

# Labour and skills in the horticulture and agriculture sectors in England, 2023: Summary report



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# 1. Introduction

Agriculture and horticulture underpin the food and drink sector which is the UK's largest manufacturing sector. Despite the vital importance of the sector there is a consensus amongst employers, industry stakeholders and academics that a combination of factors including Brexit and associated changes in immigration policy, the COVID-19 pandemic and more recently the war in Ukraine are combining to create significant challenges to the UK's farm labour market in the form of labour and skills shortages.

To date, data collection strategies have largely been ineffective in capturing the evidence required to understand the labour and skills situation across England and across all sectors of primary production. While the farming community is used to dealing with uncertainty and factors outside of their control, change in the contemporary climate is happening at such a rate that some industry experts, along with

many farmers, have identified the labour and skills situation in British agriculture as 'in crisis'.

It is, therefore, essential that an accurate depiction of farm labour and skills requirements, both now and in the future, is developed.

The Institute for Agriculture and Horticulture (TIAH), established in 2021, is the Professional Body for Agriculture and Horticulture in England. Its purpose is to support the various stakeholders within these sectors in becoming more competitive and sustainable through a variety of means, including continuing professional development (CPD), careers advice, signposting up-to-date information and training providers, and content and resource production for new entrants and employers.

The Centre for Rural Policy Research (CRPR) at the University of Exeter was commissioned by TIAH to carry out an in-depth, evidence-based study to support its aims of developing accurate and up-to-date labour market information.



## 1.1. Purpose of this research

This study sought to determine the current situation regarding the skills and labour requirements of the agricultural and horticultural industry across England. In addition to a focus on farmers and growers, this research also takes into account the labour requirements of agricultural contractors, a cohort who, until now, have been largely ignored in studies of this kind. Our intent was to produce comprehensive findings that will not only help to inform future endeavours of TIAH, but also policymakers, industry representatives and, most importantly, agribusiness employers and their staff.

## 1.2 Aims and objectives

Against this background, the objectives of the research were to:

1. Identify the drivers of change affecting agriculture (including opportunities and constraints to growth) and how these might influence employers' skills needs over the next 10 years.
2. Establish a sample profile of the agricultural workforce, including demographic information, region of origin, qualifications, and attainment.
3. Quantify the prevalence of skills shortage and recruitment difficulties at multiple levels (including hard-to-fill vacancies) and investigate the reasons why these are being experienced.
4. Identify to what extent organisations are providing training, how suitable training provision is, and highlight any gaps in training provision that can be identified by employers.
5. Quantify current skill levels and the future importance of those skills to determine future critical skills gaps and priority training needs.
6. Explore attitudes, approaches and barriers to training.
7. Prepare recommendations, taking into account additional support needed to help the agricultural sector realise its full potential.



### 1.3 Our approach

This research employed a questionnaire survey method in order to reach as many employers as possible in a short time period. The questionnaire was available as both a postal and an online version, as farmers often prefer paper questionnaires. The study focussed on businesses in England only.

The postal questionnaire was sent to a sample of 4000 from a database of 33,764 farms in England which was supplied by TIAH via Market Location, a business-to-business data provider. Full details of our sampling strategy are available upon request.

The sample was stratified by farm type (e.g. mixed farming, dairy) and by postcode in order to achieve a cross section of farm types and widespread geographical coverage.

Given that this is a study on agricultural labour, we focused on businesses recorded as employing staff, and the sample was deliberately skewed towards businesses recorded as having five or more employees.

The questionnaire was distributed, by post, to the sample of 4000 farm businesses, and online using the survey software, Qualtrics. The survey was open from 18<sup>th</sup> March to 3<sup>rd</sup> June 2022. In total we received 681 valid responses (614 postal responses and 67 online responses).



### 1.4 Key sample characteristics

Respondents to our survey reflect a good cross section of farm types, sizes and tenure situations and cover all regions of England. The 681 respondents employ a total of 14,180 staff across their businesses (excluding staff exclusively employed in non-agricultural diversified enterprises) which accounts for approximately 11% of the total employed agricultural workforce population in England. A large proportion (40.5%) were seasonal/temporary employees and 35.8% were permanent/salaried staff. In terms of staff type the survey covered a good range of managers, specialised staff and non-specialised staff, as well as casual staff, volunteers and apprentices.

The majority (73.8%) of businesses returning completed questionnaires were micro-businesses (defined as 0 to 9.5 FTEs [Full Time Equivalents]). 13.2% operated small businesses (9.51 to 49.5 FTEs) and 4% operated medium sized businesses (49.51 to 249.5 FTEs).

In contrast to the often-quoted figure of 60 being the average age of a farmer (specifically, the registered farm holder), our findings demonstrate that 84% of primary production staff accounted for in our survey are under the age of 55, with 53% falling within the 25-44 year old category

In terms of gender, male staff were in the majority in every staff group, with managerial and specialist roles showing the highest proportion of male staff, although there is also a high proportion of male staff among non-specialised staff. In contrast, among unpaid family members almost half were female (46.5%). It may be that perceptions around gender continue to impact the willingness of employers to employ women for certain roles. Similarly, ethnic diversity continues to be an issue within the farming industry.





## 2. Key Findings

**1.** The findings from this study confirm that **both the availability of labour and access to staff with the requisite skills continue to be an issue for the primary production sector** (farmers and growers), and that **these issues are not exclusive to any one sector or staff type** (i.e. seasonal). For example, 6% of businesses had vacancies open for three or more staff members at the time the study was conducted, while 19% had vacancies open for one or two members of staff. In total, 25% of respondents were seeking staff at the time of the survey. In addition, 63% of respondents stated that they had found certain vacancies hard to fill over the last 12 months, with 39% reporting that one or more of these vacancies had remained unfilled for over a month from the time of the vacancy opening. The most challenging post to fill amongst our sample was that of tractor driver with certificates, followed by seasonal crop harvesters/pickers, stock/herdperson and then non-specialised farm staff (or all-rounders) and qualified spraying operators.

**2.** These **labour and skill shortages impact both employers and businesses in ways far beyond the expected business impacts**. Respondents reported that the impact of labour or skills shortages can be extremely negative, leading to stress (48%), depression (17%), anxiety (34%), or negatively impacting upon work-life balance (52%), family relationships (31%) or general work satisfaction (36%). Commonly, employers or staff are also forced to work more hours as a coping strategy.

**3.** **Agricultural contractors remain a key source of labour for the majority of farm and horticulture businesses across England**, with at least half of respondents in each sector citing the use of their services. Most (79%) have sufficient access to contractors when they need them, but availability does appear to vary according to region, with respondents in the North East most likely to report difficulties in finding contractors when required. Contractors themselves also appear to be affected by labour and skills shortages, which could significantly impact multiple businesses should this trend continue or worsen.

**4. A large proportion of the staff represented in the sample were not qualified to FE (Further Education e.g. agricultural college) or HE (Higher Education e.g. university level).** Seasonal staff were more likely to be reported as having no qualifications. Qualifications are largely dependent upon the type of role being carried out. For example, 50% of managers were reported to hold Further or Higher Education qualifications. This means that strategies to improve skill sets among staff members need to be considerate of age, education, ability, and likely skill levels already in existence so as to be as inclusive as possible. In turn, this will require a range of training methods and approaches which should be tailored as well as possible to each 'learning audience'.

**5. Large numbers of employers report that they are already providing training for their staff.** For example, almost 60% of employers said that off-the-job or on-the-job training and development is already provided to their staff. Very few stated that they planned to provide less of any form of training in the next three years although there was widespread recognition of a range of barriers to training provision. Only 17% (of the 558 responding to a question about barriers to training) stated that there were no barriers to training.

**6.** The most common barrier cited was that **employers could not spare the time of their staff to go away for training (44%).** This was followed by lack of funds or training being too expensive (32%), difficulty finding training providers who can deliver where or when the employers require it (22%), and it being hard to find the time to organise training (20%). Just 19% of respondents believe that their staff are now fully proficient or do not require further training.

**7.** Respondents were asked to score skills in two ways. Firstly, they were asked to identify where they perceived skills gaps currently occurring among their own staff. They were then asked how important they perceived certain skills to likely be in ten years' time. **The results point to significant skills gaps occurring now, and highlighted the need for more targeted training to fulfil future needs.** For instance, the skills believed to be most lacking among current staff are those related to health and safety (55%), environmental management and regulations knowledge (51% and 49% respectively), basic IT skills (41%) and biosecurity (38%) as well as basic literacy skills. Many of these same skills were considered to be important to future requirements. In terms of more technical skills, over 50% stated that their current staff are not sufficiently skilled in advanced digital skills (e.g. other IT, social media, programming, and use of software such as GPS or mapping tools). In addition, almost two thirds stated that their staff are missing so-called 'soft skills' (such as team work and communication) or supervisory/people management skills.

**8.** It is concerning to note that **37% of respondents stated that they were either not very confident or not at all confident that they will be able to find and retain the staff who have the relevant skills to their business in the coming year,** with only 15% feeling very confident.

**9.** Turning to the employers themselves, **almost three quarters have not carried out any formal management or leadership training themselves in the last three years.** Although such training may have been carried out earlier, it is likely that many have never engaged in any kind of formal management or leadership training. Of those who had not

carried out any formal management or leadership training in the last three years, only 10% expressed any intention of doing so in the next three years. While not surprising, this indicates the extent to which lack of management and professional development training permeates the industry, which is concerning for a number of reasons. Effective management skills not only promote greater productivity and profit, they are also crucial to ensuring staff wellbeing and encouraging retention in any business.

**10.** The survey revealed significant ‘churn’ amongst the staff employed by responding businesses with **just under 45% reporting that staff had left in the previous 12 months**. A total of 1583 staff had left businesses in the sample in the last year with over twice the number of staff leaving as were recruited in the previous 12 months. Few staff exits resulted from an active decision on the part of the employer, with many seasonal staff being forced to leave or prevented from returning due to changes in immigration policy. However, a number of businesses also lost staff to other career paths or other farms, which signifies a real need for management and leadership training among employers to ensure retention of staff and improve the employment conditions sufficiently to encourage workers to stay.

**11.** Looking to the future in terms of staff recruitments, contrary to beliefs about the impact of automation and new technology on labour requirements, **it looks like labour requirements are anticipated to remain the same or increase over the next five years**, particularly in terms of specialist/technical staff. 27% of respondents anticipated a need to increase specialist/technical staff over the next five years and 20% expected to increase numbers of non-specialist staff. A quarter of our sample attributed the need for more staff to business growth, while significantly fewer

suggested that the uptake of automation might decrease their labour requirements in the next five years. A common assumption is that automation will gradually overtake the need for individual workers, but our findings suggest that this may be a long way off, and that failing to improve recruitment strategies across the industry in the short-term might be of detriment to any businesses that may be able to benefit from automation in the long-term.

**12. Future staffing and skills requirements signify a continued need for the industry to be supported in its labour and skills needs.** The indications are that, along with many of the basic skills associated with farming or horticulture, skill requirements are only going to become more specialised, across all types of skill categories. Therefore, availability and appropriateness of training design should be foremost in any industry drive towards improving recruitment, leadership and management skills, as well as staff retention.

**13. Recruiting the future workforce for the sector is likely to present a number of challenges.** Businesses participating in the survey faced a range of existing staff recruitment barriers with over half citing personal attributes of workers or potential workers as the main barrier to recruitment for permanent/salaried staff, such as attitude, motivation or personality. Personal attributes were closely followed by unsociable hours, competition from other industries, the domestic workforce not being interested in primary production roles, and low pay. However, lack of skills among applicants, lack of affordable accommodation in the local area, competition from other farm businesses, and the fact that farming has a poor image generally, were also cited by over a third of all respondents as barriers to recruitment. It seems unlikely that these barriers will disappear in the future unless



the industry as a whole takes steps to address them.

### **14. Employers need help in overcoming their labour difficulties, both on a macro and micro level.**

Few employers attribute themselves any responsibility for recruitment, retention or skill issues, and although a large proportion reported having increased salaries or training for staff (66% and 35% respectively of those reporting experiencing labour shortages), the management and leadership skills needed to support and retain staff are likely to be lacking among many due to their own limited training. With the continued reliance on 'traditional' word of mouth recruitment (52% reported relying on 'word of mouth' when recruiting from the UK), training in recruitment and selection is of particular importance if the labour shortage issue is to be remedied and barriers to recruitment overcome.

**15.** This means addressing a key characteristic of farming, in particular. Agriculture has long been challenged for having 'closed shop' characteristics and **there still exists a reliance upon individuals coming from a farming family or background, which severely limits the scope of businesses in need of staff** who are able to fulfil some of their labour or skill requirements. While some farmers expressed a willingness to engage with potential staff without any prior experience in farming, a significant number (42%) still demonstrate a reluctance towards this.

**16.** In spite of the government insistence that the industry target recruitment towards the domestic workforce, our findings show that **almost a fifth of current permanent/salaried staff are from outside the UK, while only 14% of the seasonal workforce are domestic staff.** This suggests that immigration remains the most rapid and effective solution for many employers at this time and should be regarded as such by policymakers, regardless of wider policy.



# 3. Conclusions and Recommendations

Uncertainties facing the agricultural industry are likely to continue, whether related to the impact of changes in industry, policy, trade or consumer choice, or external and unpredictable factors such as war or disease. The importance of maintaining domestic production is, therefore, crucial to not only the resilience of the food, farming and growing sectors but also in response to the growing interest in, and importance of, food security. Access to a sufficiently skilled workforce remains crucially important to the country's need to deliver safe, nutritious, affordable and sustainable food, as well as maintaining a healthy trade beyond its borders. It is imperative that further action be taken in order to achieve these goals. In order to progress towards these goals we make a number of recommendations aimed at industry representatives, policymakers, and business operators, as well as identifying key future research requirements:

## 1. Recommendations for industry representatives

- 1.1** Create an accessible (free or subsidised) set of training modules for agri-business employers to develop their people management, communication and leadership skills.
- 1.2** Create an accessible (free or subsidised) set of training modules for the employed workforce. Strategies to improve skill sets among staff members need to be considerate of age, education, ability, and likely skill levels already in existence in order to be as inclusive as possible. This will require a range of training methods and approaches which should be tailored as well as possible to each 'learning audience'.
- 1.3** Any training should take into account not only skills requirements for the present day, but also those which have been identified as being important in the future, such as advanced digital and IT skills, data use and management, health and safety, skills related to environmental management and regulations, and machinery maintenance.
- 1.4** Establish a recruitment toolkit to facilitate more efficient recruitment methods across all sectors, and to assist with the development of recruitment skills, such as writing job adverts, developing job descriptions, candidate selection, and interviewing.
- 1.5** Create an accessible resource centre to help guide employers through potential stumbling blocks, such as employment law.
- 1.6** Develop an awareness campaign (industry and media) to highlight the importance and role of farmers in improving the labour and skills situation in the primary production sector, emphasising the importance of recruitment methods, training, on-farm culture, and the employment potential of individuals who do not have a farming background.
- 1.7** Encourage greater collaboration between industry employers and educational colleges and universities to help develop vocational courses which match employees' and employers' needs more closely.

**1.8** Develop an employer accreditation scheme, identifying and certifying ‘employers of choice’.

**1.9** Support the facilitation of ‘halfway’ training schemes similar to the Access to Agriculture scheme run by Harper Adams, aimed particularly at people from non-farming backgrounds.

**1.10** Establish a cross-sector working group to identify ways to encourage gender and ethnic diversity in recruitment to the industry.

**1.11** Targeted signposting for all employers is required regarding mental health and wellbeing support, as the impact of labour/skills shortages on both employers and staff has been shown to be significant.

## 2. Recommendations for policy-makers

**2.1** The seasonal worker scheme must accommodate the needs of all sectors currently reliant upon migrant workers, including those requiring year-round staff, so as not to discriminate between sectors.

**2.2** The government response to the *Labour shortages in the food and farming sector report* should be reconsidered in order to ensure the resilience of the sector and to support the levelling up objectives set out in the food strategy. For example, the government should consider the following: adding the food and farming roles recommended by the Migration Advisory Committee (MAC) in 2020 to the Shortage Occupation List (SOL), lowering the English language requirements for the food and farming sector, and developing the Seasonal Workers Pilot into a permanent scheme.

## 3. Recommendations for agri-business employers

**3.1** Ensure that training and professional development for both employers and staff are incorporated into the business strategy.

**3.2** Seek opportunities to develop personal leadership and communication skills in order to attract and retain staff, as well as to create a good reputation and become an ‘employer of choice’.

**3.3** Evaluate current recruitment strategies and be prepared to develop recruitment skills through training (such as writing job descriptions and interviewing), as well as change the current recruitment model of the business to ensure that all potential staff are reached.

**3.4** Seek assistance from specialists to audit the on-farm culture of the business in order to identify weak spots which may prevent you from reaching your potential as an ‘employer of choice’.

**3.5** Explore opportunities to employ more people from a non-farming background or without prior experience, particularly in relation to managerial roles.

## 4. Recommendations for further research

**4.1** Further direct and specifically designed research on agricultural contractors is required, to investigate their role now and in the future to business, sector and industry resilience. Due to working patterns this cohort is particularly hard to reach therefore an alternative method of study might be required.

**4.2** A large, quantitative survey of the agricultural and horticultural employed workforce is required in order to triangulate the data in this, and other, data set/s and explore how a more efficient matching process between industry employers and potential staff might be developed.



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