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the support it needs to thrive.



Access to Labour in fishing sector 2023

Online survey findings

Published July 2023



Labour needs in the UK fishing fleet survey 2023

The purpose of the survey was to collect in-depth knowledge about the labour market and in particular the measures implemented by the sector to date to overcome labour shortages.

Survey findings will be used to inform submissions to the Migration Advisory Committee (MAC) review which will commence at the end of May.

Headlines

- Survey covered 102 responses representing 201 fishing vessels and 1330 crew.
- Majority of crew employed on UK vessels are UK/Irish nationals.
- Vessels over 10m using mobile gear are more reliant on non-UK labour.
- 30% of crew covered by the sample are operating under a transit visa.
- Recruitment challenges exist with a majority reporting that they struggle to recruit, and have open vacancies for long periods of time
- A variety of recruitment methods are being used to attract crew. The most common are: word of mouth, online advertising and crewing services.
- Majority of respondents (61%) reported issues with trying to hire local crew, related to factors that local people don't want to work in the industry and local people are not reliable. Respondents that reported issues hiring crew represented bigger multiple vessels owning companies and covered 86% of crew represented in the sample
- Confidence in the ability to hire and retain crew was low
- A number of key skills were reported to be in short supply including handling and repairing gear, and seamanship.

Key findings

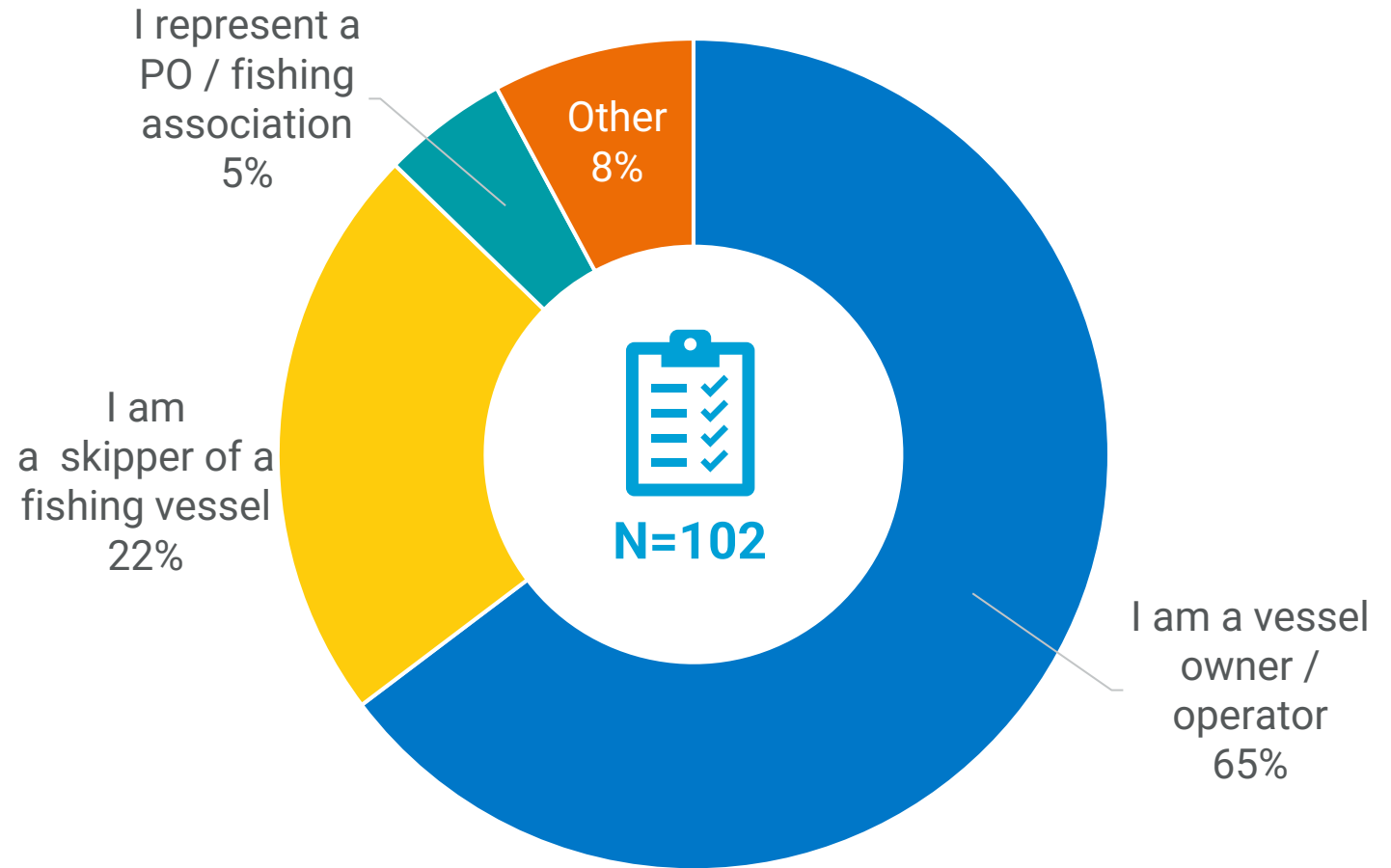
- The responses were provided mainly by vessel owner/operators and skippers from Scotland (57%), England (26%) and Northern Ireland (13%) predominantly representing over 10m fleet using mobile gears (65%)
- 57% of crew covered by the survey are British or Irish.
- 30% of crew reported, across all vessel types, are currently operating via a transit visa. 74% of vessels with crew operating under a transit visa are fishing wholly or mainly outside 12 nm.
- 37% of respondents report having vacancies, amounting to 88 unfilled roles.
- 76% of respondents reported recruitment challenges over the last three years
- 76% of open positions are for deckhands, plus another 18% of respondents are looking for all main on board specialists (deckhands, engineers and skippers).
- 43% of those who have positions open reported to have had outstanding vacancies for over a year.
- A majority of respondents reported finding it difficult or extremely difficult to recruit



Respondents profile (1)

- 102 responses representing 201 fishing vessels and 1330 crew.
- Majority are vessel owner/operators
- Of the 102 responses, 5 were from Producer Organisations who did not provide data. Therefore, the final number of survey respondents is 97.
- The 'Other' category includes mainly skipper/vessel owners and one vessels agent.

Respondents by group

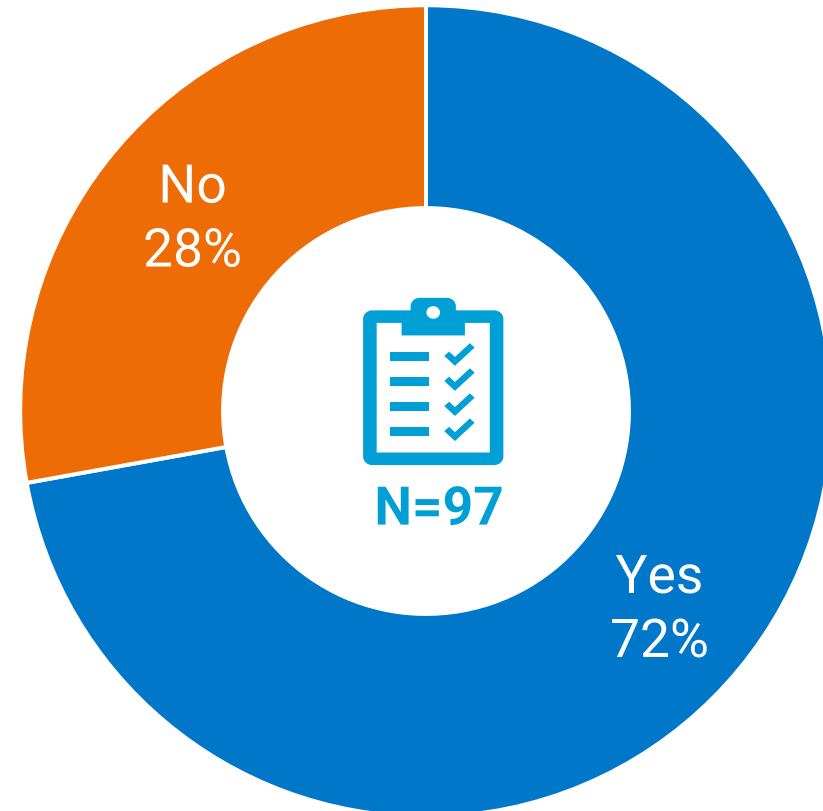


- Number of responses

Respondents profile (2)

- 72% of respondents provided their vessel and contact details. This means that survey responses could be linked to other vessel level specific information held by Seafish.
- Vessel level analysis for the above group was conducted based on the 2022 preliminary segmentation of the fleet. Relevant vessels were assigned to home nations based on their registration.

Would you be willing to provide your company name and vessel details?



Respondents' representativeness (1)

- 57% of respondents were from Scotland, and Scottish registered vessels accounted for 42% of the total surveyed fleet.
- 10% of the total Northern Irish fully active fleet is represented in the survey with 8% of the total English, 7% of the total Scottish and 3% of the total Welsh fully active fleet included*.
- The profile of vessels included in the survey by home nation is similar to the population of the fishing fleet (see mid and outer layers of diagram)

* Only active vessels that earn >10k per year been accounted as population.

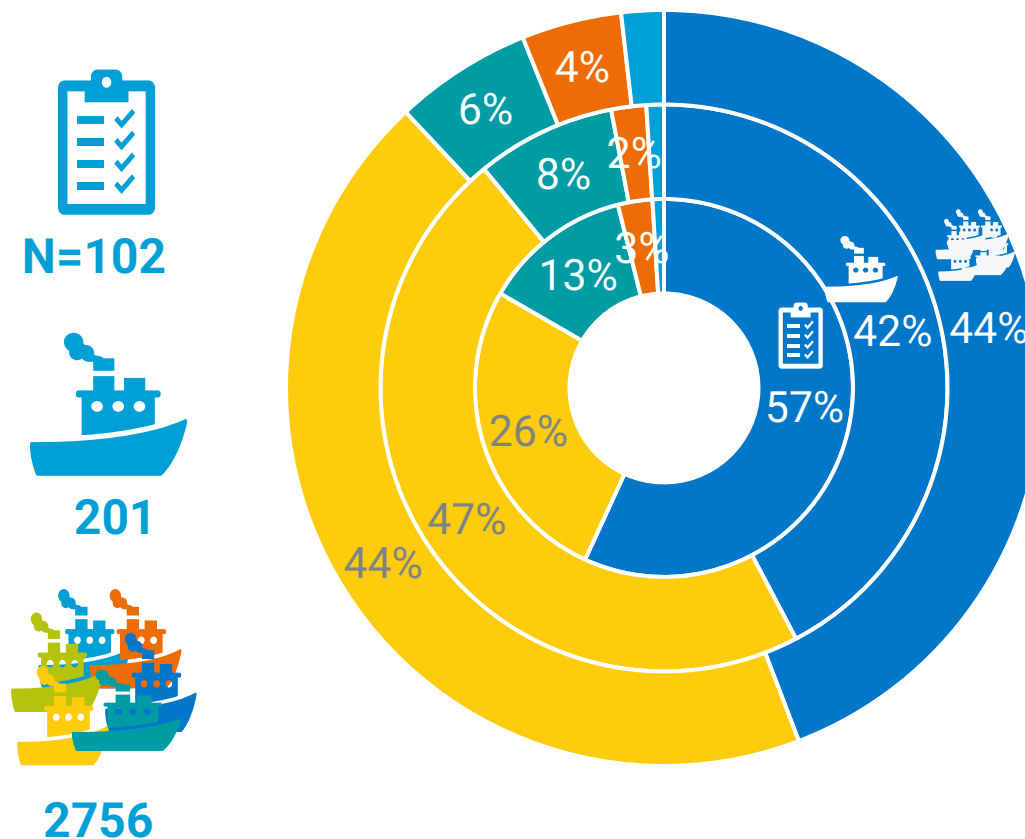


- Number of vessels covered by respondents in the sample



- Number of fully active vessels in the population

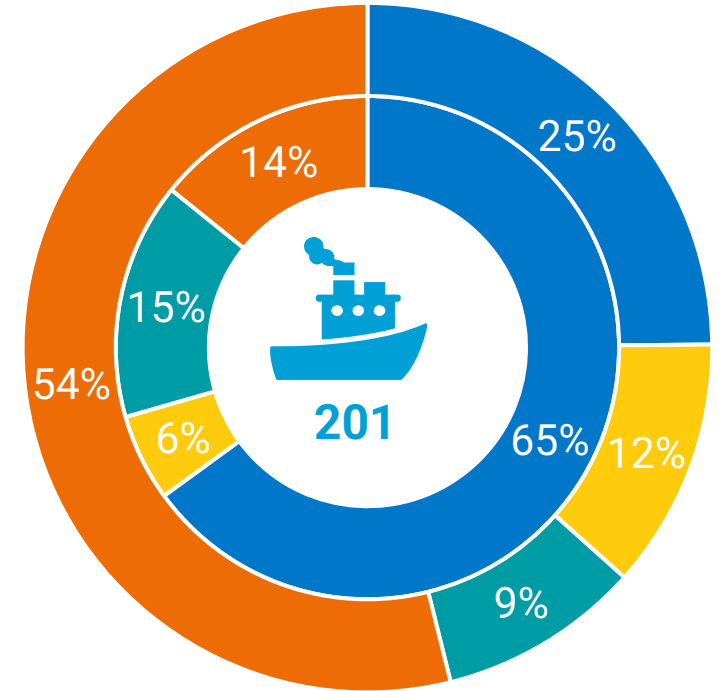
Respondents, vessels and vessels population by home nation



Respondents' representativeness (2)

- The sample is dominated by over 10m vessels predominantly using mobile gears (65% of 201 vessels)

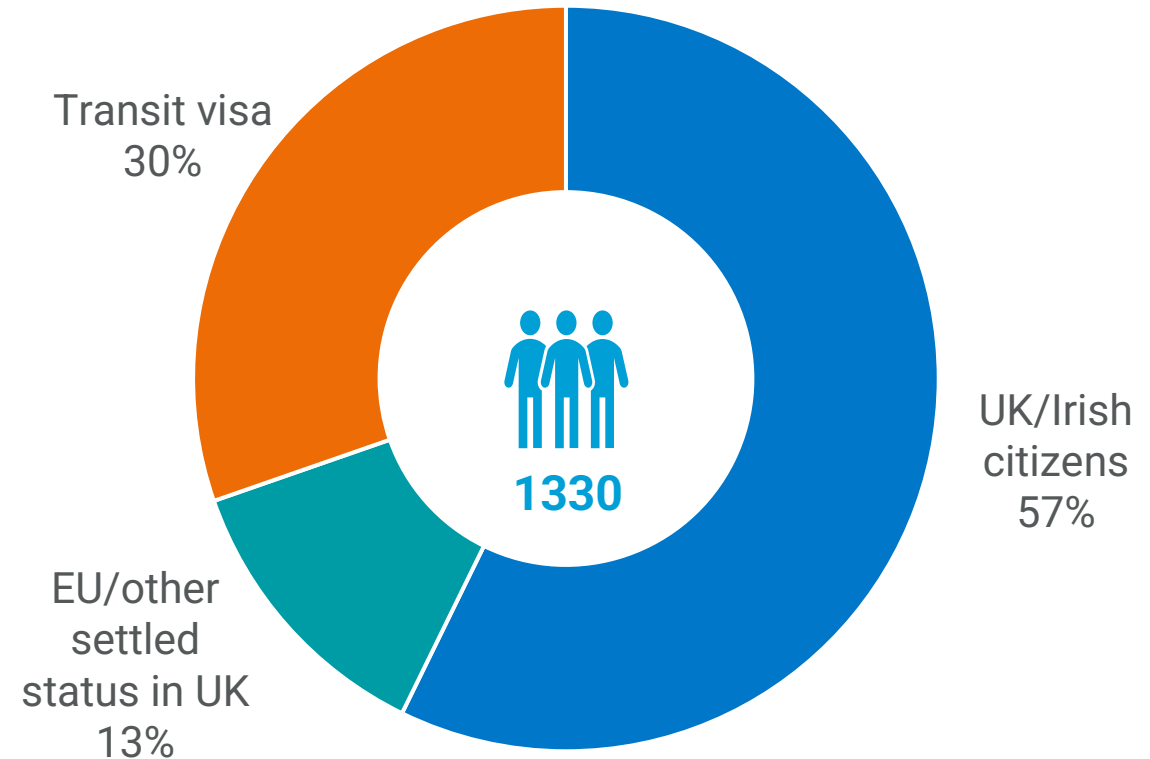
Sampled vessels activities and population by types of activities



- Over 10m mobile gears
- Over 10m static gears
- Under 10m mobile gears
- Under 10m static gears

Crew by migration status

- Of the 1330 crew covered by the survey, 57% were UK or Irish Citizens and a further 13% had EU or other settled status.
- 30% of crew are operating under a transit visa

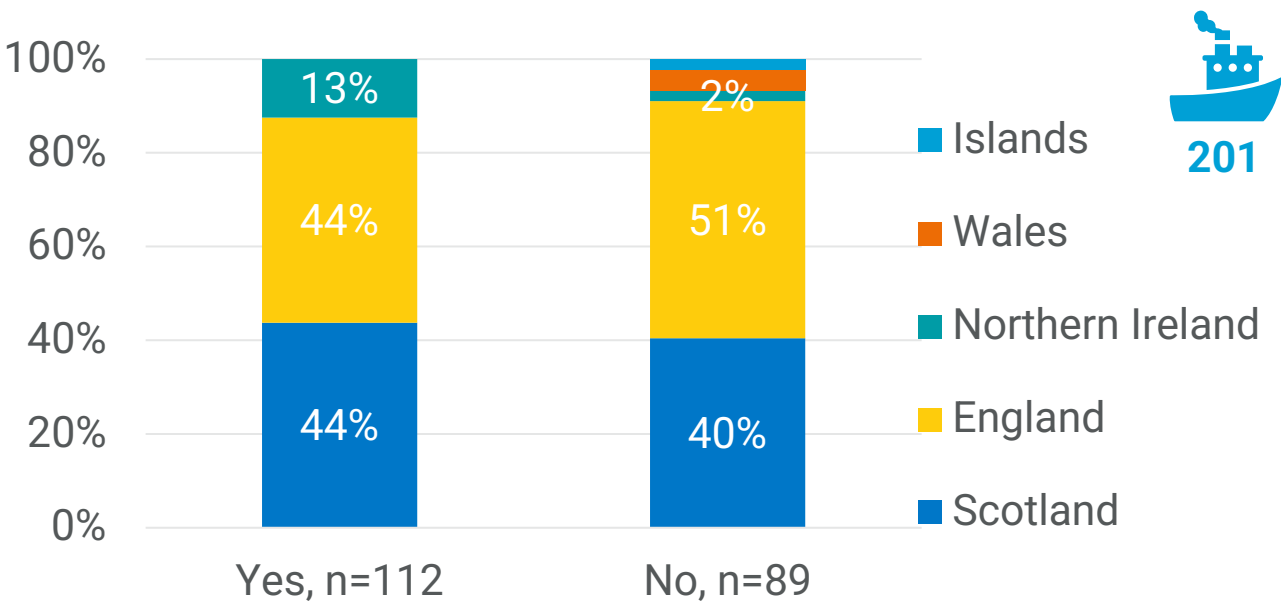
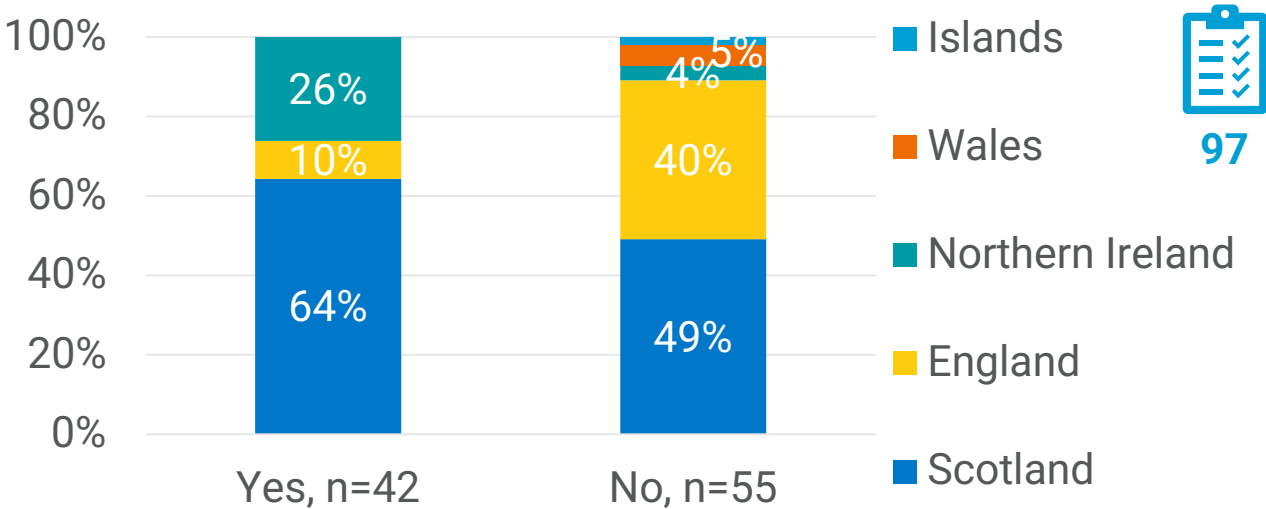


- Number of crew reported by respondents

Use of transit visas

- 43% of survey respondents that represent 56% of vessels and 80% of crew are currently using transit visa route to employ crew from outside UK.
- 85% of respondents from Northern Ireland are currently using the transit visa route to access foreign labour. 50% of Scottish and 15% of respondents from England rely on a transit visa route.
- 64% of respondents that rely on the transit visa route to access crew are registered in Scotland.
- Only 10% of respondents reported using transit visas are operating in England, but they account for 44% in terms of vessels covered. These respondents are on average larger companies owning multiple vessels that are reliant on foreign work force.

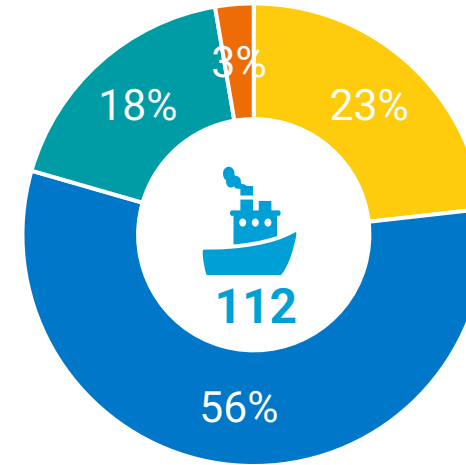
Do you currently use transit visa route to employ crew from outside UK?



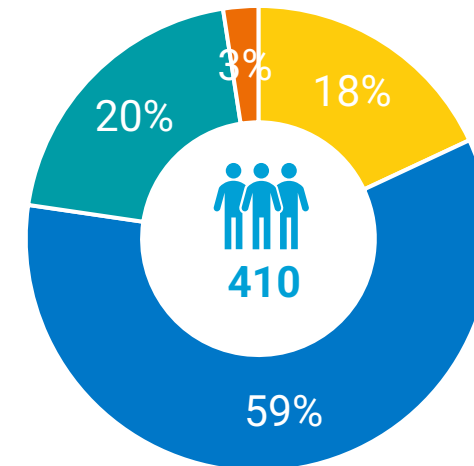
Transit visa use by vessel activity

- More than 50% of vessels covered by the sample (112 vessel, top graph) use crew that are operating under a transit visa. This accounts for 410 crew.
- 74% of these vessels operated mainly or wholly outside 12 nautical miles from the UK coastline. These vessels employed 79% of transit visas holding crew.
- Another 26% of these vessels operate mainly or wholly within 12 nm. Those vessels operate with 21% of transit visa holders.
- The analysis shows that crew operating under a transit visa are working across all areas. This suggests that all fleet segments are, to some degree, reliant on the transit visa.
- All transit visa holders are deckhand and/or engineers.

Vessels using crew on transit visa type of activities



Crew reported on transit visa by vessels area of operation

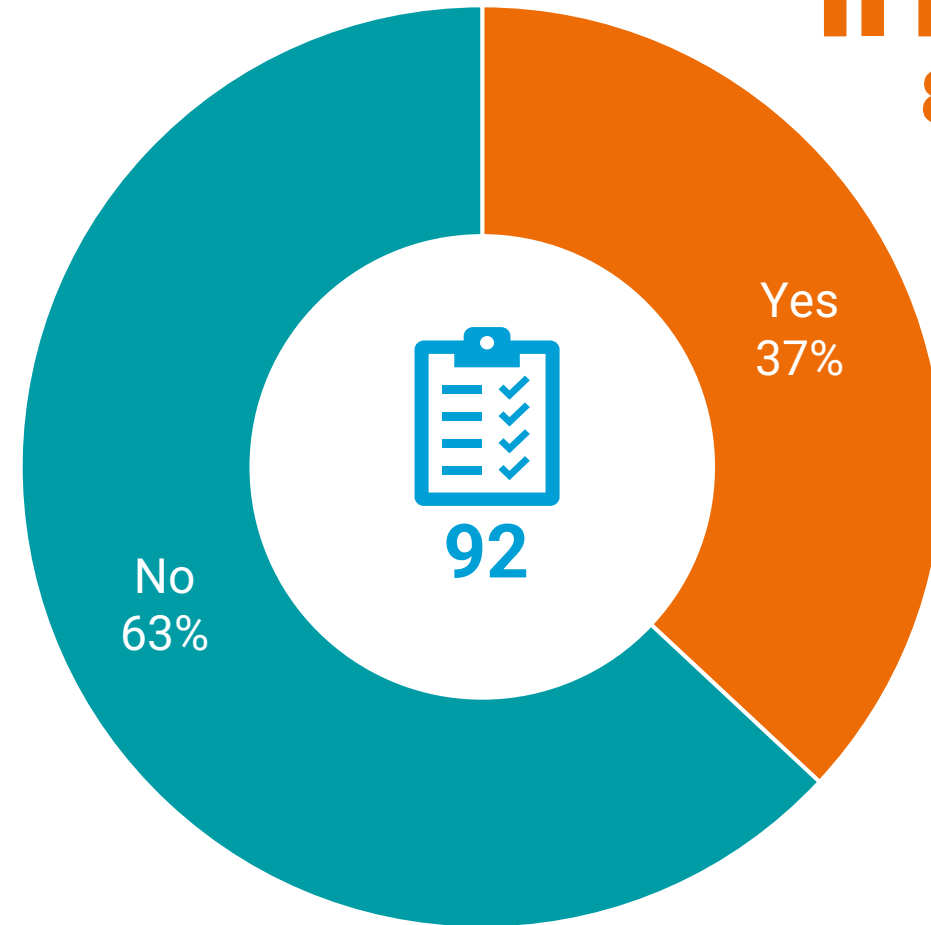


- MAINLY inside 12 nautical miles from the UK coastline
- MAINLY outside 12 nautical miles from the UK coastline
- ONLY outside 12 nautical miles from the UK coastline
- ONLY within 12 nautical miles from the UK coastline

Labour requirements (1)

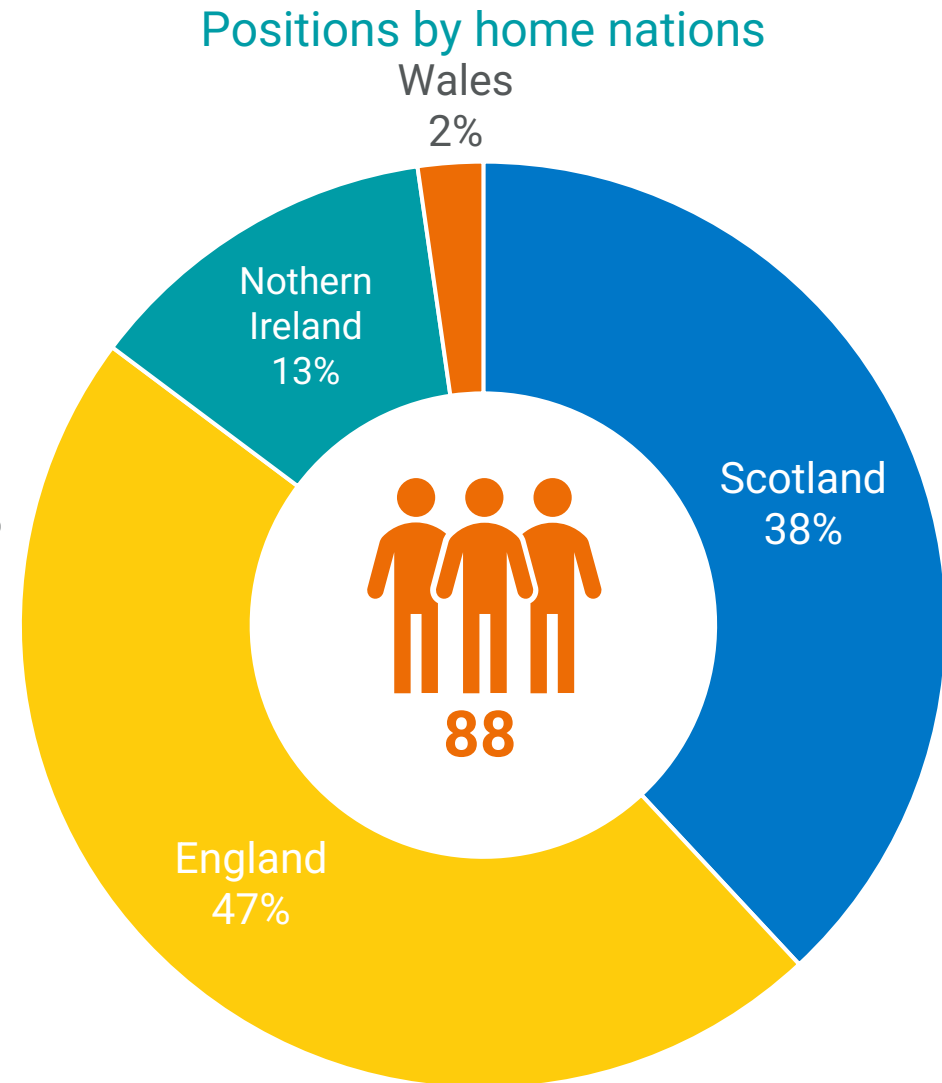
- 37%, or 34 respondents reported they have crew vacancies (88 open positions)
- Those respondents employed 56% of crew covered by the survey and represented 54% of vessels.
- Companies that have positions open tend to be bigger vessel and/or several vessel owners
- Across companies that had positions opened 52% respondents (representing 76% of crew) reported issues hiring personnel in the last three years.

Do you have open positions?



Labour requirements (2)

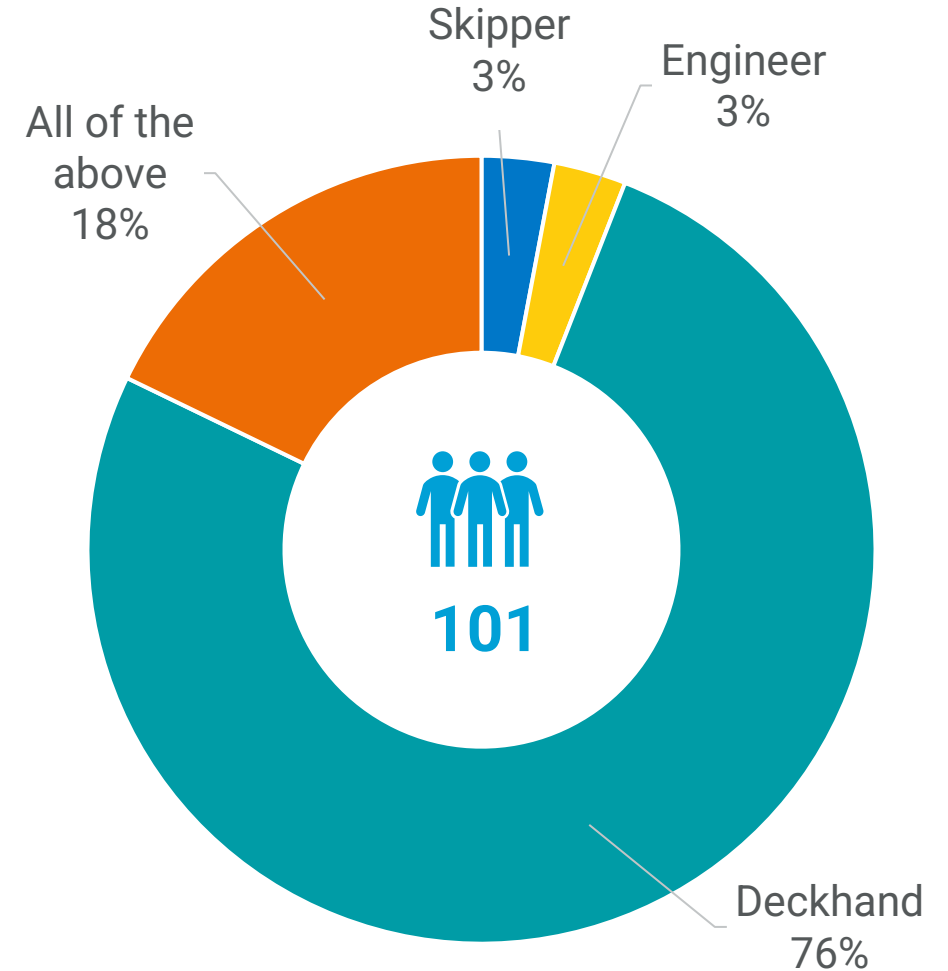
- Across vessels actively seeking crew the average vacancy rate is 12%*. The average vacancy rate on Scottish vessels is 15%, on Northern Irish vessels 38%, while on the English boats it is 9%.
- The majority of vacant positions were reported on English vessels (47%), 38% on Scottish vessels and 13% on Northern Irish vessels.
- If the vacancy rate is calculated overall for the sector as % of vacancies compared to number of jobs within the sample, the vacancy rate in Scotland is 6%, England 6.5% and Northern Ireland 18%.
- Considering that the [Office of National Statistics \(ONS\) estimates](#) that unemployment is at 0.6-1.3% across the agriculture, forestry and fishing sectors there is shortage of local labour to fulfil open positions that explains experience of the sector.



Labour requirements (1)

- The majority of vacant positions are for deckhands (76%).
- 18% are looking to fill in all types of positions (deckhand, engineer and skipper).
- Multiple vessel owners reported that they have boats tied up, or reduced fishing activities due to the absence of suitable and reliable crew.
- Single vessel operators mentioned that they have to work longer hours or operate their vessels single handed due to the shortage of reliable crew.

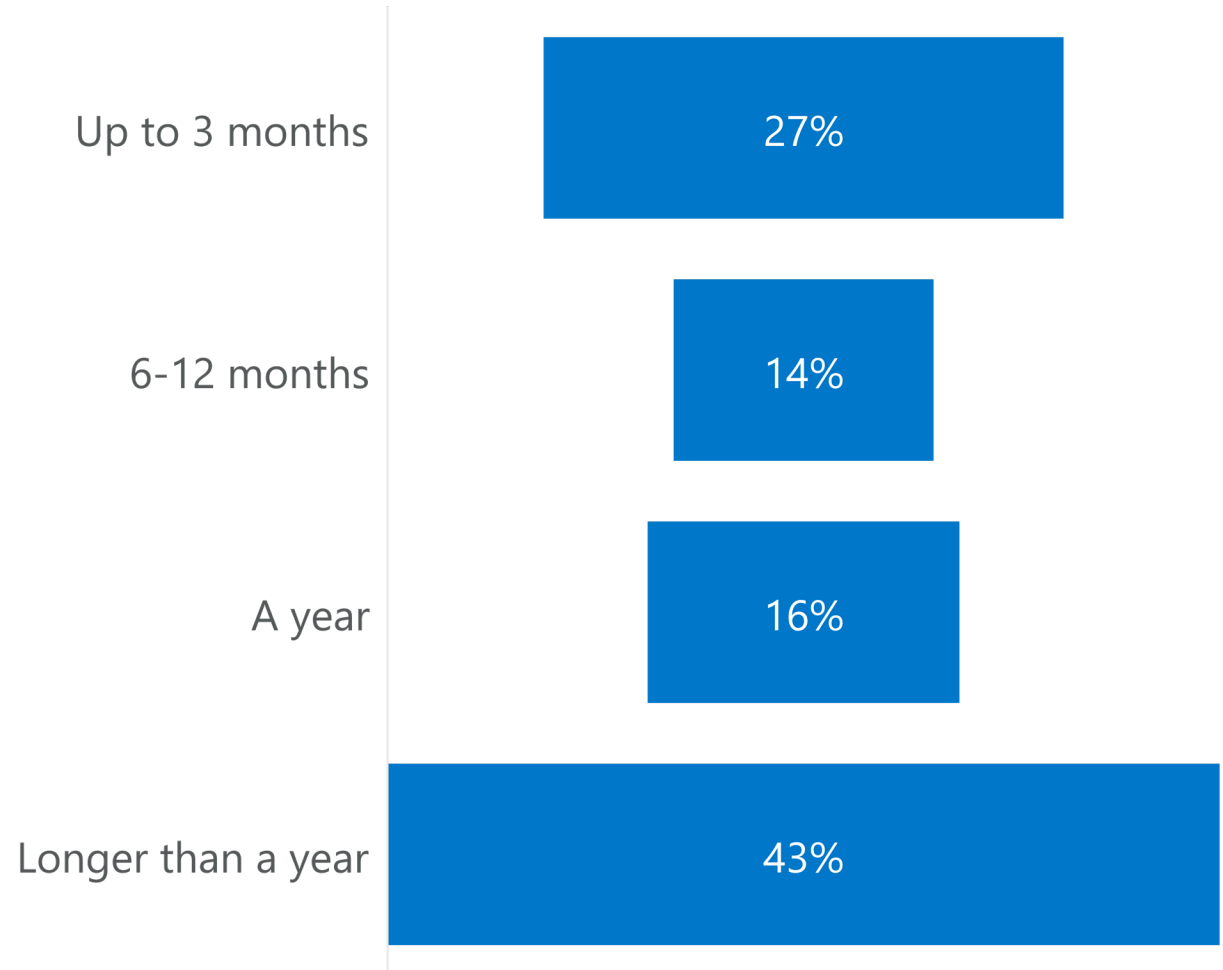
Positions opened by type of job



Labour requirements (2)

- Respondents were asked how long it was taking to fill vacancies.
- 59% of respondents reported that they have been looking for suitable crew for a year or more and/or continuously looking for candidates.

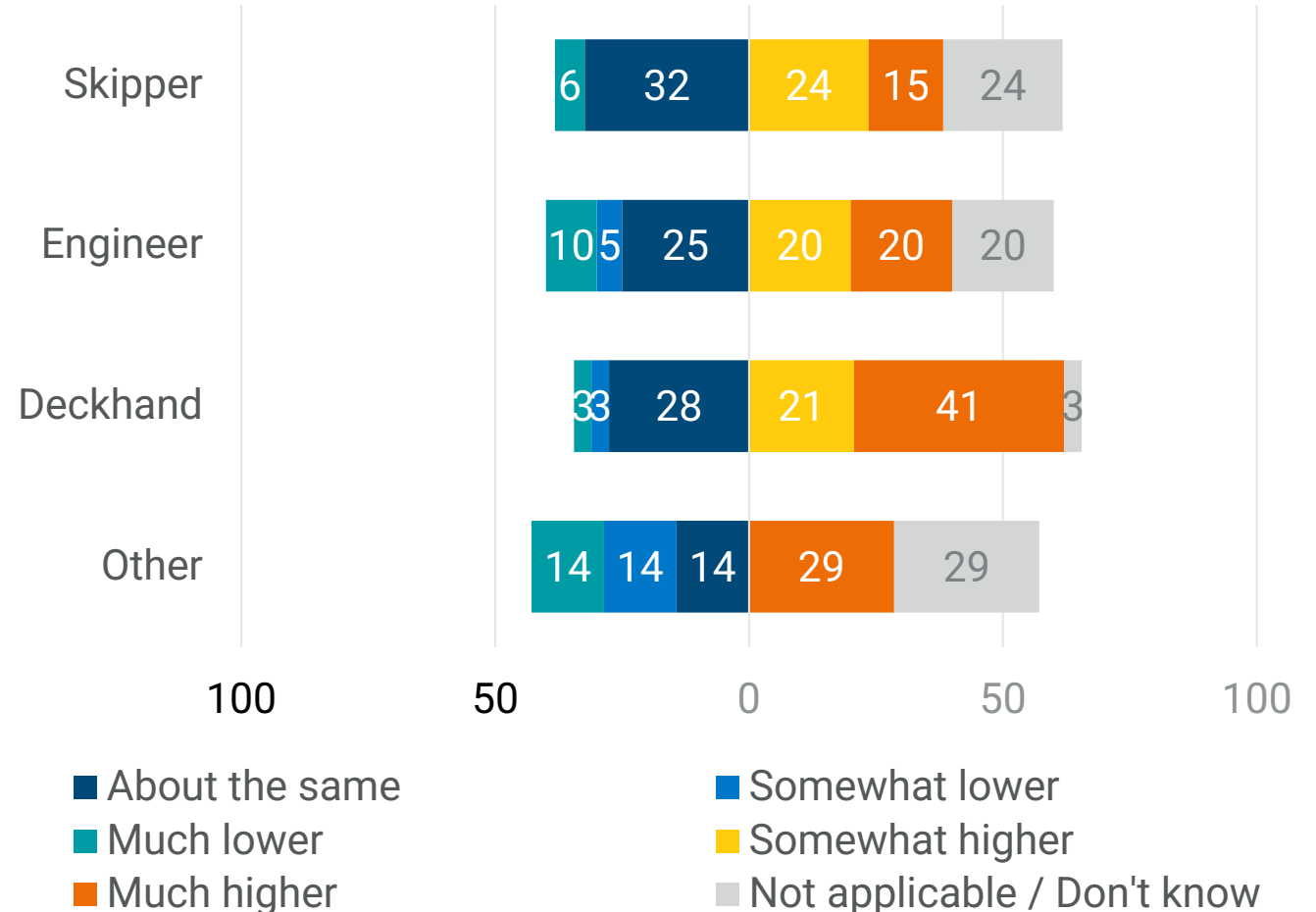
How long have you been trying to fill those positions?



Ease of recruitment

- Respondents told us that the most difficult position to recruit was deckhands.
- Many found it more difficult to recruit than three years ago and found that vacancies were left unfilled for longer periods.
- Many respondents reported finding it extremely difficult or somewhat difficult to recruit.

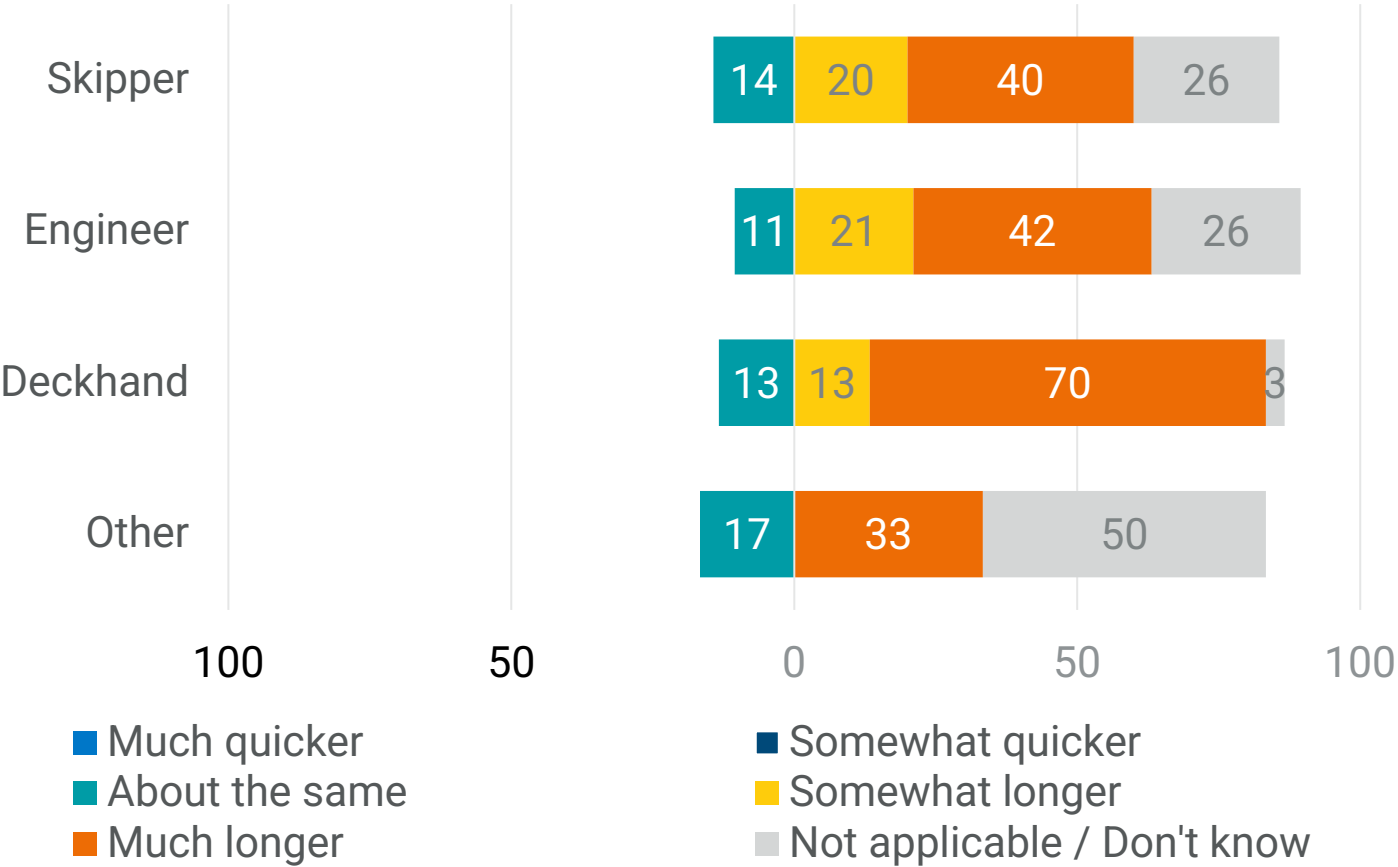
Compared to three years ago, the number of open positions you currently have is...



Duration of recruitment

- Most respondents reported that it takes somewhat longer or much longer to fill in all types of positions on board.

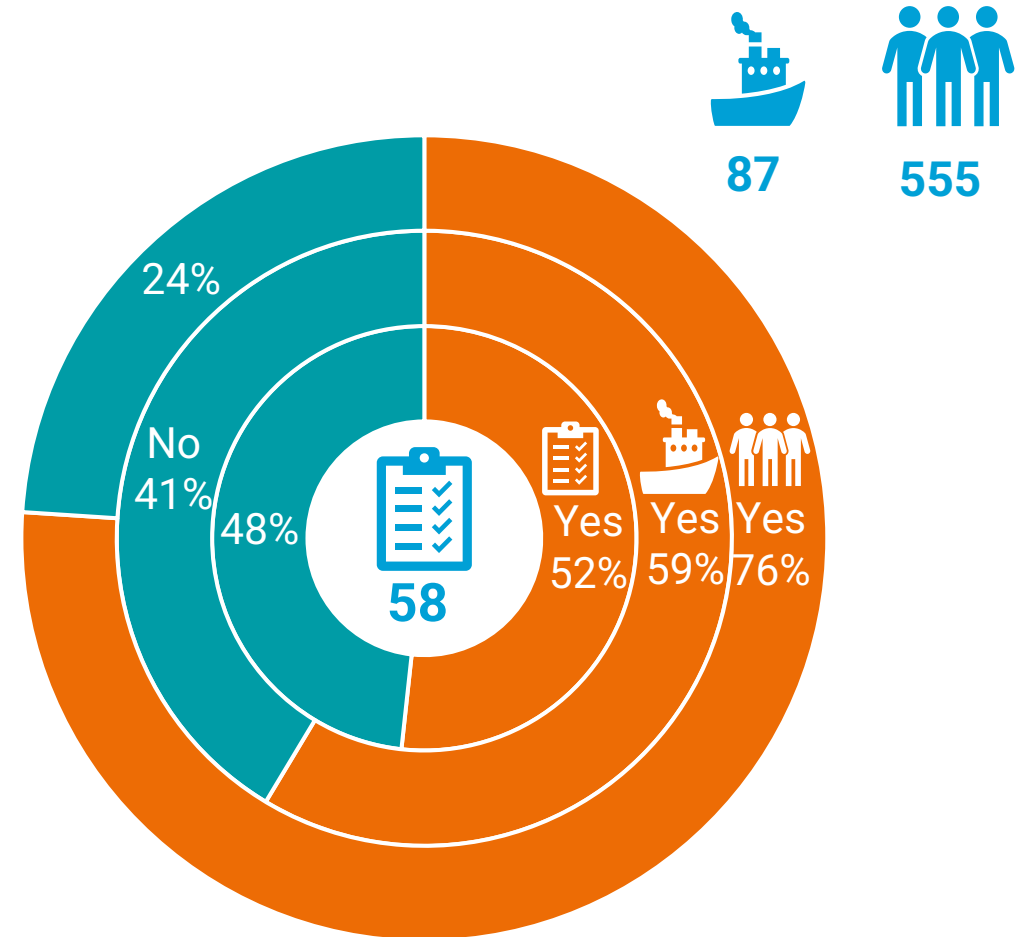
Compared to three years ago, how long does it take you now to recruit for any open positions?



Ease of recruitment (for those who didn't have open positions)

- Those respondents that didn't have any vacancies during the survey were asked generally if they experienced issues hiring people over the last three years.
- 52% confirmed that they had issues hiring people over the last three years.
- As expected those who had issues are predominantly larger companies that own multiple vessels - 59% of vessels and 76% of crew.

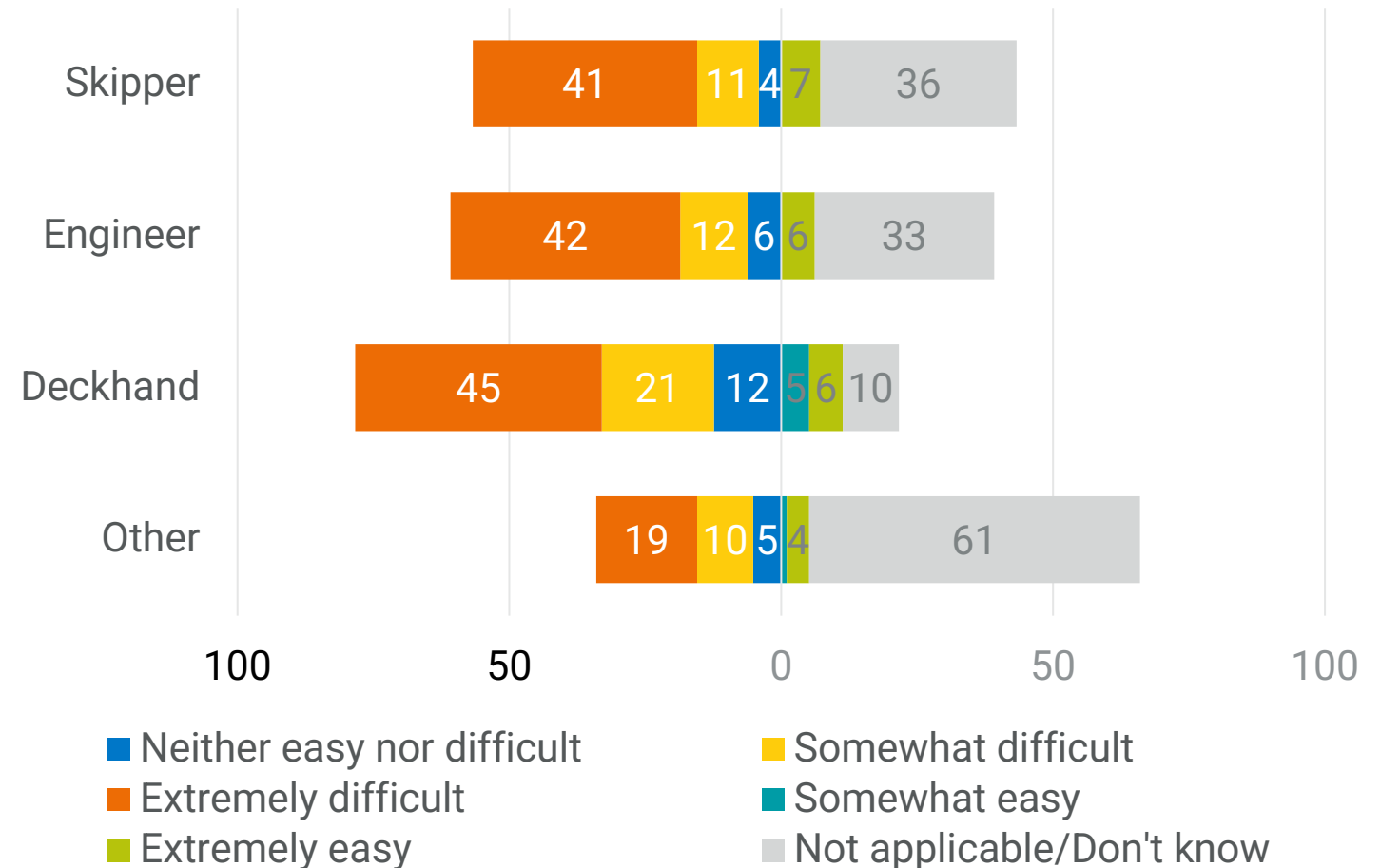
Did you experience issues hiring people in the last three years?



Ease of recruitment

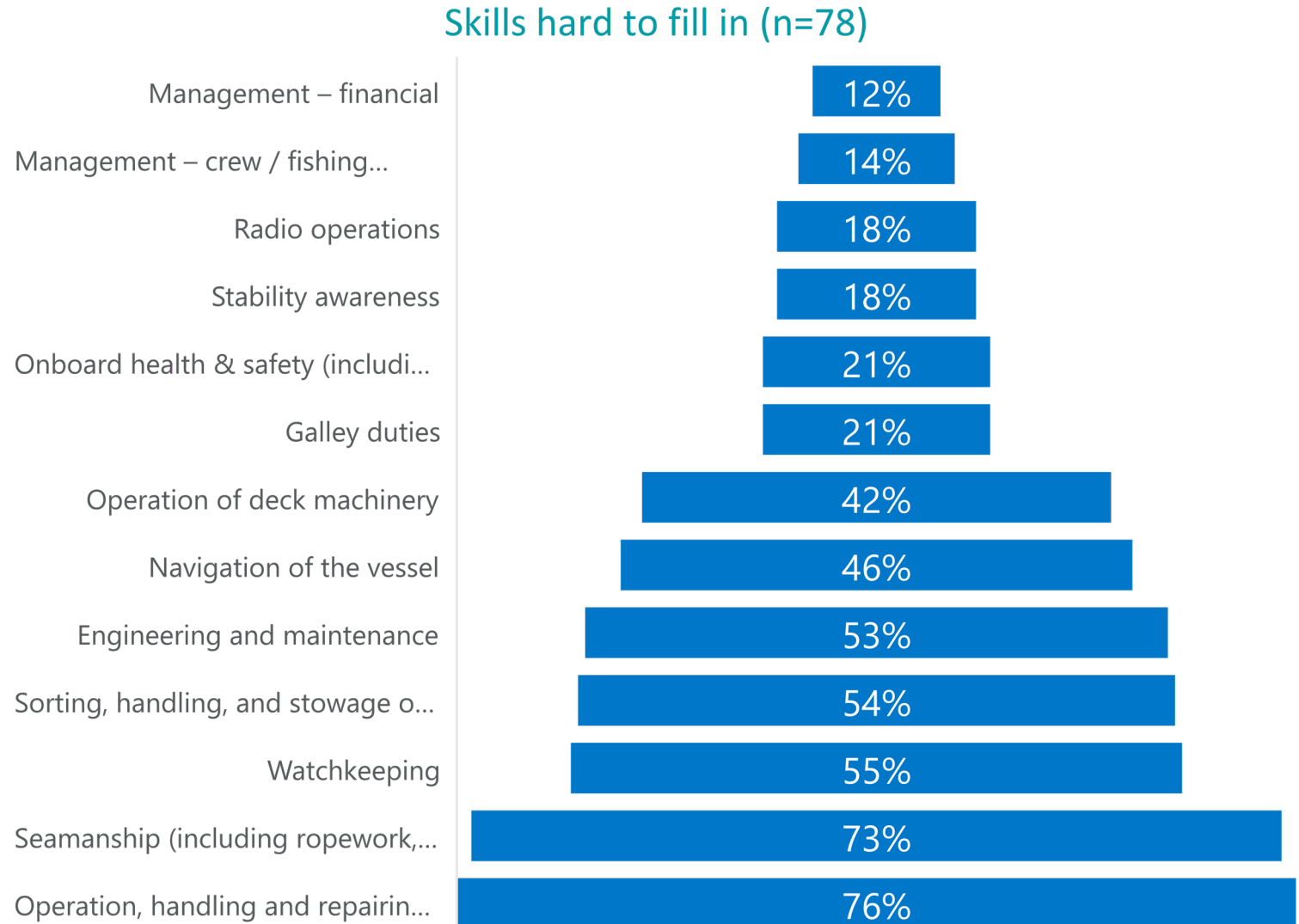
- All 97 survey respondents were asked to provide their general opinion on how easy is to find a suitable candidates.
- Majority of respondents said it's extremely difficult or somewhat difficult.

Generally how easy is it to find suitable candidates to fill the following roles?

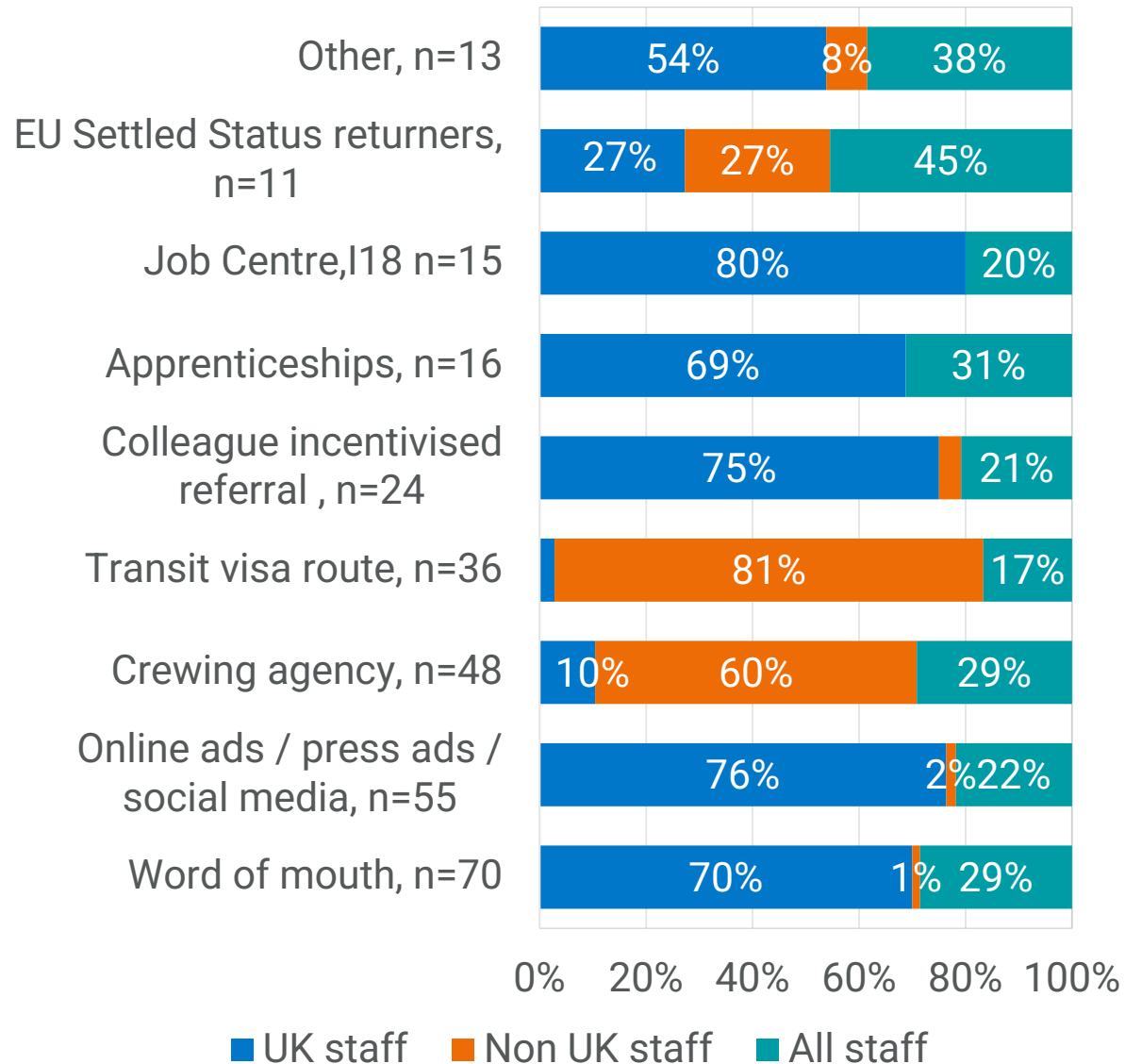


Key skills

- Respondents shared details of the skills that are difficult to fill. The graph presents data in a pyramid format to emphasize the scale of the problem for each role.
- 76% of respondents were struggling to recruit people with adequate gear operation, handling and repair skills. There was also a shortage of seamanship and watchkeeping skills - vital for health and safety whilst operating
- Less challenges were reported in relation to management both financial and human resources at 12% and 14%.



Methods used for recruitment

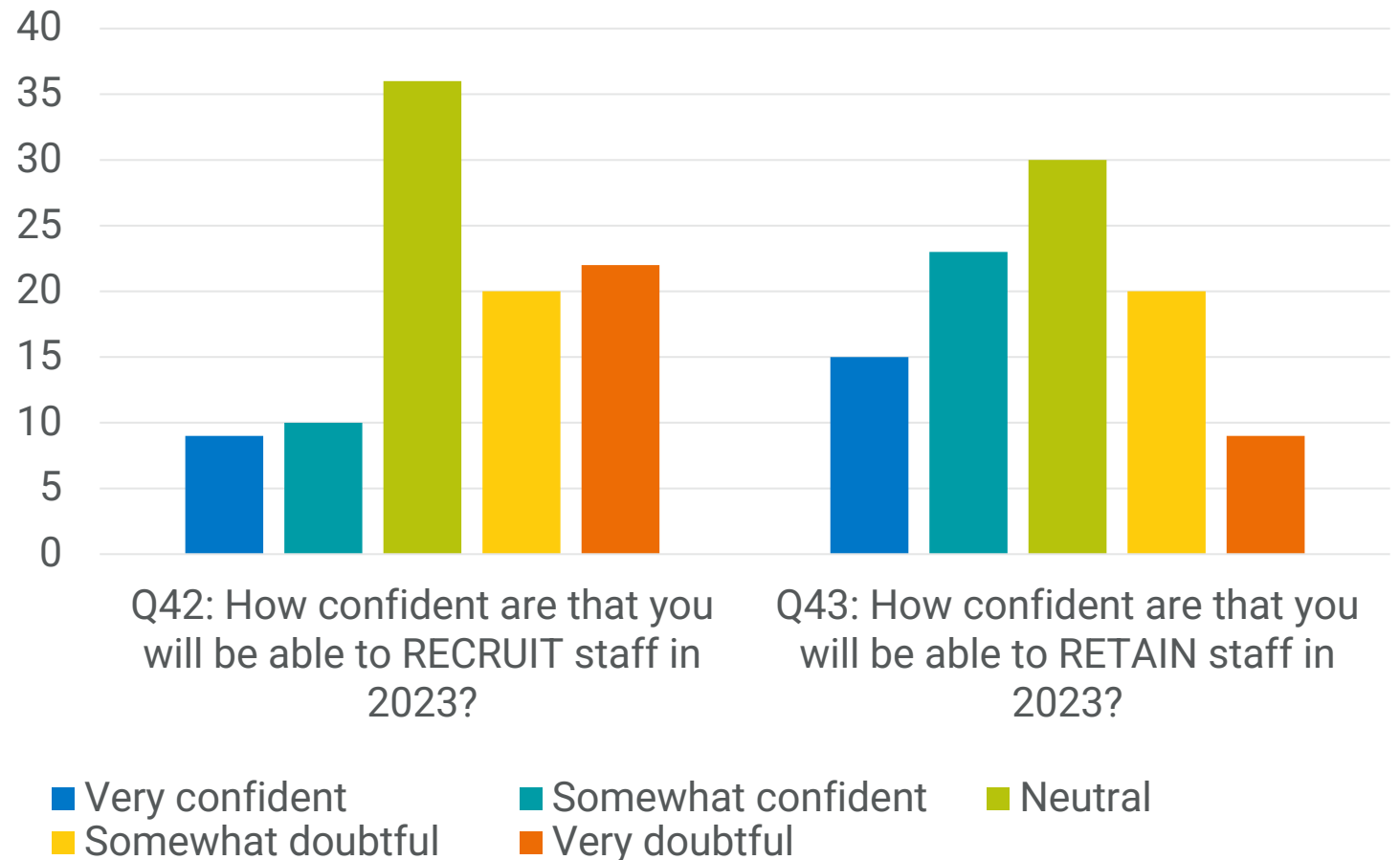


- A variety of methods are used to try and recruit crew. The most common are; word of mouth, online advertising (through Face Book and <https://www.findafishingboat.com/>)
- Different methods are used depending on the origin of the crew.
- Foreign crew:
 - Working with crew agencies and attracting foreign employees through transit visa route
 - EU Settlement scheme are the most common routes to employ non-UK staff.
- Domestic crew
 - Word of mouth
 - Online ads/press ads and social media
 - Apprenticeships
 - Job centers

Recruitment and retention

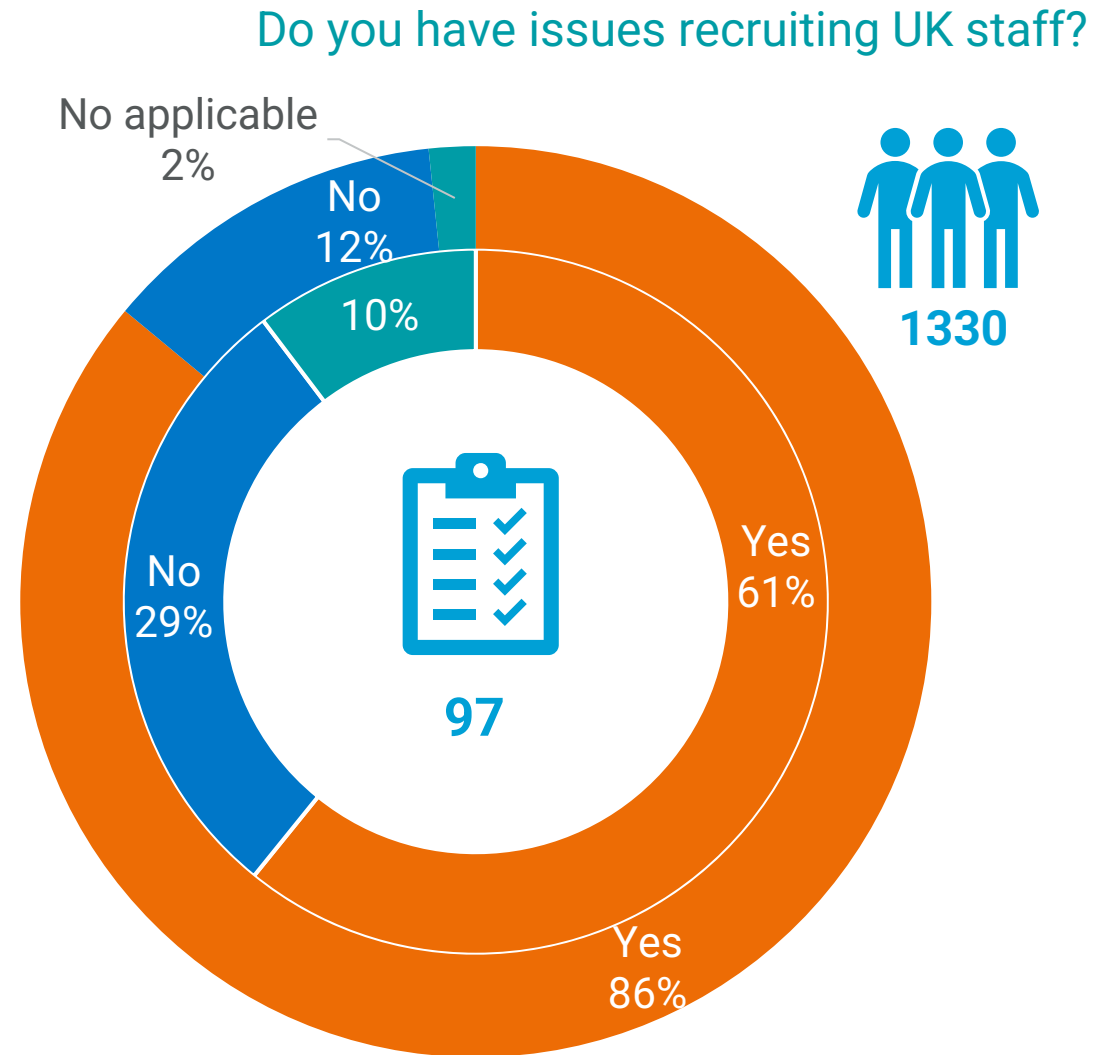
- Low confidence in their ability to recruit was reported by a significant proportion of the respondents
- Respondents were more optimistic about crew retention, but confidence was still relatively low

Confidence in ability to recruit and retain staff in 2023



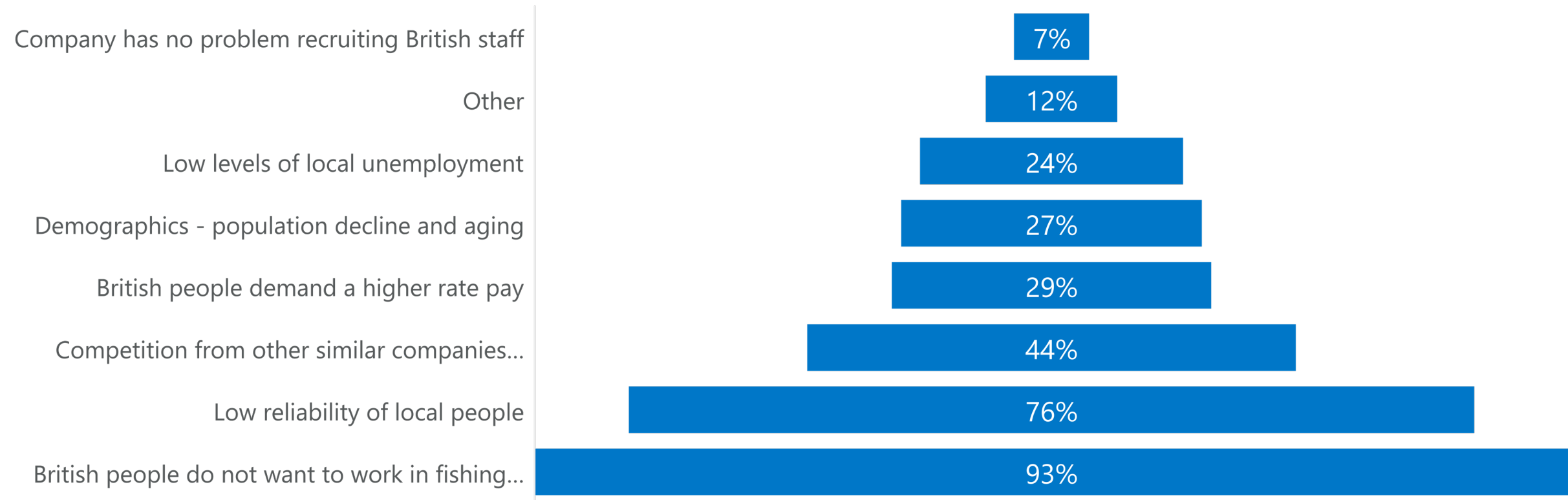
Recruitment challenges (UK staff)

- Most respondents (61%) reported having issues finding suitable candidates in UK
- Those who had issues hiring local staff represented 86% of employment within the sample and are mainly bigger companies/vessels hiring more employees compared to those who didn't report any issues.
- 79% of respondents that currently use transit visa route mentioned having issues recruiting UK crew. Companies using transit visa route and having issues recruiting locally tend to be bigger companies owning multiple vessels and providing more jobs.



Main barriers recruiting UK staff

- The survey found that the biggest barriers to recruitment were directly linked to the attitudes and behaviors of residents who reportedly do not want to work in the fishing industry and were unreliable.
- This is then followed by high levels of competition within the industry with some fishermen feeling they cannot compete with larger crews/vessel owners.



Methodological notes

1. Online survey shared through the social media and industry representatives
2. The survey started on 8th of March and was open till 21st of March
3. The questions in the survey form were organised with branching logics therefore people were prompt to answer some questions only if that was relevant to them, e.g. questions on use of transit visa, question related to experience on the labour market and others.
4. Vessel owners and skippers were asked to provide information about the number of employees and vessels they own/represent. This information been used to calculate coverage compared to the most recent information available for the active fleet.
5. See survey form could be shared if requested.



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