

The background of the entire page is a photograph of numerous prawns, likely langoustines, packed in a wooden crate. The prawns are arranged in rows, with their heads and tails visible. The lighting is warm, highlighting the texture of the prawns' shells and the grain of the wood.

seafish

SEAFISH ECONOMIC ANALYSIS

UK Seafood Processing Sector Labour
Quarterly Report 4 (July - September 2018)



UK Seafood Processing Sector Quarterly Report 4 (July - September 2018)

October 2018

AUTHORS:

Lewis Cowie
Hazel Curtis
Ana Witteveen

Seafish Report No.: SR729
ISBN No.: 978-1-911073-35-2
©Copyright Seafish 2018

Seafish Economics
Seafish Industry Authority
18 Logie Mill
Logie Green Road
Edinburgh, EH7 4HS

Executive Summary

- In September 2018, Seafish collected data on the ease of recruitment and retention of staff in the UK seafood processing sector during the third quarter of 2018 (July - September) as part of a 2-year series of quarterly surveys. The sample of processing sites responding represents 59% of FTE jobs in the sector.
- 41% of seafood processors in the sample said that they had found it more difficult to fill vacancies in the third quarter of 2018 (July - September) than in the second quarter (April - June) of the year, compared to 7% of respondents who said they had found recruitment easier. Three processors in the sample said they expected recruitment to be more difficult in October - December due to the busy festive period and competition for workers.
- Larger processing sites reported more difficulty in recruitment than smaller sites. All respondents from sites in the 1-10 FTE size band said they had seen no difference in ease of recruitment in the past quarter. In contrast, 60% of sites in the 250+ FTE size band found recruitment had been more difficult than in the preceding quarter.
- The key factor affecting recruitment in July - September 2018 was a shortage of candidates.
- According to 20% of survey respondents (12 processing sites) workers from other EU countries are increasingly leaving the UK. Explanations included the lower value of sterling, and European workers' concern about being able to stay in the UK after EU exit.
- 58% of respondents (34 processing sites) found recruitment in July - September 2018 was more difficult than the same period in 2017. Only 8% of respondents (five sites) said that recruitment had been easier than in 2017. Four of these five sites said that they had benefited from the closure of other seafood processing factories in their region in 2017/18.
- Almost three quarters of respondents (43 sites) said that the main barrier to recruiting British staff in the seafood processing industry remains the negative perception of the sector held by potential candidates.
- A quarter of respondents said that low levels of local unemployment were a barrier to recruiting British staff.
- Three quarters of processors in the sample said they would increase their efforts to recruit locally if they were unable to hire enough staff using their current recruitment techniques.
- Considering required skill levels, processors were least confident about their ability to recruit enough low-skilled staff in October - December 2018. Over half of respondents said they were doubtful or slightly doubtful about their ability to recruit enough low-skilled staff in the next quarter. Processors explained that they expected the available labour pool to tighten over the upcoming festive period.
- Almost half (48%) of respondents said they were either confident or very confident about meeting planned levels of production in October - December 2018. Whilst 30% of respondents said they were neutral about meeting planned levels of production, 18% were slightly doubtful. No respondents said they were doubtful about their ability to meet targets.

Contents

Executive Summary.....	3
1. Introduction and background	5
2. Methods.....	6
3. Ease of recruitment in the seafood processing sector	7
4. Factors affecting recruitment in the seafood processing sector	10
5. Recruitment methods in the seafood processing sector	11
6. Barriers to recruiting UK staff	12
7. Company adaptations in response to recruitment issues	14
8. Confidence in recruiting and retaining staff	15
9. Comparative analysis of Q3 and Q4 panel of respondents	16
10. Ease of recruitment: comparison to 2017	18
11. Conclusions	20
Appendix 1 – Quarterly Survey Questionnaire	21

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 third 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, for seasonal, temporary and permanent roles, 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 sea food 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?

In December 2017 the first quarterly survey (covering the period October - December 2017) was carried out alongside the first Seafish annual survey of workforce composition in the seafood processing sector. Further quarterly surveys were carried out in April (covering January - March 2018) and July (April - June 2018).

Findings of all quarterly surveys and the first annual survey of workforce composition in the seafood processing sector in 2017 are available on the Seafish website. The next annual survey of workforce composition will be carried out in November 2018.

2. Methods

The fourth quarterly survey was carried out in September 2018 and asked about processors' experience of recruitment in the preceding quarter (July - September 2018). The survey also asked processors about their expectations for recruitment and staff retention in the following quarter (October - December 2018). All UK seafood processors received questionnaires by email and were invited to complete the survey electronically (see Appendix 1). Some companies were contacted and interviewed by phone to ensure a good level of geographical coverage.

Seafish collected data from 59 individual processing sites operated by 49 processing companies in the fourth quarterly survey on recruitment and retention of staff. Table 1 shows the breakdown of sampled sites by size band (number of FTEs). According to the 2016 Seafish processing sector census (the most recent available complete population dataset) the processing sites which submitted data for this quarterly survey accounted for 59% of the full time equivalent (FTE) jobs in the sector as recorded in 2016 (10,673 FTEs).

The sample includes 18 responses from processing sites in England, 35 from Scotland, and 6 from Northern Ireland. There were no responses from sites in Wales.

Section 9 of the report presents data from a panel of respondents who have completed the quarterly survey in Q2 (covering January - March), Q3 (covering April – June), and Q4 (July - September). These responses have been analysed independently of other responses in order to reveal quarterly changes in survey findings rather than changes in sample composition.

Table 1: Number of survey responses by processing site size (FTE Band) according to the 2016 Seafish processing sector census. Source: Seafish

FTE Band	Quarter 1 (Oct-Dec 2017)	Quarter 2 (Jan-Mar 2018)	Quarter 3 (Apr-Jun 2018)	Quarter 4 (Jul-Sep 2018)	Total no. of sites ¹
1-10	9	2	7	6	178
11-49	26	14	26	22	111
50-249	15	15	24	16	54
250+	15	19	16	15	19
Total no. of sites sampled	65	50	73	59	
FTE Coverage	57%	56%	60%	59%	

¹ Seafish: Seafood Processing Industry Report 2016

3. Ease of recruitment in the seafood processing sector

Only 7% of seafood processors in the survey sample (four sites) reported that they had found it easier to fill vacancies in the third quarter of 2018 (July - September) than in the previous three months.

In surveys conducted in July and in September, the proportion of seafood processors reporting that recruitment was more difficult compared to the previous quarter has remained consistent at just over 50% of respondents, see figure 1.

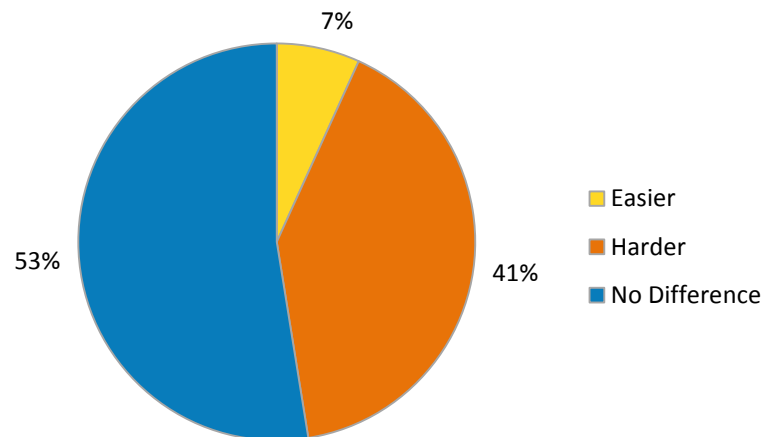


Figure 1: Proportion of processing sites in the sample reporting that recruitment in the third quarter of 2018 (July – September 2018) was easier, harder, or no different from the previous quarter (based on responses from 59 processing sites). Source: Seafish.

The proportion of sites reporting that recruitment in July - September was more difficult than the previous quarter increased as site size increased, as shown in figure 2.

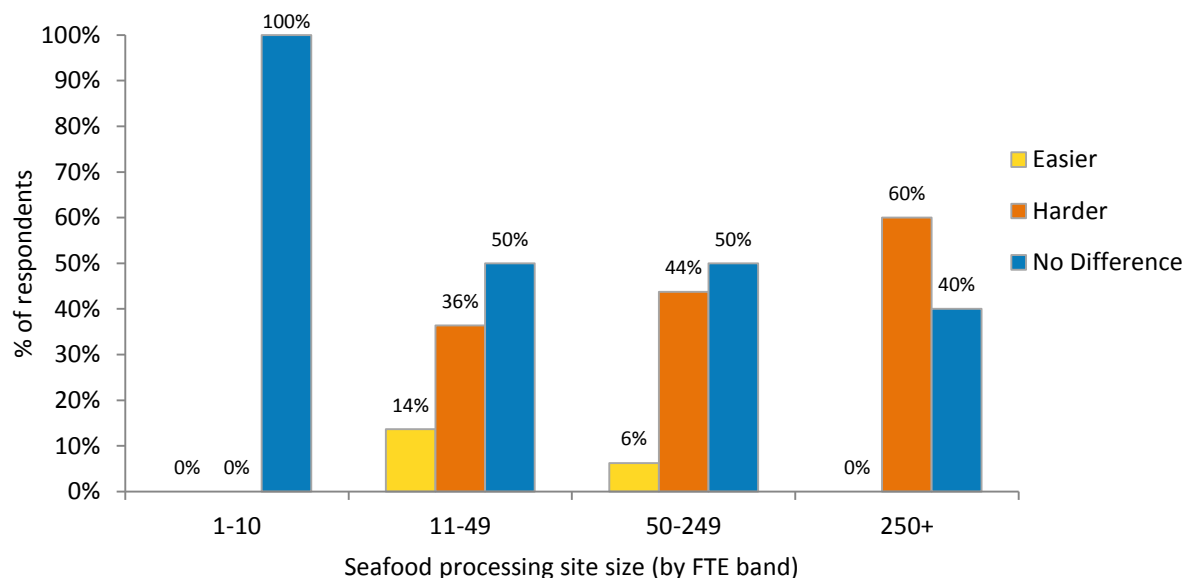


Figure 2: Proportion of processing sites in the sample reporting that recruitment in the third quarter of 2018 (July - September 2018) was easier, harder, or no different from the previous quarter (based on responses from 59 processing sites) by processing site size. Source: Seafish.

Previous research by Seafish has shown that larger seafood processing sites are more likely to employ a higher proportion of non-British workers². The reliance of larger seafood processing sites on workers from other EEA countries means they are more likely to be affected by a contracting supply of workers from other European countries. See section 4 for more information on factors affecting ease of recruitment in the sector.

In this survey, no processors in the 250+ FTE size band said that recruitment in the past quarter (July - September) was easier than the preceding one.

There were six sites in the sample in the 1-10 FTE size band. Respondents from these sites said they experienced no difference in ease of recruitment between July and September 2018. One site reported that they had not recruited any new staff in over 12 years.

One processor in the 1-10 FTE size band commented that whilst they had seen no difference in ease of recruitment in the past quarter, they believed recruitment was more difficult than in the same period last year. The processor attributed this to uncertainty surrounding Brexit and European workers being less willing to come to the UK to work. See section 10 for more information on changes in ease of recruitment between 2017 and 2018.

Figure 3 shows ease of recruitment reported by sites in the sample by region. Humberside and Grampian are shown separately; these regions are the UK's key processing hubs accounting for 27% and 21% of FTEs in the sector respectively.

Over half (56%) of the Grampian-based seafood processors in the survey reported that recruitment had become more difficult in the July - September period when compared to the previous quarter.

Previous research by Seafish found that seafood processing sites in the Grampian region employed the largest proportion of non-British staff in the UK³. This suggests that seafood processors in the Grampian region are more likely to be affected by changes in the availability of European workers.

"We have been able to get just enough workers to meet our needs, but with 85% of our workers from Eastern Europe and the labour situation worsening we are concerned."

Seafood processor in Grampian

Only two of 14 Humberside-based seafood processing sites in the sample reported that recruitment in July - September 2018 was easier than in April - June 2018.

² Seafish Economic Analysis: UK seafood processing sector labour 2018.

³ Seafish Economic Analysis: UK seafood processing sector labour 2018.

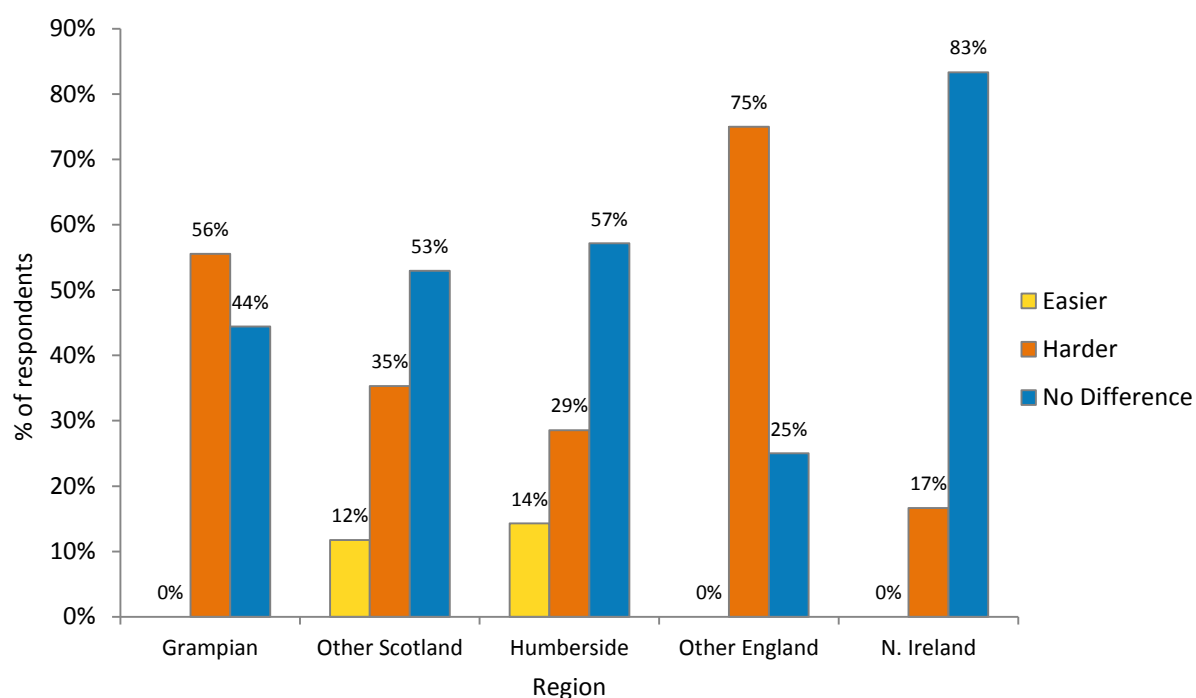


Figure 3: Proportion of processing sites in the sample reporting that recruitment in the third quarter of 2018 (July - September 2018) was easier, harder, or no different from the previous quarter (based on responses from 59 processing sites) by region. Due to the number of survey responses, data from the rest of England and Scotland (excluding Humberside and Grampian respectively) is aggregated. There were no survey respondents from Wales. Source: Seafish.

Five processors (in different regions of the UK) said that recruitment had become easier this quarter, specifically due to the shutdown of other food processing plants in their areas, leading to increased availability of local candidates.

4. Factors affecting recruitment in the seafood processing sector

One in five survey respondents said that a shortage of suitable candidates was the main factor affecting recruitment, see figure 4. Respondents gave a variety of possible explanations for the shortage.

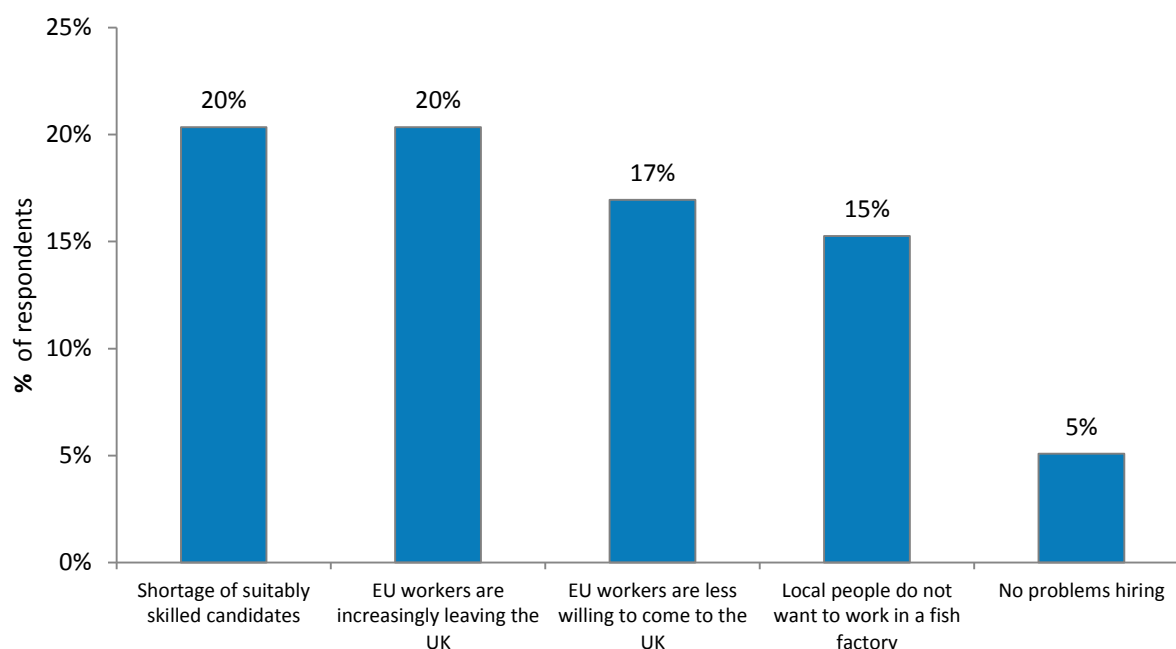


Figure 4: Barriers to recruitment in the seafood processing sector in July - September 2018. Respondents could comment on all factors, positive or negative, that applied to their company. Source: Seafish.

Twelve seafood processors (20% of respondents) said that European workers are increasingly leaving the UK whilst 17% said that EU workers are now less willing to come to the UK for work. The reasons most commonly given for this were the uncertainty surrounding Brexit, workers returning to their home countries to work or study, and European workers feeling unwelcome in the UK.

Several processors commented that, as a result of the changing value of Sterling and improving economies elsewhere in Europe, their European staff were choosing to move home.

“Lots of Polish workers have moved home because they are now being paid the same amount in Poland that they would have been paid in the UK.”

Seafood processor in Scotland

Other factors affecting ease of recruitment include the unwillingness of British candidates to work in the seafood processing sector at current wage rates (for more information on barriers to recruiting British staff in the seafood processing sector see section 6).

Three processors said they were struggling to find candidates with the right skill sets or experience for the roles they had available. One processor commented that they were struggling to fill senior production roles. Another processor said that demand and competition for workers meant that any experienced candidates were already employed.

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 was by word of mouth through existing employees (mentioned by 44% of respondents). Online advertising was the second most common response, with the website *Indeed* being the most-mentioned platform. Other sites mentioned included *Gumtree* and *Total Jobs*. Popular methods of recruitment are shown in figure 5.

“We get most of our new staff through word of mouth from our existing employees.”

Processor in Northern Ireland

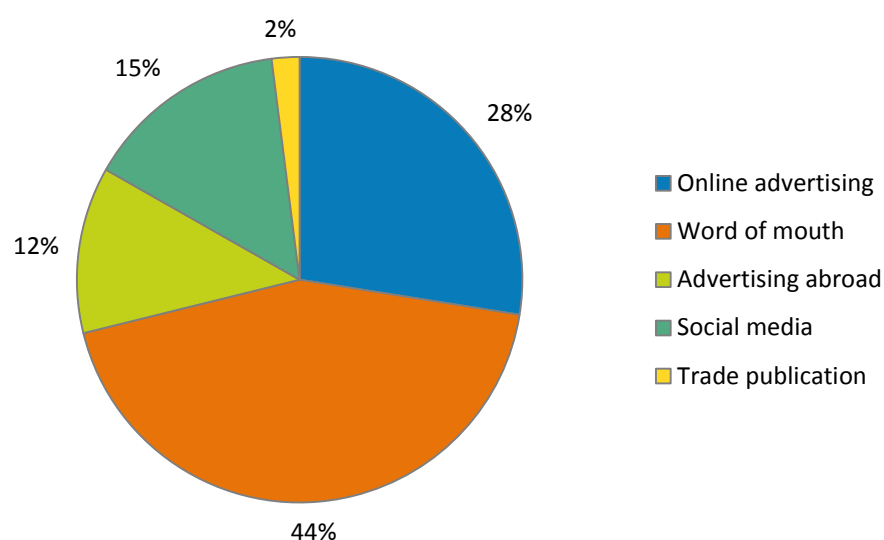


Figure 5: Reported methods for directly recruiting permanent, temporary or seasonal workers in the seafood processing sector in July – September 2018. Based on responses from 59 seafood processing sites. Source: Seafish

Social media was identified as a recruitment method in 15% of responses, with *Facebook*, *Twitter* and *LinkedIn* mentioned most often by processors. The most commonly reported method used for indirectly recruiting permanent, temporary and seasonal staff in the processing sector was recruitment through an employment agency (78% of responses).

6. Barriers to recruiting UK staff

Survey responses indicate that negative perceptions of the seafood processing industry remain the biggest barrier to recruiting British staff in the sector: 73% of respondents stated that most British job seekers do not want to work in a fish processing factory, see figure 6.

“There’s no interest in the fish industry anymore. The younger generation prefer to work elsewhere. Working in a fish factory seems to be seen as a last resort.”

Processor in Humberside

Processors acknowledged that fish processing is a physically demanding job in a cold and wet working environment. Some processors suggested that this led to difficulties in recruiting and retaining British staff. One processor said that they struggled to compete with other food manufacturers in the area which offer a more attractive, warm and dry working environment.

“The type of industry we work in discourages a lot of people from even applying to work in the factory.”

Processor in Grampian

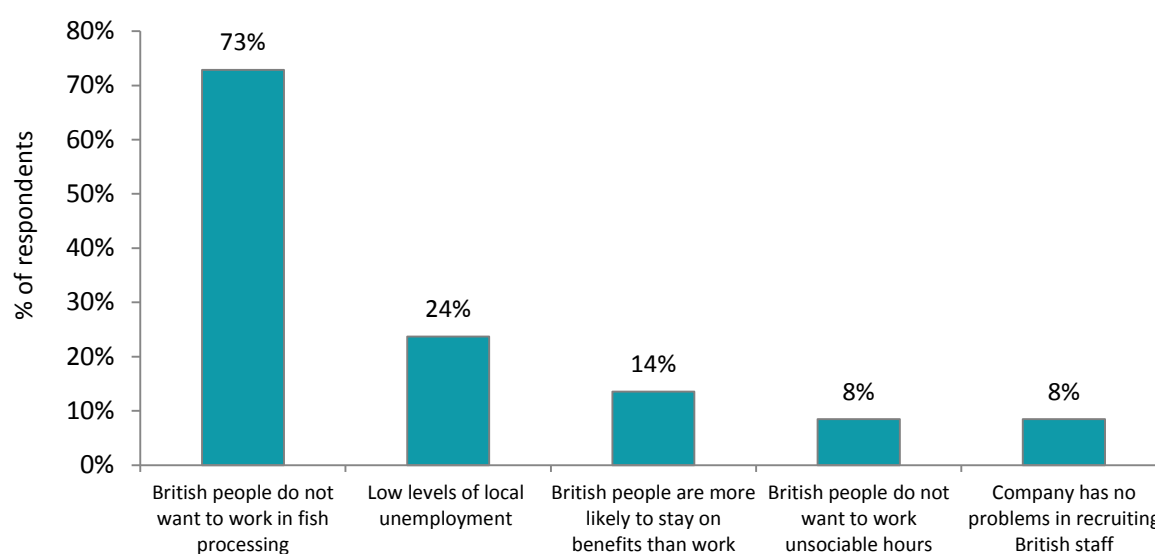


Figure 6: Reported barriers to recruiting British staff in the seafood processing sector in July - September 2018. Based on 92 answers given by representatives from 59 processing sites. Respondents were able to comment on multiple factors that applied to their site. Source: Seafish.

Eight processors in the survey (14% of respondents) thought that some British people believed they were better off claiming benefits than working. Two went further saying that some applicants applied for jobs only to maintain the eligibility for benefits.

“We have a lot of time-wasters. Many applicants have no intention of working here and they end up refusing the roles they are offered.”

Processor in Scotland

Some factories are located in remote areas, meaning their locally available labour pool is relatively small.

One processor said that being based on a Hebridean island made recruitment very difficult due to the low population and extremely low unemployment rate.

Two processors specifically mentioned the perception of jobs in the seafood processing industry as being “low-skilled” work as being off-putting to potential candidates. One processor said that potential candidates were only interested in getting academic degrees rather than learning on the job and working their way up from the bottom of the industry.

Five seafood processing sites (8% of respondents) said they have no problems in recruiting British staff. Four of the five processors commented that they had benefitted from the closure of other factories in their area.

One processor in the survey said that they have no problems in recruiting British staff for higher skilled and salaried roles but found recruiting British candidates for lower skilled or hourly paid roles more difficult.

7. Company adaptations in response to recruitment issues

Processors were asked what adaptations their company would make if they were unable to recruit enough workers using their existing recruitment methods. Three quarters of respondents said they would increase their efforts to recruit locally, see figure 7.

In the current survey, 56% of respondents said they would increase their use of employment agencies to supply workers. However, two processors commented that employment agencies in their area were beginning to struggle to fill the number of vacancies in the sector.

“We had 42 operatives leave in the space of two weeks, this left us with a large gap to fill and our agencies are struggling to bring in new recruits.”

Processor in Humberside

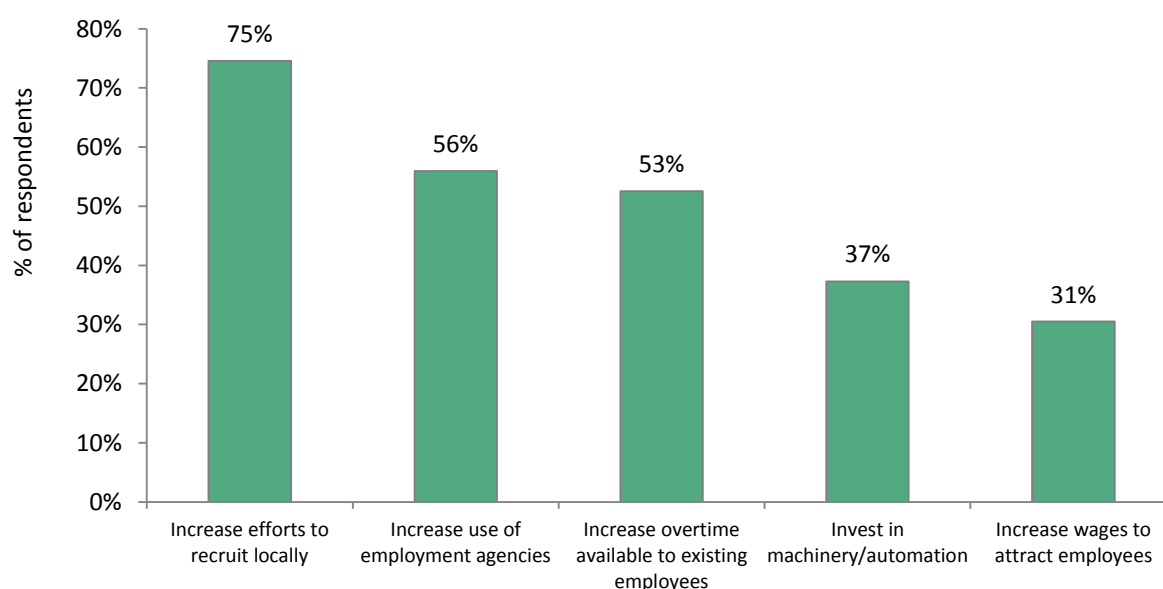


Figure 7: Adaptations seafood processing sites would aim to make if they were not able to recruit enough staff. Based on 170 answers given by representatives from 59 individual processing sites. Respondents were able to comment on all possible adaptations that applied to their processing site. Source: Seafish.

Several processors discussed the efforts they are already making to retain the staff they have. Efforts include offering English language lessons, increased training, increasing wages, and assistance and financial support to non-UK employees who are seeking UK residency.

Over 50% of survey respondents (31 sites) said they would increase overtime available to current employees in response to difficulties in recruiting new staff.

“Recruitment levels are staying the same; retaining employees is the challenge.”

Processor in the Scottish Borders

Investment in machinery or automation was noted as a potential solution to recruitment issues by 37% of respondents to the survey (22 sites). Interestingly, most processors did not think that automation would reduce the number of people they employ. Instead, machinery would be used to increase efficiency and productivity of existing workers.

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 to meet their planned levels of production in the next quarter (October - December 2018), see figure 8. Processors were able to select "N/A" if a question was not applicable to them; "N/A" responses are not shown in figure 8. In total, 28 sites selected N/A for their confidence in recruiting and retaining enough seasonal staff as they did not employ seasonal staff.

Processors' confidence in their ability to recruit enough staff across all skill levels was lower in the previous quarter (Q3 survey, carried out in July) than in the current quarter. Only 9% of respondents said they were very confident about recruiting enough low-skilled staff in the next quarter whilst 20% said they were confident. In contrast, 25% of respondents said they were slightly doubtful and 28% said they were doubtful about their ability to recruit enough low skilled staff in October - December 2018.

Processors remained confident about their ability to retain high-skilled staff with 30% of respondents saying they were very confident, and 47% saying they were confident about retaining their high-skilled employees.

Respondents' confidence in meeting planned levels of production fell slightly compared to the previous survey: 48% of respondents were confident or very confident about meeting planned levels of production. Whilst 30% of respondents said they were neutral about meeting planned levels of production in the next quarter, 18% (10 sites) were slightly doubtful. No respondents said they were doubtful about their ability to meet targets.

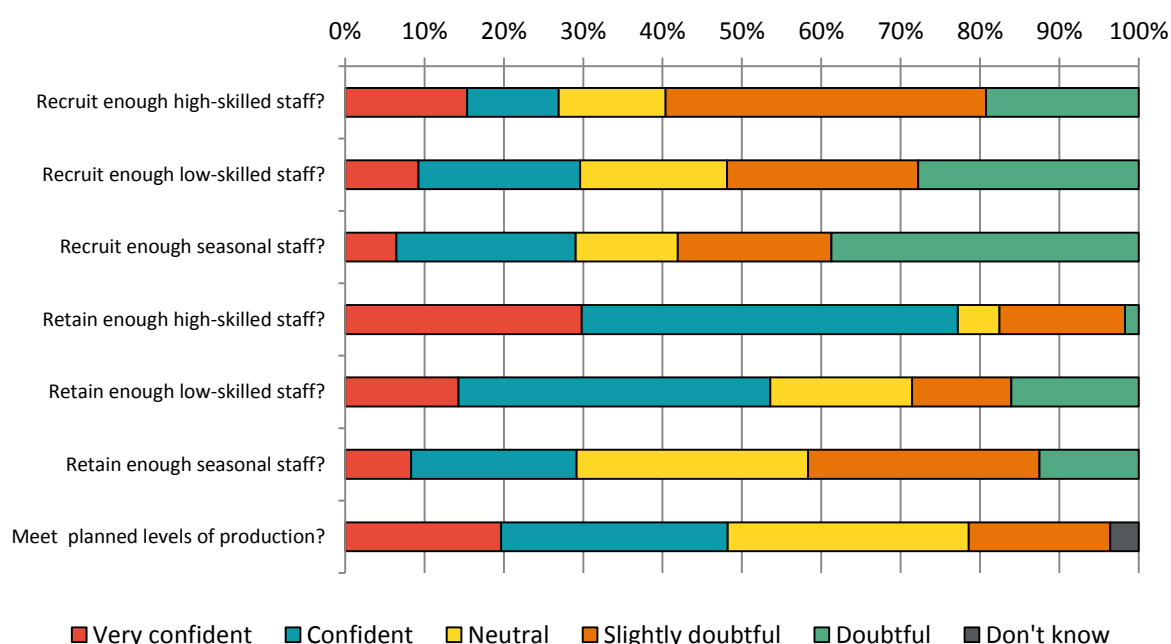


Figure 8: Seafood processors' confidence in their ability to recruit and retain sufficient numbers of high-skilled, low-skilled, and seasonal staff and in their ability to meet planned production levels in the next quarter (October - December 2018). Respondents could select "N/A" if the field did not apply to their site and these responses were removed from the final analysis. Source: Seafish.

9. Comparative analysis of Q2, Q3 and Q4 panel of respondents

In total, 30 seafood processing sites, accounting for 47% of FTEs in the sector, completed the quarterly survey in Q2 (covering January - March), Q3 (covering April – June), and Q4 (July - September). These responses have been analysed independently of other responses in order to reveal quarterly changes in survey findings rather than changes in sample composition.

No processors in this panel of respondents said that recruitment had been easier in the two previous quarters, see figure 9.

Almost one third of respondents in the panel said that recruitment had been easier in Q2 (January – March 2018) than in the previous quarter as a result of the post-festive period low season and increased availability of candidates. Since that survey responses have been consistent at around 60% of the panel reporting that recruitment has become more difficult each quarter.

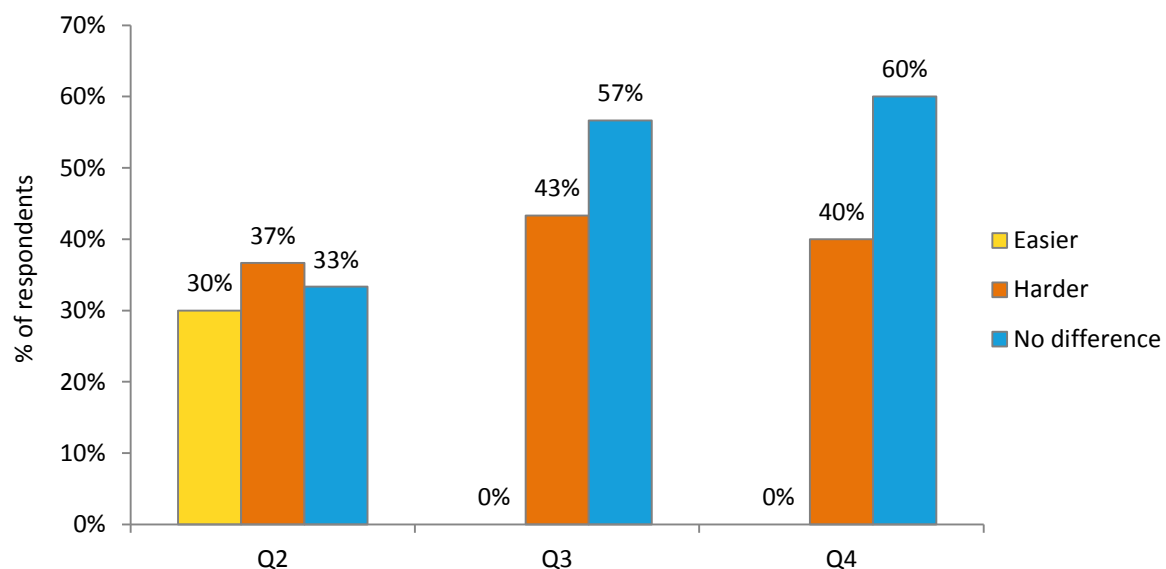


Figure 9: Proportion of processing sites reporting that recruitment was easier, harder, or no different from the previous quarter. Based on responses from 30 processing sites which responded to three consecutive surveys in April, July and September 2018. Source: Seafish.

Figure 10 shows the adaptations processors in the panel of respondents said they would make if they were unable to recruit enough workers using their existing recruitment methods. The results have remained largely consistent between Q3 and Q4 with the exception of the number of sites which said they would increase the amount of overtime available to existing employees which increased from five of the 30 sites in Q3 (July 2018) to 17 of the 30 sites in Q4 (September 2018).

The proportion of processing sites in the panel reporting that they would increase investment in machinery or automation decreased from 60% (18 sites) in Q3 to 40% (12 sites) in Q4. Two processors commented on the difficulties of securing funding to invest in automation at their sites.

In Q4, four processors who said they would increase investment in automation said that any investment in machinery would have no impact on overall numbers of staff at their site. Instead, machinery would be used to increase the productivity of existing staff, or the displaced workers would be re-trained to do other jobs in the factory.

One processor in Scotland commented on the difficulties of securing funding to invest in new technology.

“Anticipating a continued decrease in available labour, we’re investing in machinery. Then we can redistribute the workers we do have to increase efficiency. We now see mechanisation as the only option.”

Processor in Grampian

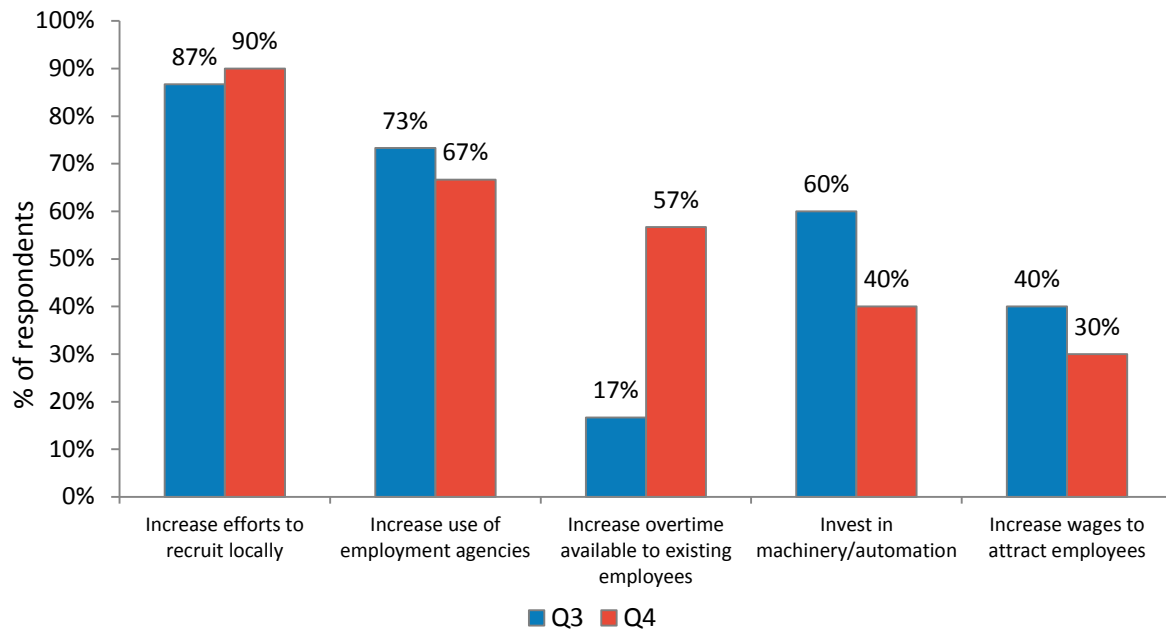


Figure 10: Adaptations seafood processing sites would aim to make if they were unable to recruit enough staff, as reported by a panel of 30 seafood processors who responded to surveys in July and September 2018. Respondents were able to comment on all adaptations that applied to their business. Source: Seafish.

The proportion of sites reporting that they would increase wages to attract new employees, or retain current staff, decreased from 40% (12 sites) in Q3 to 30% (9 sites) in Q4. One processor commented that they were already paying their staff significantly more than their competitors in order to retain workers; as a result they couldn’t increase wages further.

10. Ease of recruitment: comparison to 2017

Processors were asked how ease of recruitment in this quarter (July - September) compared to ease of recruitment in the same quarter in 2017. Only 8% of respondents (five sites) said that recruitment in 2018 was easier than in the same period of 2017.

Four of these five sites, which are distributed through England and Scotland, said that they had benefitted from the closure of other seafood or food processing factories in their region. These closures had led to an influx of suitable, experienced candidates looking for work and had reduced competition for workers between remaining sites.

“The local labour pool is getting even tighter and there are fewer European workers coming to the UK. We have to compete with other local businesses, all of whom are in the same position.”

Processor in Humberside

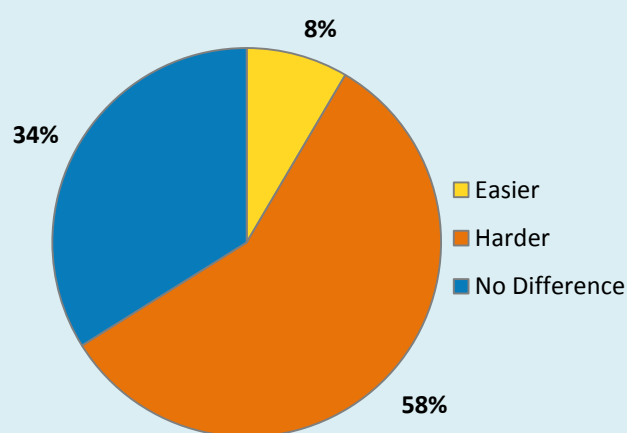


Figure 11: Proportion of processing sites in the sample reporting that recruitment in July - September 2018 was easier, harder, or no different from July - September 2017 (based on responses from 59 processing sites). Source: Seafish.

One fifth of respondents said that EU workers were less willing to come to the UK for work than the same period last year and that this was a major factor influencing ease of recruitment in the seafood processing sector. The uncertainty surrounding the UK leaving the EU was cited as the most significant barrier to EU staff coming to the UK. Other factors include the change in the value of sterling (compared to other European currencies) and European citizens feeling less welcome in the UK.

“The lack of clarity on the future of EU migrants is damaging. People don’t want to move their entire life to the UK if they think they might not be able to stay.”

Processor in Scotland

Respondents from eight processing sites said that the demand for skilled workers, such as engineers, had increased and that these vacancies are more difficult to fill.

Other common responses include low levels of local unemployment, increased competition with other companies (both other seafood processors and other businesses) for workers, and fewer available candidates with suitable skills or required experience in the seafood sector.

In some regions processors were concerned about decreased landings of the fleet in the past 12 months. According to processors, poor catches of crab and nephrops in particular have led to inconsistent supply of raw materials which has had an impact on production and the ability of some processors to offer consistent, reliable employment to their workers.

“Poor catches in the crab fishing industry has impacted peoples pay.”

Processor in the Scottish Isles

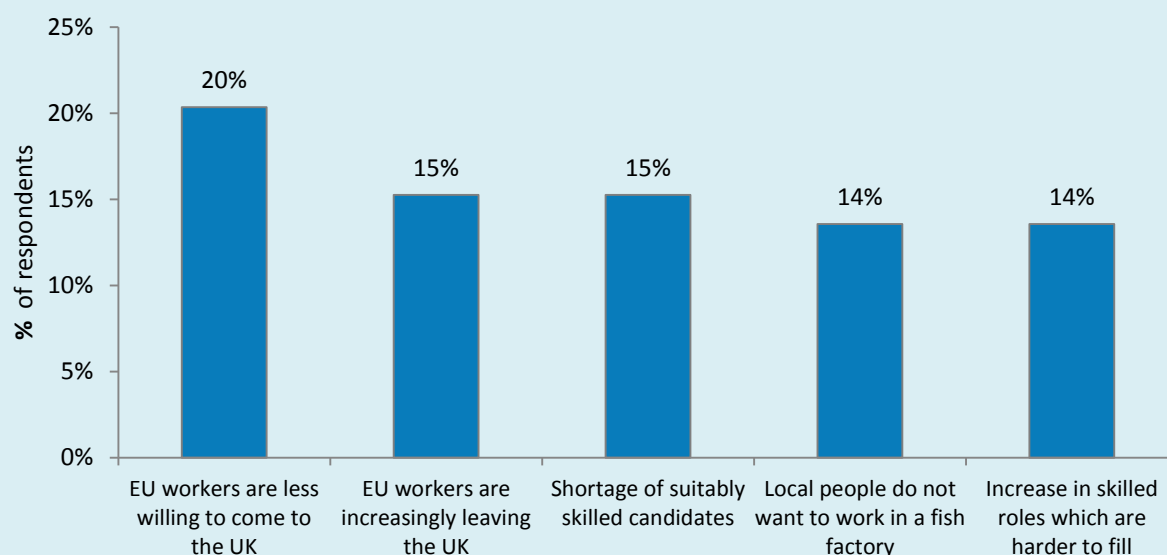


Figure 12: Factors given by survey respondents to explain differences in ease of recruitment in September 2017 and September 2018. Respondents were asked to comment on all factors they believed had impacted ease of recruitment in the past year. Based on responses from 59 seafood processing sites surveyed in September 2018. Source: Seafish.

11. Conclusions

Only 8% of seafood processors in the sample said that they had found it easier to fill vacancies in July - September 2018 than in the preceding quarter. Over half of survey respondents (53%) said they had observed no difference in the ease of recruitment whilst 41% of respondents said that recruitment in July - September 2018 was more difficult than the preceding quarter.

Larger seafood processing sites were more likely than smaller sites to have difficulty recruiting workers. All seafood processors in the 1-10 FTE size band (six sites) in the sample reported no difference in recruitment in July - September 2018 compared to April - June. In contrast 60% of sites in the 250+ FTE size band (nine sites) said recruitment was more difficult than the previous quarter.

The key factor affecting the ease of recruitment in July - September 2018 was a shortage of candidates. One in five survey respondents reported that a shortage of candidates was a major factor affecting ease of recruitment.

Over half of respondents said that recruitment in July - September 2018 was more difficult than the same period in 2017. Only 8% of respondents (five sites) said that recruitment had become easier in the past year; four of these five sites said they had benefited from the closure of other processing factories in their region.

The main barrier to recruiting British staff in the seafood processing industry remains the negative perception of the industry held by potential candidates. In total, 73% 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. Reasons for this included the physicality of the job, the cold and wet working environment and unsociable working hours.

Three quarters of processors in the sample said that they would increase their 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 (56% of respondents) and increasing overtime available to existing workers (53% of respondents).

Considering required skill-levels, processors were least confident about their ability to recruit enough low-skilled staff in October - December 2018. Over half of respondents said they were doubtful or slightly doubtful about recruiting enough low-skilled staff. Processors expect competition for workers to increase over the busy festive period.

Almost half (48%) of seafood processors in the sample were confident about their ability to meet their planned production levels in October - December 2018. Whilst 30% of respondents said they were neutral about meeting planned levels of production in the next quarter, 18% (10 sites) were slightly doubtful. No respondents said they were doubtful about their ability to meet their targets.

Seafish will continue to collect and publish robust and reliable information on the seafood processing sector workforce. The next Seafish quarterly survey on ease of recruitment, and the annual survey on workforce composition, will be carried out in November/December 2018.

Appendix 1 – Quarterly Survey Questionnaire

Seafood Processing Sector - Labour Availability Evidence Gathering (Quarterly)

For the period: **July - September 2018**

1. General information

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

2. Current vacancies

a. How many vacancies do you have open on the day of completing this survey?	
b. On average, how many days are vacancies open for?	
c. Compared to last quarter, has the time it takes to fill vacancies:	Increased <input type="checkbox"/>
	Decreased <input type="checkbox"/>
	Stayed the same <input type="checkbox"/>

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
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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?** (July - September 2017)

Easier	Harder	No difference
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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 the past quarter?

--

4.b. How many seasonal staff actually recruit in the past quarter?

--

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

Direct recruiting	Permanent	Temporary	Seasonal	Details (which sites/publications/countries if applicable)
Online advertising	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Word of mouth	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Advertising abroad	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Social media	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Trade publication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Indirect recruiting	Permanent	Temporary	Seasonal	Details (which agencies if applicable)
Employment agency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Job Centre referral	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Other (please specify)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
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	<input type="checkbox"/>
b. Increase use of employment agencies to provide labour	<input type="checkbox"/>
c. Increase wages to attract employees	<input type="checkbox"/>
d. Increase overtime available to existing employees	<input type="checkbox"/>
e. Reduce production	<input type="checkbox"/>
f. Reduce purchasing of raw materials	<input type="checkbox"/>
g. Relocate inside the UK	<input type="checkbox"/>
h. Relocate outside of the UK	<input type="checkbox"/>
i. Increase investment in machinery (if applicable see Q8.b. and 8.c.)	<input type="checkbox"/>
j. Diversify business to suit available labour	<input type="checkbox"/>
k. Company would not be affected	<input type="checkbox"/>
l. No adaptation necessary	<input type="checkbox"/>
m. Company would become unviable (no adaptation possible)	<input type="checkbox"/>
n. Other (please specify)	<input type="checkbox"/>

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 with regard to labour availability?

Enter text here

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