliances, over half (56%) of MWCs surveyed in 2019 report that they have **collaborated or partnered with another organisation** as a result of changes in demand, 15% intend to do so in the next twelve months, and a further 13% intend to do so at some point in the future. This is a small increase from 2017, especially with regard to future plans.

46% of MWCs surveyed report that they have **accessed outside help/ expertise/ consultancy**, 22% intend to do so in the next twelve months, and a further 3% intend to do so at some point in the future. This is a small increase from 2017, especially with regard to future plans.

While in 2017, 9% of MWCs reported having already merged with another charity or organisation, with a further 21% intending to do so in future; in 2019 no further mergers are self-reported by those surveyed, neither are any planned for the next twelve months, with just 8% planning to merge at some point in the future.

All MWCs 2019



Operational

“If you’d asked me that question ten years ago, we’re much better prepared today than we were then, but I think what we’re going to face as the third sector, the charity sector, is going to be quite far reaching and I think we all need to pull together, because I think things like new technologies are really going to challenge us. I think it’s those that have money to invest in those new technologies that are really going to prosper going forward and I don’t think any of the individual charities in the maritime sector have the ability to invest in that on their own...As a sector, we’re going to have to try and do some of that together working collaboratively, because if we try and do that individually, we’re not going to have the funds to do it and we’re going to get left behind, particularly in areas such as fundraising” [MN, RNRM]

In terms of operational changes MWCs have made or plan to make in response to changes in demand, the biggest changes in 2019 have been seen in new technology and marketing.

A massive 89% of MWCs surveyed in 2019 responded that they have or will **increase promotion / advertising / marketing of charity** (36% have already done so, 42% intend to do so in the next twelve months, and a further 11% intend to do so at some point in the future.

Whilst 87% of MWCs surveyed in 2019 responded that they have or will **invest in IT/new technology & online solutions** (38% have already done so, 38% intend to do so in the next twelve months, and a further 11% intend to do so at some point in the future. This has become significantly more prominent since 2017.

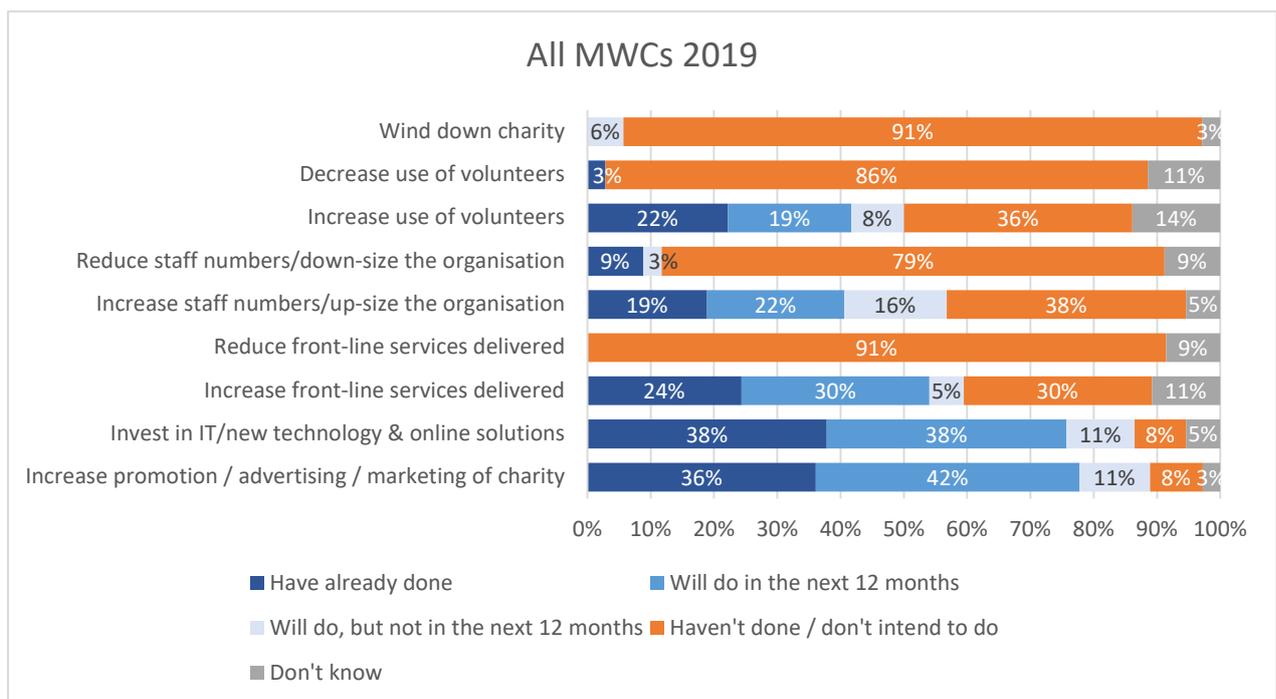
59% have or intend to **increase front-line services delivered**.

57% have or intend to **increase staff numbers/up-size the organisation**.

This pattern roughly matches that seen in 2017.

Additionally, in 2019, 49% have or intend to **increase use of volunteers**.

The proportion of MWCs **reducing staff numbers** has declined since 2017, as has the proportion reducing front line service provision.



9. Challenges facing the maritime sector

In 2019, the two greatest challenges seen to be facing the MWC sector are **raising awareness of the charity or cause** (56%), and **identifying or finding beneficiaries** (56%).

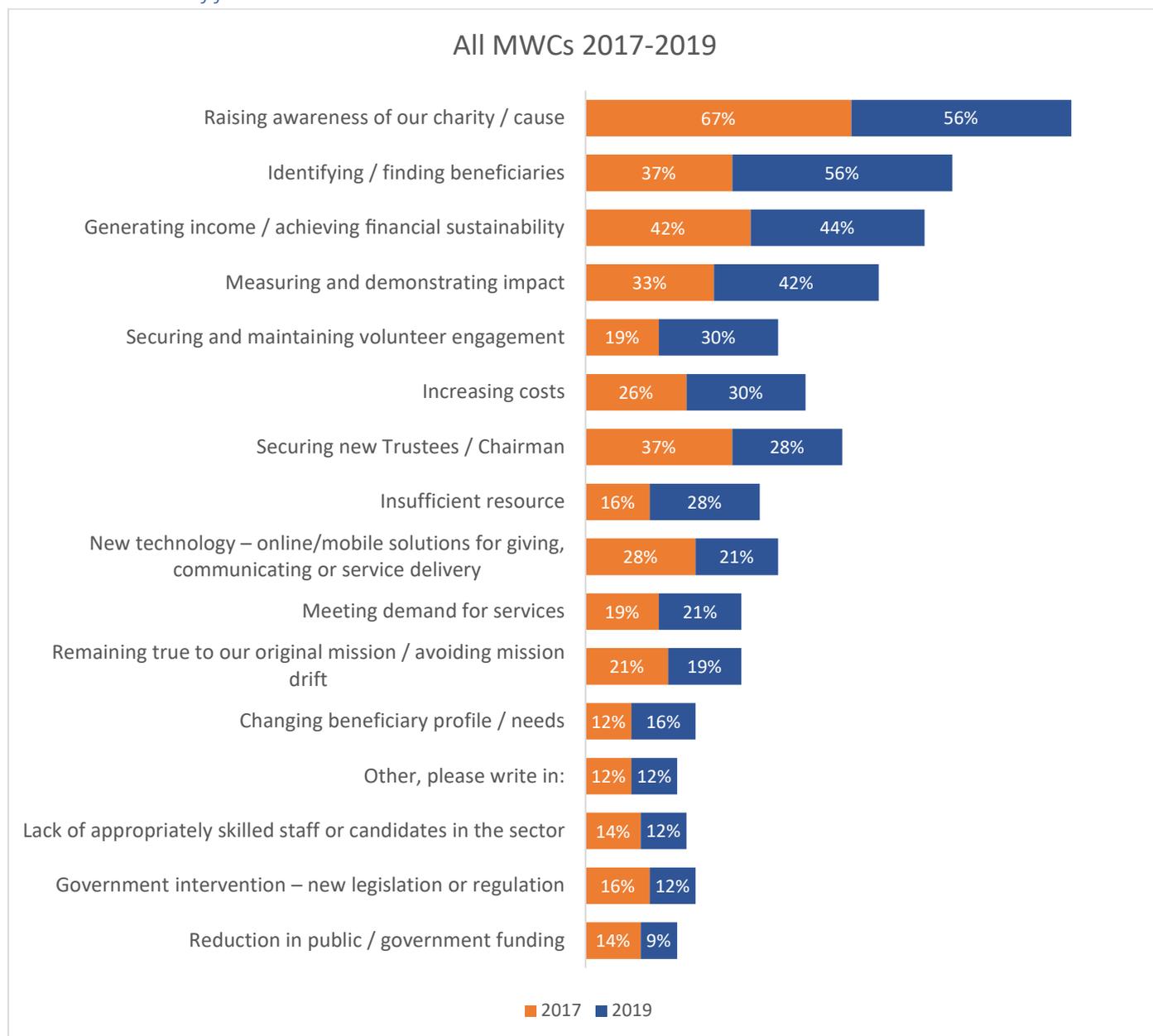
Following these, **generating income / achieving financial sustainability** (44%), and **measuring and demonstrating impact** (42%) were the most mentioned.

Since 2017 there has been some change in these priorities, with **identifying or finding beneficiaries** and **measuring and demonstrating impact** gaining more importance, while **generating income / achieving financial sustainability** has decrease slightly in importance in relation to other issues.

The top 10 challenges currently facing MWCs:

1. Raising awareness of our charity / cause
2. Identifying / finding beneficiaries
3. Generating income / achieving financial sustainability
4. Measuring and demonstrating impact
5. Securing and maintaining volunteer engagement
6. Increasing costs
7. Securing new Trustees / Chairman
8. Insufficient resources
9. New technology – online / mobile solutions for giving, communicating or service delivery
10. Meeting demand for services

Which do you consider to be the most pressing challenges currently facing your organisation? Please select a maximum of five codes



Other challenges identified by MWCs in 2019 include:

Working to pre-empt future need

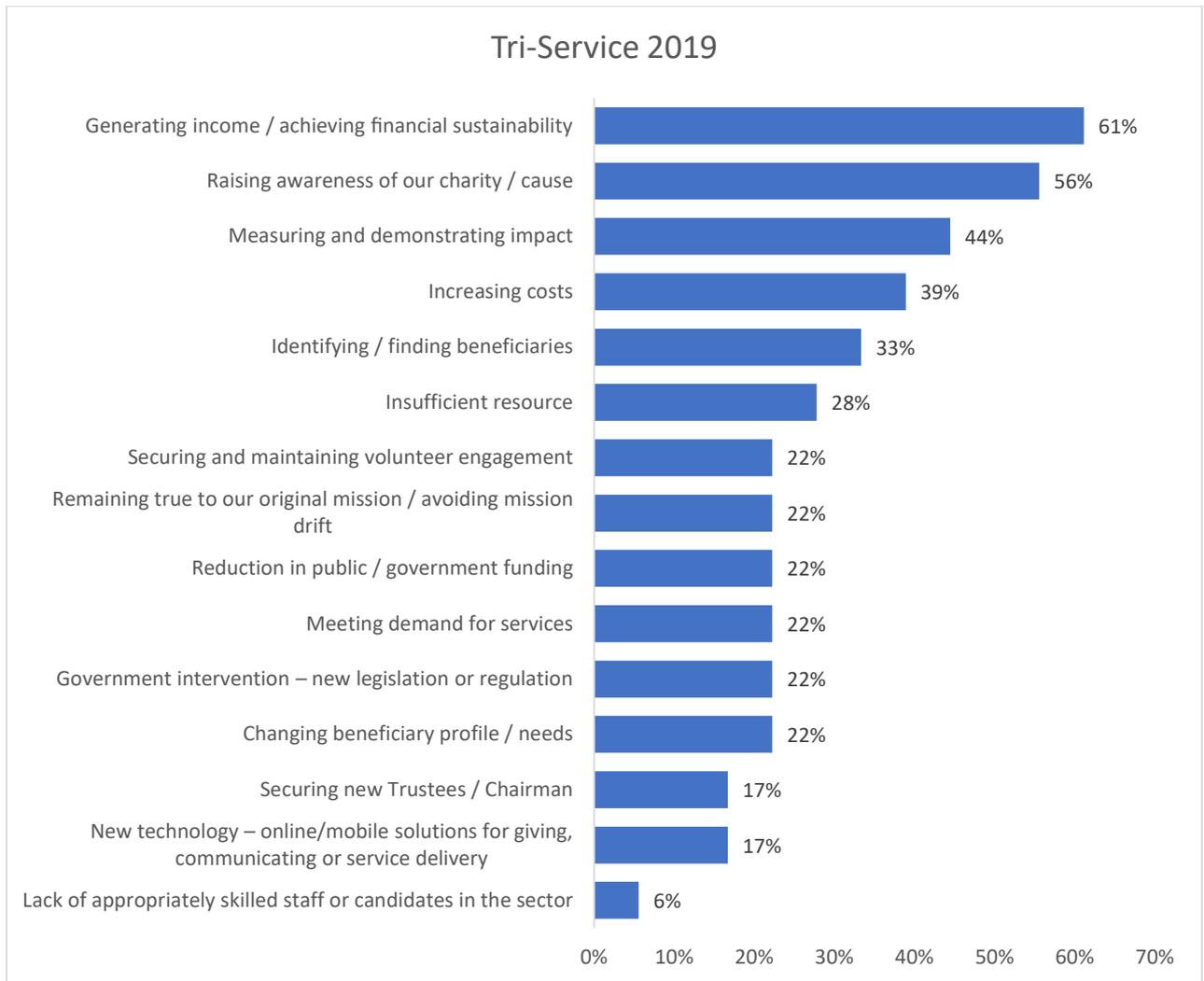
Diversity - not enough women / ethnic minorities

Dissemination and buy-in to new strategy; Leveraging funding; seeing new technology as an opportunity, not a challenge

Getting other sector charities to work in a more cooperative/partnering and efficient fashion

Difficulty in finding qualifying applicants. Very few ex seafarers in this once busy maritime community.

For tri-Service charities, **generating income / achieving financial sustainability** (61%) is seen as the greatest challenge in 2019, followed by **raising awareness of the charity / cause** (56%). **Measuring impact** (44%) is seen as the third most pressing need.



Bibliography

The Maritime Charities Funding Group. (2007). *Supporting Seafarers and their families: Challenges for the Future*. The Maritime Charities Funding Group.

Walker, C., & Fairclough, D. (2017). *Navigating Change: A review of the UK Maritime Welfare Charity sector*. The Maritime Charities Group.

ⁱ This comprised a summary of three separate reports: *Institute of Public Care (2015) 'UK Seafarers' Demographic Profile'*; *Opinion Research Services (2016) 'Older Seafarers' Needs'*; and *Institute of Public Care (2016) 'The needs and aspirations of the dependants and families of seafarers under retirement age'*.

ⁱⁱ Some organisations have been reclassified from the 2017 survey following more recent information about their activities. Therefore, some of the quoted results from 2017 may differ slightly from those published in *Navigating Change* (Walker & Fairclough, 2017), although for the most part this is only a couple of percentage points.

ⁱⁱⁱ Three new providers out of seven responding.

^{iv} Two new providers out of seven responding.

^v Two new providers out of seven responding.

^{vi} Although absolute numbers are fairly low.

^{vii} The matched sample have increased their agreement that **there is adequate signposting within the maritime sector pointing beneficiaries towards the right charity or service to meet their needs** (from 24% in 2017 to 33% in 2019), with more MWCs being uncertain whether or not this is the case.

^{viii} This is a difficult one to fathom. In the matched sample more than 50% of MWCs agree in both years... The only differential appears to be that most benevolence charities answered that they were unsure.