



SEAFISH

SEAFISH ECONOMIC ANALYSIS

UK seafood processing sector labour 2018





UK seafood processing sector labour report 2018

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AUTHORS:

Hazel Curtis
Lewis Cowie
Ana Witteveen
Arina Motova
Marta Moran Quintana

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

Executive Summary

There is evidence that the UK seafood processing sector is heavily reliant on workers from other EEA countries (Seafish, 2017¹; Marine Scotland, 2018²). Anecdotal evidence from seafood processors suggests that the supply of workers from other European Economic Area (EEA) countries is contracting and some processors report a shortage of locally available labour at current wage rates.

Reliable information on the nationality of the workforce in the seafood processing sector is necessary to inform decision making. Defra commissioned this research to track trends in number, proportion and ease of recruiting both UK and non-UK (including other EEA) labour in the seafood processing sector in the period before and immediately after the UK leaves the EU.

In December 2017 Seafish conducted two surveys of UK seafood processing companies to collect data on workforce composition. The findings of both of these surveys are presented in this report.

Differences in the findings between this report and the earlier Seafish report¹ are due to different methods and do not reflect trends in employment in the seafood processing sector. In October 2017 Seafish published figures from a snapshot survey, conducted in February and March 2017, of workers in the seafood processing sector, excluding agency workers. In contrast, findings presented in this report are for all workers (including agency employees) in the seafood processing sector throughout 2017. The figures presented in this report are more comprehensive and up to date than the Seafish report published in 2017.

EEA workers represented 49% of the total surveyed workforce employed in the seafood processing sector in 2017. UK workers made up 48% of the total sampled workforce, and workers from third countries (or for whom nationality was unknown) made up 3% of the sampled workforce.

Region and processing site size were major factors influencing the nationality mix of the workforce. Grampian and North England had the largest proportion of non-UK workers at 70% and 68% respectively whereas Humberside and Northern Ireland had the lowest proportion of non-UK workers at 39% and 40% respectively.

Larger processing sites are more likely to employ EEA workers than smaller sites. EEA workers made up 53% of employees in sampled sites in the 100+ full-time equivalent (FTE) band; in contrast EEA staff made up only 9% of employees in sampled sites in the 1-10 FTE band.

Workers from other EEA countries made up a greater proportion of low-skilled and unskilled roles than skilled or high-skilled roles. Over 80% of high-skilled (NQF 6+) roles in the sample were held by British employees. As job skill level decreased the proportion of EEA staff increased; workers from other EEA countries held 52% of low-skilled roles and 50% of unskilled roles in the sample of 9,585 employees. This trend is most prominent in Scotland where workers from other EEA countries hold 69% of low-skilled jobs and 67% of unskilled jobs.

The low availability of suitable candidates is a key barrier to recruitment in the seafood processing sector. The availability of suitable workers was identified as the key barrier to recruitment by 38% of respondents to the quarterly survey. Reasons for this include *“EEA staff being less willing to come to the UK”* (19% of respondents) and *“lower availability of staff with suitable skills sets/experience”* in fish processing (8% of respondents). Processors in the quarterly survey were least confident about

¹ Seafish Economic Analysis: UK seafood processing sector labour 2017. Published October 2017.

² Marine Scotland, Employment in Scotland's Seafood Processing Sector 2018.

their ability to recruit and retain sufficient numbers of low-skilled and seasonal staff. Only 11% of respondents to the quarterly survey said they had no problems in recruiting staff.

The main barrier to recruiting British staff in the seafood processing industry is the negative perception of the industry by some workers. Over half of processors in the quarterly survey 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 include the physicality of the job, the cold/wet working environment and unsociable working hours. The second most common response was that low levels of local unemployment meant there was a lack of British candidates for vacancies (31% of respondents).

Almost three quarters of processors in the quarterly survey said they would increase their efforts to recruit locally if they struggled to recruit enough staff. Processors said they would increase local advertisement of vacancies and engage in more proactive recruitment strategies. Increased use of employment agencies was identified as a key strategy by 55% of respondents and increased investment in machinery by 44% of respondents.

Processors were confident about their ability to meet their planned production levels in the first quarter of 2018. Despite some processors expressing concerns about their ability to recruit or retain sufficient numbers of staff, only 4% of respondents were slightly or very doubtful about their ability to meet planned production levels in the first quarter of 2018. This may suggest that whilst processors believe the labour pool is contracting, the availability of labour has not yet had a noticeable impact on production.



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1. Introduction and background

In 2016 there were 377 fish processing sites in the UK which derived over 50% of their turnover from fish processing, these sites were operated by 347 companies. The turnover of sea fish (saltwater species) processing companies in 2014 was £3.13 billion and gross value added (GVA) was £554 million (n.b. these figures exclude the turnover and GVA of salmon-only processing companies).³

In 2016 fish processing sites accounted for 17,999 full-time equivalent (FTE) jobs⁴; 13,455 of them in majority sea fish processing sites and the remainder in salmon processing sites.

Research conducted by Seafish in early 2017 found that 66% of processing sites employ workers from other European Economic Area (EEA) countries. Foreign workers represented approximately 42% of the total workforce in sites surveyed in February to March 2017.⁵ The 2017 report also revealed significant variability in reliance on EEA staff by region within the UK. In the Grampian region 70% of reported workers were citizens of other EEA countries; in comparison, processors in Humberside reported the lowest proportion of EEA workers at 17%.

Further research by Marine Scotland, based on a survey sample of 18 Scotland-based seafood processors, found that 58% of workers were from other EEA countries with citizens from Poland, Lithuania and Latvia the most cited.⁶

As the UK redefines its relationship with the EU it will be important for policy makers and industry to have accurate information about composition of the seafood processing sector workforce, hence a more detailed UK-wide project was commissioned by Defra. At project design meetings held by Seafish in October 2017 processors recognised that recruitment and retention of workers, for seasonal, temporary and permanent roles, was becoming a concern for some businesses. Processors agreed that more information on the composition of the labour force was needed to inform future policy decisions.

2. Methods and definitions

Seafish conducted a further labour survey of fish processors during December 2017, covering all workers throughout the last 12 month period. Seafish defines a **processor** as an individual factory or facility for processing fish. A processing **site** is defined as the physical premises where fish processing activities are carried out. A **company** is an organisation that owns at least one processing site; some companies own more than one site.

The survey population was 377 fish processing companies (including those with salmon as their major species processed).

Following project design meetings, industry stakeholders and government agreed that Seafish would gather detailed evidence from the processing sector through two surveys:

- An **annual survey** which would collect information on workforce composition for the previous 12 month period

³ Seafish, Seafood Processing Industry Report 2016.

⁴ Full-time equivalent (FTE) job is a standardised measure of employment based on an employee working 37 hours per week, 52 weeks per year.

⁵ Seafish Economic Analysis: UK seafood processing sector labour 2017. Published October 2017.

⁶ Marine Scotland, Employment in Scotland's Seafood Processing Sector 2018.

- A **quarterly survey** which would collect information on ease of recruitment in the preceding three month period and confidence in recruiting and retaining sufficient numbers of staff in the upcoming three month period.

The questionnaires for both surveys are presented in full in appendices 1 and 3.

Key research questions this study aimed to address through the annual survey were:

- *What proportion of people working in the fish processing sector over the past 12 month period were citizens of other EEA countries?*
- *How does the proportion of UK and other EEA workers vary by region, site size, job skill level, employment type (direct or agency workers), and contract type?*

Key research questions this study aimed to address through the quarterly survey 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 fish processing sector?*
- *How do companies plan to adapt if they are unable to recruit and retain a sufficient workforce?*

Seafish conducted the first annual and quarterly surveys during December 2017 and early January 2018. Processors were first sent survey forms by email and invited to complete surveys electronically. Further companies were contacted and surveyed by phone in January 2018 to ensure a good level of coverage of all company size bands.

3. Annual survey of workforce composition results

Seafish collected data from 114 individual processing sites operated by 106 processing companies. The processing sites included in the sample accounted for 12,627 people employed in sea fish processing in 2017 and 108 people in salmon and trout processing (this figure refers to salmon or trout-only processors, not mixed processors who also process salmon and trout).

According to the most recent Seafish processing sector census the companies who responded to this 2017 survey accounted for 10,189 FTEs in 2016 (or 57% of the FTEs in the sector in 2016). The Seafish 2016 census presents the most complete, up to date information on total employment across all UK seafood processing sites.

Seafish follows data confidentiality rules and does not publish aggregated data for regions or size bands with fewer than three companies. Due to the low

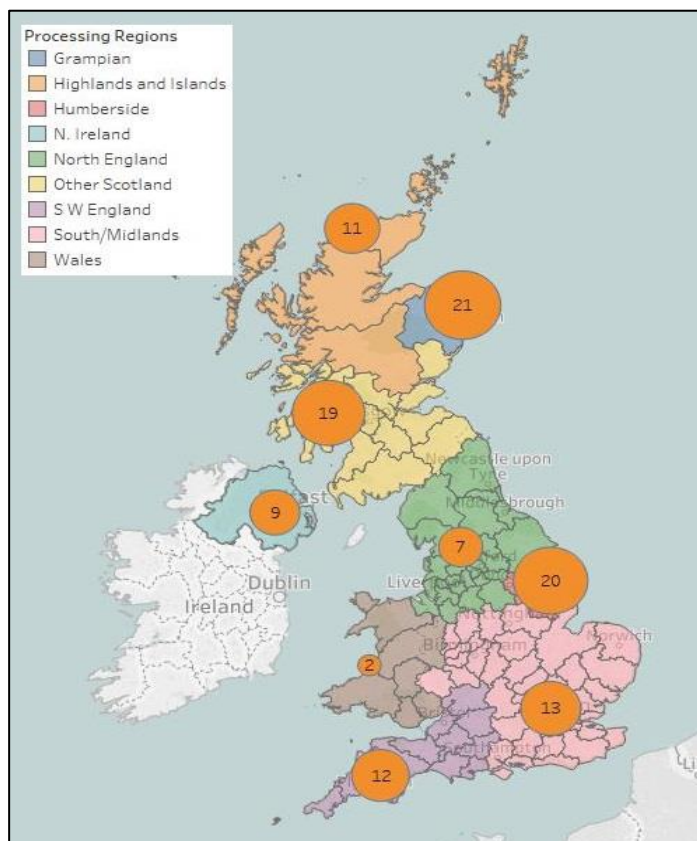


Figure 1: Regions used in the analysis and number of processing sites in the sample from each region. Source: Seafish.

number of survey responses from Wales, the Welsh and English sector data have been combined throughout this report. In 2016 the Welsh processing industry consisted of 12 processing companies each operating a single site, and in total they employed a total of 55 workers.

Table 1 shows the number of workers (including direct employees and agency staff) reported by processing sites in this survey (i) by region and the number of FTE jobs reported by these same processing sites in 2016; sample size (iv) is expressed as the number of reported FTE jobs in 2016 (ii) as a percentage of the total reported population of FTE jobs in each region in 2016 (iii).

The Seafish processing sector census is a biennial survey which collects data on all staff and estimates the total number of FTE jobs for every fish processing site in the UK. The most recent available data on total employment in the UK seafood processing sector is the Seafish 2016 census.

Sample sizes by region and business size of the seafood processing sector for this survey are estimated based on 2016 census data for every processing site in this 2017 survey. This approach to estimating sample sizes accounts for differences in methods between this 2017 survey and earlier Seafish research. Some processors did not hold detailed information on the staff employed through agencies meaning that some companies were unable to provide data for all questions. This lack of information may have resulted in underreporting of some agency staff.

Table 1: Estimated sample sizes. Number of employees sampled in this 2017 study by region (i); number of FTE jobs reported in the 2016 processing census by companies in the 2017 sample only (ii); reported population of FTE jobs in the 2016 census (iii); and estimated sample sizes of this 2017 survey by extracting 2016 data (iv). Source: Seafish.

	Region	i. Reported workers in 2017 survey sample	ii. Reported FTE jobs in 2016 census (2017 survey companies only)	iii. Reported population of FTE jobs in 2016 census (all companies)	iv. Estimated coverage of 2017 survey (%)
England & Wales	Humberside	3,178	2,949	5,340	55%
	S W England	793	543	1,379	39%
	South/Midlands & Wales	831	649	1,832	35%
	North England	263	263	1,485	18%
	Total	5,065	4,404	10,036	44%
Scotland	Grampian	3,032	2,575	4,011	64%
	Highlands & Islands	562	433	1,390	31%
	Other Scotland	3,519	2,487	3,588	69%
	Total	7,113	5,495	8,989	61%
N. Ireland	N. Ireland	557	290	404	72%
	Total	557	290	404	72%
United Kingdom	Total	12,735	10,189	19,429	52%

4. Workforce composition in the UK seafood processing sector

Processors in the sample reported a total of 12,735 workers in the UK seafood processing sector during 2017. The sample included 6,117 British workers, 6,272 workers from other EEA countries, and 346 workers from third countries or for whom nationality was unknown or unreported.

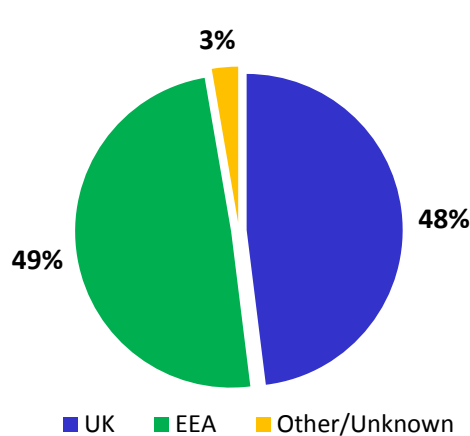


Figure 2: Nationality of workers in the sample of the seafood processing sector in 2017, across all sites sampled. Source: Seafish

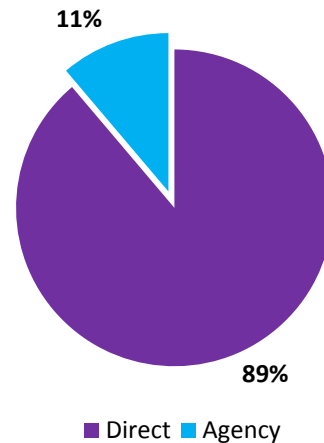


Figure 3: Employment type for people employed in the seafood processing sector in 2017, across all sites sampled. Source: Seafish

British workers represented 48% of the sample, workers from other EEA countries represented 49% of the sample, and citizens of non-EEA countries or for whom nationality was unknown or unreported represented 3% of the sampled workforce. Around 95% of non-British workers in the sample were from other EEA countries. As shown in Figure 3, 89% of workers in the sample were directly employed by processors whilst 11% of workers were contracted through an employment agency.

The proportion of EEA workers employed through an agency was almost double the proportion of UK staff contracted via agencies, at 14% and 8% agency staff respectively, see Figure 4. This difference may be explained by the fact that some employment agencies which supply workers to the seafood processing sector actively advertise in other EEA countries to attract staff to the UK.

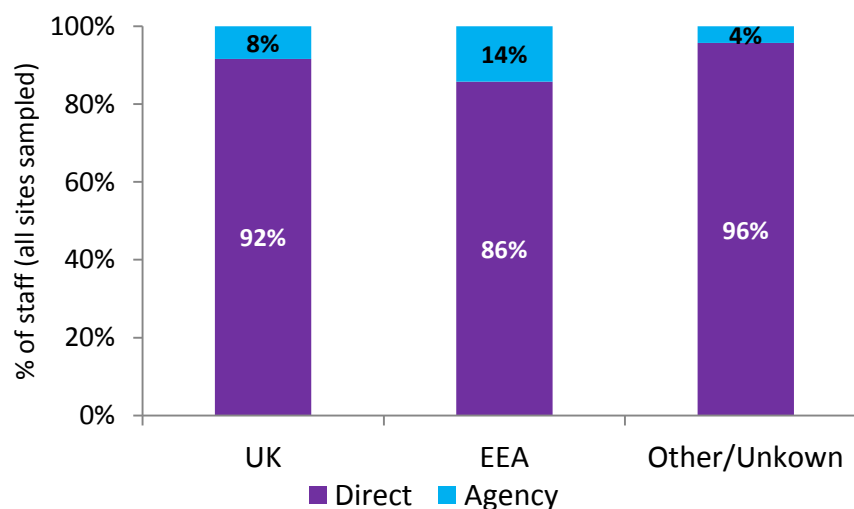


Figure 4: Employment type by nationality for sampled workers employed in the processing sector in 2017, across all sites sampled. Source: Seafish.

4.1 Nationality of the processing sector workforce by home nation

The proportions of UK, other-EEA and non-EEA citizens in the sample of people working in the sea food processing sector in 2017 by home nation are shown in Figure 5.

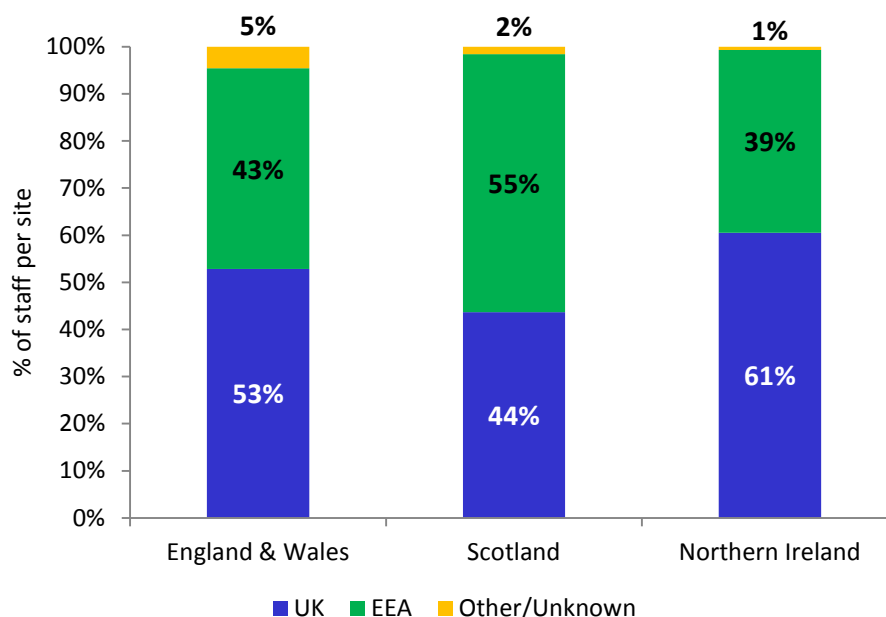


Figure 5: Nationality of the seafood processing sector workforce sampled in 2017 by home nation, across all sites sampled. Source: Seafish.

Scotland had the highest proportion of non-British workers at 57% of the total sample of people working in the processing sector (7,113 workers). This finding closely aligns with the Marine Scotland findings from a survey of 18 seafood processing businesses accounting for 37% of the sector's workforce in Scotland in 2017; Marine Scotland's research found that 59% of workers in their sample were from other EEA countries or non-EEA countries⁷.

British workers represented 53% of the sample of people working in the processing sector in England & Wales in 2017 (5,065 workers).

Northern Ireland had the highest proportion of British staff of the home nations at 61% of the sample of people working in the processing sector (557 workers).

4.2 Nationality of the processing sector workforce by site region

The split between British and non-British workers varied significantly by region, see Figure 6. The major sea fish processing hubs in the UK are Humberside in England and Grampian in Scotland. **In the Grampian region 71% of the total sample of people working in the processing sector in 2017 are citizens of other EEA or third countries.** The sample from Grampian covered 3,032 employees. EEA workers represented 68% of the sampled workforce in North England, the second highest proportion of any region in this sample.

⁷ Marine Scotland, Employment in Scotland's Seafood Processing Sector 2018.

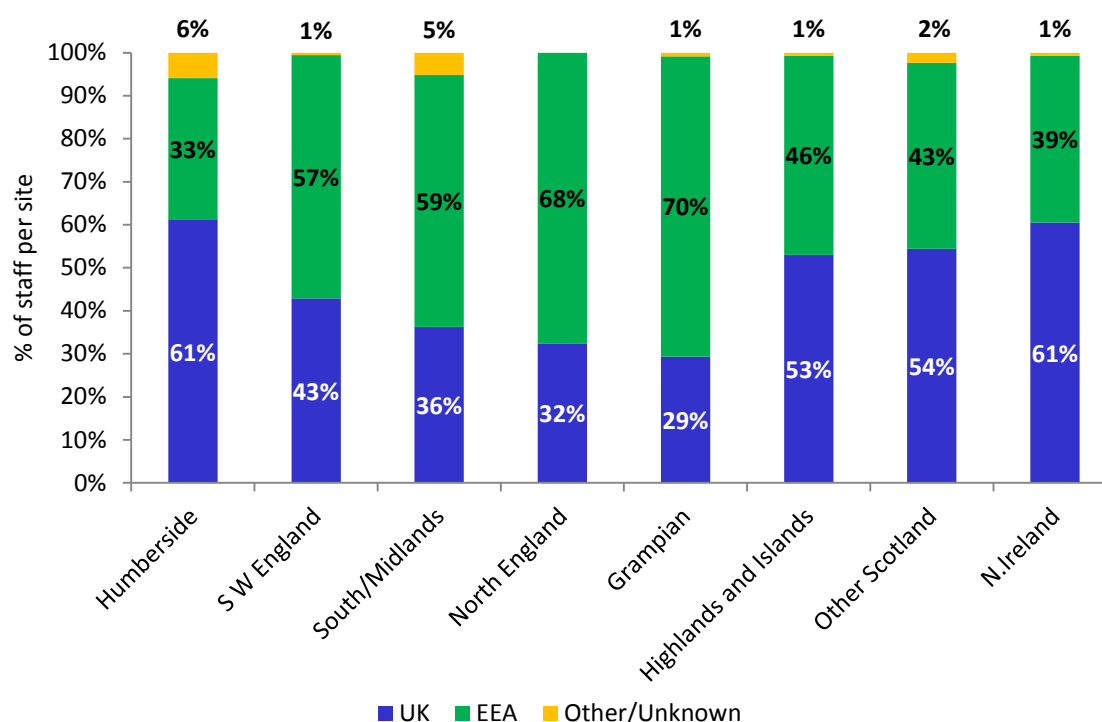


Figure 6: Nationality of seafood processing sector workforce sampled in 2017 by region, across all sites sampled. Source: Seafish.

Processors in the **Humber region reported the lowest proportion of workers who are citizens of other EEA countries at 33% of the sample of people working in the processing sector in 2017.** The sample from Humberside covered 3,178 employees. Previous research by Seafish found that 17% of workers in the Humber seafood processing sector were from other EEA countries⁸. The difference between the results of previous work and this research is because the previous research did not present nationality data for agency workers employed in the seafood processing sector. In this survey Seafish collected data for 3,178 workers employed in the seafood processing sector in Humberside, 802 of these workers were employed through agencies. In the Humber region 61% of agency employees were citizens of other EEA countries or non-EEA countries. Therefore, it is clear that this survey is not evidence of an increase in the proportion of non-UK workers in Humber since the previous survey.

Survey data were compared with ONS data⁹ on the average proportion of the non-British population over the age of 16 per region, see Figure 7. ONS figures are based on the Annual Population Survey, and it should be noted that they exclude people absent from the UK for more than six months of the year and may not capture certain population groups such as overseas students living in communal halls. These figures have been included as estimates for context and comparison purposes only.

In all regions the proportion of non-British workers employed in the seafood processing sector was substantially greater than the proportion of non-British residents in the region according to 2017 ONS data. These figures support reports (both anecdotal and those presented in section 6.3) that one of the main barriers to recruiting British people in the seafood processing sector is that British nationals do not want to work in seafood processing.

⁸ Seafish Economic Analysis: UK seafood processing sector labour 2017. Published October 2017.

⁹ Office for National Statistics (ONS), 2018: annual population survey estimates, September 2017.

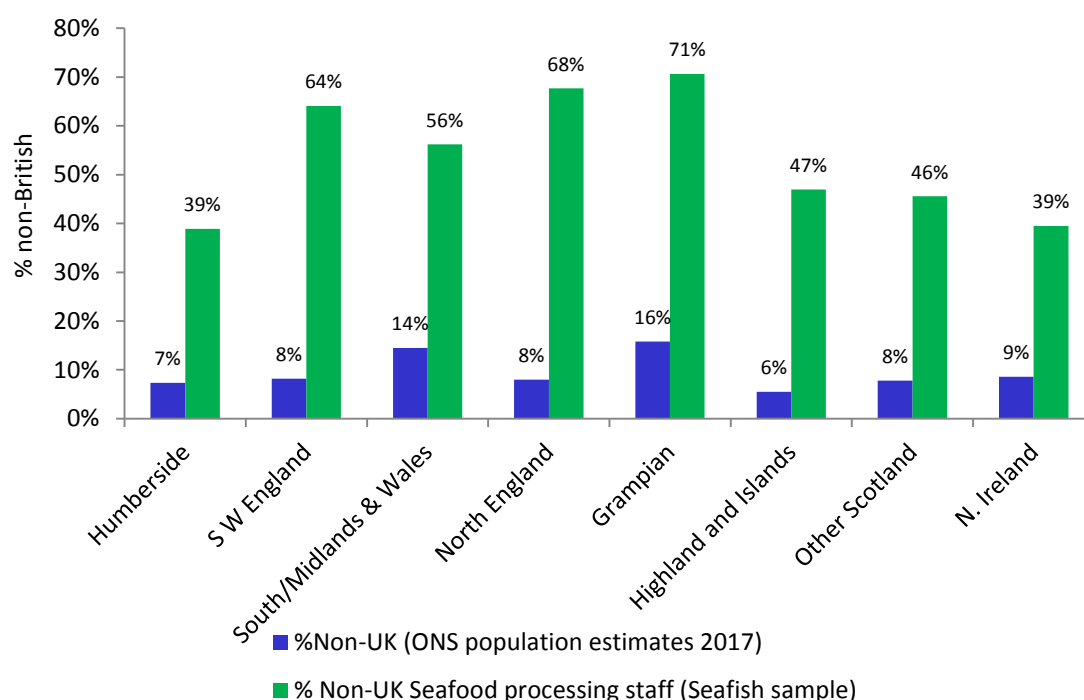


Figure 7: Nationality of the seafood processing sector workforce sampled in 2017 and non-British population (over the age of 16) by region according to the Office of National Statistics, across all sites sampled. Source Seafish, from Seafish data and ONS Annual Population Survey data.

4.3 Nationality of the processing sector workforce by site size

Previous research by Seafish has shown that processing site size is a major factor influencing the nationality mix of the workforce, with larger processing sites more likely to employ a higher proportion of non-British workers. FTE bands are defined by the most recent processing sector census carried out by Seafish in 2016.¹⁰ Workforce composition by FTE band is presented in Figure 8.

The proportion of workers who are citizens of other EEA countries was generally higher for larger site sizes. Processing sites in the largest size band (100+ FTE jobs) accounted for 9,103 workers in the sample; 44% of these workers were British whilst 53% were citizens of other EEA countries and 3% were from other countries or for whom nationality was unknown or unreported.

Processing sites in the smallest size band (1-10 FTE jobs) accounted for 542 workers in the sample and 91% of these workers were British.

¹⁰ Seafish, Seafood Processing Industry Report 2016.

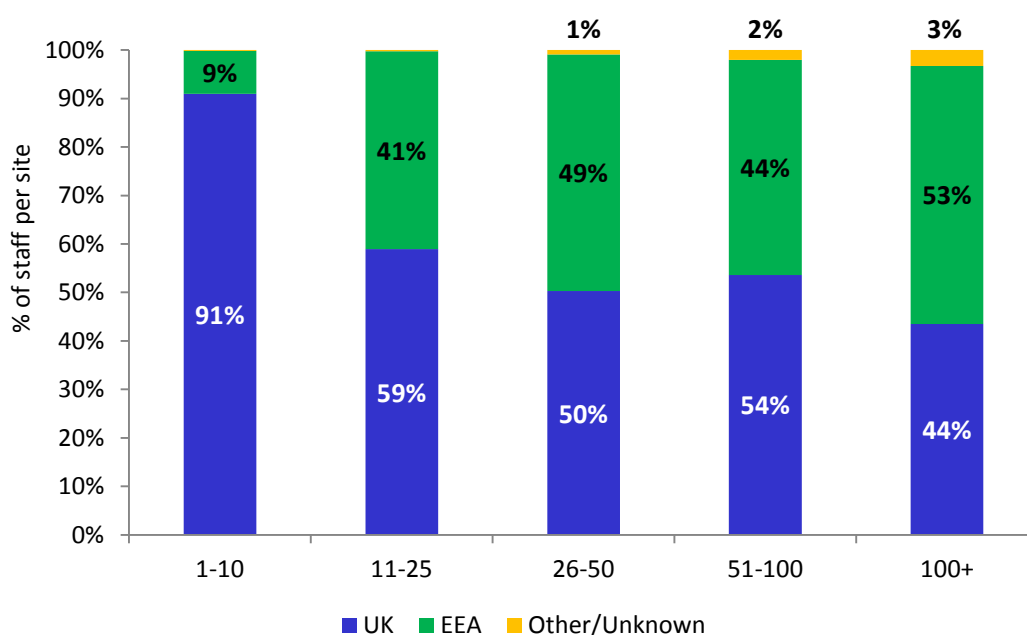


Figure 8: Nationality of the seafood processing sector workforce sampled in 2017 by processing site size (FTE band according to Seafish 2016 Processing Sector Census). Across all sites sampled. Source: Seafish.

4.4 Nationality of the processing sector workforce by job skill level

Data on the job skill level of sampled workers employed in the fish processing sector in 2017 are presented in Figure 9. Processors were asked to submit data on the skill level of the job rather than the skill level of the employee. Job skill levels were defined to processors following National Qualifications Framework (NQF)¹¹ classification as follows:

- High skilled (NQF 6+): requiring a degree or higher professional qualification
- Skilled (NQF 5-6): requiring an Higher National Diploma (HND) and experience
- Semi-Skilled (NQF 3-4): requiring experience and training
- Low-skilled (NQF2): requiring some training or experience
- Unskilled (below NQF 2): requiring little or no training or experience

A large majority, 82%, of the 28 high skilled roles in the sample were held by British workers compared to 14% of high skilled roles held by workers who are citizens of other EEA countries and 4% held by workers from other countries or for whom nationality was unknown or unreported.

The proportion of non-British staff was higher for lower skill level jobs in the sample. Workers from other EEA countries were more prominent in low and unskilled roles. EEA workers held 52% and 50% of low-skilled and unskilled roles respectively compared to 41% and 32% for British staff.

Job skill level data at home nation level are presented in Figure 10. In Scotland, workers from other EEA countries in the sample held 68% of low-skilled and 66% of unskilled roles; in contrast, sampled EEA workers in England and Wales held 38% of low-skilled roles and 41% of unskilled roles. British workers held 100% of the high skilled jobs in sampled sites in Northern Ireland.

¹¹ NQF: "List of qualification levels" from www.gov.uk.

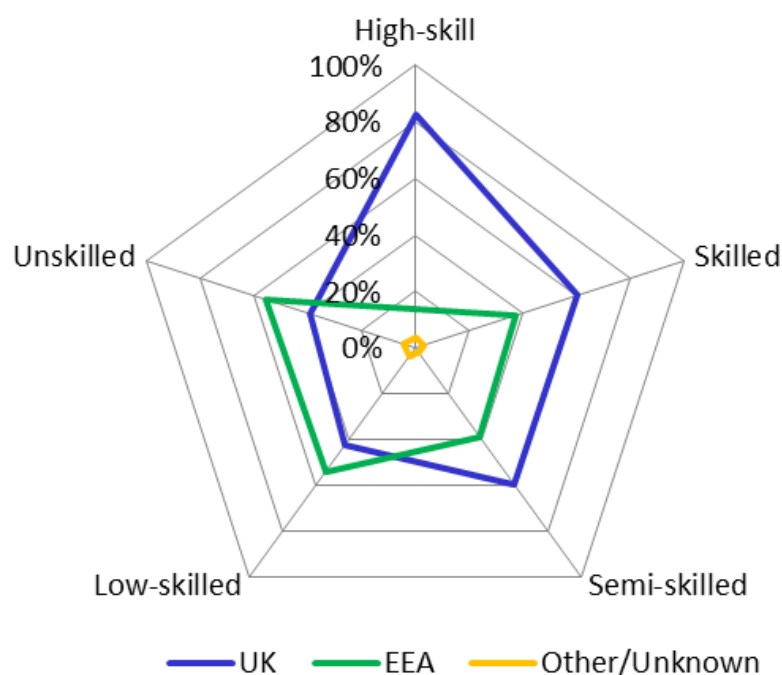


Figure 9: Distribution of sampled workers in the seafood processing sector in 2017 by job skill level and nationality, across all sites sampled (9,585 workers), excluding workers for whom job skill level was unknown or unreported. Source: Seafish.

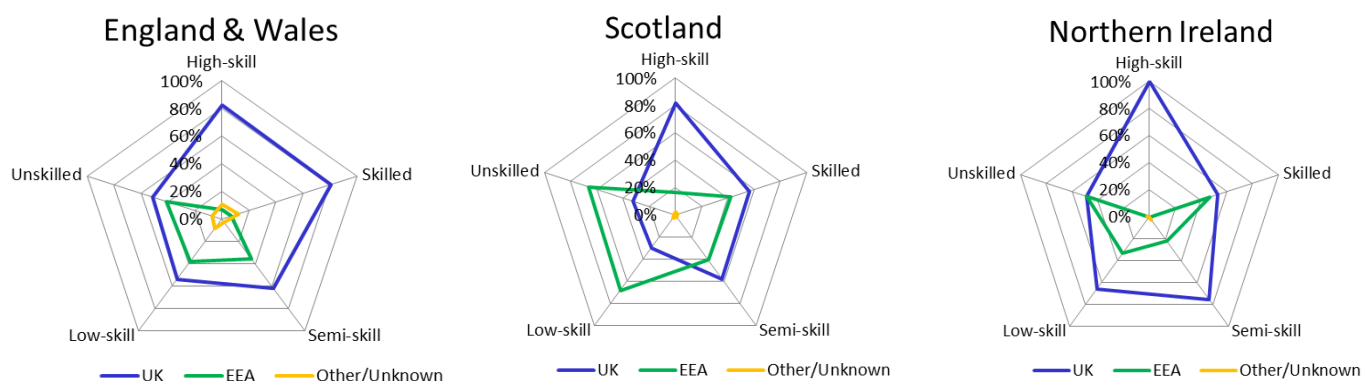


Figure 10: Distribution of sampled workers in the seafood processing sector in 2017 by job skill level and nationality, by home nation. Across all sites sampled (9,585 workers). Data are presented for England & Wales (3,077 people), Scotland (6,054 people) and Northern Ireland (454 people).

4.5 Nationality of the processing sector workforce by contract type

Data on contract type were collected for 10,628 workers employed in the seafood processing sector in 2017. Contract type was unknown or unreported for 2,107 workers. Of the 10,628 people for whom contract type was reported, 8,560 were on permanent contracts, 1,264 on temporary contracts, and 804 were seasonal employees.

The split between British and non-British workers was fairly similar for permanent and temporary contracts, as shown in Figure 11. In total, 74% of all British workers in the sample were on

permanent contracts and 60% of workers from other EEA countries in the sample were on permanent contracts.

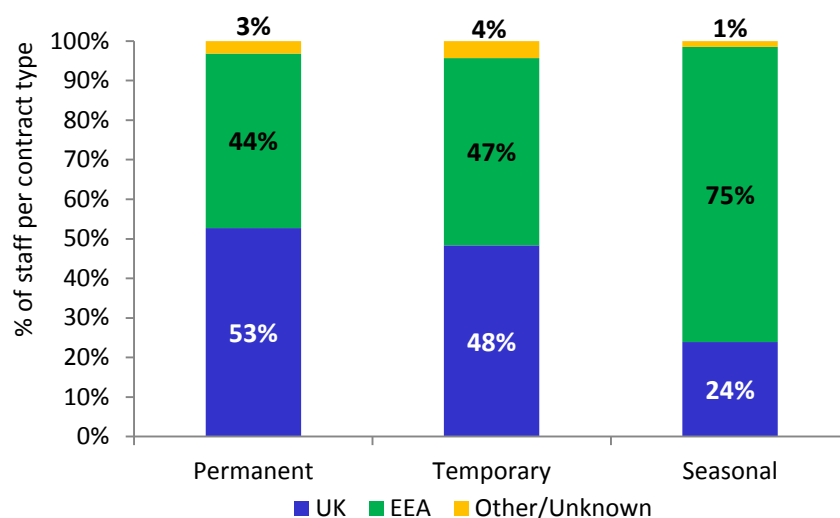


Figure 11: Nationality of the seafood processing sector workforce sampled in 2017 by employee contract type, across all sites sampled. Data is presented for 10,628 workers (excluding those for whom contract type was unknown or unreported). Source: Seafish.

People from other EEA countries made up 75% of seasonal workers in the sample of 804 workers. No processing sites based in England & Wales reported seasonal employees, this could be a result of more distinct production seasons in the Scottish catching and aquaculture sectors which may be determined by the demands of the market (e.g. increased demand for salmon products during the festive period) or legislative restrictions on the fishing season (e.g. the pelagic fishing seasons for mackerel and herring).

4.6 Nationality of the processing sector workforce by age band

Most people in the sample were in the 25-39 and 40-64 age bands at 3,823 and 4,279 individuals respectively; 1,355 individuals in the sample were in the 15-24 year old age band. Only 145 individuals in the sample were in the 65+ age band. Age band data were collected for 9,602 people employed in the seafood processing sector in 2017. Age band was unknown or unreported for 3,133 people in the sample.

Employees in the 15-24 year old age band accounted for 14% of the sample. In this age band British staff represented 50% of the workers, workers from other EEA countries represented 48%, and workers from other countries or for whom nationality was unknown or unreported represented the remaining 2%.

The 25-39 year old age band exhibited the greatest disparity in the proportion of British and non-British employees, see Figure 12. Workers from other EEA countries in the 25-39 year old age band represented 24% of the entire sampled workforce, while British workers aged 25-39 years represented 15% of the entire sampled workforce. This difference is largely explained by the high proportion of workers from other EEA countries in the 25-39 year old age band employed in Scotland: workers from other EEA countries represented 66% of employees in the 25-39 year old age band in the sample from Scotland.

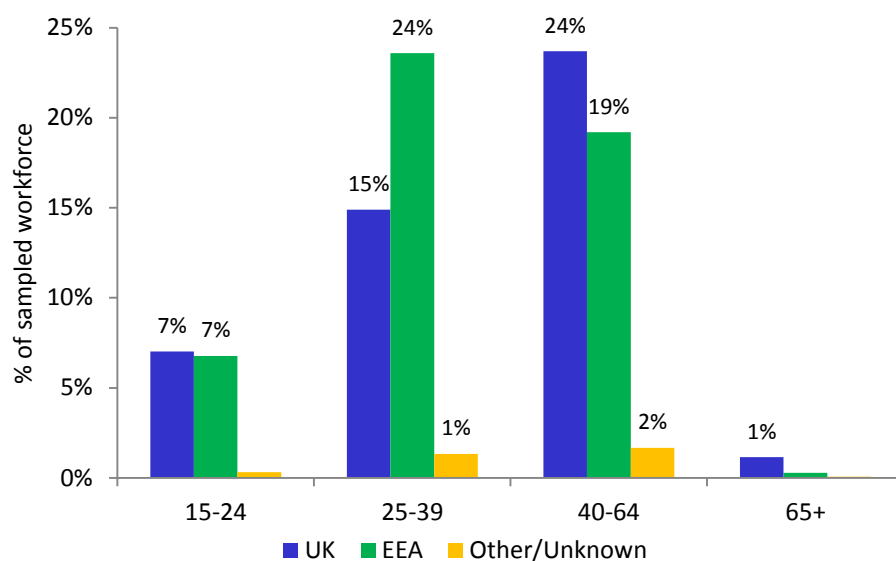


Figure 12: Nationality of the seafood processing sector workforce sampled in 2017 by age band, across all sites sampled. Data are presented for 9,602 workers (some workers in the sample had no age unreported). Source: Seafish.

4.7 Nationality of the processing sector workforce by processing type

When grouped according to processing type (primary, secondary or mixed) processing sites showed an approximately even split between British and non-British workers. Primary and secondary processors employed a slightly lower proportion of workers from other EEA countries at 47% and 44% of total staff respectively compared to mixed processing sites. Workers from other EEA countries represented 51% of the total staff at mixed processors. This observation is likely linked to the fact that primary and secondary processors are smaller on average (fewer FTEs) than mixed processing sites. Figure 13 presents data on the proportion of British and non-British workers amongst three processing types: primary, secondary, mixed¹².

¹² Primary processing includes cutting, filleting, picking, peeling, washing, chilling, heading and gutting. Secondary processing includes cooking, freezing, brining, smoking, canning, breeding, vacuum and controlled packing, and production of ready meals.

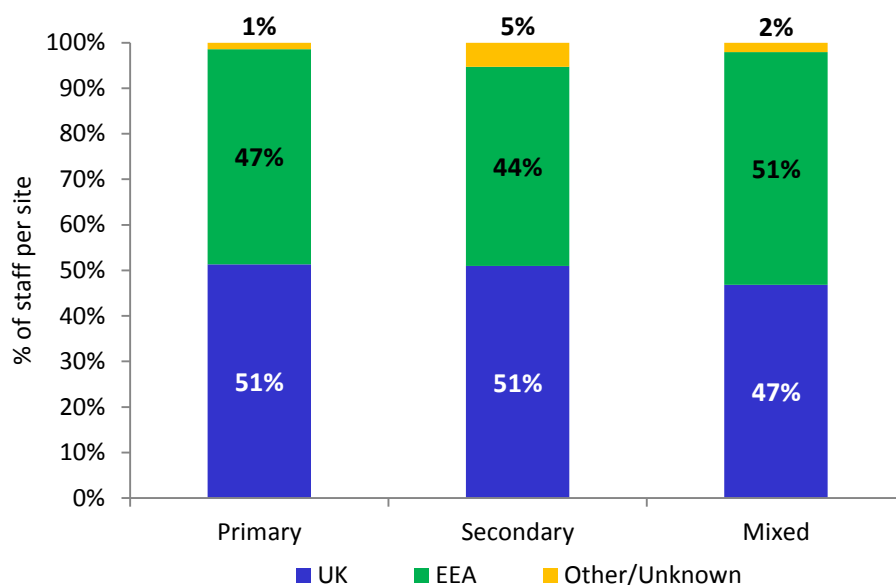


Figure 13: Nationality of seafood processing workers sampled in 2017 by processing type (processing activity according to the Seafish 2016 processing sector census), all sites sampled. Source: Seafish.

4.8 Nationality of the processing sector workforce by fish type

The split between British and non-British workers varied significantly between the five fish type categories. British workers accounted for 77% of workers at demersal fish processors and 76% of workers at salmon and trout processors. Conversely British workers accounted for only 30% of employees at pelagic processors. This observation could be partly due to the larger size of pelagic processors compared to processors of other fish types. As shown in Figure 8 in Section 4.3, larger processors tend to employ a greater proportion of staff from other countries. Most of the pelagic processors in this sample belonged to the two largest size bands by FTE (51-100 FTE jobs and 100+ FTE jobs).

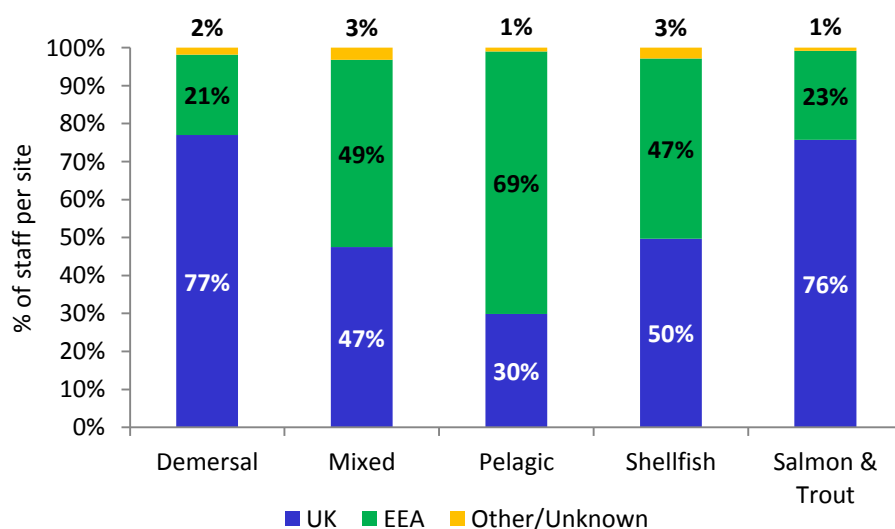


Figure 14: Nationality of seafood processing workers sampled in 2017 by fish type processed (fish type according to the Seafish 2016 processing sector census), all sites sampled. Source: Seafish.

5. Nationality estimates for the population of all fish processing workers

Based on these 2017 labour survey findings and data collected in the most recent Seafish processing sector census in 2016, Seafish estimates that there were 22,630 people¹³ employed in the sector during 2017 and that approximately 51% of these people were British, see Figure 15. This estimate compares to 48% of workers in the survey sample being British. The small difference between the sample percentage and the estimate for the whole population of workers is as expected because the majority of workers not included in the survey sample work in larger companies, which have a higher proportion of non-British workers.

The number of people working in the entire UK processing sector in 2017 (the population) was estimated based on 2016 processing sector census data, using the method outlined in Figure 16.

The share of each type of worker (*UK direct, UK agency, EU direct, EU agency, Other/Unknown direct, Other/Unknown agency*) was calculated for processing sites using data from the 2017 labour survey.

The numbers of UK, other EEA, and Other/Undefined employees for sites that were not in the sample in the 2017 labour survey were estimated using these nationality proportions.

The nationality share multipliers used to calculate these figures are presented in full in appendix 2. Multipliers are presented by worker type, region, and site size.

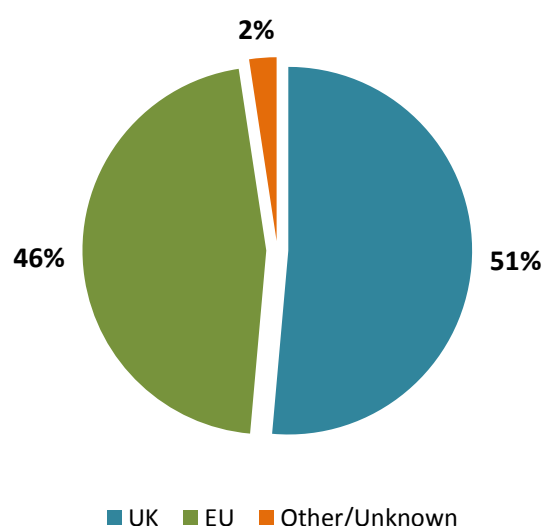


Figure 15: Estimated nationality of all workers in the seafood processing sector in 2017. Estimates based on nationality data from the sample in this 2017 survey and population data from the 2016 seafood processing census. Source: Seafish.

Figure 15 shows the estimated nationality breakdown of all workers employed in the seafood processing sector in 2017. It was estimated that 51% of people employed in the sector in 2017 were British, this is slightly higher than the sample of 12,735 employees from this survey of which 48% were British.

Table 2: Defined groups used for population estimation based on region (or pelagic fish type) and FTE band (from Seafish 2016 census of seafood processors). Source: Seafish.

Groups (region and FTE band)		
Grampian 1-10	Other England & Wales 1-10	N. Ireland 1-10
Grampian 11-25	Other England & Wales 11-25	N. Ireland 11-25
Grampian 26-50	Other England & Wales 26-50	N. Ireland 26-50
Grampian 51-100	Other England & Wales 51-100	N. Ireland 51-100
Grampian 100+	Other England & Wales 100+	N. Ireland 100+
Humberside 1-10	Other Scotland 1-10	Pelagic 1-10
Humberside 11-25	Other Scotland 11-25	Pelagic Other
Humberside 26-50	Other Scotland 26-50	
Humberside 51-100	Other Scotland 51-100	
Humberside 100+	Other Scotland 100+	

¹³ Full-time equivalent (FTE) job is a standardised measure of employment based on an employee working 37 hours per week, 52 weeks per year. The number of people employed is higher than the number of FTE jobs.

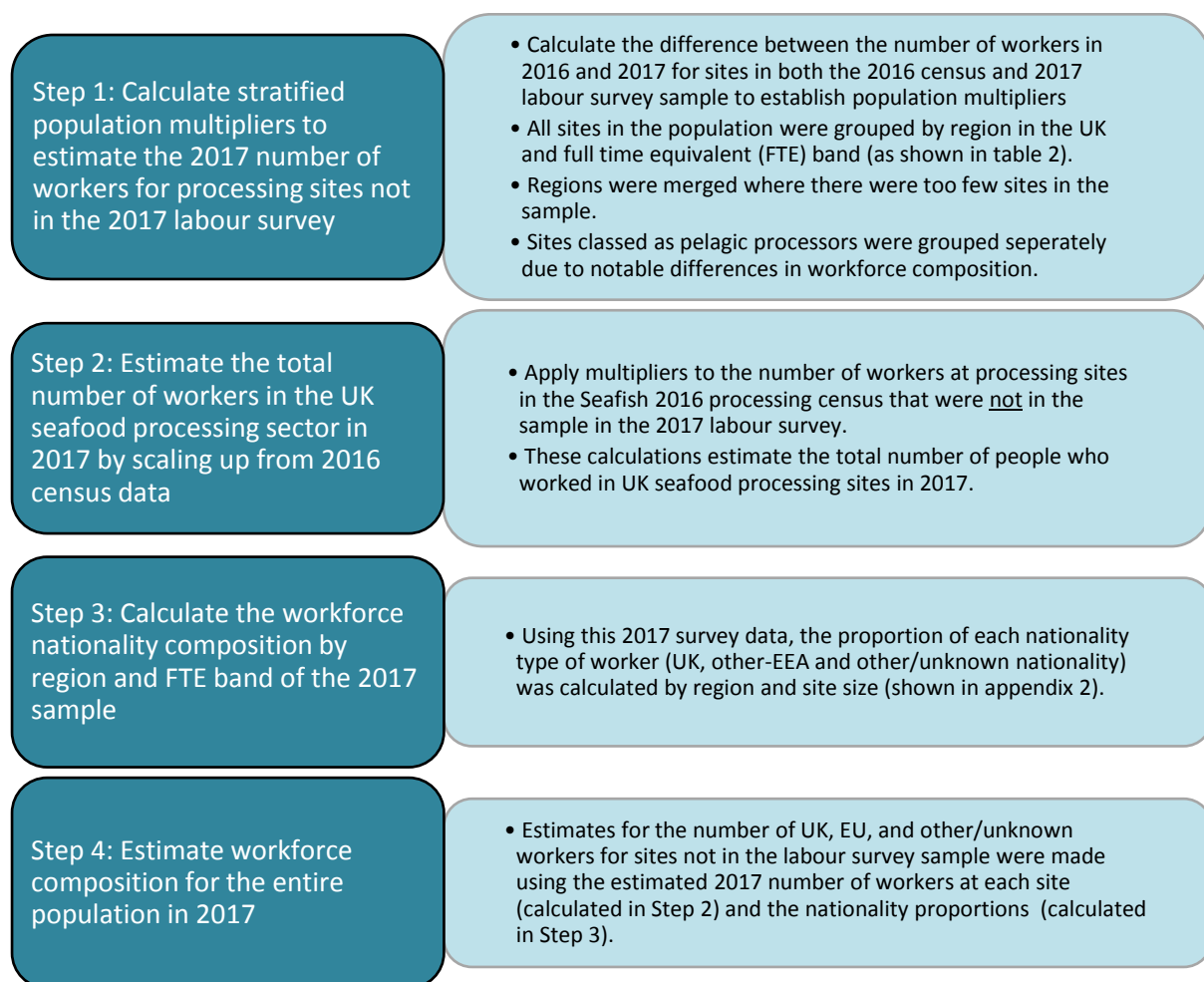


Figure 16: Method used to create nationality estimates for the entire population of people employed in the seafood processing sector in 2017 using workforce composition from the 2017 sample and population figures from the Seafish processing sector census 2016. Source: Seafish.

Nationality estimates are shown by region in Figure 17 and Table 3. Estimates show that Northern Ireland has the highest proportion of British people employed in the seafood processing sector at 72% of the total workforce.

Humberside has the second highest proportion of British workers at 62% of the total workforce. The sample from 2017 found that 61% of people working in the seafood processing sector in Humberside were British.

Estimates show that the Grampian region employed the highest proportion of non-British workers in 2017 at 64% of the total workforce. This figure is slightly lower than that found in the sample from - 2017 presented in section 4.2 – which found that 71% of the sample of people working in the processing sector were from other EEA or third countries.

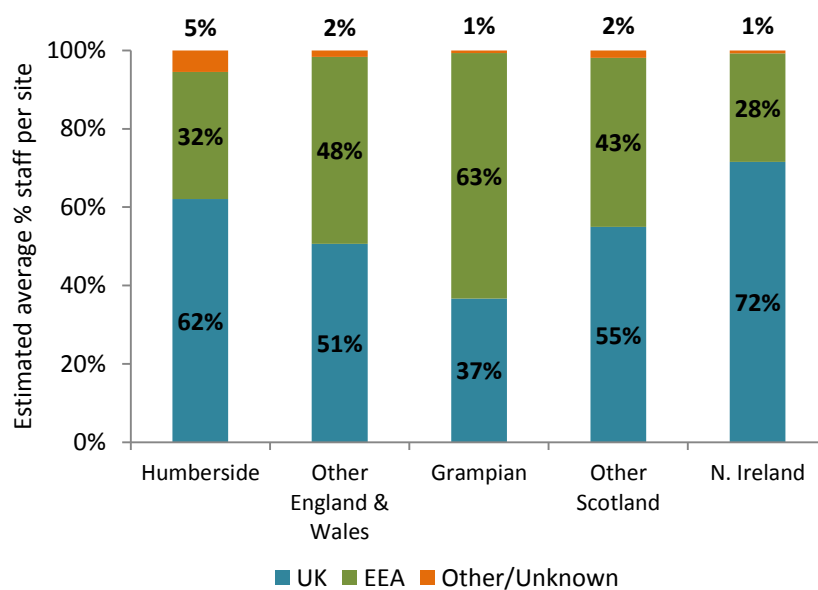


Figure 17: Estimated nationality of the seafood processing sector workforce population by region, excluding pelagic processors. Source: Seafish

Table 3: Estimated proportions of UK, other-EEA and non-EEA workers in the seafood processing sector in 2017 by region. Estimates are based on 2016 Seafish processing census and 2017 sample data. Source: Seafish.

Region	UK	EEA	Other/Unknown
Humberside	62%	32%	5%
Other England & Wales	51%	48%	2%
Grampian	37%	63%	1%
Other Scotland	55%	43%	2%
N. Ireland	72%	28%	1%
Pelagic	30%	69%	1%

Nationality estimates are shown by processing site size in Figure 18 and Table 4. As shown in the 2017 sample – presented in section 4.4 – larger processing sites are more likely to employ a higher proportion of non-British people. It was estimated that 90% of people employed in seafood processing sites in the 1-10 FTE band in 2017 were British. The proportion of British staff decreases

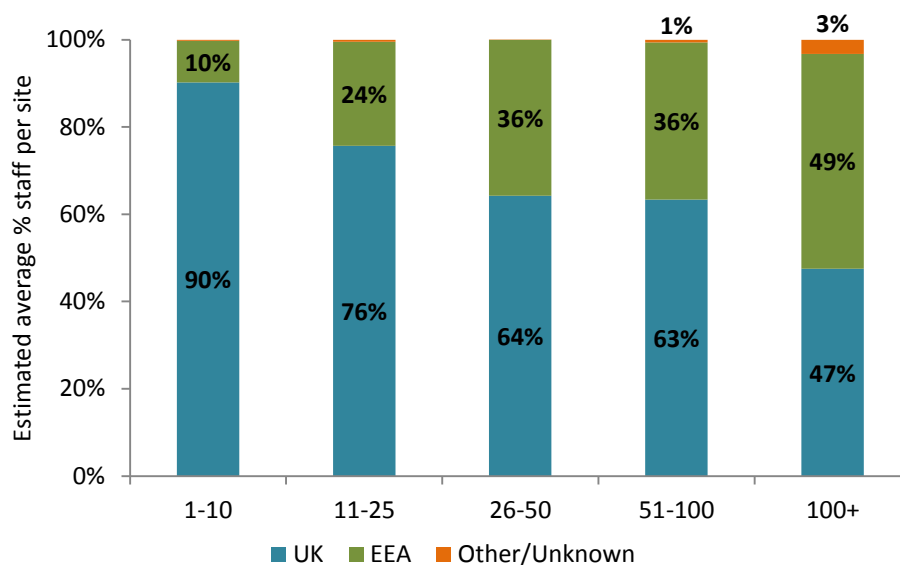


Figure 18: Estimated nationality group proportions of the seafood processing sector workforce population by processing site size (FTE band according to Seafish 2016 Processing Sector Census), excluding pelagic processors. Source: Seafish.

Table 4: Estimated proportion of UK, other-EEA and non-EEA workers in the seafood processing sector in 2017 by processing site size (FTE band). Prepared using 2016 Seafish processing census and 2017 sample data. Source: Seafish.

FTE Band	UK	EEA	Other/Unknown
1-10	90%	10%	0%
11-25	76%	24%	0%
26-50	64%	36%	0%
51-100	63%	36%	1%
100+	47%	49%	3%

These population estimates were developed using the best data available. However, they should be interpreted with caution as the sample data could not be directly raised to the population level due to differences in definitions used in data collection for the 2017 labour survey and the 2016 census. 2017 data were collected on people who worked at processing sites during 2017; the 2016 census collected data on the number of people employed on the day of survey completion (summer 2016) which is subsequently used to calculate the number of FTE jobs in the sector.

As some agency workers may have been employed by more than one processing company that participated in the 2017 labour survey, it is possible that some employees have been counted more than once. Additionally, as the processing census data captured a snapshot of the industry during the summer months, some processors may have been operating at a higher or lower capacity than normal at the time of the census survey due to the seasonal nature of different fisheries.

6. Quarterly survey of staff recruitment and retention

Seafish collected data from 64 individual processing sites operated by 55 processing companies for the quarterly survey on recruitment and retention of staff. According to the 2016 Seafish processing sector census (the most recent available complete population data) the processing sites which submitted data for this quarterly survey accounted for 9,398 FTEs in 2016 (or 52% of the total number of FTE jobs in the sector that year). The full survey questionnaire is presented in Appendix 3.

6.1 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 via word of mouth through existing workers, see Figure 19. 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*.

Social media was identified as a recruitment method in 13% of responses with *Facebook*, *Twitter* and *LinkedIn* being the social media websites mentioned most often by processors. A small number of seafood processors reported other recruitment methods such as advertising in local newspapers or using posters on local public noticeboards.

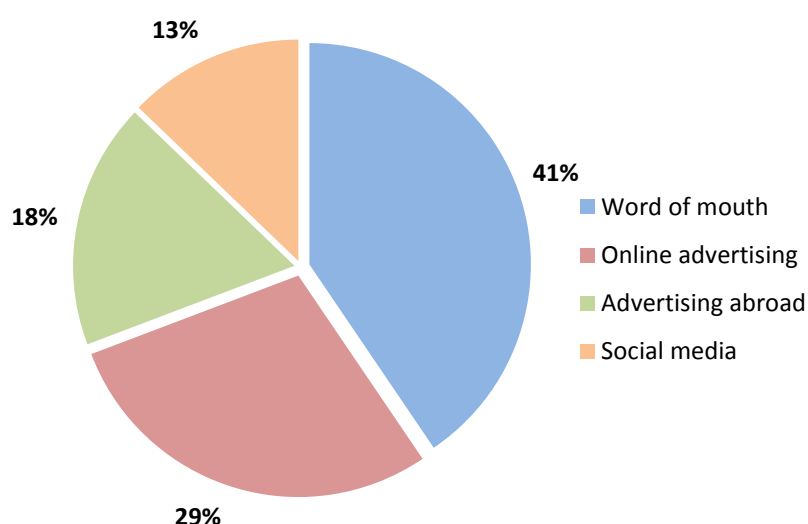


Figure 19: Percentage of companies which reported use of popular methods for directly recruiting permanent, temporary or seasonal workers in 2017. Based on responses from 58 seafood processors. Source: Seafish.

The most commonly reported method used for indirectly recruiting permanent, temporary and seasonal staff in the processing sector was recruitment through an employment agency (65%). In total 35% of respondents (19 processing sites) reported that they used job centre referrals as an indirect method of recruiting permanent, temporary or seasonal workers.

6.2 Factors affecting the ease of recruitment

Processors were asked what factors, positive or negative, affected the ease of recruitment in the previous quarter (October to December 2017). Low availability of suitable candidates was identified as a key factor by 38% of respondents, see Figure 20. Four processors elaborated on this point discussing the fact that their processing sites are located in remote areas with low levels of local unemployment which meant it was difficult to find enough suitable candidates for fish processing roles.

A total of 19% of respondents said that EEA workers are now less willing to come to the UK whilst 6% said that EEA workers are already increasingly leaving the UK. The main reasons cited for this change were the decreasing value of Sterling and improving economies elsewhere in the EEA, resulting in some people choosing to work in EEA countries other than the UK; that some other EEA citizens feel less welcome than previously in the UK; and that the uncertainty surrounding Brexit and the future status of EEA workers in the UK was off-putting to potential candidates.

Only 11% of respondents said they had no problems in recruiting staff.

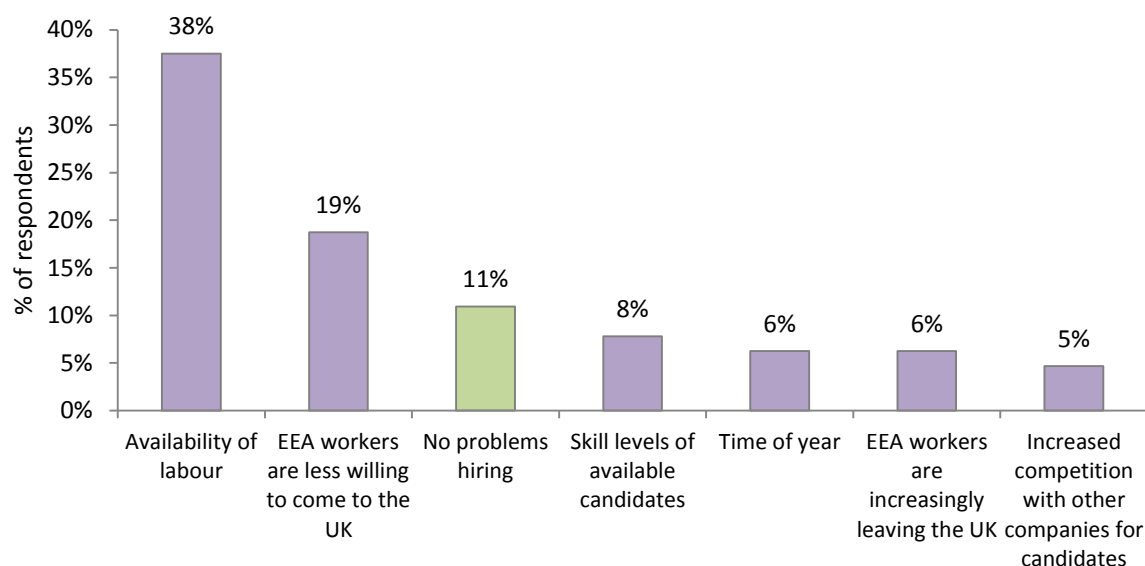


Figure 20: Barriers to recruitment in the seafood processing sector. Based on 69 individual answers from 42 individual processing sites. Respondents were able to comment on all factors that applied to their company. Source: Seafish.

6.3 Barriers to recruiting UK staff

When asked about the main barriers to recruiting British staff in the seafood processing sector, 56% of respondents stated that most British candidates do not want to work in a seafood processing factory, see Figure 21. Processors said that fish processing is a physically demanding job in a cold and wet working environment and some processors suggested that this led to difficulties in recruiting and retaining British staff. Several seafood processors stated that working in a factory was not considered a “glamorous” job by potential candidates, and that perception made it difficult to recruit British people.

The low availability of local workers was cited as a barrier by 31% of respondents. Some factories are located in remote areas, meaning the locally available labour pool is relatively small.

Other common responses included differences in the work ethic of British and non-British workers, reluctance of some British staff to work early mornings or late nights, and that some British staff were more likely to leave or be unreliable, with repeated absences which could lead to dismissal.

Several processors commented that difficulties in recruiting British staff to lower skilled roles meant that there are now fewer British staff being promoted to higher skilled and management roles in their companies and that recent promotions had gone to citizens of other EEA countries who had started at entry level in the company.

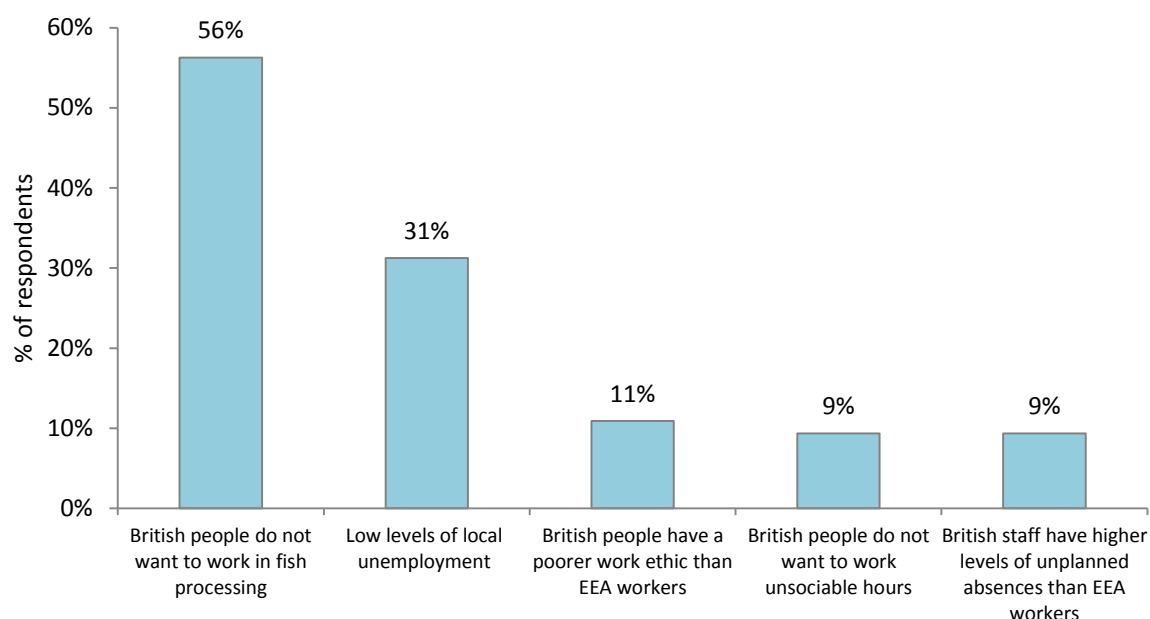


Figure 21: Barriers to recruiting British staff in the seafood processing sector. Based on 108 responses from 59 individual processing sites. Respondents were able to comment on all factors that applied to their company. Source: Seafish.

6.4 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. Almost three quarters of respondents (from 57 individual processing sites) said they would increase their efforts to recruit locally, see Figure 22. Three processors commented that they had already changed the way they recruit locally through increased local advertising; active recruitment drives; or recruiting through word of mouth via existing employees.

In total, 56% of respondents said they would increase their use of employment agencies to supply workers. In October 2017 Seafish carried out an informal survey of six major employment agencies which supply workers to the seafood processing sector. Researchers asked about changes in availability of candidates and demand for workers from the processing sector (*unpublished*). All employment agencies surveyed said they were finding it more difficult to attract enough suitably skilled candidates to meet the demand for labour from the seafood processing industry.

Several agencies reported that they had started targeting new European countries (such as Bulgaria) and increasing their expenditure on advertising in Europe in attempts to attract new candidates. Two agencies specifically mentioned that they were finding it more difficult to attract candidates from Poland, which had previously been their main source of employees, and were now looking targeting candidates in other eastern European countries.

There have been suggestions from the industry that employment agencies may struggle to meet significantly increased demand for workers from the seafood processing sector.

Nearly half (44%) of respondents to the quarterly survey said they would invest in machinery or automation in response to difficulties in recruiting sufficient numbers of staff. For some sectors or specific jobs the shift to automation may be prohibitively expensive or not possible given the variable nature of the work.

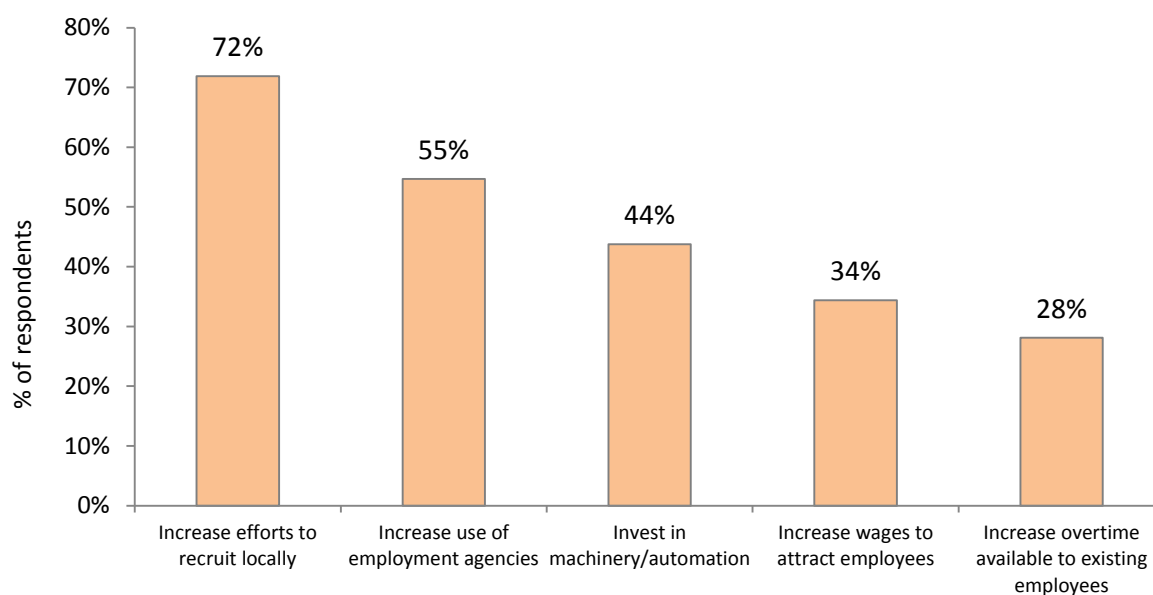


Figure 22: Based on 206 responses from 57 individual processing sites. Respondents were able to comment on all factors that applied to their company. Source: Seafish.

Responses not presented in Figure 22 include:

- Relocate inside the UK (14% of respondents)
- Reduce production (13% of respondents)
- Reduce purchasing of raw materials (13% of respondents)
- Company would become unviable (11% of respondents)
- Relocate outside of the UK (3% of respondents)

6.5 Confidence in recruiting/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 (January 2018 to March 2018). Processors were able to select "N/A" if a question was not applicable to them; these responses are not shown in Figure 23.

On the whole, confidence in ability to recruit staff was lower, for all skills levels, than confidence in ability to retain staff. Just 29% of respondents were very confident or confident in their ability to recruit enough high-skilled staff in the coming quarter.

Overall, processors were confident about their ability to retain sufficient numbers of high and low skilled staff. Over three quarters (76%) of respondents said they were confident or very confident about retaining high-skilled staff and 53% were confident or very confident about retaining low-skilled staff. However, almost half of respondents said they were slightly or very doubtful about retaining sufficient numbers of seasonal staff in the following quarter.

Processors were generally confident about their levels of production in the first quarter of 2018. Whilst 35% of respondents were "neutral" on production, only 4% of respondents were slightly doubtful or very doubtful about meeting their planned levels of production in the next three months.

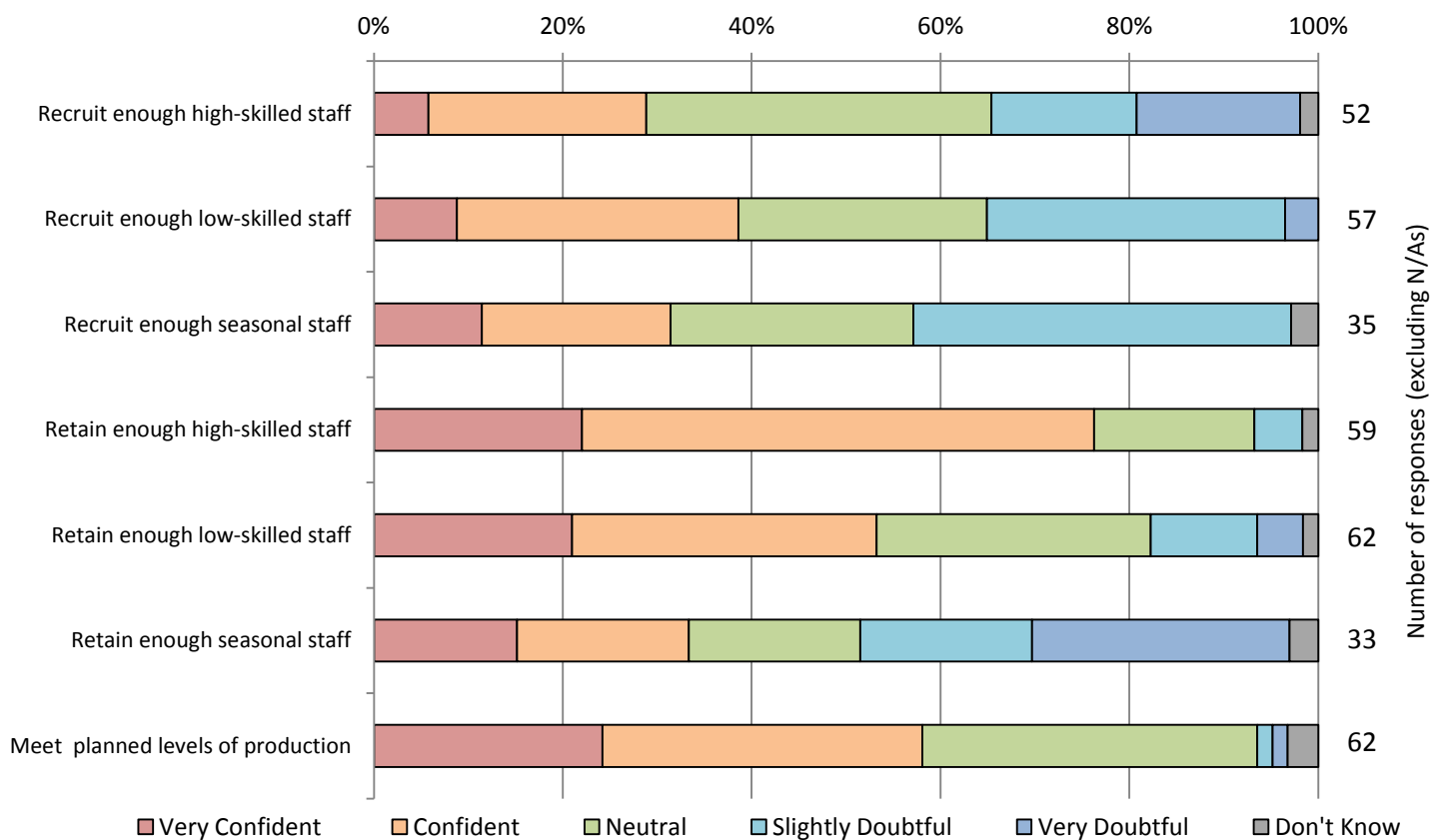


Figure 23: Processors confidence in their ability to recruit and retain sufficient numbers of high-skilled, low-skilled and seasonal staff, and in their ability to meet their planned levels of production in the first quarter of 2018. Respondents could select “N/A” if the field did not apply to their company and these responses were removed from the final analysis. Source: Seafish.

7. Conclusions

The seafood processing sector is very reliant on non-British workers and, in particular, workers from other EEA countries. Workers who are citizens of other EEA countries represented 49% of workers employed in the fish processing sites in our sample in 2017. British staff represented 48% of workers whilst workers from other countries (or for whom nationality was unknown) represented only 3% of the sample.

Region and site size were major factors influencing the nationality mix of the workforce. The Grampian region had the largest proportion of non-British workers at 71% of the workforce in the sample in 2017. Overall 7,113 workers in the sample were employed in Scotland, and 55% of these workers were from other EEA countries, while 2% were from other countries or their nationality was unknown.

The Humber region had the lowest proportion of non-British workers at 33% of the sampled workforce in 2017. 5,065 workers in the sample were employed in England and 43% of these workers were from other EEA countries, while 5% were from other countries or their nationality was unknown.

Larger processing sites are more likely to employ EEA workers than smaller sites. EEA workers made up 53% of employees in sampled sites in the 100+ full-time equivalent (FTE) band; in contrast EEA staff made up only 9% of employees in sampled sites in the 1-10 FTE band.

Workers from other EEA countries made up a greater proportion of low-skilled and unskilled roles than skilled or high-skilled roles. Over 80% of high-skilled (NQF 6+) roles in the sample were held by British employees. At lower job skill levels the proportion of EEA staff was higher; workers from other EEA countries held 52% of low-skilled roles and 50% of unskilled roles in the sample of 9,585 employees. This characteristic is most prominent in Scotland where workers from other EEA countries hold 69% of low-skilled jobs and 67% of unskilled jobs.

The main barrier to recruiting British staff in the seafood processing industry is the negative perception of the industry held by some workers. In total, 56% of processors in the quarterly survey 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. The second most common response (from 31% of respondents) was that low levels of local unemployment meant there was a lack of British candidates for vacancies.

Processors were confident about their ability to meet their planned production levels in the first quarter of 2018. Despite some processors expressing concerns about their ability to recruit or retain sufficient numbers of staff, only 4% of respondents were slightly or very doubtful about their ability to meet planned production levels in the first quarter of 2018. This may suggest that whilst processors believe the labour pool is contracting, the lower availability of labour has not yet had a noticeable impact on production.

Seafish will continue to collect and publish robust and reliable information on the seafood processing sector workforce. The next Seafish quarterly survey is due in March 2018 and the next annual survey of workforce composition will be carried out in November 2018.

Appendix 1: Annual survey questionnaire

Seafood Processing Sector - Labour Availability Evidence Gathering (Annual)							
1. General information							
a. Company name:							
b. Site/facility/unit name*:							
c. Site postcode*:							
d. Company contact name							
e. Contact email:							
*If your company operates multiple fish processing sites, please complete a survey sheet for each individual site and include the postcode for each site.							
2. Workforce composition over the past 12 months							
The aim of this section is to gather evidence on your workforce over the previous 12 months.							
If you collect and store employee information in another way or using another database (for example, for SEDEX submissions) please get in touch with Lewis Cowie at Lewis.Cowie@seafish.co.uk or 0131 524 8631 to discuss the most convenient way to submit your company's information.							
Table 2.a: Workforce composition totals							
You can enter totals for your workforce in table 2.a. or, if you would prefer, complete table 2.b. with one line per worker.							
Please enter totals under each category for the most recent 12 month period for which you have records.							
Please complete this table for every worker that was working at your site at any time during the 12 month period that you are reporting on.							
Please state the 12 month period here: E.g. December 2016 to November 2017							
ONLY COMPLETE TABLE 2.A. OR TABLE 2.B., NOT BOTH							
		UK		EU/EEA (non-UK)¹		Non-EU/EEA²	
		Direct	Agency	Direct	Agency	Direct	Agency
Gender	Male						
	Female						
	Unknown or undeclared						
Age band	15 - 24						
	25 - 39						
	40 - 64						
	65+						
Contract type	Permanent						
	Temporary						
	Seasonal						
Hours	Full time (over 37 hours per week)						
	Part time (fewer than 37 hours per week)						
Job skill level	Highly skilled (NQF 6+: requiring a degree or professional qualification)						
	Skilled (NQF 6: requiring a degree and experience)						
	Semi-skilled (NQF 3-4: requiring experience and training)						
	Lower-skilled (NQF 2: requiring some training or experience)						
	Unskilled (below NQF 2: requiring little or no experience)						
Staff turnover	Left or dismissed during this period						
	New staff hired during this period						
¹ European Union (EU) countries: Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden ² Non-EU/EEA : all other countries that are not part of the EU or EEA							

2.B. Alternative formats for workforce composition evidence

Details of your workforce over the last complete 12 month period (including temporary and seasonal staff)

Please answer the questions in relation to the situation at the end of employment of the worker or the end of the 12 month period you are reporting on.

If your company employed a person for two temporary or seasonal periods in the 12 month period you are reporting on, please include that person for each period of employment

ONLY COMPLETE TABLE 2.A. OR TABLE 2.B., NOT BOTH

Worker ID (e.g 001, 002 etc)	Gender ³ M/F/U	Age (at the end of the 12 month period)	Nationality	Job skill level ⁴ High-skill (H) Skilled (S) Semi-skill (M) Low-skill (L) Unskilled (U)	Contract type Permanent (P) Temporary (T) Seasonal (S)	No. of weeks employed (max. 52 weeks)	Hours ⁵ Full time (F) Part time (P)	Employment type ⁶ Agency (A) Direct hire (D)	Payment method Hourly (H) Piece rate (P) Salary (S) Agency fee (A)	Pay rate Hourly rate, piece rate, or agency rate (if applicable) (£)	Annual salary (if applicable) (£)
Example	F	25	Polish	S	P	52	F	D	H	7.20	
00Y	M	22	UK	L	S	6	F	A	A	8.00	
001											
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Click to add a row

Alternative table notes

³ Male (M), female (F), or unknown, undefined or unbinary (U)

⁴ Skill level notes

High skilled (NQF 6+): requiring a degree or higher professional qualification

Skilled (NQF 5-6): requiring an HND and experience

Semi-Skilled (NQF 3-4): requiring experience and training

Low-skilled (NQF2): requiring some training or experience

Unskilled (below NQF 2): requiring little or no training or experience

⁵ Full time employment is defined as over 37 hours per week, below this is classed as part time

⁶ Employment type: agency (A) staff that are employed by an agency or, direct (D) staff that are employed by your company directly at the time of completing the survey. If an employee was recruited through an agency but is now employed directly by your company they should be recorded as a direct employee (D)

3. 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 ANNUAL SURVEY*****

Appendix 2: Nationality shares used for population estimates

Estimated nationality shares by group used for population estimation procedures as presented in section 5 of this report. Nationality shares were calculated using nationality data collected in this survey for 12,735 people working in the seafood processing sector in 2017. Source: Seafish.

Group	Share of UK direct workers	Share of UK agency workers	Share of EU direct workers	Share of EU agency workers	Share of Other/Unknown direct workers	Share of Other/Unknown agency Workers
Grampian 1-10	0.774	0.000	0.226	0.000	0.000	0.000
Grampian 11-25	0.857	0.000	0.143	0.000	0.000	0.000
Grampian 26-50	0.631	0.000	0.369	0.000	0.000	0.000
Grampian 51-100	0.550	0.000	0.450	0.000	0.000	0.000
Grampian 100+	0.219	0.019	0.694	0.057	0.007	0.003
Humberside 1-10	1.000	0.000	0.000	0.000	0.000	0.000
Humberside 11-25	0.750	0.000	0.250	0.000	0.000	0.000
Humberside 26-50	0.651	0.000	0.349	0.000	0.000	0.000
Humberside 51-100	0.273	0.030	0.652	0.045	0.000	0.000
Humberside 100+	0.534	0.099	0.153	0.146	0.064	0.003
N. Ireland 1-10	0.632	0.000	0.316	0.000	0.053	0.000
N. Ireland 11-25	0.550	0.000	0.450	0.000	0.000	0.000
N. Ireland 26-50	0.969	0.000	0.031	0.000	0.000	0.000
N. Ireland 51-100	0.210	0.000	0.790	0.000	0.000	0.000
N. Ireland 100+	0.817	0.000	0.173	0.000	0.010	0.000
Other England & Wales 1-10	0.965	0.000	0.035	0.000	0.000	0.000
Other England & Wales 11-25	0.737	0.000	0.253	0.000	0.010	0.000
Other England & Wales 26-50	0.507	0.030	0.164	0.299	0.000	0.000
Other England & Wales 51-100	0.778	0.000	0.210	0.000	0.012	0.000
Other England & Wales 100+	0.339	0.014	0.615	0.009	0.024	0.000
Other Scotland 1-10	0.882	0.000	0.118	0.000	0.000	0.000
Other Scotland 11-25	0.781	0.000	0.219	0.000	0.000	0.000
Other Scotland 26-50	0.646	0.030	0.256	0.061	0.006	0.000
Other Scotland 51-100	0.542	0.000	0.448	0.000	0.010	0.000
Other Scotland 100+	0.464	0.040	0.450	0.022	0.024	0.000
Pelagic 1-10	1.000	0.000	0.000	0.000	0.000	0.000
Pelagic Other	0.268	0.029	0.491	0.202	0.009	0.001

Appendix 3: Quarterly survey questionnaire

Seafood Processing Sector - Labour Availability Evidence Gathering (Quarterly)				
1. General information				
a. Company name:				
b. Site/facility/unit name:*				
c. Site postcode:*				
d. Company contact name				
e. Contact email:				
<i>*If your company operates multiple fish processing sites, please complete a survey sheet for each individual site and include the postcode for each site.</i>				
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. Has the time it takes to fill a vacancy changed in the past quarter?		(Y/N)		
d. If yes, what changes have your company experienced?				
Enter text here, e.g. vacancies open for longer, change in the number of applicants, candidates with different skill-sets				
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="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>		
3.b. Why do you think this is? Please tell us all the reasons affecting ease of recruitment:				
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"/>	
Direct 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 <u>three months</u> , 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. <u>Retain</u> enough high-skilled staff?														
e. <u>Retain</u> enough low-skilled staff?														
e. <u>Retain</u> 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. How would your company adapt if you can't get enough workers? (tick all that apply)														
a. Seek 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								<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														
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*****														