SEAFISH ECONOMIC ANALYSIS

UK Seafood Processing Sector Labour
Quarterly Report 6 (January - March 2019)

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Executive Summary

- In April 2019, Seafish collected data on the ease of recruitment and retention of staff in the UK seafood processing sector during the first quarter of 2019 (January – March) as part of a two-year series of quarterly surveys. The sample of processors responding represents 30% of total FTE jobs in the sector and 17% of all processing companies in the UK.

- A quarter of seafood processors in the sample said that they had found it harder to fill vacancies in the first quarter of 2019 (January – March) than in the last quarter of 2018 (October – December). Nearly 70% found no difference.

- A quarter of respondents said the time to fill vacancies had increased in the first quarter of 2019 compared to the last quarter of 2018. Nearly 70% reported no difference.

- Small processors found it more difficult to fill vacancies than large processors. A third of processors in FTE bands 1-10 and 11-49 said they found it harder to fill vacancies than in the previous quarter, while a third of the largest sites (250+ FTEs) said recruitment was easier than in the preceding quarter. More than half of the respondents across all site sizes reported no difference.

- Respondents in Scotland, excluding Grampian, found it most difficult to recruit (40% said recruitment was harder than in the preceding quarter), followed by England, excluding Humberside (27%), and Northern Ireland (25%).

- Nearly 80% of respondents in Humber found no difference in recruitment from the previous period, as did more than 60% of respondents in Grampian and nearly 75% of respondents in England, excluding Humber. The only regions to report that recruitment had become easier than in the previous quarter were Grampian (15% of respondents) and Scotland excluding Grampian (13%).

- Nearly two thirds of respondents said that ease of recruitment in the first quarter of 2019 had not changed since the first quarter of 2018. Nearly one third found it had become harder.

- It took on average 14.5 days to fill vacancies in the first quarter in 2019. This is similar to the last quarter of 2017 and the first quarter of 2018, but lower than the second and third quarters of 2018.

- The key factor affecting recruitment in the first quarter of 2019 was a shortage of suitably skilled candidates.

- The most common method of direct recruitment among respondents was Word of mouth, and for indirect recruitment, the most common method was Employment agency.

- Almost half of respondents said the main barrier to recruiting British staff remains the negative perception of the processing sector held by potential candidates.

- More than 80% of processors in the sample said they would increase efforts to recruit locally if they were unable to hire enough staff using their current recruitment techniques. More than half would increase use of employment agencies.

- In regards to staff recruitment and retention, respondents were most confident in their ability to retain both high-skilled and low-skilled labour in the next quarter (nearly 70% of respondents were either very confident or confident). They were least confident about their ability to recruit enough high-skilled staff (nearly 40% of respondents were slightly doubtful or doubtful).

- More than 60% of respondents said they were either confident or very confident in their ability to meet planned levels of production in April - June 2019. A quarter of respondents said they were neutral in their ability to meet planned levels of production, and one tenth was slightly doubtful or doubtful.

- A comparison of data from all six quarterly surveys indicates that processors have become more doubtful in their ability to recruit low-skilled staff. This may be related to the EU exit, as data indicates the change only applies low-skilled staff, not high-skilled staff.

Contents

1. Introduction and background

Research by Seafish has shown that the seafood processing sector is heavily reliant on workers from other EEA countries. There have been reports from the sector that the labour pool is contracting, with some processors reporting a shortage of locally available workers at current wage rates. It is important for policy makers and industry to have accurate information about recruitment and staff retention in the seafood processing sector. This report presents the findings of the sixth quarterly survey on ease of recruitment in the seafood processing sector carried out by Seafish as part of a UK-wide project funded by Defra.

At project design meetings held by Seafish in October 2017, seafood processors recognised that recruitment and retention of workers was becoming a concern for some businesses. At the meeting it was agreed that more information on recruitment in the sector was needed to inform future policy decisions.

It was agreed that Seafish would carry out a series of quarterly surveys to collect quantitative and qualitative evidence from processors on ease of recruitment, confidence in recruiting and retaining enough staff, and adaptations businesses would make if they could not recruit enough workers. Key research questions this study aimed to address were:

- How has the changing labour market affected recruitment and retention of staff?
- What are the main barriers to recruiting British staff in the seafood processing sector?
- How do companies plan to adapt if they are unable to recruit and retain a sufficient workforce?
- What investments in automation could processors make if they cannot get enough workers and how would investment impact the number of staff businesses need to employ?

The first quarterly survey was carried out in December 2017 alongside the first Seafish annual survey of workforce composition in the seafood processing sector. In total, six quarterly surveys and two annual surveys have been carried out.

Findings of all quarterly and annual surveys are available on the Seafish website[1]. The next and final quarterly survey for the period April-June 2019 will be carried out in July-August 2019.

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[1] Available here: https://www.seafish.org/article/processing-labour-and-recruitment

2. Methods

The sixth quarterly survey was carried out in April – May 2019 and asked about processors' experience of recruitment in the preceding quarter (January – March 2019) and other questions relating to recruitment and retention of staff (see Appendix 1).

All UK seafood processors received questionnaires by email and were invited to complete the survey electronically. Some companies were contacted and interviewed by phone to ensure a good level of geographical coverage.

Seafish collected data from 60 processing companies in the sixth quarterly survey on recruitment and retention of staff. Table 1 shows the breakdown of sampled processors by size band, i.e. number of Full-Time Equivalent (FTE) jobs within each size band sampled in the survey, and the survey coverage in regards to total number of processing sites.

The sample for quarter six includes 25 responses from processors in England, 31 from Scotland, and 4 from Northern Ireland. There were no responses from processors in Wales.

Table 1. Number of survey responses by processor size (FTE band), total number of processors surveyed, and coverage as a percentage of total number of processing companies.[2] Source: Seafish

	Q1 Oct-Dec 2017	Q2 Jan-Mar 2018	Q3 Apr-Jun 2018	Q4 Jul-Sep 2018	Q5 Oct-Dec 2018	Q6 Jan-Mar 2019
1-10 FTEs	9	2	7	6	12	9
11-49 FTEs	26	14	26	22	20	24
50-249 FTEs	15	15	24	16	28	23
250+ FTEs	15	19	16	15	3	4
Total no. of processors sampled	**65**	**50**	**73**	**59**	**63**	**60**
Perc. of processors sampled	**19%**	**14%**	**21%**	**17%**	**18%**	**17%**

According to the 2018 Seafish processing sector census, there are 19,190 FTE jobs in the UK seafood processing industry.[3] The processors that submitted data for this quarterly survey covered nearly 5,700 FTE jobs and accounted for 30% of the total FTEs as per the 2018 census (see Table 2).

Table 2. Survey coverage by FTEs. FTEs and FTE coverage is determined according to the 2018 Seafish processing sector census.[4] Source: Seafish

	Q1 Oct-Dec 2017	Q2 Jan-Mar 2018	Q3 Apr-Jun 2018	Q4 Jul-Sep 2018	Q5 Oct-Dec 2018	Q6 Jan-Mar 2019
FTEs in samples	9,933	10,249	10,437	10,673	6,834	5,676
FTE coverage	52%	53%	54%	56%	36%	30%

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[2] Seafish has about 349 seafood processing sites in their database.
[3] The survey was sent to majority processors, which Seafish defines as deriving 50% or more of their turnover from fish processing activities.
[4] FTE coverage % has been updated to reflect FTE data from the 2018 census. The number of FTEs increased between the 2016 and 2018 censuses, resulting in lower percentage coverage numbers in this report compared to previous reports.

The number of responses has remained relatively stable since the first quarterly survey but the FTE coverage declined in the fifth and sixth quarterly surveys due to reduced participation from larger processors (see Table 1 and Table 2).

Several of the large processors have stopped participating in the survey, which has affected FTE coverage considerably. Processors have commented that they are asked to complete many surveys, so part of the explanation is most likely survey fatigue. Another factor could be that processors have been preparing for the prospect of hard EU-exit.

3. Ease of recruitment in the seafood processing sector

Processors were asked if they had found it easier, harder or experienced no difference in ease of recruitment in the first quarter of 2019 (January-March) compared to the last quarter of 2018 (October-December).

Over two thirds of survey respondents reported no difference in ease of recruitment in the first quarter of 2019 compared to the last quarter of 2018. Nearly one quarter found it harder to fill vacancies than in the period October – December 2018 (see Figure 1).
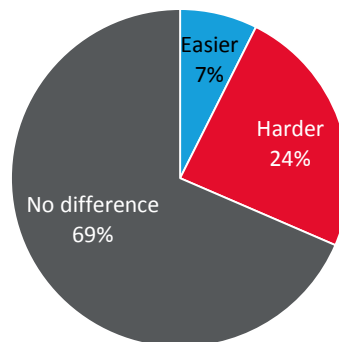

Figure 1. Proportion of processing sites in the sample reporting that recruitment in the first quarter of 2019 (January – March 2019) was easier, harder, or no different than in October-December 2018 (based on responses from 60 processors) Source: Seafish.

Small processors reported more difficulty in filling vacancies in the first quarter of 2019 than in the final quarter of 2018. A third of processors in the 1-10 and 11-49 FTE size bands said they had found it more difficult to fill vacancies in the first quarter of 2019. The majority of processing sites across all FTE bands reported no difference in ease of recruitment during the period January – March 2019 (Figure 2).
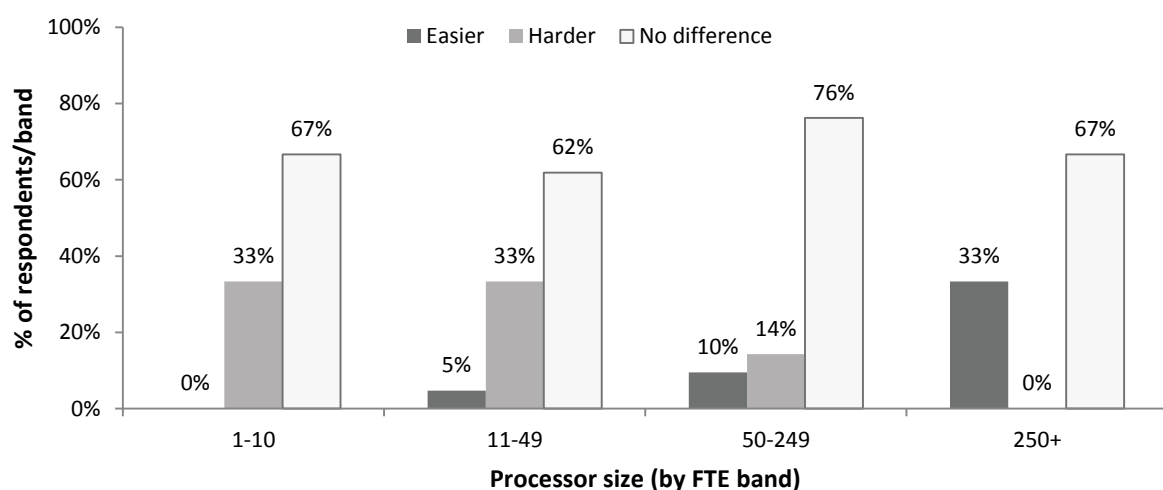

Figure 2. Ease of recruitment in the first quarter of 2019 by FTE band. Source: Seafish.

Figure 3 shows ease of recruitment by region. Humberside and Grampian are shown separately. The reason is that these regions are the UK's key processing hubs, accounting for 30% and 23% of FTEs in the sector respectively.

The majority of processors, irrespective of region, found no difference in ease of recruitment. Processors in Scotland outside the Grampian region reported the highest difficulty in recruitment with 40% of respondents saying recruitment had become more difficult.
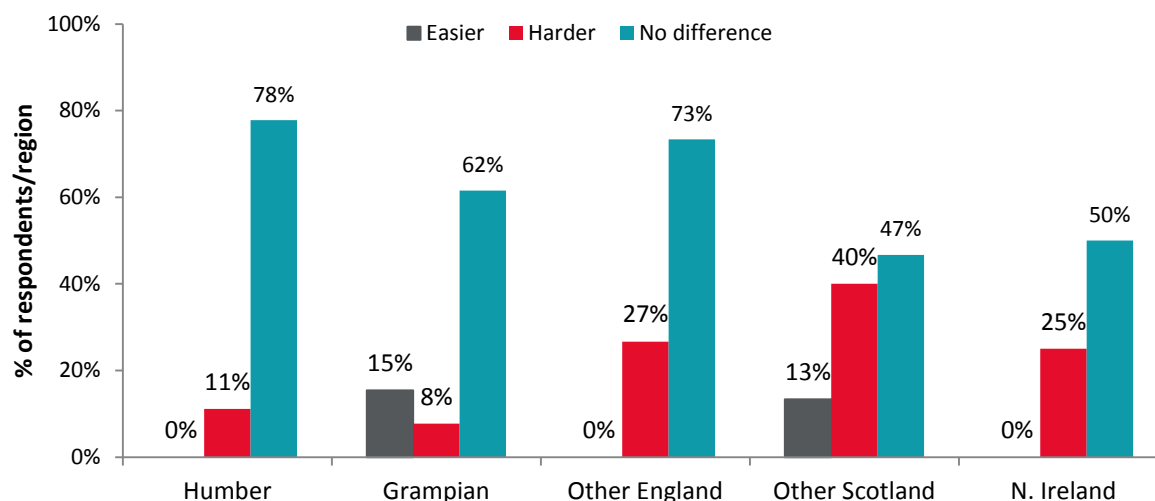

Figure 3. Proportion of processors in the sample reporting that recruitment in the first quarter of 2019 (January-March 2019) was easier, harder, or no different from the previous quarter by region. Due to the number of survey responses, data from the rest of England and Scotland (excluding Humberside and Grampian respectively) are aggregated. There were no respondents from Wales. Source: Seafish.

Just under 30% of respondents in England, excluding Humberside, reported that recruitment had become more difficult, as did a quarter of respondents in Northern Ireland.

In Grampian and Humberside, 78% and 62% of respondents reported no difference in ease of recruitment since the previous quarter.

Seafood processors in the Grampian region on average employ the largest proportion of non-British staff in the UK[5]. This suggests that seafood processors in the Grampian region are more likely to be affected by changes in the availability of European workers, but this is not reflected in responses in the latest quarterly survey. This topic is explored further in section 9.

About two thirds of respondents said there was no difference in recruitment in the first quarter of 2019 compared to the first quarter of 2018, suggesting that ease of recruitment has not changed much since last year. However, almost one third reported that it had become more difficult to recruit in the first quarter of 2019 compared to the same period in 2018 (Figure 4).

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[5] Seafish Economic Analysis: UK seafood processing sector labour report 2018. Available here: https://www.seafish.org/article/processing-labour-and-recruitment
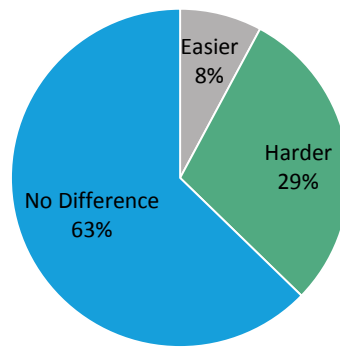
Figure 4. Proportion of processing sites in the sample reporting that recruitment in the first quarter of 2019 (January – March 2019) was easier, harder, or no different from the same period in 2018. Source: Seafish.

Two thirds of respondents reported no difference in the time it took to fill vacancies in the first quarter of 2019 compared to the last quarter of 2018, while a quarter reported an increase in the time to fill vacancies (see Figure 5).
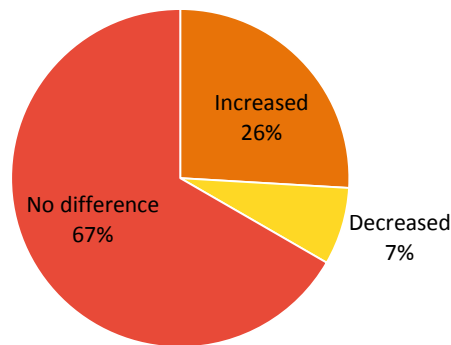

Figure 5. Proportion of processors in the sample reporting that the time to fill vacancies increased, decreased or was no different in the first quarter of 2019 (January – March 2019) compared to the previous quarter. Source: Seafish.

The average time it took processors to fill vacancies since the surveys began are listed in Table 3. In three of the periods, the average time was around 14 days. The peak was in the period July-September 2018, when processors reported it took them on average of 27.7 days to fill vacancies.

Table 3. The average time it has taken to fill vacancies since the first survey in 2017. This question was not included in the survey covering the last quarter of 2018. Source: Seafish.

Period	Oct-Dec 2017	Jan-Mar 2018	Apr-Jun 2018	Jul-Sep 2018	Oct-Dec 2018	Jan-Mar 2019
Average no. of days to fill vacancies	14.5	14.2	20.9	27.7	N/A	14.5

4. Factors affecting recruitment in the seafood processing sector

Processors were asked which factors they believe affects recruitment in the processing sector. The question was open ended and the below are the most common responses (Figure 6).

More than one in ten survey respondents said that a shortage of suitable candidates was the main factor affecting recruitment.
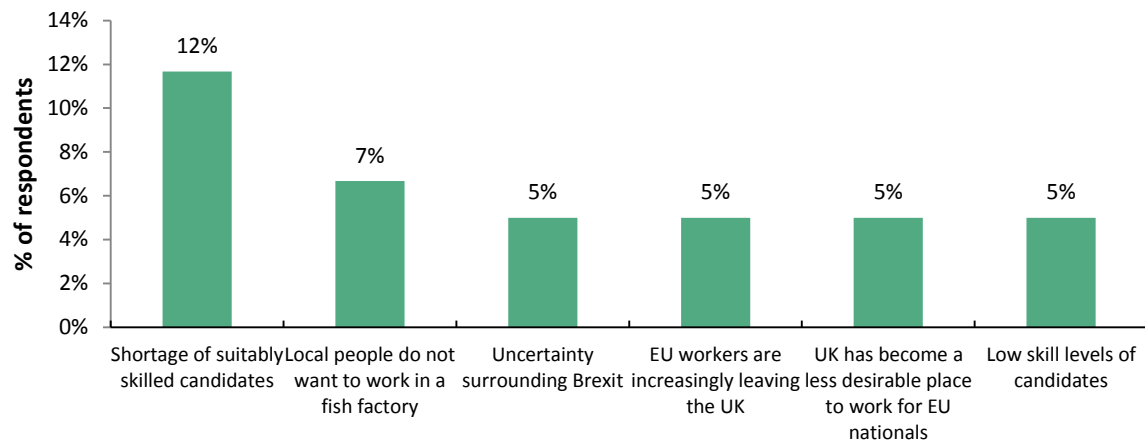

Figure 6. Barriers to recruitment in the seafood processing sector in January – March 2019. Respondents could comment on all factors, positive or negative, that applied to their company. Source: Seafish.

Many processors believe the current political climate is affecting recruitment. Some respondents attributed their recruitment difficulties to uncertainty surrounding the UK leaving the EU (5% of respondents), EU workers leaving the UK (5%), or said that the UK has become a less desirable place to work for EU nationals (5%).

> "More Eastern Europeans are going back home and fewer new ones are arriving."
> - Seafood processor

Other factors reportedly affecting recruitment are that local people do not want to work in a fish factory (7%) and low skills levels of candidates (5%).

5. Recruitment methods in the seafood processing sector

The most commonly reported method used for direct recruitment of permanent, temporary and seasonal staff in the seafood processing sector is illustrated in Figure 7.
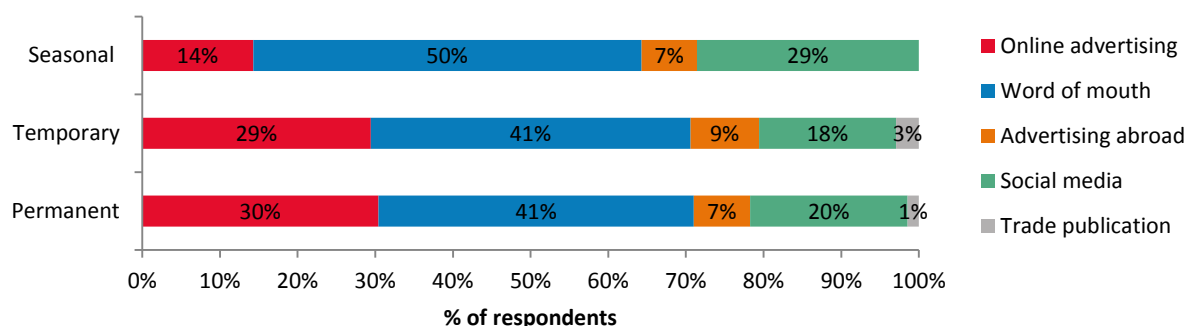

Figure 7. Methods reported for direct recruitment of permanent, temporary and seasonal workers in the seafood processing sector in January – March 2019. Graph illustrates percentage of responses for seasonal, temporary and permanent roles. Respondents were able to comment on multiple factors that applied to their site. Source: Seafish

The most commonly reported method of direct recruitment was Word of mouth. For seasonal workers, half of responses were Word of mouth, while for temporary and permanent roles, 41% of responses were Word of mouth. In total, Word of mouth was logged 49 times.

Other popular methods of direct recruitment were Online advertising and Social media. The least popular method for direct recruitment was Trade publication. Advertising abroad was also not used much.
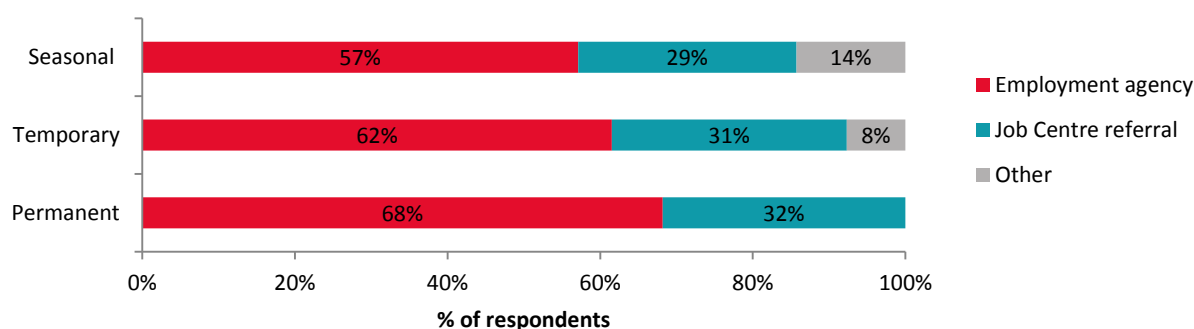

Figure 8. Methods reported for indirect recruitment of permanent, temporary and seasonal workers in the seafood processing sector in January – March 2019. Graph illustrates percentage of responses for seasonal, temporary and permanent roles. Respondents were able to comment on multiple factors that applied to their site. Source: Seafish

The most commonly reported method used for indirect recruitment is illustrated in Figure 8. The most common method for indirect recruitment was use of an Employment agency, mentioned 35 times for all three types of roles (seasonal, temporary, permanent).

For recruitment of seasonal and temporary staff, some responses were Other. These responses many times referred to specific agencies or websites. Some mention their own company websites, and newspaper adverts and local noticeboards are also mentioned.

6. Barriers to recruiting UK staff

Survey responses indicate that negative perceptions of the seafood processing industry remains the biggest barrier to recruiting British staff in the sector. Almost half of respondents stated that most British job seekers do not want to work in a fish processing factory (see Figure 9):

> *"Shift work, particularly afternoons and evenings [is a barrier]. There is a perception that working conditions are poor and pay is low." – Seafood processor*
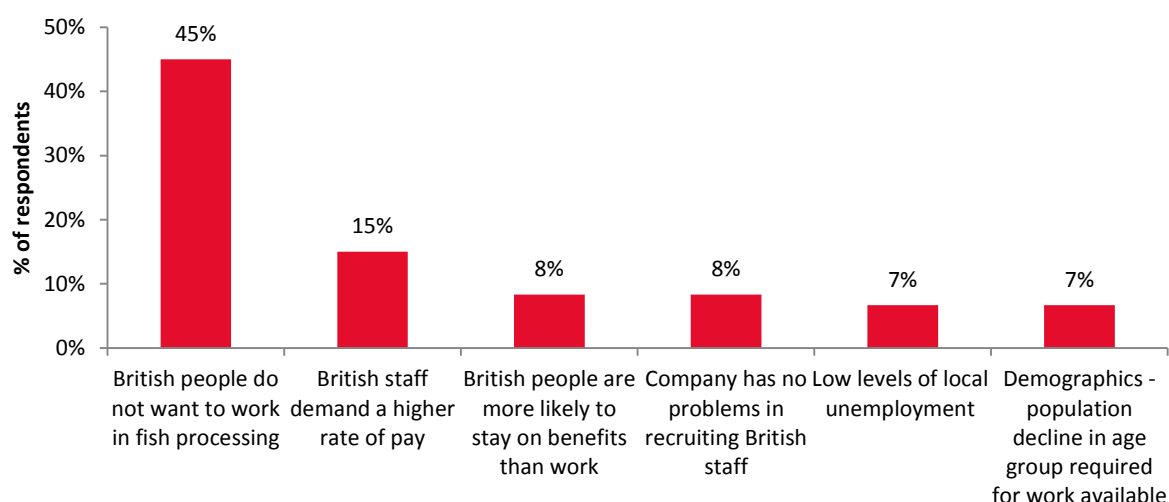

Figure 9. Reported barriers to recruiting British staff in the seafood processing sector in January - March 2019. Respondents were able to comment on multiple factors that applied to their site. Source: Seafish.

The second most common response was that British people demand a higher rate of pay to do the job (15% of respondents):

> *"Why do a cold, wet, on-your-feet-all-day job, when there are 'comfier' alternatives at similar or slightly less pay?" – Seafood processor*

Some processors thought that some British people believed they were better off claiming benefits than working (8% of respondents):

> *"I don't think British people go looking for jobs the same way as foreign nationals."*
> *- Seafood processor*

Some processors are located in remote areas, meaning their local labour pool may be relatively small, and some respondents said the main barrier for recruiting British staff is the low level of local unemployment (7% of respondents):

> *"[There is] a shortage of available people due to low levels of local unemployment."*
> *- Seafood processor*

7. Company adaptations in response to recruitment issues

Processors were asked which adaptations their company would make if they were unable to recruit enough workers using their existing recruitment methods. More than 80% of respondents said they would increase their efforts to recruit locally (see Figure 10).
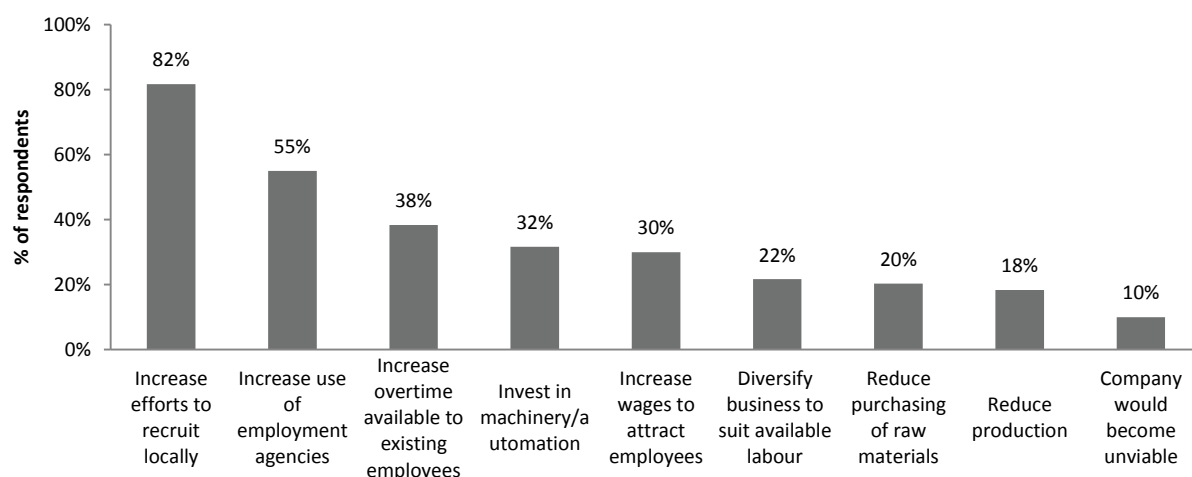

Figure 10. Adaptations seafood processing sites would aim to make if they were not able to recruit enough staff. Respondents were able to comment on all possible adaptations that applied to their processing site. Source: Seafish.

The second most common response was to increase the use of employment agencies to supply workers (55%). Nearly 40% of survey respondents said they would increase overtime available to current employees in response to difficulties in recruiting new staff.

Investment in machinery or automation was noted as a potential solution to recruitment issues by 32% of survey respondents. Most of these respondents reported that they would elect to automate production/processing lines or packaging. Several respondents noted that automation would reduce their staff needs. For some respondents automation would only reduce staff needs by a few staff while others estimated their staff needs would halve. A few processors mentioned that automation would increase their needs for higher skilled engineers. Several respondents noted that the initial cost of increasing automation or investing in machinery was prohibitive for them.

8. Confidence in recruiting and retaining staff

Processors were asked about their confidence in their company's ability to recruit and retain enough high-skilled, low-skilled and seasonal staff in the next quarter and in their confidence to meet their planned levels of production in the next quarter (April – June 2019). Respondents were able to select N/A to questions that were not applicable to them.

Respondents were generally more confident in their ability to retain staff than they were about recruitment. Nearly 70% of respondents were either very confident or confident that they would be able to retain enough low-skilled and high-skilled staff (see Figure 11).

However, not a single respondent was very confident in their ability to retain seasonal staff. More than 40% were confident they would be able to retain their current seasonal staff, and 15% said they were doubtful they would be able to retain enough seasonal staff. 29 respondents selected N/A to this question, indicating they do not employ seasonal staff.
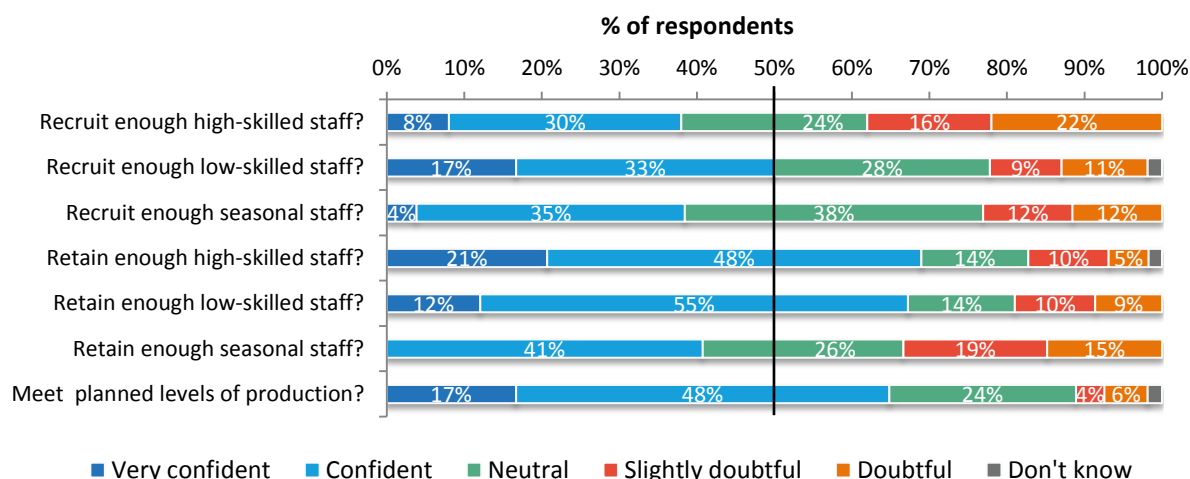
% of respondents

Figure 11. Seafood processors' confidence in their ability to recruit and retain sufficient numbers of high-skilled, low-skilled, and seasonal staff and in their ability to meet planned production levels in the next quarter (April - June 2019). Respondents could select "N/A" if the field did not apply to their site and these responses were removed from the final analysis. Source: Seafish.

Nearly 40% of respondents were either very confident or confident that they would be able to recruit enough high-skilled staff in the next quarter, and half of respondents were either very confident or confident that they would be able to recruit enough low-skilled staff. The results indicate that recruiting high-skilled staff is more difficult than low-skilled staff.

Nearly 40% of respondents were either very confident or confident they would be able to recruit enough seasonal staff. For this question, 32 respondents selected N/A, indicating they did not plan to hire seasonal staff in the next quarter.

Two thirds of respondents were either very confident or confident in their ability to meet planned levels of production in the following quarter. Only six percent were doubtful.

9. Comparison of quarterly survey results

Figure 12 illustrates respondents' perceived ease of recruitment in each of the six quarterly surveys conducted since surveys began in 2017. The number of respondents and FTE coverage is based on numbers reported in Table 1 and 2.

In the final quarter of 2017 (the first quarterly survey), nearly half of respondents said that recruitment had become harder than in the preceding quarter. In the first quarter of 2019, only a quarter reported that recruitment had become harder.

The proportion of respondents who said there is no difference in recruitment ranged 48-56% in all surveys except the most recent one where it jumped to 69% (the first quarter of 2019).

The proportion of respondents reporting that recruitment had become easier has declined from 20% in the first quarter of 2018 to closer to five percent in subsequent surveys.
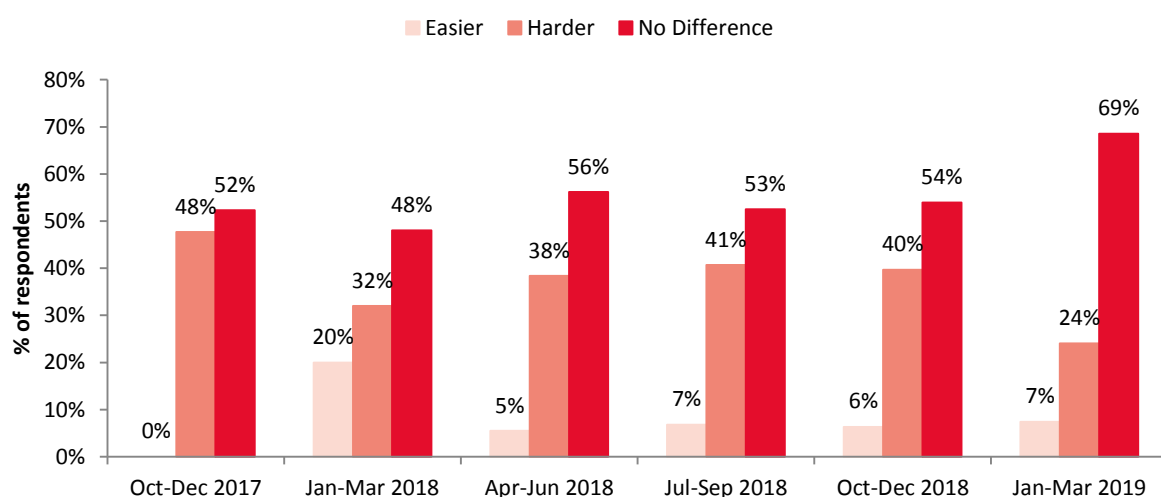

Figure 12. Proportion of processing sites sampled in each of the six quarterly surveys reporting that recruitment in the previous quarter was easier, harder, or no different (based on responses as outlined in Table 1 and Table 2). Source: Seafish.

Figure 13 illustrates the changes in ease of recruitment in Humber and Grampian since the first quarterly survey in 2017. Seafood processors in the Grampian region on average employ the largest proportion of non-British staff in the UK, and therefore they may be more affected by the changing labour market than processors in other regions.

In Grampian, the proportion of respondents who said recruitment had become harder gradually increased until the last quarter of 2018, where it peaked at 71%. In first quarter of 2019, only 15% of respondents said recruitment had become harder, while 69% said there was no difference.

In Humber, the proportion of respondents who said recruitment had become harder has gradually declined since 2017, starting at 57% and ending at 13% in 2019. The proportion of respondents who said there was no difference in ease of recruitment has increased from 21% at its lowest (first quarter of 2018) to almost 90% in the first quarter of 2019.
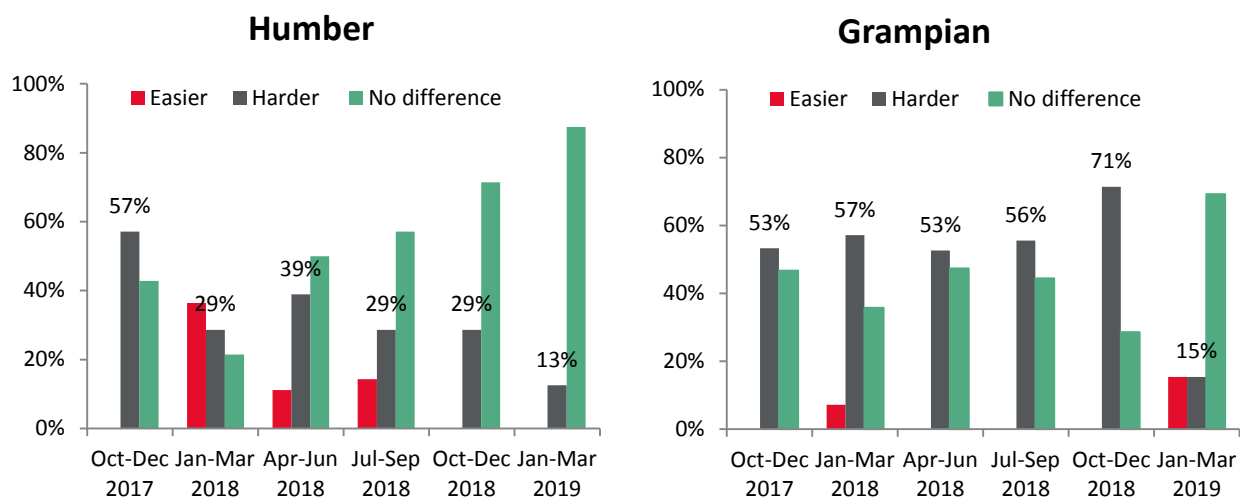
Figure 13. Ease of recruitment in Humber and Grampian in each quarterly survey. Labels highlight percentage of respondents who said recruitment had become harder. Based on responses in Table 1 and Table 2. Source: Seafish.

Scotland, excluding Grampian (not illustrated), displays the same trend as Humber, where fewer and fewer respondents say recruitment has become harder, while the South and Midlands have a more similar trend to Grampian. The Highlands and Islands are more stable throughout time, where the majority of processors say there is no difference.

Case study: Skills and recruitment in the processing sector

The most common barrier for recruitment is a shortage of suitably skilled candidates (Figure 6). However, data on which specific skills processors are referring to has not been collected and therefore we do not know which skills gaps the processing sector is facing.

Seafish has in the last six quarterly surveys collected data on confidence in ability to recruit high-skilled staff (Figure 14) and low-skilled staff (Figure 15).
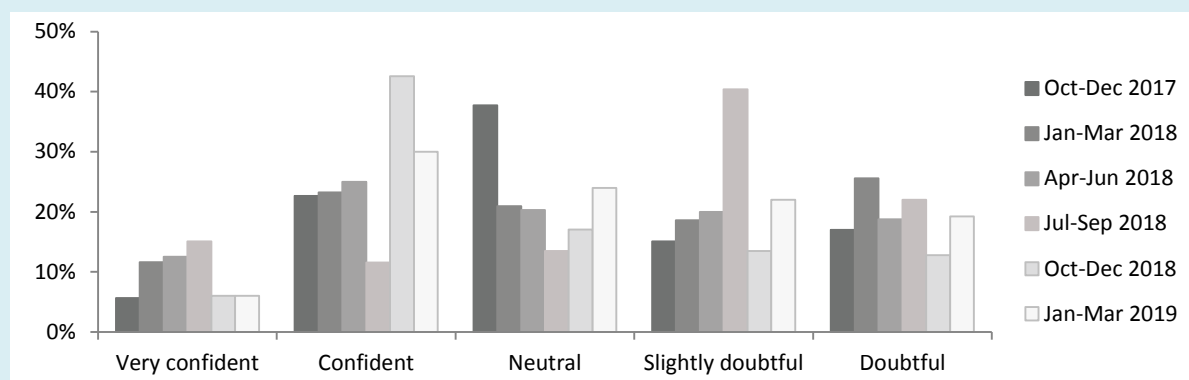

Figure 14. Processor confidence in recruiting enough **high-skilled staff** in the upcoming quarter. The figure shows responses in each of the six quarterly surveys (based on response numbers as outlined in Table 1 and Table 2). Source: Seafish.

Figure 15. Processor confidence in recruiting enough **low-skilled staff** in the upcoming quarter. The figure shows responses in each of the six quarterly surveys (based on response numbers as outlined in Table 1 and Table 2). Source: Seafish.
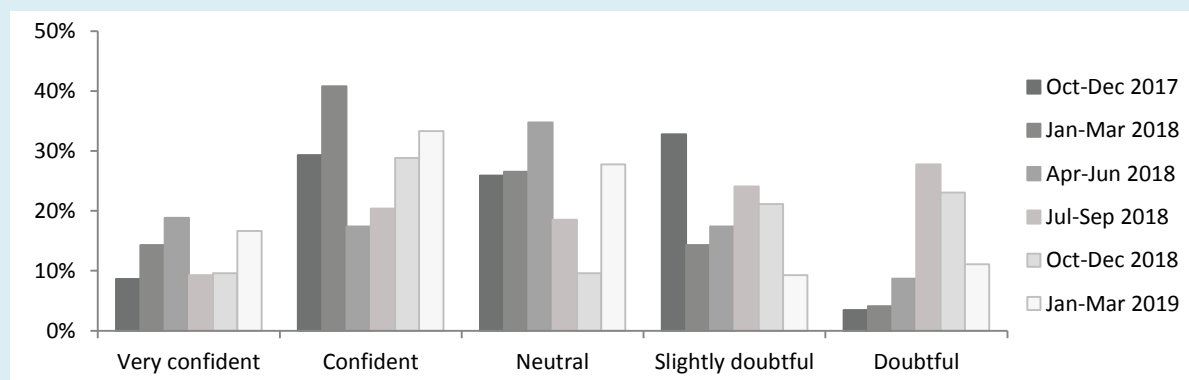
Fewer respondents were generally **very confident** in their ability to recruit *high-skilled* staff than they were in their ability to recruit *low-skilled* staff. For high-skilled staff, 6-15% of respondents were very confident and for low-skilled staff, it ranged 9-19%.

At the other end of the scale, many more processors were **doubtful** about their ability to recruit *high-skilled* staff than about recruiting *low-skilled* staff. Across surveys, 13-26% of respondents doubted their ability to recruit high-skilled staff. For low-skilled staff, the range was 3-28% across surveys, with numbers increasing in the third quarter of 2018.

The data indicates that processors are less confident in their ability to recruit high-skilled staff but

the difference between high-skilled and low-skilled staff is relatively small.

The data also indicates that more respondents have become doubtful about recruiting low-skilled staff. Given that there is not much change for high-skilled staff, there is a possibility this is related to the EU exit and may worsen over time:

> *I believe that all recruiters and employers in the agricultural, food manufacturing, industrial and hospitality sectors have difficulties to attract and retain British workers in the low-skilled roles as UK nationals often see those roles as unattractive. The low-skilled roles currently filled by EU nationals - changing methods of recruitment and automation won't be able to compensate for this. – Seafood processor*

Seafish is collecting data on skills gaps in the processing sector in the next quarterly survey to explore this topic further.

10. Conclusions

Only seven percent of seafood processors in the sample said that they had found it easier to fill vacancies in January - March 2019 than in the preceding quarter. Nearly 70% of respondents said they had observed no difference in the ease of recruitment whilst a quarter of respondents said that recruitment in January - March 2019 was more difficult than the preceding quarter (October-December 2018).

Almost 70% of respondents observed no difference in the time it took to fill vacancies in January - March 2019 than in the preceding quarter. More than a quarter (26%) of respondents said the time to fill vacancies had increased, while 7% said the time to fill vacancies had decreased in the period January - March 2019 compared to the preceding quarter.

Small processors were more likely to have difficulty recruiting staff than large processors in the period January - March 2019 than in the preceding quarter. A third of respondents in the 1-10 FTE band and 11-49 FTE band responded that recruitment was harder. Most processors across all FTE bands experienced no difference in their ability to recruit staff.

Respondents in Scotland, excluding Grampian, found it most difficult to recruit (40% said recruitment had become harder than in the preceding quarter). This was followed by England, excluding Humber (27%), and Northern Ireland (25%).

Nearly a third of respondent respondents said that recruitment in January - March 2019 was more difficult than in the same period in 2018. Only 8% of respondents said that recruitment had become easier in the past year.

The key factor affecting the ease of recruitment in January - March 2019 was a shortage of suitably skilled candidates. More than one in ten survey respondents reported that a shortage of candidates was a factor affecting ease of recruitment.

More than four out of five respondents in the sample said that they would increase efforts to recruit locally if they were unable to hire enough staff using their current recruitment techniques. Other common responses were increasing use of employment agencies (55% of respondents) and increasing overtime available to existing workers (38%).

According to those surveyed, the main barrier to recruiting British staff in the seafood processing industry remains the negative perception of the industry held by potential candidates. Almost half of processors in the sample said that the main barrier to recruiting British staff is that British workers do not want to work in seafood processing factories.

Regarding skill-levels, processors were least confident about their ability to recruit enough high-skilled staff and to retain enough seasonal staff in April - June 2019. Almost 40% of respondents said they were doubtful or slightly doubtful about recruiting enough high-skilled staff and retaining enough seasonal staff in the next quarter.

Nearly two thirds (65%) of seafood processors in the sample were confident or very confident about their ability to meet their planned production levels in April - June 2019. A quarter (24%) of respondents said they were neutral about meeting planned levels of production in the next quarter. One tenth of respondents were slightly doubtful or doubtful about their ability to meet their planned production targets.

Appendix 1 – Quarterly Survey Questionnaire

Seafood Processing Sector - Labour Availability Evidence Gathering (Quarterly)
For the period: January - March 2019

1. General information

a. Company name:	
b. Site/facility/unit name	
c. Site postcode	
d. Company contact nam	
e. Contact email:	

2. Current vacancies

a. How many vacancies do you have open on the day of completing this surve			0
b. On average, how many days are vacancies open for?		-	
c. Compared to last quarter, has the time it takes to fill vacancies:	Increased	☐	
	Decreased	☐	
	Stayed the same	☐	

3.a. Are you finding it easier, harder, or no difference to fill vacancies this quarter compared to the previous quarter?

Easier	Harder	No difference
☐	☐	☐

3.b. Why do you think this is? Please tell us all the reasons affecting ease of recruitment since the last quarter:

Enter text here

3.c. Are you finding it easier, harder, or no difference to fill vacancies this quarter compared to the same period last year? (January – March 2018)

Easier	Harder	No difference
☐	☐	☐

3.d. Why do you think this is? Please tell us all the reasons affecting ease of recruitment since this period last year:

Enter text here

4.a. How many seasonal staff did you aim to recruit in
4.b. How many seasonal staff actually recruit in the p

5. How did you recruit permanent, temporary and seasonal staff in the past quarter? (please select all that apply)

Direct recruiting	Permanen	Temporary	Seasonal	Details (which sites/publications/countrie:
Online advertising	☐	☐	☐	
Word of mouth	☐	☐	☐	
Advertising abroad	☐	☐	☐	
Social media	☐	☐	☐	
Trade publication	☐	☐	☐	
Indirect recruiting	Permanen	Temporary	Seasonal	Details (which agencies if applicable)
Employment agency	☐	☐	☐	
Job Centre referral	☐	☐	☐	
Other (please specify)	☐	☐	☐	
Enter text here				

6. In the next three months, how confident are you in your company's ability to:

	Very confident	Confident	Neutral	Slightly doubtful	Very doubtful	Don't know	Not applicable
a. Recruit enough high-skilled staff?							
b. Recruit enough low-skilled staff?							
c. Recruit enough seasonal staff?							
d. Retain enough high-skilled staff?							
e. Retain enough low-skilled staff?							
e. Retain enough seasonal staff?							
f. Meet your planned levels of production?							

7. In your opinion, what are the main barriers to recruiting British staff in your company

Enter text here

8.a. How would your company adapt if you can't get enough workers? (tick all that apply)

a. Increase efforts to recruit locally	☐
b. Increase use of employment agencies to provide labour	☐
c. Increase wages to attract employees	☐
d. Increase overtime available to existing employees	☐
e. Reduce production	☐
f. Reduce purchasing of raw materials	☐
g. Relocate inside the UK	☐
h. Relocate outside of the UK	☐
i. Increase investment in machinery *(if applicable see Q8.b.*	☐
j. Diversify business to suit available labour	☐
k. Company would not be affected	☐
l. No adaptation necessary	☐
m. Company would become unviable (no adaptation possible)	☐
n. Other (please specify)	☐

Enter text here

8.b. Please describe the investment in machinery that your business would make if you can't recruit enough workers *(if applicable)*

Enter text here

8.c. What is the expected impact this investment would have on the number of staff your business needs to employ? *(if applicable)*

Enter text here

9. Is there any further information you would like to share about the business impacts of the EU-exit on your company

Enter text here

*****END OF THE QUARTERLY SURVEY******