



The Seafood Industry in Northern
Ireland
Skills, Recruitment and Retention

Executive Summary

The seafood industry in Northern Ireland comprises a number of different but interrelated sectors - aquaculture, catching, fish frier, processing, and retail which employ some 5,200 people 0.6% of a total NI workforce of 870,000 people.

The industry, while relatively small, is of importance well beyond beyond its contribution to employment and GDP, a fact that has been underlined by the food security concerns raised during the Covid-19 epidemic. The industry is also a major employer in some coastal communities.

In parallel with the unique challenge of a global pandemic the industry is also facing major challenges/opportunities from the UK's exit from the EU.

In spite of the existing and potential negative impacts, all of this points to opportunities for the industry. The catching sector is typical, but all sectors will have to adapt to thrive in the post EU-exit environment.

The Sea Fish Industry Authority (Seafish) is a Non-Departmental Public Body tasked with improving efficiency and raising standards across the industry. It is at the forefront of facilitating change and driving improvement across a united industry.

In February 2020 Seafish commissioned Pye Tait Consulting to

Recommendation 16:

Map skills, recruitment and retention needs and issues across the entire value chain and,

Review best practice with regards to training, skills development and workforce retention within the UK and overseas

Pye Tait Consulting conducted this work in parallel to conducting similar work in England and Wales.

Approach

The study involved both detailed secondary research and primary research.

Secondary research involved desk work on existing seafood reports and publications.

Primary research consisted of an employer survey which returned 47 individual responses, six depth interviews with employers and stakeholders, and 5 participants in an extended nominal group to add depth to the first two interventions.

The study was designed and initiated prior to the advent of the Covid-19 pandemic and lockdown (mid-March to July 2020). Both desk and field work were in progress at the time of the lockdown but it was decided, in conjunction with Seafish, that the results of the research were of such importance to the industry that it should be completed.

Key findings

Perhaps the most important finding concerning skills in the seafood industry is that its skills and qualifications are relatively unknown, unappreciated, and quite widely under-estimated. This is evidenced by the recruitment issues flagged up by stakeholders and employers during this research.

Each of the sectors is, however, highly skilled in specialist areas and require the same levels and diversity of business and management skills seen in all other economic sectors. For example:

- Aquaculture – very high science skills, high animal care skills, business management, marketing, customer relations. Surveyed employers regard 80% of permanent staff as highly skilled or skilled.
- Catching – complex high-level combinations of skills in navigation, seamanship, ship engineering and handling, safety at sea, survival, fire precautions and fighting, fish identification, equipment handling, net management and repair. Around 87% of permanent staff are regarded as skilled or highly skilled by surveyed employers.
- Processing – high manufacturing and equipment skills, business and process management, advanced hand skills such as filleting, hygiene and packing skills. Around 50% of permanent, full-time staff are regarded highly skilled by surveyed employers.
- Fish friers – high skills in preparation of food, cooking, management of equipment, business management, marketing, customer relations. Employers surveyed regard over 60% of their staff as skilled or highly skilled.
- Retail – highly skilled fishmongers, business management, purchasing, marketing, customer relations. Employers surveyed said that 80% of their staff are graded as Recognised, Advanced or Master Fishmongers

Skill levels and their “labelling” and promulgation are, on the surface, a matter of simple numbers and official classification systems. However, they matter because they underpin the way in which a sector is regarded by potential recruits, by parents, career advisers and teachers, and by those already employed within the sectors.

The seafood industry in Northern Ireland is highly-skilled but this is not obvious to outsiders from the disaggregated and diverse sets of certificates and qualifications required.

Skills Gaps

Different sectors have different skills gaps but the need for technical and digital skills was mentioned across the board.

Also mentioned by high numbers of respondents were:

- Marketing (especially digital marketing)
- Digital skills for the whole range of staff (e.g. in click and collect and online trading)
- Technical skills (especially in aquaculture)
- Business skills – strategy, planning, finance for managers
- Supervisory training
- Selling and selling on
- Customer service training
- People management and mentoring skills for managers and supervisors
- Multi-skilling for certain sectors (e.g. filleting and marketing for catchers)
- Apprenticeships – funding and support for taking on apprentices

Training Provision

Employers called for assistance in training for the above priority skills but most particularly for flexible and easily accessible video and online approaches which can be made accessible to lower skilled staff and those whose first language is not English.

Training and qualifications in the seafood industry tend to be driven by compliance requirements – for such areas as health and safety, food safety, etc. – and by difficulties in releasing staff for training. Consequently, a great deal of training is conducted on the job through mentoring and tutoring by senior staff.

The employer survey found that around three quarters of employers use “on-the-job” training often or occasionally, and 87% never use external training.

Two Seafish Approved Training Providers alone deliver offshore training and there is one Approved Trainer for onshore training based in Northern Ireland. Training organisations have concerns around the ageing training workforce.

Recruitment

The seafood industry in Northern Ireland is extremely diverse, and it is therefore impossible to design and adopt a one-size-fits-all approach to recruitment. However, we found during this study that employers would appreciate help and guidance with the ways in which recruits should be attracted and informed.

The results from our survey of employers reveal that much recruitment in the industry – across almost all sectors – is by word of mouth. This is partly a reflection of the relatively low numbers of people required and partly a result of the high degree of localisation in the seafood industry.

There were requests for guidance and checklists for interviews and materials to support ways of informing interviewees of the scope of the work. Employers were aware that perceived lack of career progression was a barrier to recruitment.

In particular, employers ask for ways of promoting the good points (e.g. the prospects and excitement) about working in the industry without giving potential employees unrealistic expectations.

Retention

In general, in Northern Ireland’s seafood industry does not appear to suffer from serious retention issues however many smaller businesses claimed that they had lost quality staff because they were unable to offer them higher pay or benefits.

There are calls, however, for more awareness videos to give a more realistic but inspiring vision of work in any given sector and to aid employers in their recruitment and retention efforts. The range of instructional videos could also be used as promotional and awareness tool for the sectors.

Age Profile

For the surveyed element of Northern Ireland’s Seafood industry, the proportion of employed people who are over the age of 45 is 39% with 21% being over the age of 55 years of age. This compares with the entire UK workforce which has 41.3% over the age of 45.

Taken in its entirety the industry does not have an “ageing” workforce, but this is an average picture which takes no account of the situation in specific sectors, specific roles within sectors, or given regions or localities. Some sectors have an older workforce profile. For example, three quarters of surveyed employees in aquaculture are over 45 years of age.

Recommendations

The widely reported “negative industry image” is not just about awareness and the need to better communicate that these are highly skilled sectors with excellent opportunities for progression and advancement, but also about job status.

The majority of stakeholders agreed that a negative industry image is having a detrimental effect on recruitment. They argue that this is especially the case with young people, who tend to perceive the industry as being dirty, smelly, hard work, and low paid. Stakeholders and employers are keen to rectify these stereotypes for many jobs have high earning potential and career progression with many different opportunities available. Stakeholders spoke of opportunities for progression in the industry, employers gave examples of individuals starting fish processing and progressing from factory floor to board level. Catching stakeholders highlighted transferable skills in the catching workforce, enabling fishermen to move into marine survey work, operating guard vessels for subsea cables or offshore energy support.

I believe the public, mainly youngsters need to be educated and properly informed about the fishing industry.

Catcher, Northern Ireland

People in the industry understand the importance of engaging with young people at school and college level to show them how rewarding a career in the industry can be and the opportunities and benefits that come with it.

Unlike in the previous century the status of job roles within an industry today is very much linked to their formal qualifications structures. The qualification structures and levels need to be re-assessed and addressed for each sector as a matter of urgency and progression and career pathways developed.

Based on the findings of this study we also recommend:

Training

- 1. Digital awareness training** – Technology use is increasing in amount and in the depth to which it affects job roles. The digital revolution is affecting different sectors and different roles in different ways but business owners, managers and supervisors certainly need much deeper awareness of the ways in which the digital world can leverage productivity and profits and aware of it and its significance to entering the catching sector; all levels of staff require training that focuses on inputting data digitally and learning how to use technological equipment digitally;
- 2. Distance learning** – Many respondents in all sectors claimed it was difficult to attend training courses based on their costs and schedule, especially those running a business

independently. Distance learning will also greatly impact those living in rural areas of the country where travel time and costs affect most of their day. Distance learning would be helpful so workers can complete training courses in their own time and around work commitments whilst also helping to save finances;

- 3. Virtual networking** – Meeting up with other industry professionals and experts is always beneficial however costs and time away from work coupled with living in remote areas makes this difficult for some employers and staff members. In a post Covid-19 world, virtual networking, online conferences and research talks would be beneficial for some smaller business owners who are unable to travel long distances.
- 4. Marketing and social media** – There is high demand for this training which will help businesses reach a wider audience and will have a positive impact on improving industry image by using modern methods of communication and advertising. Few businesses we spoke to during this study have a full understanding of the absolute importance of modern marketing and customer relationship management. We found that such knowledge as exists is “siloesd” and that managers are having difficulty understand the ways in which marketing elements are linked and inter-dependent. Smaller businesses especially need support in this area.
- 5. Click and Collect** – Training for businesses who need support establishing this service which is important for the future success of many smaller businesses and has proved vital during the Coronavirus pandemic;
- 6. Selling on and customer service** – Guidance/short courses on effective customer service how to push add-on sales effectively to generate more income for fish frier and retail businesses;
- 7. Catch sales** – Teaching fishermen how to process (fillet, store, etc.) and sell their catch is an innovative way for fishermen to survive during uncertain economic periods when sales to traditional customers may not be possible;
- 8. Training videos** – Videos are a very successful and highly regarded way to learn and practise new skills with step-by-step guidance. Additional YouTube style videos would work well for all sectors. They should be available on one website or portal to ease accessibility;
- 9. Train the Mentor** – There is a large number of “train the trainer” courses available but very few which explain the most effective ways to mentor staff. Such training would bring benefits to almost all sectors but especially to catching and retail;
- 10. Financial Management training** – Many sectors have explained their need for financial training in the light of the Covid-19 pandemic and outcomes. Managing debt, pricing, cash flow management, etc are all urgently needed by many small and medium sized businesses;
- 11. Introductory days for prospective new entrants** – From a careers perspective it may be highly desirable to develop an industry-wide network of companies willing to offer Introductory Days. These will offer a taster of the sector and provide new entrants with a more realistic understanding of the job;
- 12. Promotion of “Introduction to Commercial Fishing” course** – Promoting this course more effectively to industry outsiders so they are
- 13. Salesmanship and customer service training** – Retailers pointed out the need for new or enhanced tools to improve sales and customer service;

14. **Seafish website** navigation– The Seafish website works well for frequent users. However, navigation and accessibility improvement will be needed for those who use the site infrequently and for potential new entrants - with clear messaging and visual aids;
15. **Access to “over 16.5m” skipper training** – The catching sector needs more ticketed individuals due to what is seen as an ageing workforce. Improve promotion of this training by focussing on progression from crew to wheelhouse and the transferable skills gained through this training.
16. **New customs procedures and documentation** - Leaving the EU will involve the introduction of documentation to ensure compliance with HMRC declarations, including the implications of the NI protocol. There will be a requirement for individuals to be trained to manage any new procedures.

Recruitment

1. **Recruitment ‘toolkits’** – Develop and provide businesses with a sector-specific toolkit that offers guidance on writing attractive job advertisements, how to get the most of out their website, and what important questions should be asked at interviews. Materials in the recruitment toolkits should be available to everyone in the industry online and take the form of videos, case studies and role descriptions.
2. **Lessons from other industries’ messaging** - The ‘Go Construct’ website, run by the Construction Industry Training Board (CITB), is a good example of a resource that young people can go to in order to learn more about the construction and built environment industry.
3. **Clear communication of opportunities in the industry** – Promote opportunities in the industry with clearer communications showcasing careers, apprenticeships, work experience and the different routes into the industry. Offer young people a career map which depicts the qualifications, experience and routes for particular roles and sectors. Focus on local people who have stayed in the area and progressed to bigger roles;
4. **Less text, more infographics** – Websites, social media platforms and any literature aimed at young people should be aesthetically attractive and incorporate images and videos of people at work. This will give them a realistic picture of what a job looks like in the industry. Some potential new entrants will have limited literacy – design of promotional collateral should take this into account;
5. **Effective messaging**- Research young people’s aspirations and perceptions of the industry and use the data to develop messages and approaches for employers to use when speaking to potential recruits;
6. **Key workers** – Learning from the Coronavirus pandemic, being a key worker may now be seen as a more attractive career choice. Ensure recruitment messages depict that industry workers are essential and key workers, from fisherman to supermarket counter staff.

Retention

1. **Career pathways** – As mentioned above, a visual pathway for each sector should be produced and used. Currently the fish frier sector is the only sector to openly provide this to staff.

- 2. Guidance on employer branding as a retention tool** – Develop a toolkit – perhaps alongside others as part of a series to improve “employer branding” by demonstrating how to offer staff benefits including bonuses, additional pension contributions, birthday days off, “ideas” schemes, cycle to work schemes, staff social events, ongoing skills progression, and health and mental health advice. These benefits demonstrate to staff and potential new entrants that the employer is invested in them and that they are valued.
- 3. Investment in staff training** – Employers should be made aware of the positive relationship between investment in staff training and retention rates, found in the research.

Covid-19

The UK was put into a stringent lockdown on 23 March 2020 to control the spread of the Coronavirus. Most of the retail and hospitality sectors were immediately closed. This included restaurants, pubs, hotels and ‘non-essential’ retail. Schools were also closed. Supermarkets, which remained open saw a wave of panic buying and had difficulties keeping pace with the increased custom. In response, a few supermarkets closed fresh fish counters in order to use the staff to re-stock shelves.

Pye Tait’s fieldwork in Northern Ireland, including a telephone survey of employers in aquaculture, catching, processing, fish frier and retail, started on 26 March and ran until early July. Primary data across a wide section of the industry were, therefore, being collected as the major impacts of the Covid-19 virus were developing.

The Legacy

There is absolutely no doubt that the Covid-19 pandemic will leave a deep and lasting legacy. There are businesses that may not survive the disruption and others that may fail during the recession which is predicted to follow it.

Many businesses have run down any cash reserves during the course of the pandemic and struggle to stay in business. Many others will have loans to pay off. There are fears that business failures may affect these companies in the near future and will have impacts up the supply chain. Some hotels and restaurants may never re-open. Demand may change, businesses supplying ‘luxury’ seafood e.g. lobsters and oysters might take longer to recover than others. Equally business models may change.

I believe that there will be more on-line shopping in the future. We will need to keep developing and updating our website.

Retailer, Northern Ireland

Expansion plans and staff training may well be put on hold for some considerable time as businesses try get to grips with the “new reality”.

Before Covid-19 we were looking to grow the fish processing side of the business which would have required taking on more people with fish processing and wholesale experience.

Processor, Northern Ireland

There is analysis of the industry's reaction to the pandemic and a set of Covid-19 related recommendations in the report.

EU-exit

To an understandable extent the issue of the UK's exit from the EU has been overshadowed by the advent of the Covid-19 pandemic. The UK's exit from the European Union, which we joined as the European Economic Community (EEC) in 1973, is due to be formalised in December 2020. The exact effect of our departure on the Seafood industry is difficult to predict, but no sector will be unaffected; fishing quotas, the availability migrant labour, and trading terms for imports and exports are all currently uncertain.

All sectors face uncertainty, but it is likely that Northern Ireland's catching sector will be most affected by the UK's exit from the EU. Increased quota could lead to the Northern Irish fleet being able to land more fish, but equally Northern Irish vessels could be banned from entering Irish and European waters.

There is uncertainty at the time of writing as to what will happen regarding the movement of labour between the European Economic Area and the UK.

Across the UK fishing vessel crews consist of about 15% non-UK nationals. In Northern Ireland this is approximately 50%, with approximately half of those being from inside the EU¹. Stakeholders suggest that without this source of labour the sector in Northern Ireland would collapse.

Our survey of processors in Northern Ireland found a heavy reliance on migrant workers, a quarter of staff are EU residents and 10% non-EU residents

As things stand the approach seems to be moving towards a "points-based" system which will permit suitably qualified professional and workers who are filling a shortage situation to enter on working visas. However even in the latter category it seems likely that there will be a requirement for at least Level 3 skills.

Our research found a good deal of qualitative and anecdotal feedback about EU-exit along the lines discussed above but in answer to specific questions about the impacts almost all sectors were clear that it has had and will have no, or minimal, impact on business. Reticence about future implications for the industry could be due to uncertainty about the final terms of the UK's exit from the EU, combined with a tendency for employers to adopt a 'wait and see' attitude while focusing on immediate issues.

Our depth interviews with employers, stakeholders and trainers echoed the feedback from the survey, however one processing employer in Northern Ireland was concerned about the impact, saying that 'once we have got over coronavirus, 80% of our business will disappear overnight due to Brexit'.

¹ July 2017 Migration Advisory Committee Commission call for evidence

It is also important to recognise that labour is not the only concern of the seafood industry where exiting the EU is concerned. The terms of trade between the EU and the newly independent UK are of great importance. The most likely outcome at present appears to be a return to the international trade rules as established by the World Trade Organisation (WTO). This will require the payment of standard duties on all trade between the EU and UK. There is a chance however that a more sensible approach will be agreed – but probably not by December 2020 – which will move towards a free-trade agreement between the two.

The departure of the UK from the EU was always regarded as desirable by the catching sector, which has experienced severe problems from EU fishing quotas and common rules for fishing areas, Under the Common Fisheries Policy (CFP) EU countries have access to each other's waters, except for twelve nautical miles from coastlines (the internationally accepted "Territorial Waters").

A further issue is the way in which the UK's exclusive economic zone (EEZ)² will be interpreted. The definitions and rules are complex but, broadly, the EEZ extends out for 200 nautical miles and theoretically the UK could keep all such waters for its own fishing fleets in a similar way to the Icelandic approach. This issue is yet another unknown at the present time but exclusive access to a 200 mile sea-zone around the UK would make a significant difference to the catching sector and would have positive implications for associated sectors such as processing, fish frying and retail.

EU diplomats have made it plain that this is not something they would wish to see and that everything in future negotiations is linked (i.e. that they wish to see the UK being flexible on such matters if the UK wishes to have flexibility in access to EU markets in other industrial and commercial sectors.

For example, restricting EU access to UK waters could lead to retaliatory action on UK fish exports to the EU. Exports and imports of seafood products within the EU Single Market are currently without tariffs and involve minimal paperwork. Northern Ireland exports 36% of its catch to the EU³, Export tariffs and bureaucracy could hit European exports; but freedom from European restrictions could present opportunities to open up far Eastern export markets.

In the absence of alternative markets, any action by the EU to impose tariffs on exports may have wide reaching effects on the Northern Irish industry. Similarly, any increased documentation will impose costs on the industry, and subsequent delays at Border Inspection Posts could make some seafood exports impossible. There is also a finite possibility that Northern Ireland will face increased bureaucracy when trading with the rest of the UK, the 'border in the Irish Sea'.

Tariffs or other action to limit exports to the EU could be followed by the UK government imposing tariffs on EU exports of fish to the UK. This would see the sector catching more fish, having limited or different export markets, and a potentially an increased domestic market. The industry would be faced with the marketing challenge of switching domestic consumers from imported species to those caught in domestic waters; together with the challenge of seeking new export markets.

² The EEZ, prescribed by the 1982 United Nations Convention on the Law of the Sea, is an area of the sea over which a sovereign state has special rights regarding the exploration and use of marine resources, including energy production from water and wind. The "territorial sea" gives full sovereignty over the waters, whereas the EEZ is a "sovereign right" below the surface of the sea.

³ 2018 House of Commons Report 'Brexit and Northern Ireland: Fisheries

The outcomes of diplomatic negotiations during 2020 (and beyond) are unknown but it is very clear that the seafood industry will have to prepare itself for a number of different results and that preparing for new export markets, a degree of growth and increased bureaucracy are very sensible approaches which will be advantageous regardless of the UK-EU outcomes in the negotiations.

Report

Introduction

Northern Ireland's seafood industry comprises a number of different but interrelated sectors - aquaculture, catching, fish frying, processing, and retail. Together they employ some 5,000 people, approximately 3,700 of these in the fish frier sector.

A major employer in some areas, the industry has great importance beyond its contribution to employment and GDP.

The seafood supply chain was forced to change rapidly and dramatically by the Covid-19 pandemic. New systems of working have seen accelerated developments in marketing innovation and uptake of technology. Nationally the pandemic will restructure industries and may create new pools of potential recruits for a seafood industry with elevated status with respect to food security.

The outcome of EU-exit negotiations is far from certain, but anticipated changes in fishing quotas and new trade agreements will be key drivers of change, pointing to opportunities for the industry. The catching sector is emblematic, but all sectors will have to adapt to thrive in the post-EU-exit environment. In spite of their possible issues, taken together, the complex and evolving situation surrounding Covid-19 and the UK's exit from the EU, together with seafood's place in the drive towards healthy eating, herald a period of change and opportunity for the industry.

The Sea Fish Industry Authority (Seafish) is a Non-Departmental Public Body tasked with improving efficiency and raising standards across the industry. It is at the forefront of facilitating change and driving improvement across a united industry.

In February 2020 Seafish commissioned Pye Tait Consulting to:

Map skills, recruitment and retention needs and issues across the entire Northern Ireland seafood value chain and,

Review best practice with regards to training, skills development and workforce retention within the UK and overseas

Pye Tait Consulting conducted this work in parallel with conducting similar work in England and Wales.

The Study

Aims

The study was focused on the following research aims.

1. Establish current skills levels, and levels of recruitment and retention;
2. Improve the client's understanding of potential skills and training provision gaps;
3. Identify current recruitment problems, trends and likely future labour market demands;

4. Identify any overseas best practice in seafood training, recruitment, and retention beneficial to the industry;
5. Obtain reliable and detailed reference data covering employment patterns in the seafood industry in Northern Ireland; and
6. Recommend actions based on the overall analysis to ensure a labour force that is suitably trained and skilled to meet its future requirements and an industry that can effectively address its skills, recruitment and retention needs and issues.

Approach

The study was designed and initiated prior to the advent of the Covid-19 pandemic and lockdown (mid-March to May 2020). Both desk and field work were in progress at the time of the lockdown but it was decided, in conjunction with Seafish, that the results of the research were of great importance to the industry and that it should be completed.

At the time – mid-March 2020 – no-one knew how the lockdown would work and what people’s reactions to the pandemic and the unique social needs would be. Nevertheless, we developed a plan of action to meet the changed circumstances and these were agreed by Seafish.

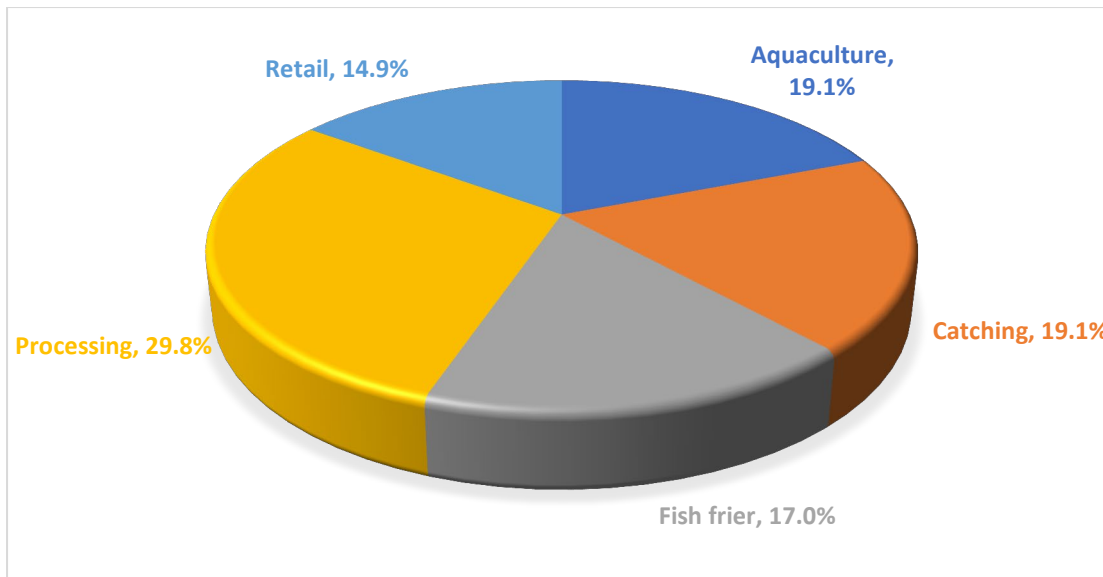
Employers in Northern Ireland were shutting down or trying to adjust to having staff work from home or on furlough. In the absence of prior experience there was uncertainty what proportion of employers would be contactable, and how employers would react to being contacted – even remotely – about such research during a major disruption.

It says a great deal about the seafood industry in Northern Ireland that the research was well received and survey targets met.

In the midst of the pandemic and lockdown, the study achieved 47 completed telephone surveys with employers in Northern Ireland. In-depth telephone interviews were arranged and completed with nine stakeholders. In addition, five senior stakeholders and employers took part in a multi-contact nominal group exercise to acquire deeper insights into sector issues. Nominal Groups are a method of obtaining deep qualitative data from stakeholders and employers without incurring the disadvantages of face to face groups in which dominant or senior attendees can often skew results. Nominal groups are based on group members receiving a series of iterative questions (usually by email or telephone interview). The answers are then collated and subsequent questions directed at members of the group to achieve greater depth. Individual members do not know who gave specific opinions and are therefore less likely to be swayed in their responses by identities or seniority.

The completed employer interviews were spread fairly evenly across all sectors (Figure 1)

Figure 1 Surveyed sectors in Northern Ireland (%)



Source Pye Tait survey 2020

Survey responses are illustrated in Table 1. This shows the response in terms of employees covered by the survey rather than numbers of businesses.

Table 1: Survey response rates in Northern Ireland (by employment)

	Sector employment*	Surveyed employees	%
Aquaculture	118 ⁴	20	17%
Catching	854 ⁵	85	10%
Fish frier	3,700 ⁶	35	1%
Processing	436 ⁷	113	26%
Retail	135	35	26%
Excluding fish frier sector	1543	253	16%

⁴ CEFAS (2012), Aquaculture statistics for the UK

⁵ Marine Management Organisation (2018), UK Sea Fisheries Annual Statistic

⁶ National Federation of Fish Friers

⁷ Seafish Processing Industry Enquiry Tool

Key Findings for Northern Ireland

Skills & Qualifications

Perhaps the most important finding concerning skills in the seafood industry is that skills and qualifications are relatively unknown, unappreciated, and quite widely under-estimated. This is evidenced by the recruitment issues flagged up by stakeholders and employers during this research.

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Skills gaps

Different sectors have different skills gaps but the need for technical and digital skills was mentioned across the board.

Also mentioned by respondents were:

- Sales and marketing (especially digital marketing)
- Business skills – strategy, planning, finance for managers
- Customer service skills
- People management skills for managers and supervisors
- Multi-skilling for certain sectors (e.g. filleting and marketing for catchers)
- Quality control
- Filleting and knife skills
- Production management
- Food processing
- Specific technical skills for aquaculture

Training Provision

Employers called for training provision to meet the above priorities.

There was a suggestion that migrant workers have difficulties understanding trainers with Northern Irish accents, and that training material, supplied in their native languages would help them better understand training sessions.

Employers in all sectors have difficulties releasing staff for training; they view flexible online training as a more practical alternative to releasing staff to attend training at providers' premises.

Training is working well for us. Especially online courses at the moment. Reasonably priced and doesn't take the employee long out of their day to do it.

Retailer – Northern Ireland

Similarly, employers spoke of their preference for providers who will deliver training at the employer's premises.

The issue is taking people off factory floor for training. On-site training is more beneficial. It means we can split into two groups and allow one group to continue with day's work and then swap over.

Processor – Northern Ireland

Much training is internal, carried out by employers in-house, over 90% of survey respondents train in-house often or occasionally.

Few employers have concerns about the direct costs of training, primarily they are concerned with the opportunity cost of employees' time. Exceptionally, the catching sector has concerns around the cost of mandatory training primarily due to the perceived low proportion of people completing training who go on to careers in fishing. One stakeholder spoke of mandatory training costing £500, with only one person in six going on to a career in catching, making the true cost £3000.

The youngsters coming into the fishing industry all need to have their Sea Survival Certificates prior to coming on-board. In many cases they get these certificated then join the boat for a day and don't return.

Catcher - Northern Ireland

Some employers spoke of having to travel to England or Wales to access training.

There was a course I had to do, and I had to go to Wales for it. In the end they did offer the course in NI but it was 5 times the price it was in Wales.

Processor Northern Ireland

Recruitment

The Northern Irish seafood industry is extremely diverse, and it is therefore impossible to design and adopt a one-size-fits-all approach to recruitment.

The most common form of recruitment is word of mouth, used by half of all employers to recruit permanent staff and 60% recruiting seasonal staff. Catching sector stakeholders have advertised widely for new entrants to the sector, with little or no success.

We found during this study that employers would appreciate help and guidance with the ways in which recruits should be attracted, informed and interviewed.

There were requests for guidance for interviews and materials to support ways of informing interviewees of the scope of the work. In particular, employers ask for ways of promoting the good points (e.g. the prospects and excitement) about working in the industry without giving potential employees unrealistic expectations.

Training providers and employers are familiar with the Seafish website and can generally find information that they need. However, navigation of the website is not intuitive especially for industry outsiders. Similarly, Seafish Training eAlerts are appreciated by the industry, but, potential recipients must visit the Seafish website and go through a sign-up process for these, so they are not easily accessible to industry outsiders.

Awareness videos are required to underpin a more well-founded appreciation of work in each sector. Employers would like people to start the job and their training course with a more realistic impression and understanding of what will be required of them.

Stakeholders from the catching and processing sectors spoke of new entrants being unaware of the working environment and how physically demanding the work is. Employers spoke of younger people being put off by the prospect of continuous hard work.

Difficulty to recruit locally, lack of motivation, work ethic, not willing to do non-stop work. Can be a danger due to this.

Catcher Northern Ireland

I believe the public, mainly youngsters, need to be educated and properly informed about the fishing industry.

Catcher, Northern Ireland

Stakeholders suggested that the problem is not that young people are unprepared to work hard, but that they have a different expectations of work i.e. they are prepared to work hard but they expect to be working in front of a screen rather than doing manual work.

Stakeholders also commented on how the industry could be better promoted to young people.

I feel schools could do more through their career advisors to advise students of the opportunities within the fishing industry.

Stakeholder Northern Ireland

Retention

In general, the industry in Northern Ireland does not appear to suffer from serious retention issues. Surveyed employers have an average employee turnover rate of 16% which compares to a UK average across all industries of 15%. The industry is characterised by small and micro businesses with employers working closely with staff and developing enduring staff teams.

Where retention issues have appeared however, stakeholders and employers said that a lack of awareness of the industry was the main underlying cause. The argument – supported by many respondents – is that, because the industry is relatively poorly understood in careers circles and by teachers and parents, new entrants can lack any genuine understanding of what they are joining, with the result that they leave quite soon.

There are calls across all sectors for more awareness videos to give a more realistic but inspiring vision of work in a sector and to aid employers in their recruitment and retention efforts. The range of instructional videos could also be used as promotional and awareness tools for the sectors.

Employers can have difficulty retaining new entrants when they are undertaking their mandatory training. For example, many new catching entrants are unaware of the realities of working at sea, the nature of the work and what it entails. Some employers report paying for mandatory training, only for new entrants to drop out before completing it, or very soon after. Sometimes due to being unprepared for the physical demands of the role, the arduous conditions and occasionally due to seasickness.

Recommendations

The majority of stakeholders agreed that a negative industry image is having a detrimental effect on recruitment. They argue that this is especially the case with young people, who tend to perceive the industry as being dirty, smelly, low paid, with limited prospects

The negative industry image is not just about awareness and the need to better communicate that these are highly skilled sectors with excellent opportunities for progression and advancement. but also about job status – which is further linked to the disparate and disaggregated nature of most qualification structures in all sectors from retail and fish frier to catching, processing and aquaculture

1. The qualification structures and levels need to be addressed for each sector as a matter of urgency and progression pathways developed.
2. The industry in Northern Ireland needs to develop career and qualification paths to compete with other industries and promote these with accessible material which clearly shows opportunities and prospects for each sector in the industry. Online resources including videos, sample wording for job adverts, material for employers' websites should have a specific Northern Ireland focus. Case studies should be produced to illustrate 'success stories' and career ladders in each of the sectors in Northern Ireland.

Based on the findings of this study we also recommend:

Training

1. **Digital awareness training** – Technology use is increasing in amount and in the depth to which it affects job roles. The digital revolution is affecting different sectors and different roles in different ways but business owners, managers and supervisors certainly need much deeper awareness of the ways in which the digital world can leverage productivity and profits; all levels of staff require training that focuses on inputting data digitally and learning how to use technological equipment digitally;
2. **Bilingual resources** – Trainers identified that language barriers and hindered training for migrant workers undertaking mandatory training. Course materials in learners' native languages would help learners better understand training sessions. There were suggestions that some migrant workers find the Northern Irish accent difficult to understand.
3. **Remote learning** – Many respondents in all sectors claimed it was difficult to attend training courses based on their costs and schedule. There should be a focus on facilitation of remote learning and assessment, by increasing online resources; videos are regarded as an accessible medium for learning particularly for those with limited literacy. The restrictions imposed by Covid-19 have increased the requirement for remote learning.
4. **Virtual networking** – Meeting up with other employers, peers and industry professionals is beneficial in that it enables smaller employers and staff to keep abreast of sector

developments, however costs and time away from work limit the opportunities. In a post Covid-19 world especially, virtual networking, online conferences and research talks would be beneficial for some smaller business owners and their staff.

5. **Cooperation** - employers in all sectors are enthusiastic about cooperation with other businesses. Between businesses in different sectors, this is seen as a way to streamline supply chains and add value. Efforts should be made to facilitate cooperation between employers.
6. **Marketing and social media** – There is high demand for this training which will help businesses reach a wider audience and will have a positive impact on improving industry image by using modern methods of communication and advertising. Few businesses we spoke to during this study have a full understanding of the absolute importance of modern marketing and customer relationship management. We found that such knowledge as exists is “siloesd” and that managers are having difficulty understand the ways in which marketing elements are linked and inter-dependent. Smaller businesses especially need support in this area;
7. **Click and Collect** – Training for businesses who need support establishing this service which is important for the future success of many smaller businesses and has proved vital during the Coronavirus pandemic. Some wholesale businesses have used click and collect to diversify into retail during the pandemic, and would like to expand this channel;
8. **Add on sales and customer service** – Guidance/short courses on effective customer service how to push add-on sales effectively. This is particularly important for retailers and fish friers, some of whom use their EPOS systems to measure add-on sales, and see these as key to increasing income;
9. **Catch sales** – Teaching fishermen how to process (fillet, store, smoke etc.) and retail their catch is an innovative way for some fishermen to add value to their catch and survive during uncertain economic periods when sales to traditional customers may not be possible;
10. **Train the Mentor** – Very few courses explain the most effective ways to mentor staff. Such training would bring benefits to almost all sectors but especially to processing and retail;
11. **Financial Management training** – Most sectors have explained their need for financial training in the light of the Covid-19 pandemic and outcomes. Managing debt, pricing, cash flow management, etc are all urgently needed by many small and medium sized businesses, some businesses are also looking for help managing diversification;
12. **Introductory days for prospective new entrants** – From a careers perspective it may be highly desirable to develop an industry-wide network of companies willing to offer Introductory Days. These will offer a taster of the sector and provide new entrants with a more realistic understanding of the job;
13. **Promotion of “Introduction to Commercial Fishing” course** – Promoting this course more effectively to industry outsiders to generate viable cohorts who are more likely to consider a career in catching;
14. **Seafish website navigation**– The Seafish website works well for frequent users. However, navigation and accessibility improvement will be needed for those who use the site infrequently and for potential new entrants some of whom may have limited literacy or language skills - with clear messaging and visual aids. Where possible some recruitment

material – case studies etc specific to Northern Ireland should be signposted from the website;

15. **Access to “over 16.5m” skipper training** – The catching sector needs more ticketed individuals due to what is seen as an ageing workforce. Improve promotion of this training by focussing on progression from crew to wheelhouse and the transferable skills gained through this training.
16. **New customs procedures and documentation** - Leaving the EU will involve the introduction of documentation to ensure compliance with HMRC declarations. Trade between Northern Ireland and the EU (including Ireland) may be subject to tariffs. Trade between Northern Ireland and the rest of the UK will involve more bureaucracy. There will be a requirement for individuals to be trained to manage any new procedures.

Recruitment

1. **Recruitment ‘toolkits’** – Develop and provide businesses with a sector-specific toolkit that offers guidance on writing attractive job advertisements, how to get the most of out their website, and what important questions should be asked at interviews. Materials in the recruitment toolkits should be available to everyone in the industry online and take the form of videos, case studies and role descriptions.
2. **Lessons from other industries’ messaging** - The ‘Go Construct’ website, run by the Construction Industry Training Board (CITB), is a good example of a resource that young people can go to in order to learn more about the construction and built environment industry.
3. **Clear communication of opportunities in the industry** – Promote opportunities in the industry with clearer communications showcasing careers, apprenticeships, work experience and the different routes into the industry. Offer young people a career map which depicts the qualifications, experience and routes for particular roles and sectors. Focus on local people who have stayed in the area and progressed in their careers;
4. **Less text, more infographics** – Websites, social media platforms and any literature aimed at young people should be aesthetically attractive and incorporate images and videos of people at work. This will give them a realistic picture of what a job looks like in the industry. Some potential new entrants will have limited literacy – design of promotional collateral should take this into account;
5. **Effective messaging**- Research young people’s aspirations and perceptions of the industry and use the data to develop messages and approaches for employers to use when speaking to potential recruits;
6. **Key workers** – Learning from the Coronavirus pandemic, being a key worker may now be seen as a more attractive career choice. Ensure recruitment messages depict that industry workers are essential and key workers, from fisherman to supermarket counter staff.

Retention

1. **Career pathways** – As mentioned above, a visual pathway for each sector should be produced and used. Currently the fish frier sector is the only sector to openly provide this to staff;
2. **Guidance on employer branding as a retention tool** – Develop a toolkit – perhaps alongside others as part of a series to improve “employer branding” by demonstrating how to offer staff benefits including bonuses, additional pension contributions, birthday days off, “ideas” schemes, cycle to work schemes, staff social events, ongoing skills progression, and health and mental health advice. These benefits demonstrate to staff and potential new entrants that the employer is invested in them and that they are valued.
3. **Investment in staff training** –Employers should be made aware of the positive relationship between investment in staff training and retention rates, found in the research.

The Industry

The industry which catches, farms, processes, and sells Northern Ireland’s seafood is relatively small but of immense potential for the economy, particularly in view of the imminent exit of the UK from the European Union and the additional emphasis on food security resulting from the experience of the Covid-19 pandemic.

The seafood industry as a whole employs over 5,000 people across five sectors, with the fish frier sector representing more than 70% of the industry’s total employment. There are around 3,700 people employed in Northern Ireland’s 600 fish and chip shops/restaurants, these tend to be larger than those on the UK mainland.

The Northern Ireland fishing fleet employs some 850 people operating 330 vessels, of which around 60% are small-scale, defined as under 10m in length. Northern Ireland’s employment in the fishing fleet represents around 7% of the UK total. The industry is concentrated around Ardglass, Kilkeel, and Portavogie and a number of other smaller sites. Landings in Northern Ireland in 2018 totalled 22,000 tonnes with a value of £27m, Nethrops comprise almost half of the value of the catch.

The processing sector in Northern Ireland employs over 400 individuals, it is mainly concerned with Nephrops, with some shellfish and pelagic processing taking place. The processing sector along with the catching sector has some reliance on migrant labour.

Aquaculture in Northern Ireland is a small, but important sector. The main shellfish species cultivated are mussels and Pacific Oysters. The main finfish species cultivated are salmon, rainbow trout and brown trout. In 2016 the aquaculture sector produced 3,438 tonnes of shellfish valued at £4.3 million and 1069 tonnes of finfish valued at £4.16 million⁸.

⁸ DEARA-introduction-to-aquaculture

Table 2 Industry employment by sector in Northern Ireland (2018)

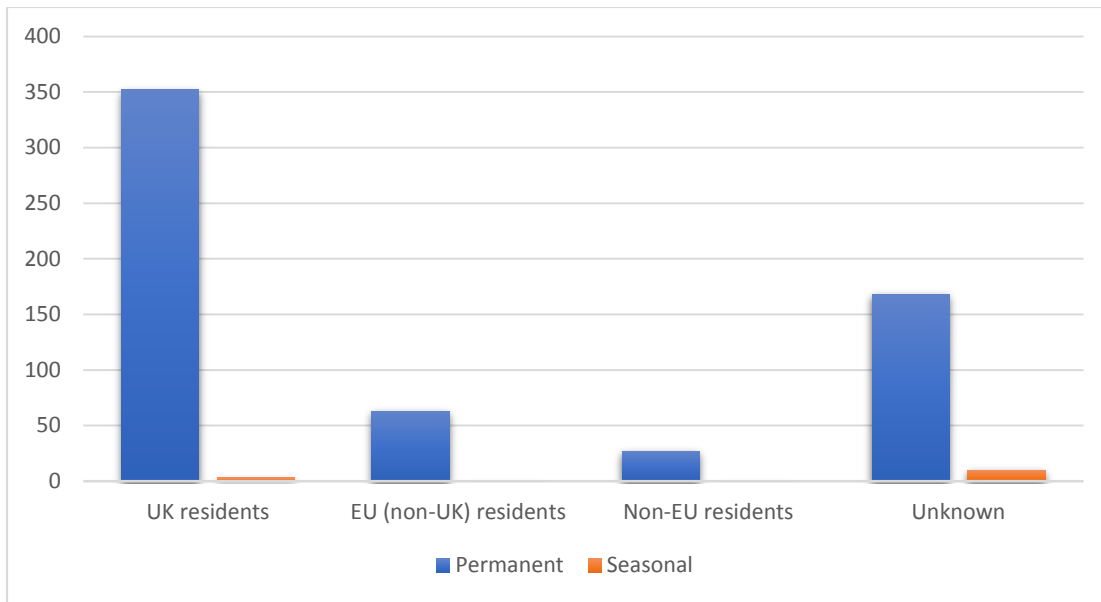
Sector	Est. Employment	% of total employment
Aquaculture	118	2%
Catching	854	16%
Processing	436	8%
Retail	135	3%
Fish frier	3700	71%
Total	5243	

The industry, in common with many others, is finding it difficult to attract and recruit staff – particularly young people – which has the effect of requiring higher levels of resource (human and financial) to be tied up and spent in the recruitment process.

Certain sectors – as demonstrated in this report – also have an “ageing” workforce.

In Northern Ireland the industry as a whole has some reliance on non-UK labour (Figure 2) the catching and processing sectors rely heavily on migrant labour. The main issues as a whole are trade barriers, quotas, and the pattern of ownership of vessels and quota by businesses and individuals located in other nations.

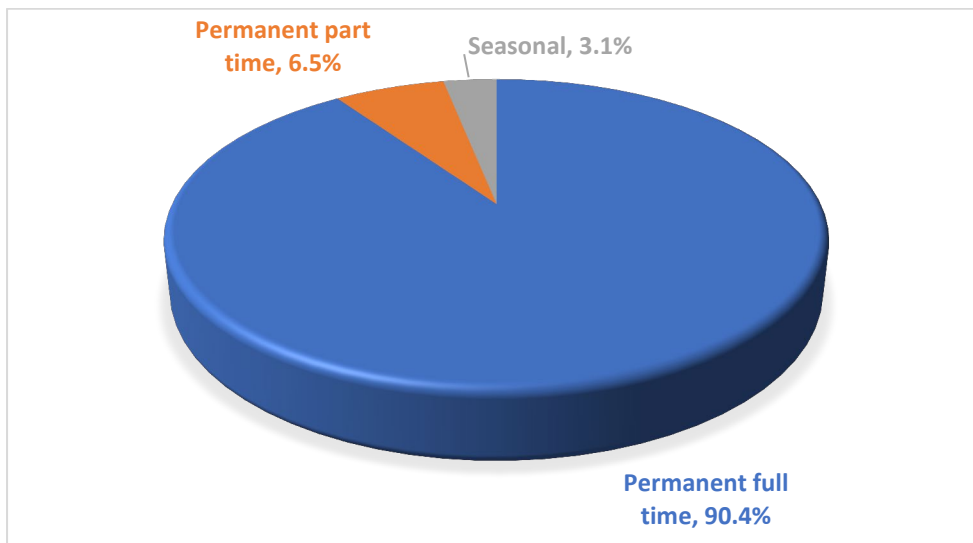
Figure 2 Staff by residency in Northern Ireland (numbers)



Source Pye Tait survey 2020

The industry as a whole is made up on mainly permanent staff (just under 97%), of which number around 6.5% are employed on a part-time basis (Figure 3).

Figure 3 Mode of employment in Northern Ireland



Source Pye Tait survey 2020

Training

There are two offshore approved training providers (ATPs) in Northern Ireland offering courses including basic sea survival, first aid, fire-fighting and health and safety for new entrants as well as under 16.5m Skipper courses. These ATPs are Sea Fish Industry Training Association and Anglo North Irish Fish Producers Organisation (ANIFPO) Ltd. Much advanced training for Skippers and Engineers is not available in N.I., necessitating travel to the mainland or the Irish Republic.

Offshore providers are generally colleges or private training providers employing a number of trainers, whereas onshore providers tend to be smaller organisations often just one person. There is one offshore provider based in Northern Ireland, though others offer training throughout the UK.

The Northern Ireland Seafood Network plans and promotes a number of training courses such as Advanced Fish Quality Assessment Courses, fish frying and fish smoking courses. The Scottish Shellfish Training Centre is able to address Bivalve Purification training needs across Northern Ireland as well as Scotland and in March this year Seafish organised a Bivalve Purification Operations Courses with ATPs from Aquafish Solutions. It was the first time the course had been run for many years, allowing local businesses and regulators to access it without incurring significant travel costs.⁹

Seafish has recently introduced an innovative Bivalve Purification online course and assessment.

Intermediate and Advanced Apprenticeships are available in the fish and shellfish industry skills at levels two and three. These apprenticeships are based on the fish and shellfish proficiency skills framework which covers fish friers, fishmongers, processors, merchants and bivalve depuration centre staff.

The apprenticeships are offered by one Seafish-recognised apprenticeship provider in Northern Ireland - Southern Regional College. The National Federation of Fish Friers (NFFF) no longer has a training hub in Kilkeel but does offer remote courses in fish frying.

Training and qualifications in the Northern Irish seafood industry tend to be driven by compliance requirements – for such areas as health & safety, sea survival, firefighting, and first aid – and by difficulties in releasing staff for training or costs of training and travel to and from training. Consequently, a great deal of training is conducted on the job through mentoring and tutoring by senior staff or employers. Over three quarters of employers never use external training (Figure 4).

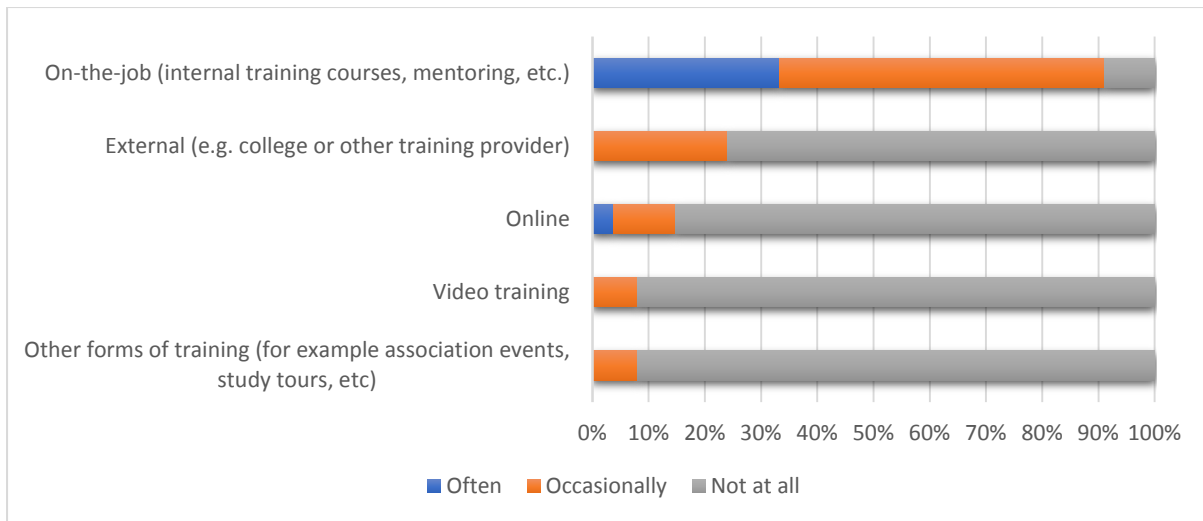
We spoke in depth with a number of employers and stakeholders who mentioned that the industry needed to focus on ensuring the workforce is equipped with digital and technical skills such as inputting data digitally instead of hand-writing, ordering stock online rather than over the phone, software and digital devices, understanding databases and how to use them and analysing customer data.

We are currently taking a leap forward with instore technology to help reduce inaccuracies, manage time, and assist in social distancing, whilst at the same time increasing on customer spend. Having a greater understanding of this might well help a lot of people/businesses who fear change.

Fish frier, Northern Ireland

⁹https://seafish.org/media/Bivalve_Purification_Operations_Course_held_in_Belfast_Upskilling_the_Aquaculture_Sector.pdf

Figure 4 Mode of training – seafood industry in Northern Ireland (permanent staff)



Source Pye Tait survey 2020

Age Profile

The age profile for the industry as a whole is shown in Figure 5.

For the surveyed element of the Northern Ireland’s seafood industry the proportion of staff over the age of 45 is 39% (the equivalent proportion for the entire UK workforce is 41.3% - 2019) with 21% being over the age of 55 years of age. Over 30% of the surveyed workforce is under the age of 35.

Although the age profile of employees in the industry is relatively low, employers and stakeholders are concerned about the difficulty of attracting local young people into the industry. Catching employers have particular difficulties in this respect; hence the sector is heavily reliant on recruiting migrant workers.

Attracting younger people into the industry has always been an issue here. The fishing industry is viewed as a dead-end job, especially in fishing ports.

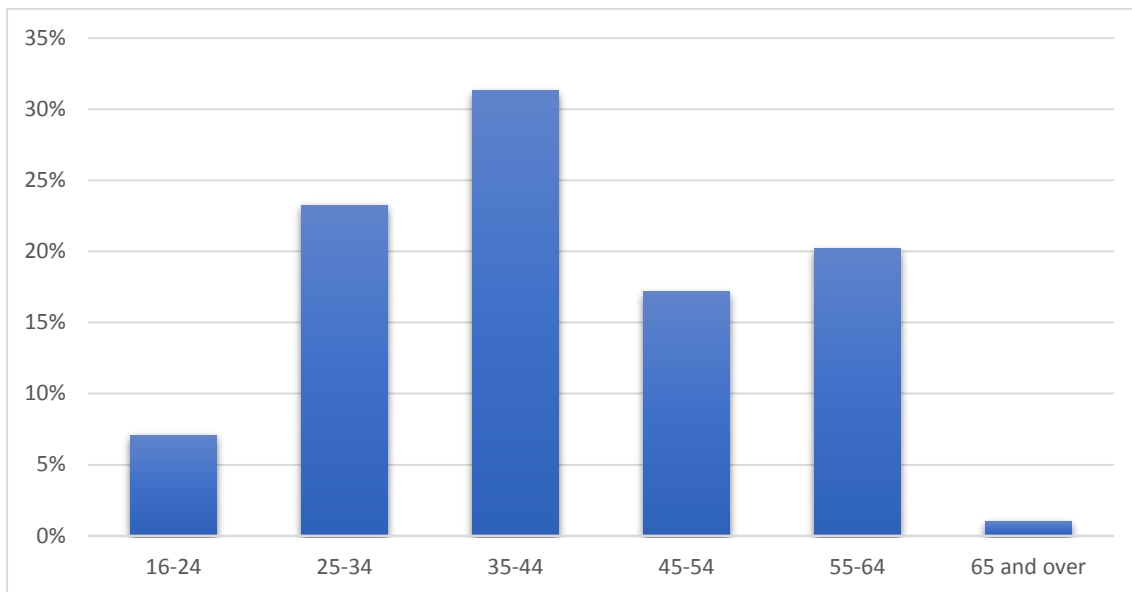
Catcher and Processor, Northern Ireland

A negative industry image is often mentioned with the difficulty of recruiting younger people, but this is not merely a matter of marketing the job, salary expectations, and progression pathways. It is also necessary to establish in the minds of young people the status of the job roles to which they could aspire; and status today usually relates to the perceived educational or qualifications level of that role.

Furthermore sectors with high proportions of micro and small businesses may have pockets of “ageing” employees due to the fact that small businesses tend to be run by their founders and that, quite often, the succession possibilities for the business are problematic. Employers were not asked detailed questions around this issue but research by the authors in other industries such as construction, hospitality, retail, etc. indicates that smaller businesses tend not to have formal succession plans, are extremely dependent upon the skills and energy of their founders, and

sometimes do not have family members (or enthusiastic family members) to take over from the founders.

Figure 5 Age profile of seafood industry in Northern Ireland



Source Pye Tait survey 2020

Recruitment

Our survey of employers shows that much recruitment in the industry is by word of mouth. This is partly a reflection of the relatively low numbers of people required and partly a result of the high degree of localisation in the seafood industry. Communities tend to generate new recruits to a certain extent.

People generally do not want to come into this industry. When I set up this business in the 90's there were around thirty fish processors in this area, today there are five. Young people used to come down after school and weekends for work, that just doesn't happen anymore.

Processor, Northern Ireland

All sectors offer extensive career possibilities (including self-employment) and these are discussed further in the specific sector sections below. Many respondents complained that careers in the sector are, in their view, not well-enough promoted.

I feel more could be done to attract new entrants without a background in the industry. Job centres used to be used to advertise careers in the industry. I also feel schools could do more through their career advisors to advise students of the opportunities within the fishing industry.

Trainer, Northern Ireland

Retention

Each sector of the industry exhibits its own unique profile where the issue of staff retention is concerned. These are discussed in the sector sections where employers have quantified the extent

to which they have experienced vacancies and hard-to-fill vacancies. Taken as a whole, Northern Ireland's seafood industry does not appear to experience high levels of vacancies.

During the in-depth interviews we asked employers and stakeholders a number of questions around the subject of staff retention; about its importance as an issue, actions employers were taking to enhance retention levels, about career pathways and progression routes, about training and its impact on retention, and about whether there were any notable differences between "stayers" and "leavers".

Employers and stakeholders commented on the issue of retaining a younger population in certain areas and sectors in Northern Ireland. It is believed by some employers and stakeholders that younger people have different aspirations and expect more in terms of pay and progression which affects retention. The image industry and nature of the work can also be discouraging for younger people (e.g. catching fish in all weather conditions, handling smelly produce in the cold and uncomfortable processing factory, etc.).

I don't think that young people are lazy, but their expectations have changed because of the pressures around them. The education system tells them to go to university, graduate and get a graduate job in an office or something that doesn't require much manual hard work.

Stakeholder, Northern Ireland

Active initiatives

Employers value hard working and quality staff and say that investing in their employees is a good way to retain them for the future.

One employer stated that "retention is an issue for any employer who doesn't invest in their staff." Depending on the sector, employers try to offer incentives and benefits to staff however some employers said that they were unable to offer certain benefits because it didn't fit within the job role, such as flexible working.

We invest in our staff and pay everyone above the national living wage. Within their first month we talk about areas to work on, how they feel, etc. None of my staff have to ask for a pay rise, I always recognise when someone deserves a raise. I could give someone a pay rise three times in one year.

Fish frier, Northern Ireland

Career pathways and progression routes

Several employers expressed concern that Northern Ireland seafood industry's qualifications and career pathways are not yet truly reflective of the skills and knowledge required in many sectors. One said that:

There has been a societal and educational change. Younger people's success barometer is measured on them going to FE then university. There's the expectation that you didn't do all that to work in a fishing boat.

Stakeholder, Northern Ireland

Almost all the employers we spoke to were in favour of a “better” career structure and set of pathways. One succinctly stated that the real issue was status because current qualifications, job titles and public perception are not of sufficiently high status to attract or retain staff.

Another employer said that they want to be looking at apprenticeships but that there were not enough relevant ones available. This point was also made by a stakeholder who told us that a more realistic set of qualifications were needed to reflect what they see as the ‘true’ level of some jobs.

There is a view in all sectors that there are opportunities for talented people to do well, either by promotion or moving into self-employment; but equally it was acknowledged that this is not communicated well to potential new entrants.

Characteristics of stayers and leavers

Employers are generally clear that stayers are people who have a number of difficult-to-define characteristics. They have a good work ethic, they see the job as a way of life, are not only driven by pay, have a positive attitude to life, exhibit initiative, are willing to give just that little bit more, and, perhaps above all else, are interested in the work. An employer organisation suggested that stayers often want to live and work in the coastal area where they grew up.

Leavers on the other hand tend to be people who are driven only by the wages, who do not seem to be interested in the work as a job, and who are not motivated by promotion and progression. One employer claimed that there was a lack of people who were invested in the work and these are the ones likely to leave. They also stated that there was a general lack of new entrants coming into the industry.

The ones that leave don't show any interest in their work or the industry they are a part of.

Retail, Northern Ireland

A majority of employers used the phrase “want to get stuck in” with respect to stayers. In this context they meant that stayers are interested to learn and grow, and generally interested in the industry and “getting on”.

Does training affect retention?

The overall reaction of employers is that training does improve retention, but that there is a significant downside in terms of the potential to lose the employee. One employer said that it depends on the person and that it is “very disappointing” for an employer when workers are happy to receive training but will leave if they think something better turns up. It felt as if they were ‘training them to leave’. As in many other sectors employers appear to be caught in a dilemma between ‘what if we train them and they leave, and what if we don't train them and they stay?’

One employer stated that they try and look for the most promising candidates who want to get stuck in and will offer training to them as it is more of an investment.

An employer had a similar view:

If someone is showing promise, I will give them more responsibility and let them move around the stations – you can usually recognise it in someone straight away. These are the ones I will invest time and money in for training.

Processor, Northern Ireland

One stakeholder pointed out that an interesting piece of fallout from the Covid-19 pandemic is that food providers are now seen very much as ‘key workers’. From a career and recruitment point of view this could mean that their status has risen as a result.

In light of Covid-19, I hope people see that there are ‘near bulletproof’ careers available in this industry and that this will attract potential new entrants. This needs to be highlighted more – that with a recession and a pandemic, we in the seafood industry work our way through with attention, detail and vision.

Fish frier, Northern Ireland

Sectors

Two of the key questions that employers were asked were about their appreciation of the level of skills in their company and sector. In both cases they were asked to apply scores on a scale of zero to ten. The first question asked for scores of the current skill level of staff against the skills needs of the business (where zero was unskilled and ten was highly skilled).

The subsequent question focused on the future demand for the skill for the sector as a whole. The time scale was seven to ten years and they were asked to score the skills from zero (sector demand would decrease considerably) to ten (sector demand would increase considerably).

Each question and set of skills has been dealt with separately for each sector in order to make clear the distinction in employers’ minds between current skills in their own businesses and their assessment of the degree to which the sector would require the skills in the medium term future.

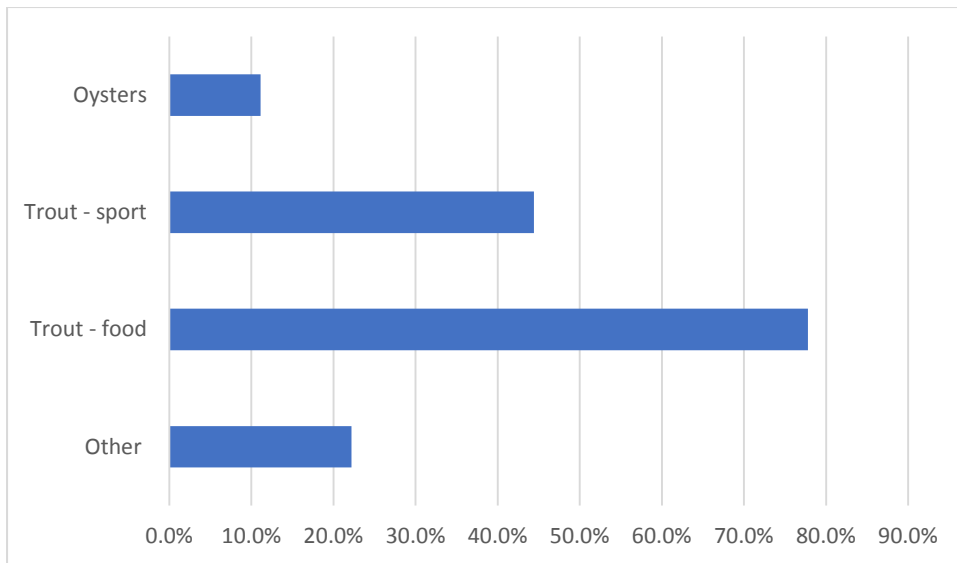
Aquaculture

Although a relatively small sector in employment terms, aquaculture is a growing one and requires very high levels of skill in its core workforce.

Our survey covered aquaculture companies headquartered in Northern Ireland.

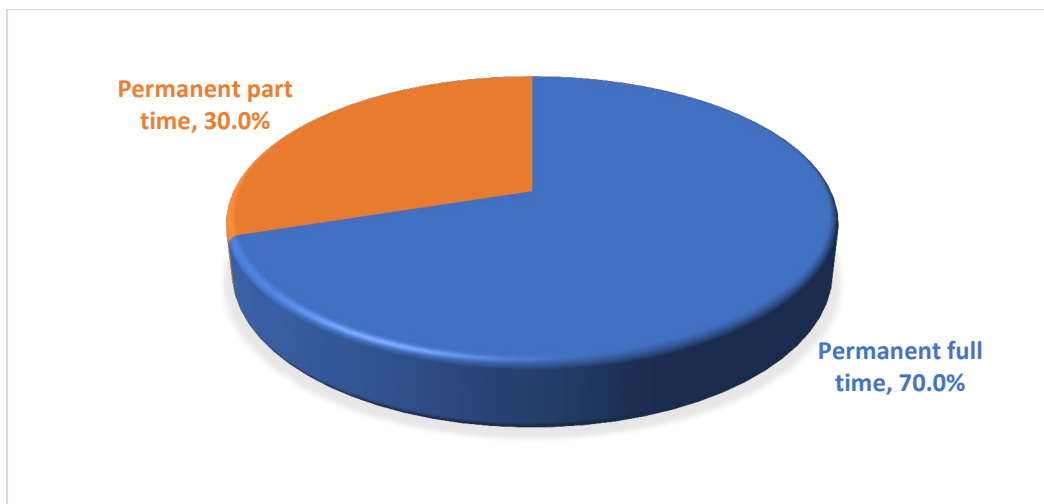
Just under 78% of the responding businesses farm trout for food, 44% trout for sport and 11% oysters (Figure 6). The two respondents who answered ‘other’, farm other species alongside trout farming, one specified Rainbow trout as the ‘other’ species

Figure 6 Species farmed in Northern Ireland's aquaculture sector



Source Pye Tait survey 2020

Figure 7 Employed workers by mode of employment in Northern Ireland's aquaculture sector (%)

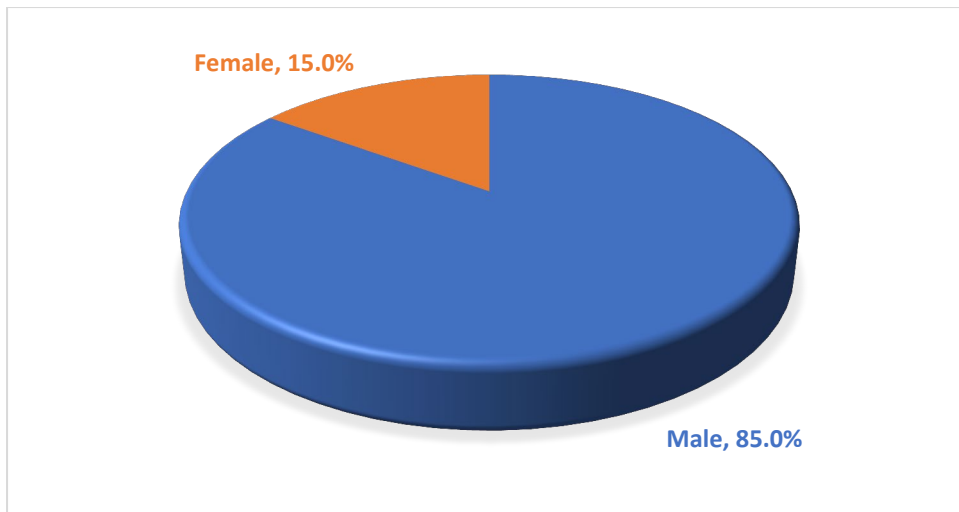


Source Pye Tait survey 2020

Survey respondents reported 70% of employees are employed on permanent full-time contracts with a further 30% on permanent part-time arrangements (Figure 7). Respondents reported no seasonal employees.

In surveyed businesses 85% of employees are male, and 15% female. (Figure 8)

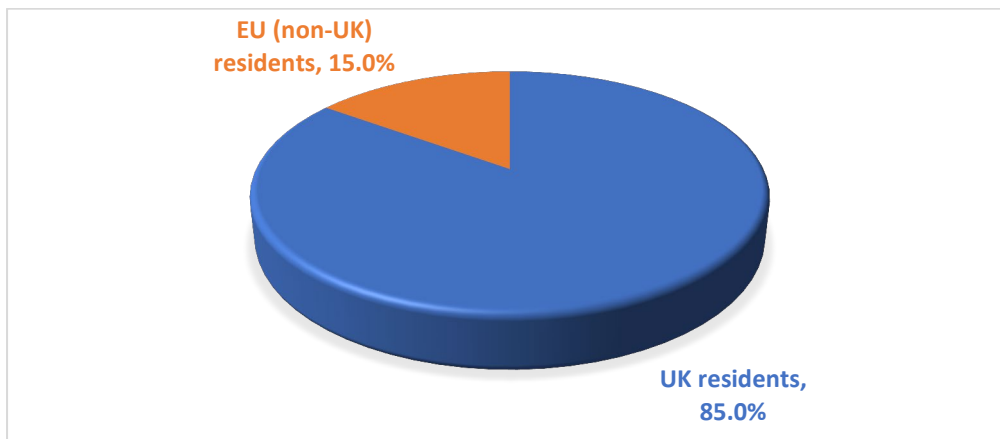
Figure 8 Employment made by gender in Northern Ireland's aquaculture sector



Source Pye Tait survey 2020

All permanent aquaculture sector workers are either UK residents (85%) or EU (non-UK) residents (15%), i.e. no respondents reported any workers from outside the EU. (figure 9)

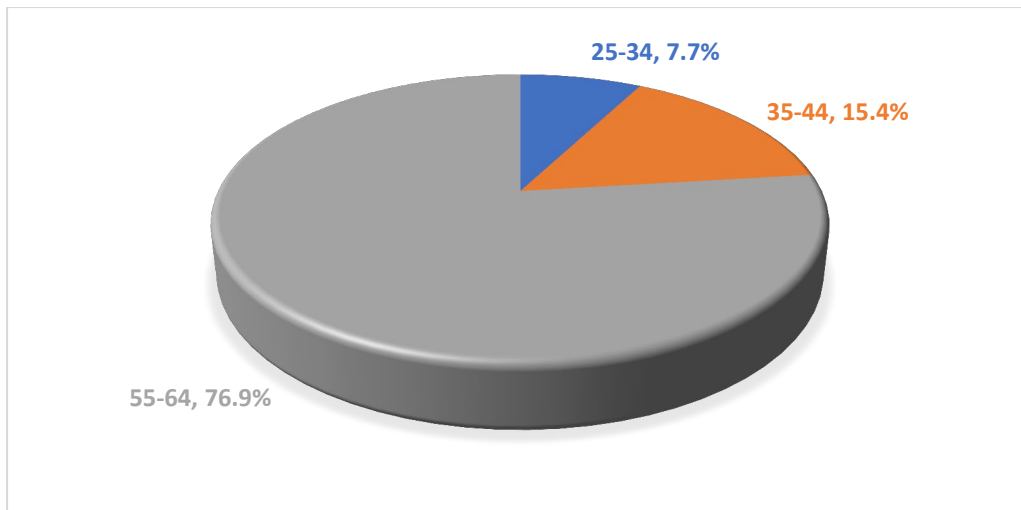
Figure 9 Residence by mode of employment in Northern Ireland's aquaculture sector (%)



Source Pye Tait survey 2020

Respondents from the aquaculture sector gave ages for 13 employees. 92% are over 45 years and just under 8% are under the age of 35 (Figure 10). Indicating an ageing workforce for this small sample.

Figure 10 Aquaculture age profile in Northern Ireland



Source Pye Tait survey 2020

Skills

The level of skills required in the aquaculture sector is high, employers report that 95% of full-time permanent are either highly skilled or skilled (Figure 11).

Figure 11 Skill levels by mode of employment in Northern Ireland’s aquaculture sector (%)



Source Pye Tait survey 2020 Source Pye Tait survey 2020 Not all respondents could score every skill. In some cases, therefore, there are no responses

Figure 12 show reasons given by employers for skills gaps within the current workforce. The highest rated reason by far was that there was not enough external training available locally (43%).

Other reasons rated just under 15% each were that businesses were too busy to release staff for training, the costs of external training plus the costs of travel to external training were too high and external training is not relevant to the business.

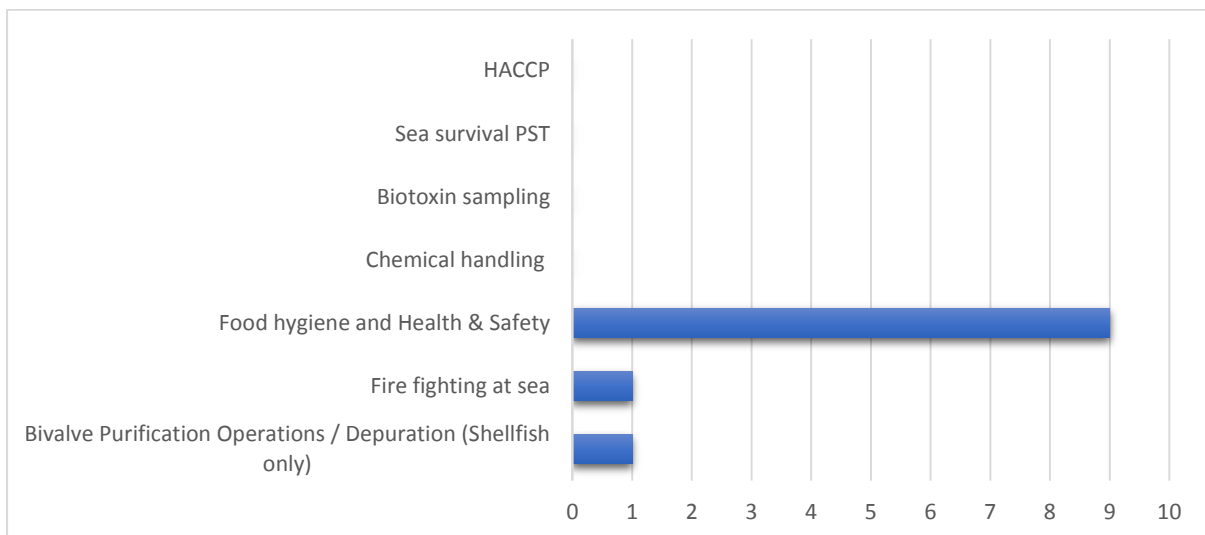
Figure 12 Reasons for skills gaps in Northern Ireland's aquaculture sector



Source Pye Tait survey 2020 Source Pye Tait survey 2020 Not all respondents could score every skill. In some cases, therefore, there are no responses

Figure 13 illustrates the perceptions of employers in the sector as to the current level of skill of operatives in their workforces. A score of zero represents no skill at all and a score of 10 indicates that the employer feels the current workforce is very highly competent in the specific skill.

Figure 13 Current skills amongst operative level staff in Northern Ireland's aquaculture sector

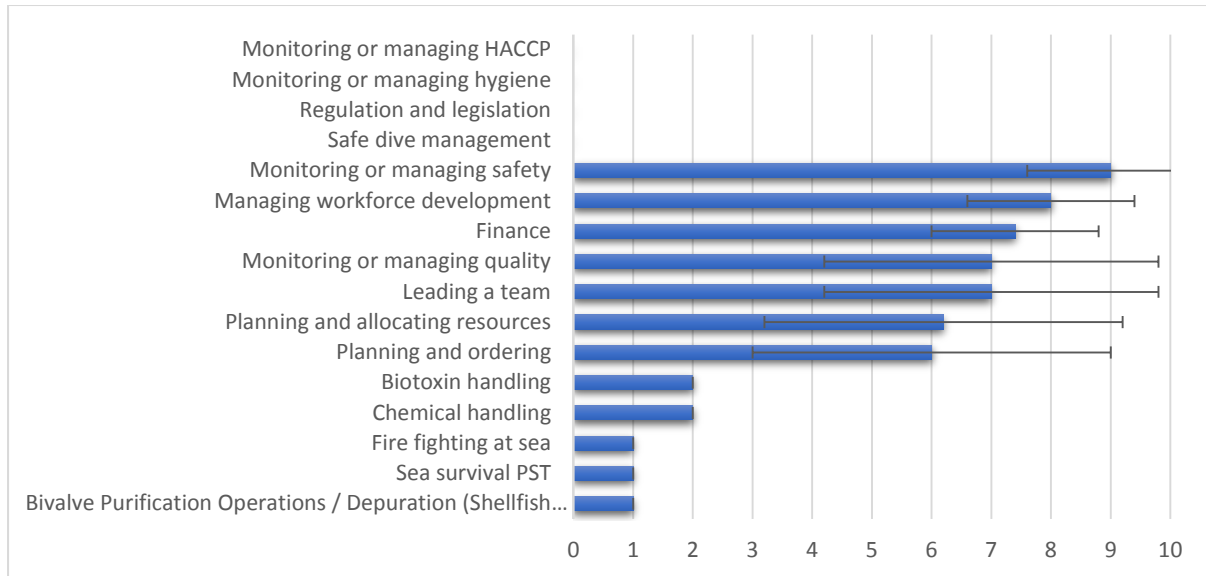


Source Pye Tait survey 2020. Source Pye Tait survey 2020 Not all respondents could score every skill. In some cases, therefore, there are no responses

Employers rate most highly Food hygiene and Health and Safety however other skills employers rated – Firefighting at sea and Bivalve Purification Operations – were rated very low at one out of ten. Employers were unable to rate four other skills for their employees.

With respect to future demand for the same skills employers in aquaculture could only rate Food hygiene and Health and Safety to be in demand in the future. However, other skills that employers stated would be in demand included fish health, fresh water/oxygen health, oxygen purification, natural fish-farming, fish welfare, freshwater trout management and animal welfare.

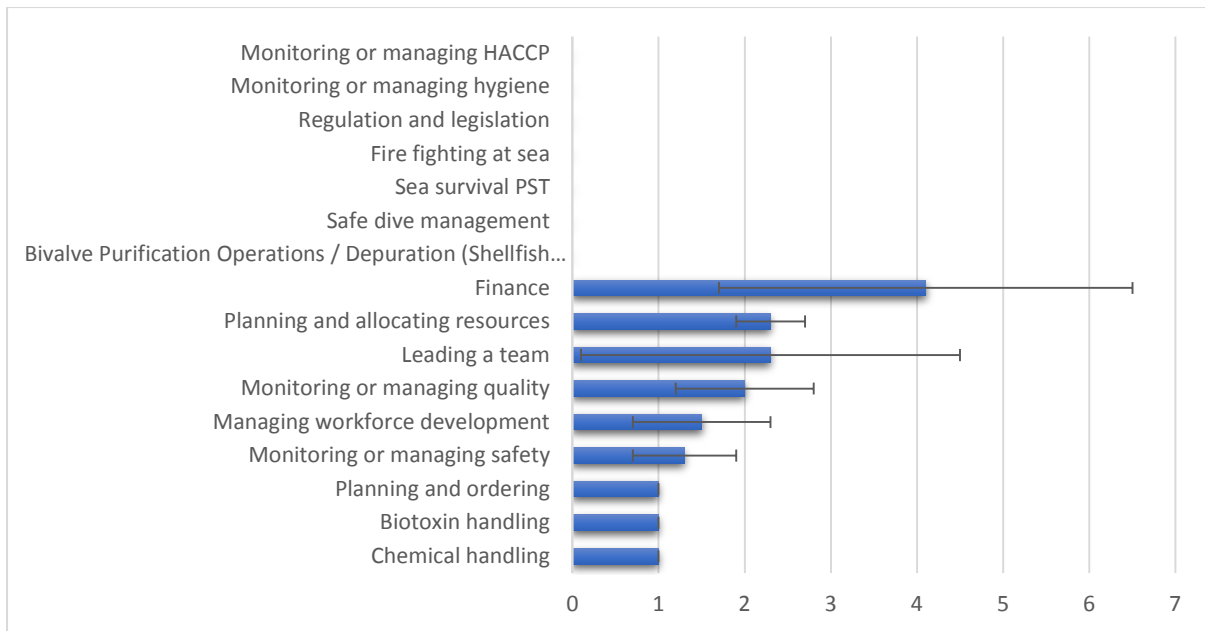
Figure 14 Current skill level of supervisors and managers in Northern Ireland's aquaculture sector



Source Pye Tait survey 2020 The black arrows indicate the measure of the standard error of the mean

The current skills for supervisors and managers in the sector are shown in figure 14. Skills such as Monitoring or managing safety are highly rated as excellent however this skill rates low in the future demand as do other current skills (Figure 15). Employers stated that freshwater trout farming and freshwater trout management as well as animal welfare and oxygen purification skills were future skills in demand of supervisors and managers in this sector.

Figure 15 Future skills demand of supervisors and managers in Northern Ireland's aquaculture sector



Source Pye Tait survey 2020 The black arrows indicate the measure of the standard error of the mean

Training

Survey respondents in the aquaculture sector said that there was little practical training available with the majority of training delivered in-house. Respondents would like to see more training become available.

There are no Aquaculture apprenticeships available in Northern Ireland, Wales or England. Aquaculture apprenticeships are only offered in Scotland. Employers in this sector, however, would like to offer aquaculture apprenticeships suggesting combining on the job training with online courses supported by colleges.

There's unskilled staff in the aquaculture sector due to there being no practical training provided in Northern Ireland, there's only in-house training.

Aquaculture, Northern Ireland

The Scottish Shellfish Training Centre is able to address Bivalve Purification training needs across Scotland and Northern Ireland¹⁰

In response to requests from Northern Ireland industry, a Bivalve Purification Operations Course was organised by Seafish in early March 2020. The course was delivered by two ATPs from Aquafish

¹⁰ <https://seafoodacademy.org/bvp-sstc.php>

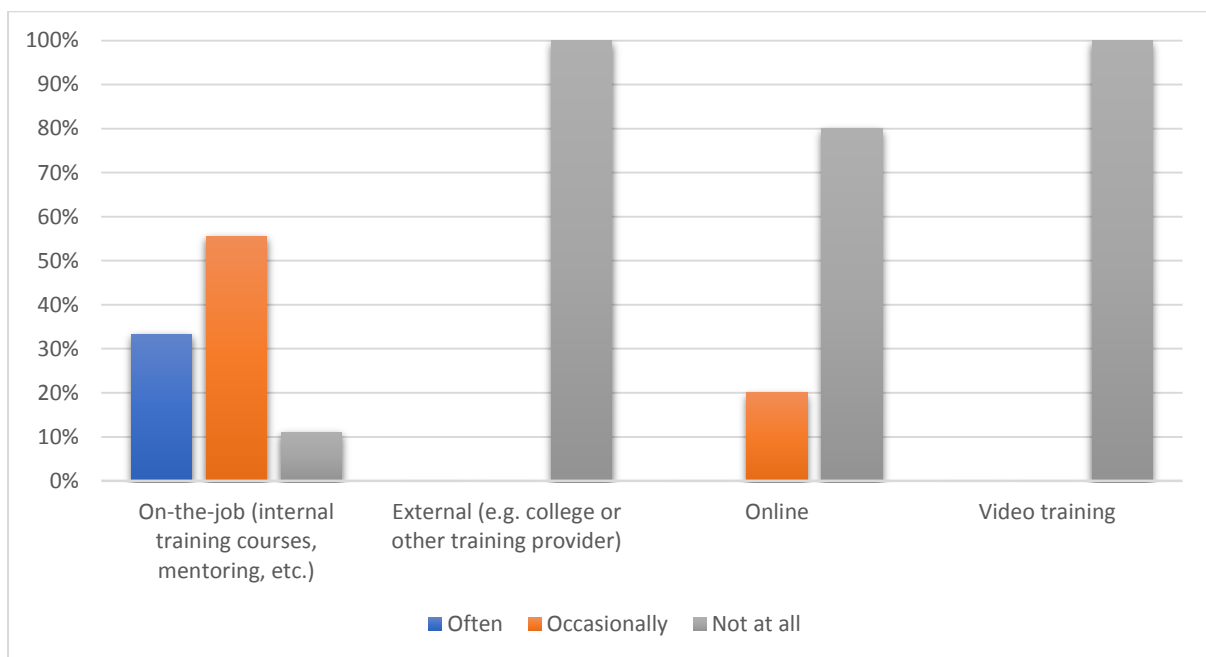
Solutions. It was the first time the course had been run for many years, allowing local businesses and regulators to access it without incurring significant travel costs.¹¹

Seafish has also recently pioneered innovative online training and assessment for Bivalve Purification.

All courses in the aquaculture sector are provided almost exclusively internally with no respondents using external training through a college or training provider.

Occasionally employers will use online training (20%) with on-the-job training being delivered often (33%) and occasionally (56%) (Figure 16)

Figure 16 Training approaches in Northern Ireland's aquaculture sector (permanent staff)



Source Pye Tait survey 2020

Some aquaculture respondents claimed that they had no extra training needs but that their biggest issue was dealing with the impact of Coronavirus. Thus, production management strategies and financial training was requested. It was commented however that fish farming training is limited in Northern Ireland and delivering courses such as Advanced Fish Health would be advantageous to how they look after fish especially with the threat of Coronavirus.

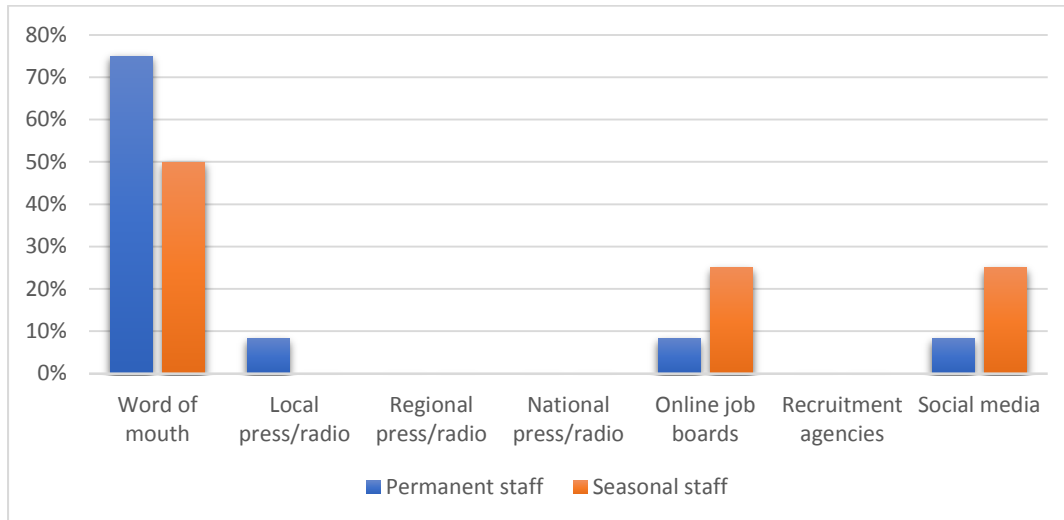
Recruitment

Figure 17 shows the main recruitment methods used by aquaculture employers. Word of mouth is the most popular recruitment method of permanent (75%) and seasonal staff (50%). Social media and online job-boards are used more to recruit seasonal staff (25%) than permanent staff (8%).

¹¹[https://seafish.org/media/Bivalve Purification Operations Course held in Belfast Upskilling the Aquaculture Sector.pdf](https://seafish.org/media/Bivalve_Purification_Operations_Course_held_in_Belfast_Upkilling_the_Aquaculture_Sector.pdf)

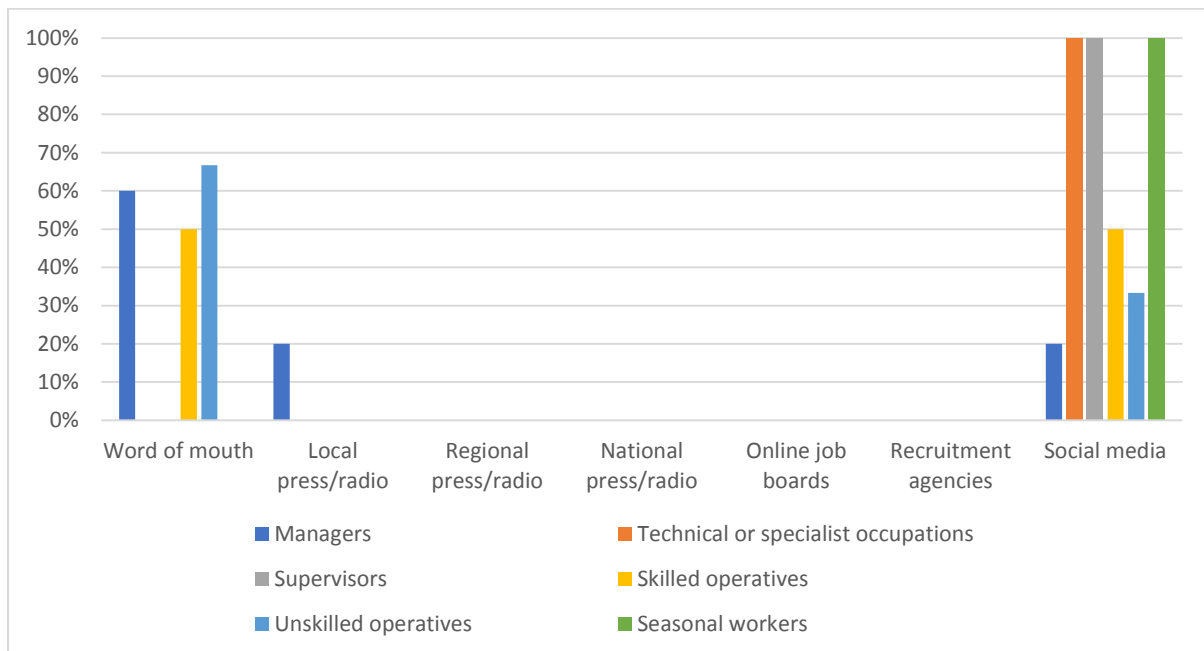
Employers may also use local press/radio to recruit permanent staff (8%).

Figure 17 Recruitment methods used in Northern Ireland's aquaculture sector



Source Pye Tait survey 2020

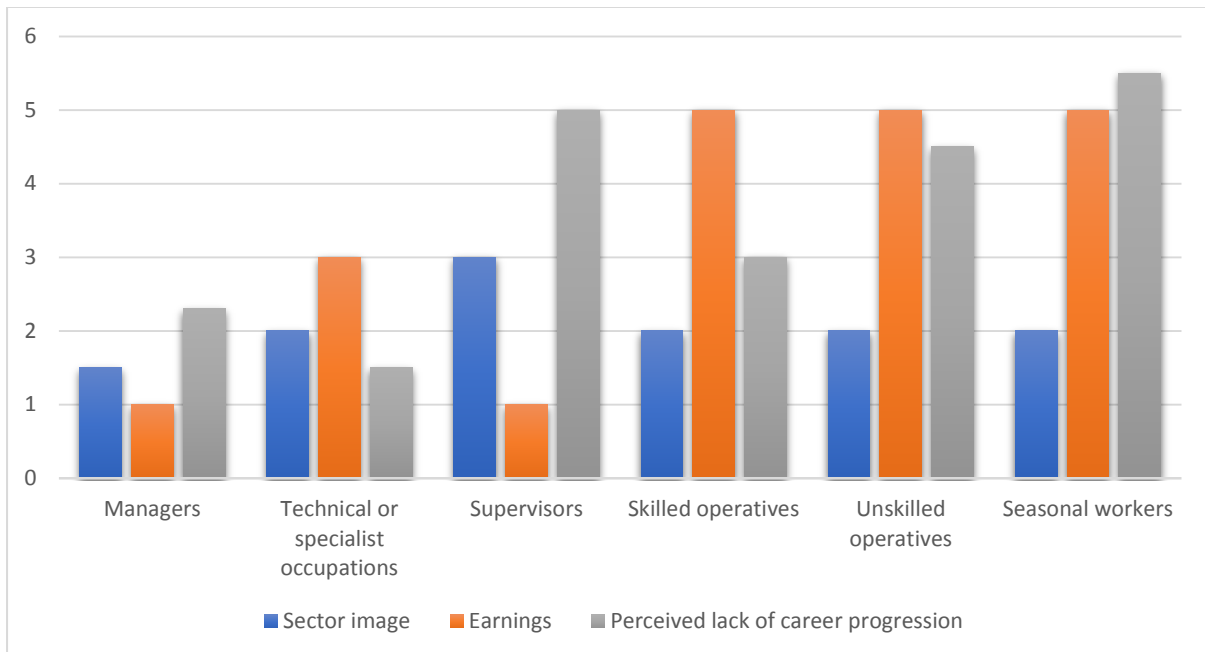
Figure 18 Recruitment methods used in Northern Ireland's aquaculture sector by job role (%)



Source Pye Tait survey 2020

Figure 18 shows recruitment methods used by employers by job role, social media is used to a varying extent for all roles, whereas word of mouth is used for operatives and managers. Of the other methods of recruitment, local press is the only one used, and this only for managerial roles.

Figure 19 Barriers to recruitment in Northern Ireland's aquaculture sector (by job role %)



Source Pye Tait survey 2020

Figure 19 shows employers in aquaculture regard a perceived lack of career progression to be an important barrier to recruitment for all types of staff, especially supervisors and seasonal workers. Staff earnings however are regarded highly as the main barrier for a range of staff roles from Technical/specialist occupations and skilled and unskilled operatives. The sector image rated low as a barrier for all job roles apart from supervisors.

Catching

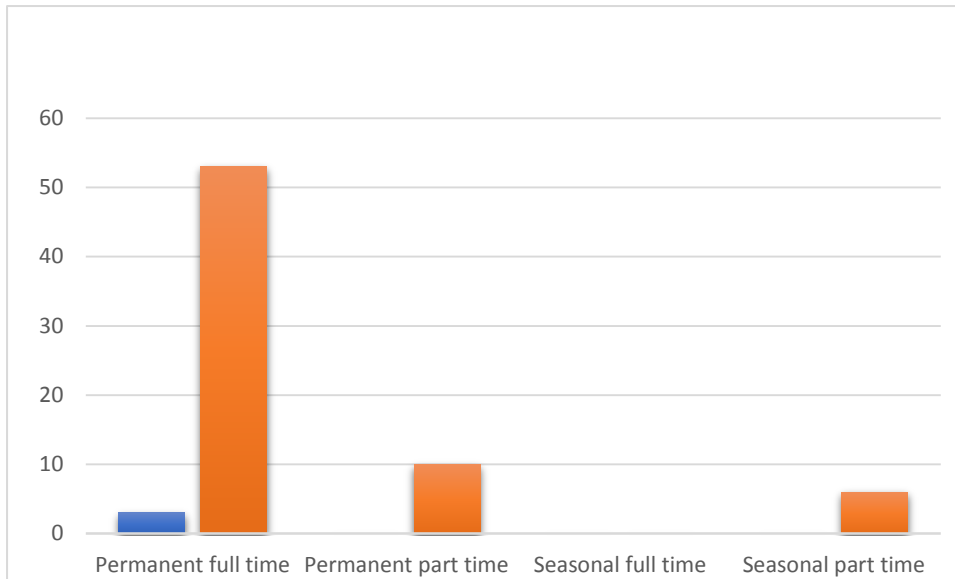
Introduction

The survey covered fishing enterprises with headquarters in Northern Ireland.

Three quarters of vessels operated by surveyed employers are under 16.5m, the remaining quarter are between 16.6m and 24m, around 66 people are employed onboard supported by a further 19 ashore.

The vast majority of share fishermen are taken on, with a permanent full-time contract (Figure 20).

Figure 20 Number of onboard workers and share fishermen by contract type in Northern Ireland's catching sector

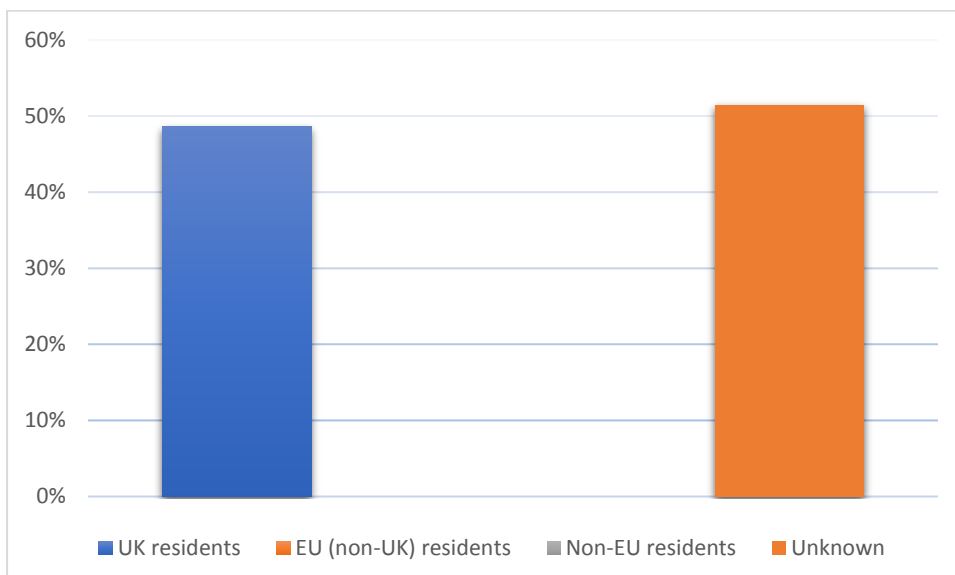


Source Pye Tait survey 2020

Just under 50% of permanent staff are UK residents, with employers unable to state the residence of the remaining staff.

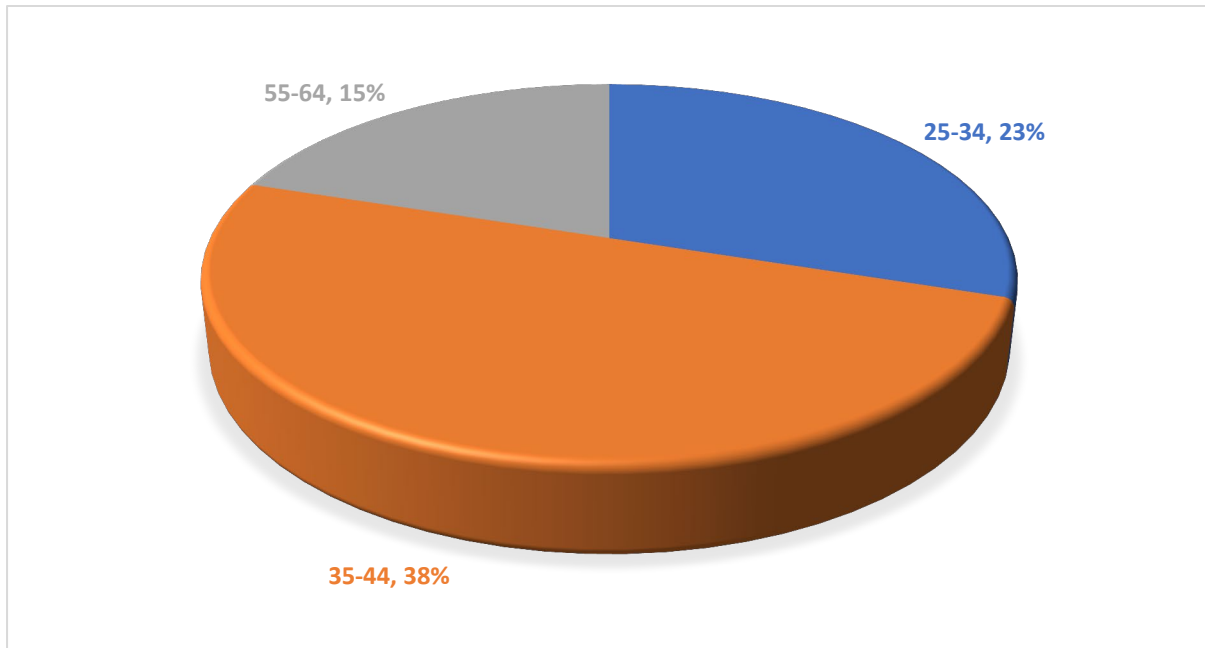
Stakeholders suggest that migrant labour can be divided into Filipino nationals, Eastern Europeans and those of African origin. Skills and qualifications of migrant staff vary; stakeholders speak highly of Filipino deckhands who generally only require the one-day Safety Awareness course, and are competent deckhands with a wide range of skills.

Figure 21 Residence of employees in Northern Ireland's catching sector



Source Pye Tait survey 2020

Figure 22 Catching age profile in Northern Ireland



Source Pye Tait survey 2020

Over half of the surveyed catching workforce in Northern Ireland is aged over 45 (compared to around 43% of the UK workforce).

Skills

The question of skill level in the fishing industry is fraught with difficulties. These are mainly based on the fact that most people in the sector do not have formal qualifications but instead possess a series of mandatory certificates and additional training.

These difficulties are made more intractable by the fact that the industry has traditionally been regarded as relatively unskilled – particularly with respect to deckhands who are often seen by lay-people as labourers.

Skippers, engineers and mates are generally regarded as level 3 roles and deckhands as being, at most, at level 2.

Since completion of the research, the Migration Advisory Commission has recommended that Deckhand roles on 9m and above vessels should be regarded as Level 3 and that they should be added to the shortage occupation list.

The industry has adapted and adopted – partly through Government regulation – a number of approaches but all are founded on four basic courses and certificates:

- Basic Sea Survival

- Basic Firefighting and Prevention
- Basic First Aid
- Basic Health and Safety

Skippers, mates and engineers may then have to obtain certain “Certificates of Competence” for deck officers and engineering officers – depending on their role and the size of vessel.

The Maritime Skills Alliance (MSA) provides a summary of apprenticeships available in sea fishing which states that there is no apprenticeship currently available in England, Wales, or Northern Ireland although the NAFC Marine Centre (part of the University of the Highlands and Islands) offers apprenticeships in Scotland. Level 4 courses exist for senior seafarers in areas such as medical care, management and operations but most of the courses listed on the comprehensive site are at Levels 2 and 3.

The problem for the industry is that – whereas in other economic sectors – job roles can generally be categorised at a specific RQF level, there is no overarching qualification which grants a level to a specific job role in the catching sector. Job holders tend to acquire a set of certificates and qualifications. An “electrician” for example undertakes a single course of study – usually through an apprenticeship at Level 3 – which imparts all of the knowledge and skill they will require to begin competent work. In this sense an electrician begins work at Level 3 and the role is regarded as a “Level 3” job (at least in the first instance).

Sea fishermen on the other hand collect a series of specific certificates each of which may be rated according to the RQF at Level 1, 2, 3, or 4.

The extreme difficulty of attaching a “level” to a sea-fishing role presents no day to day issues for the sector but it does have ramifications in two important areas: firstly where immigration regulations are concerned (in which Level 3 acquires a special significance), and secondly for the overall status and career-attractiveness of the sector.

A further consideration for the level of a job role is the element of multi-skilling involved. Skippers, for example, may have a collection of certificates which individually are considered to be at level 2, 3 or 4, but the overall job role involves the deployment of numerous skills and deep and extensive underpinning knowledge which almost certainly places the role above those levels in practice.

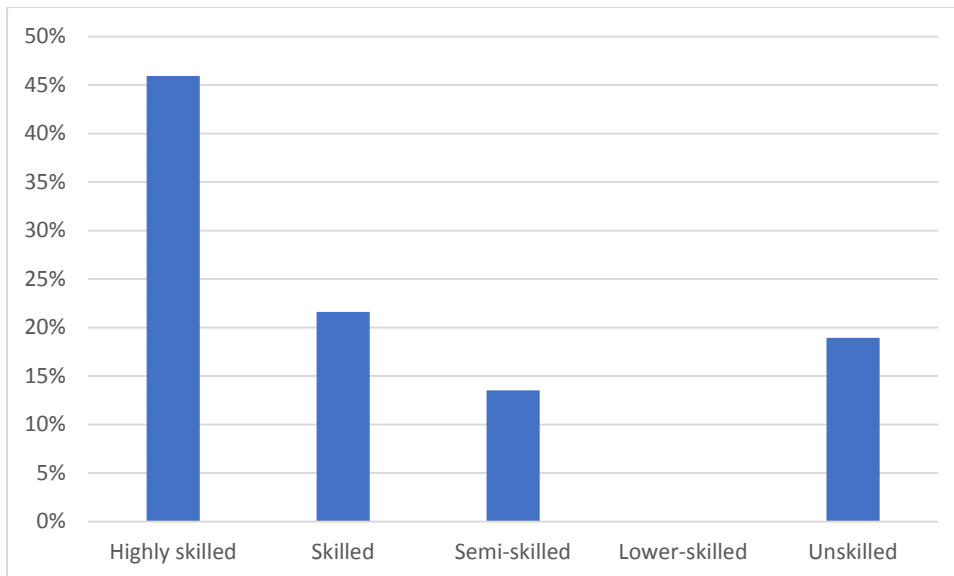
Deckhands, while often seen as labourers and unskilled operatives, carry out a multi-skilled job role in which knowledge and skill have to be displayed over a wide range of tasks including net handling, engine management, fish identification and selection, machinery and equipment management, team working, navigation, safety management, fish processing and packing and much else.

The results of our survey should be read in the light of these considerations. They may offer insights, for example, into why employers in the sector regard their employees as being “highly skilled” as in Figure 23, which shows that catching employers regard 68% of permanent staff as skilled or highly skilled.

There is an unwillingness among employees to undertake external training, this is an issue in many UK sectors and is often related to the basic educational level of the member of staff. Many people regard themselves (and possibly are justified in doing so) as “practical people” and not “academics”.

They have an inbuilt fear of, or antipathy to, what they see as “classroom education”. People may be perfectly competent in their basic role but may have limited numeracy and literacy skills and may have been “traumatised” by their early educational experiences. These types of issues may well lie behind some of the unwillingness to undertake external training.

Figure 23 Skill levels in Northern Ireland’s catching sector (%)

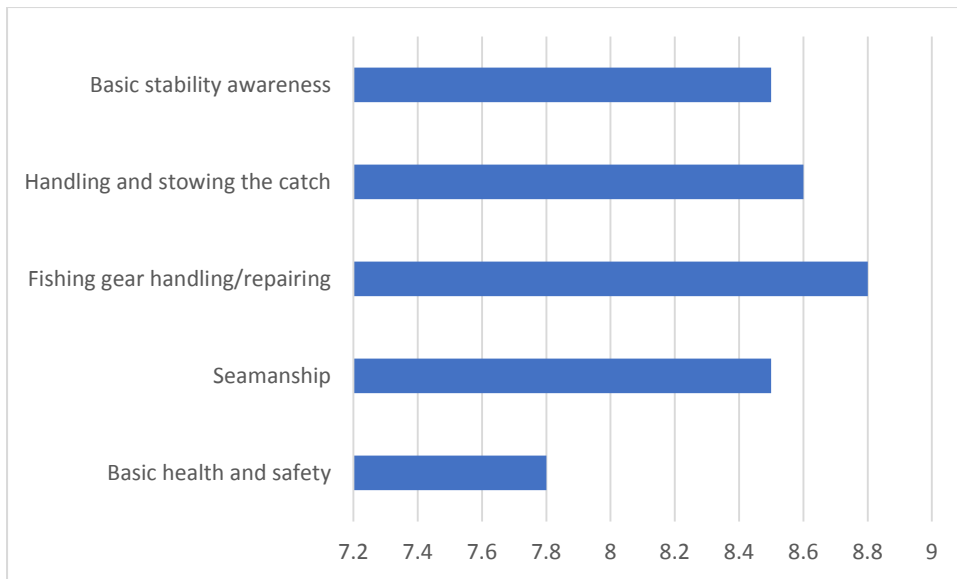


Source Pye Tait survey 2020.

Survey respondents were unable to give a reason for skills gaps in the catching sector. Many businesses are small and are operated by a small number of crew who have worked together for a number of years, forming effective teams.

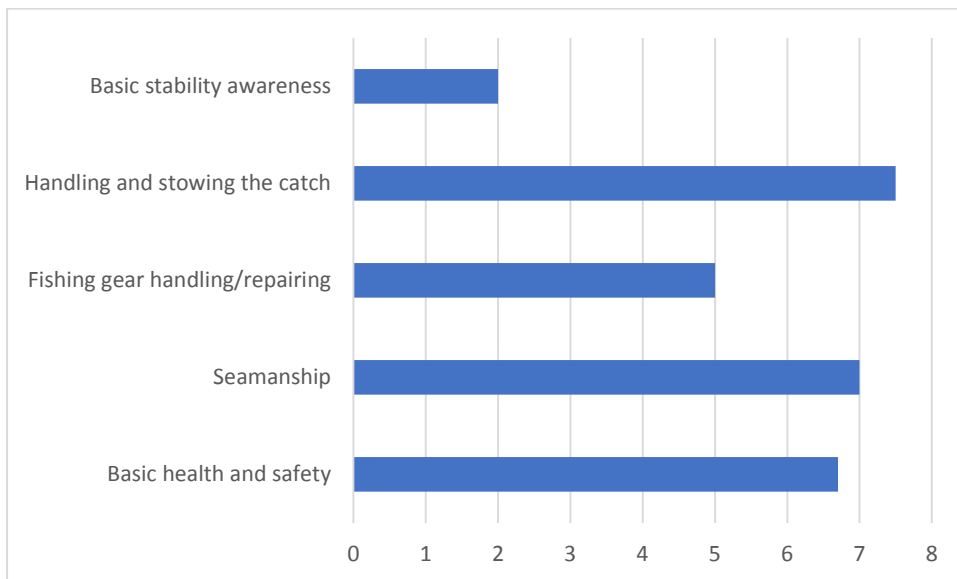
Employers regard deckhands as being well skilled (scores of seven and over out of ten) in the key catching skill areas (Figure 24). Employers see the future demand for those skills increasing, with the exceptions of Basic stability awareness (decreasing) and Fishing gear handling/repair (staying the same).

Figure 24 Current deckhand skills levels in Northern Ireland's catching sector



Source Pye Tait survey 2020

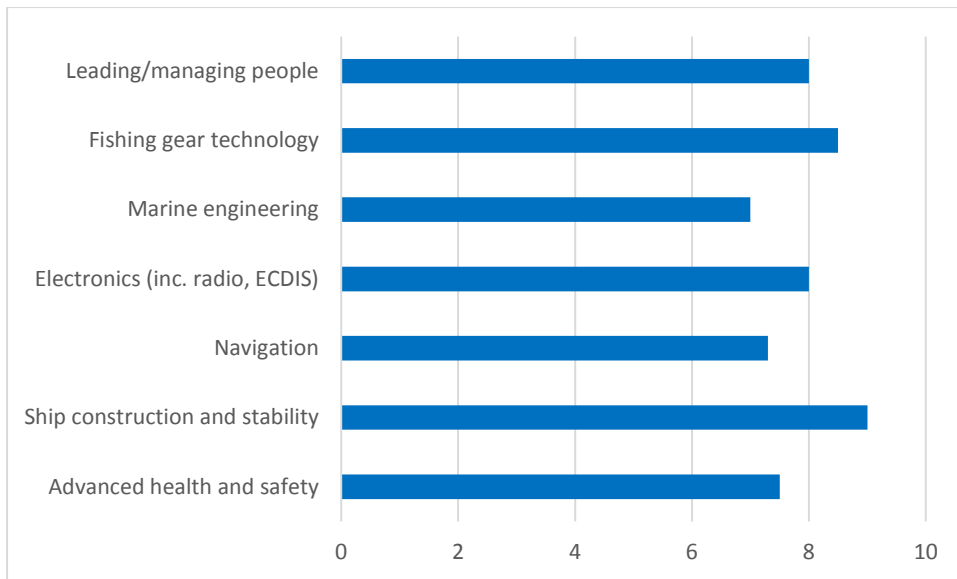
Figure 25 Future demand for deckhand skills in Northern Ireland's catching sector



Skills levels for mates and skippers are shown in Figure 26, all skills score above 7, which is termed good. Ship construction and stability, and Fishing gear technology score above 8, very good.

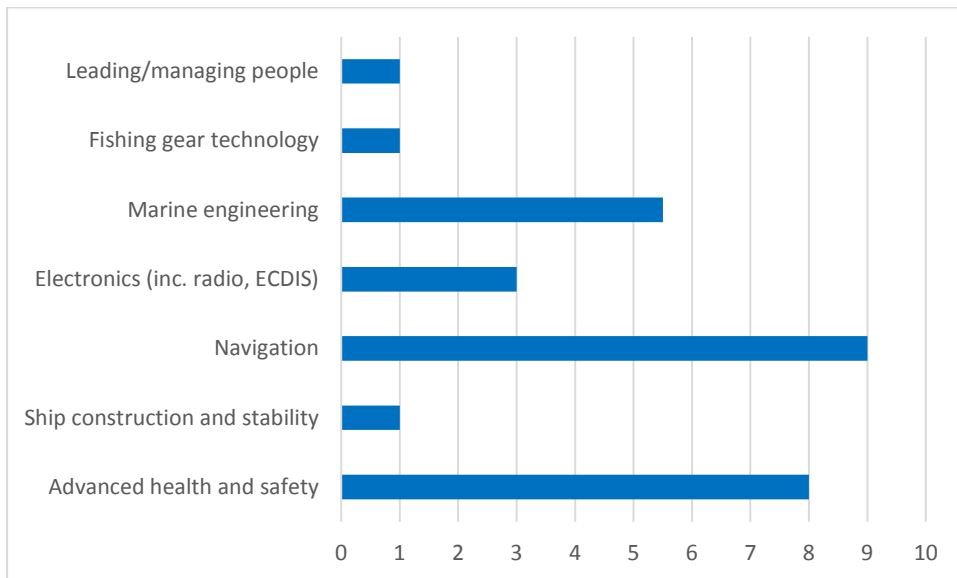
Employers predict falling demand for all skipper and mate skills with the exception of marine engineering and advanced health and safety.

Figure 26 Current skills levels of mates and skippers in Northern Ireland's catching sector



Source Pye Tait survey 2020

Figure 27 Future demand for skills skippers and mates



Training

The mandatory safety training courses for fishermen in Northern Ireland are delivered by two Seafish-approved training providers:

Seafish Industry Training Association (Northern Ireland)

Offers the full range of mandatory safety courses for fishermen, as well as a range of under 16.5m skipper courses and 2 advanced courses (4-day medical first aid at sea; 5-day navigation)¹²

¹² [sfitani.co.uk/training-courses/](https://www.sfitani.co.uk/training-courses/)

Anglo North Irish Fish Producers Organisation (ANIFPO)

Offers the full range of mandatory safety courses for fishermen¹³

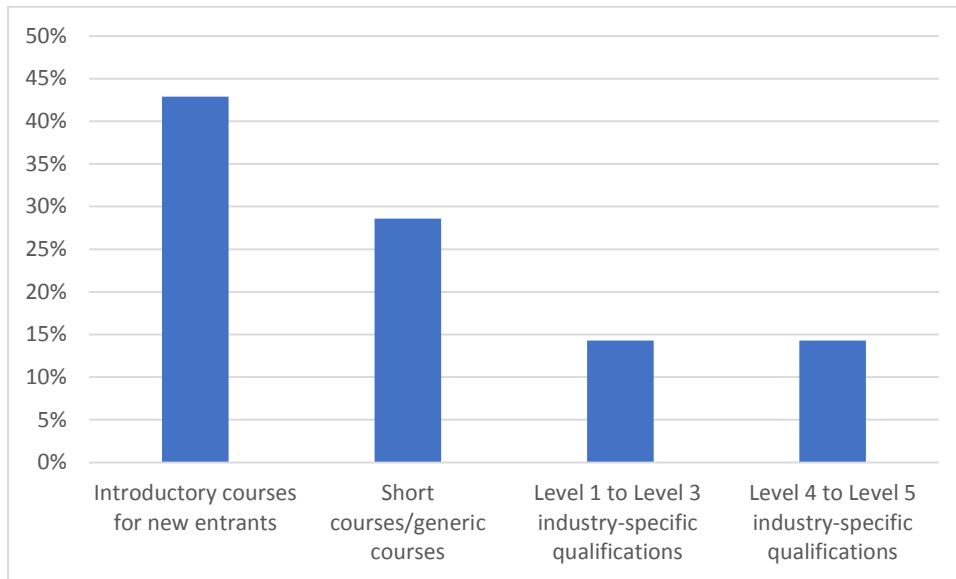
ANIFPO also offers training to catchers wishing to diversify into guard ship services, which involve monitoring activity around subsea cables. Other areas of diversification supported by ANIFPO include Fishing Surveys - gathering data for monitoring the environmental impact of construction; Marine wildlife observation; and Asset monitoring.

ANIFPO also runs a fish retail outlet and a fish processing organisation.

¹³ <https://www.seasource.com/training>

Figure 28 shows that the majority of training undertaken in the sector consists of introductory or short courses.

Figure 28 Training undertaken in Northern Ireland's catching sector

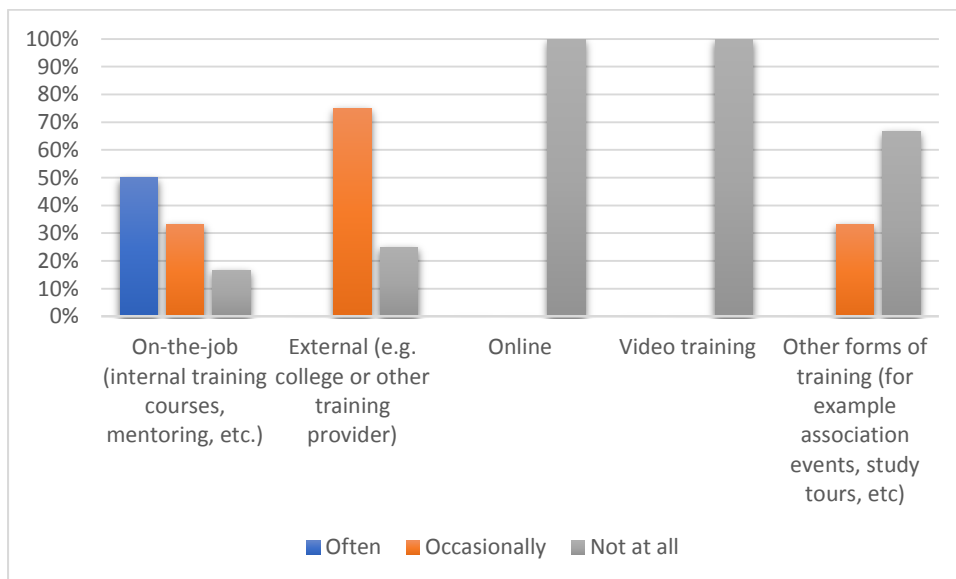


Source Pye Tait survey 2020.

Stakeholders agree that training is driven by mandatory requirements, with employers reluctant to engage in any other training unless they can see a return for the direct costs and indirect costs in terms of lost earnings.

Figure 29 shows half of surveyed employers use on the job training often for permanent staff, the existence of mandatory training accounts for over 70% of employers using external providers occasionally.

Figure 29 Training approaches used for permanent staff in Northern Ireland's catching sector



Source Pye Tait survey 2020

Recruitment

Over the past three years surveyed employers have had vacancies for 19 deckhands and 7 skippers. Employers found four of each of deckhand vacancies and skipper vacancies were hard to fill i.e. taking three months or longer.

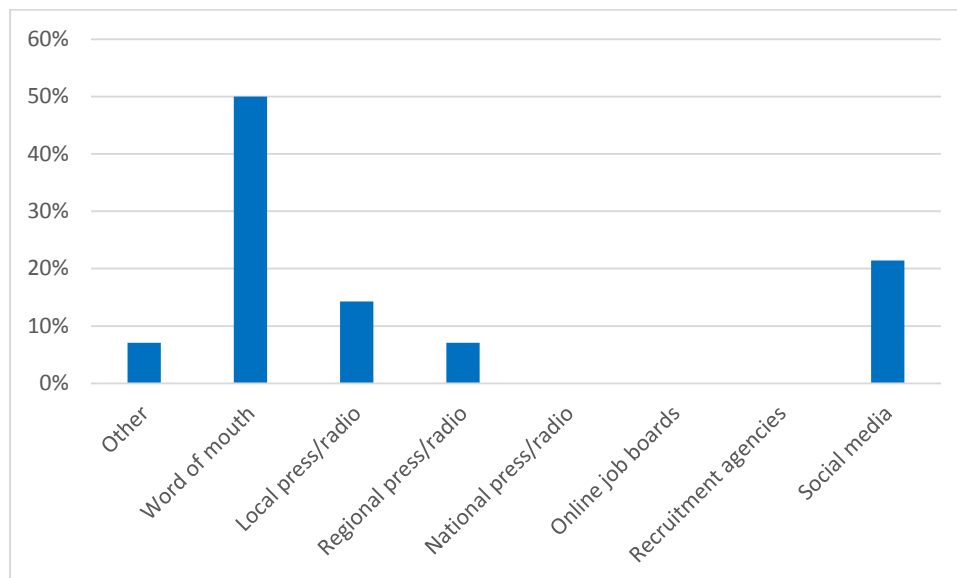
*We always have difficulty in recruiting good qualified skippers and deckhands.
Recently took on school leaver to learn the ropes.*

We are always looking for people who have good skipper quals

Catchers, Northern Ireland

The preferred method of recruitment for both permanent staff is word-of-mouth, with 50% of employers using this method recruited this way. Social media is the next most common way of recruiting staff for the sector. (Figure 30)

Figure 30 Methods of recruitment for permanent staff in Northern Ireland's catching sector



Source Pye Tait survey 2020. Not all respondents felt they could provide specific responses for all options. In some cases, therefore, there are no responses

Survey respondents could only comment on the barriers to recruitment for deckhands and unskilled operatives. For both occupations sector image was seen as a barrier, scoring seven out of ten. The biggest barrier to recruiting deckhands is earnings (scoring eight out of ten).

Employers are concerned that young people do not have a good grasp of what roles at sea involve, leading to some incurring costs for mandatory training but not going on to a career in catching.

The youngsters coming into the fishing industry all need to have their Sea Survival Certificates prior to coming on-board. In many cases they get these certificated then join the boat for a day and don't return.

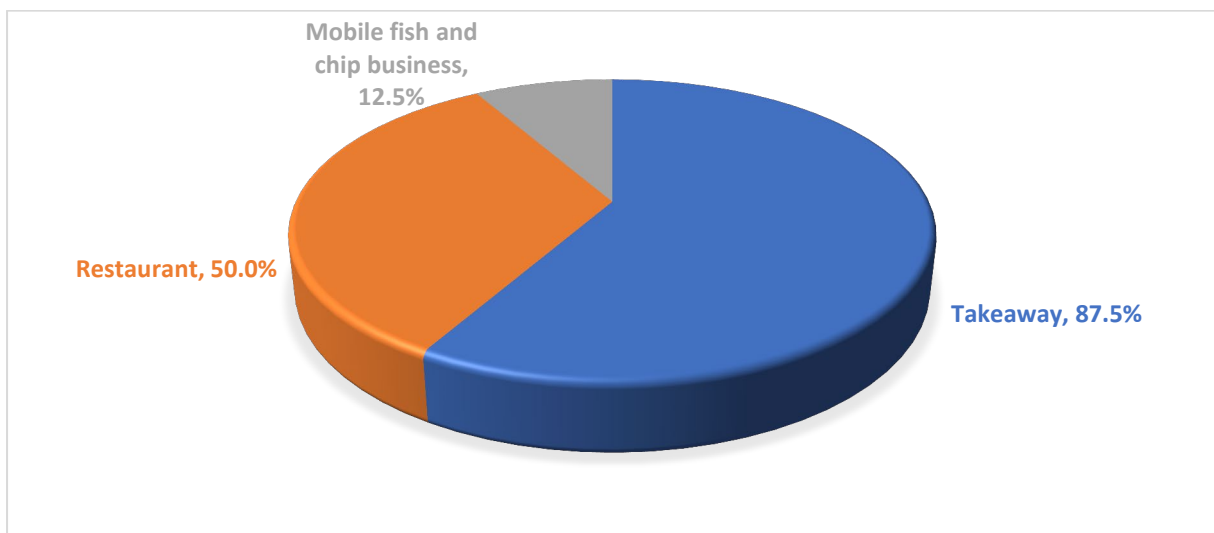
Catcher, Northern Ireland

Fish Frier

Introduction

The sector in Northern Ireland employs some 3,700 people in around 600 businesses. Most of the companies are micro or small. For the survey we were able to contact and interview eight fish frier businesses during the Covid-19 lockdown. Of the surveyed businesses 87.5% were takeaways, 50% were restaurants and 12.5% were mobile businesses (Figure 31).

Figure 31 Type of fish frier business surveyed in Northern Ireland

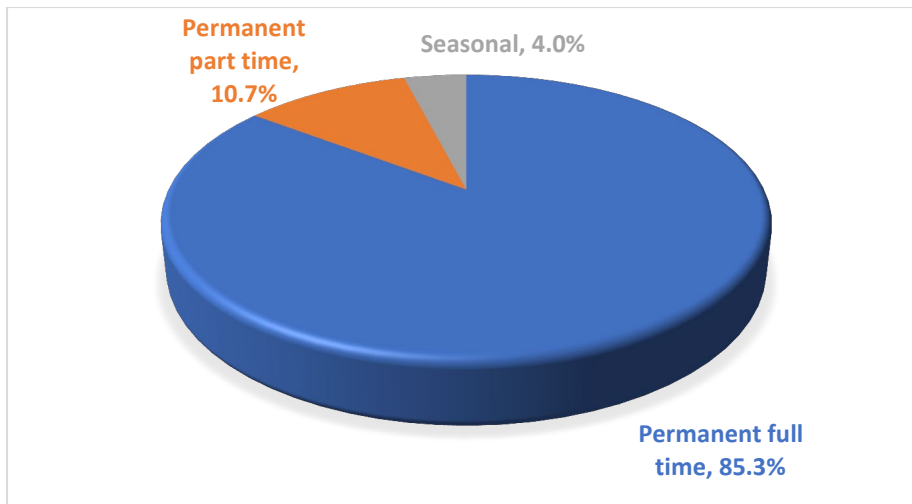


Source Pye Tait survey 2020

Just over 85% of staff are employed on a full-time permanent basis with 10.7% being permanent part-time and 4% seasonal workers.

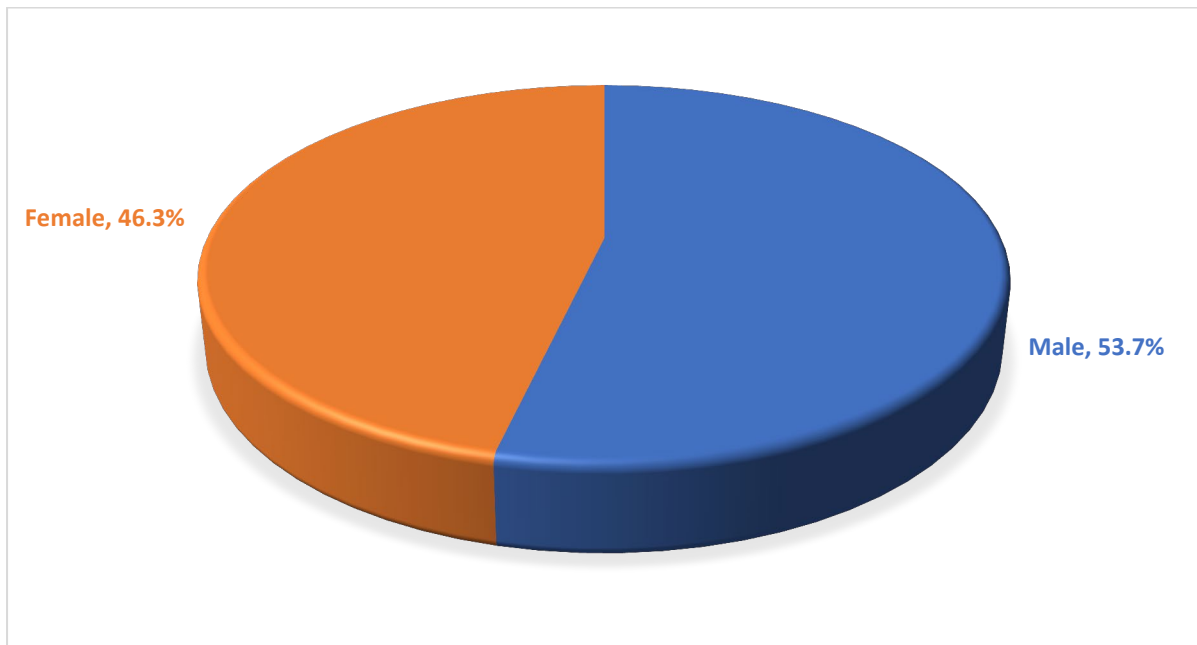
Employers surveyed only gave information on gender for permanent full-time staff. Just over half (53.7%) are male and 46.3% are female. (Figure 33).

Figure 32 Employment made in Northern Ireland's fish frier sector



Source Pye Tait survey 2020

Figure 33 Permanent full-time staff by gender in Northern Ireland's fish frier sector



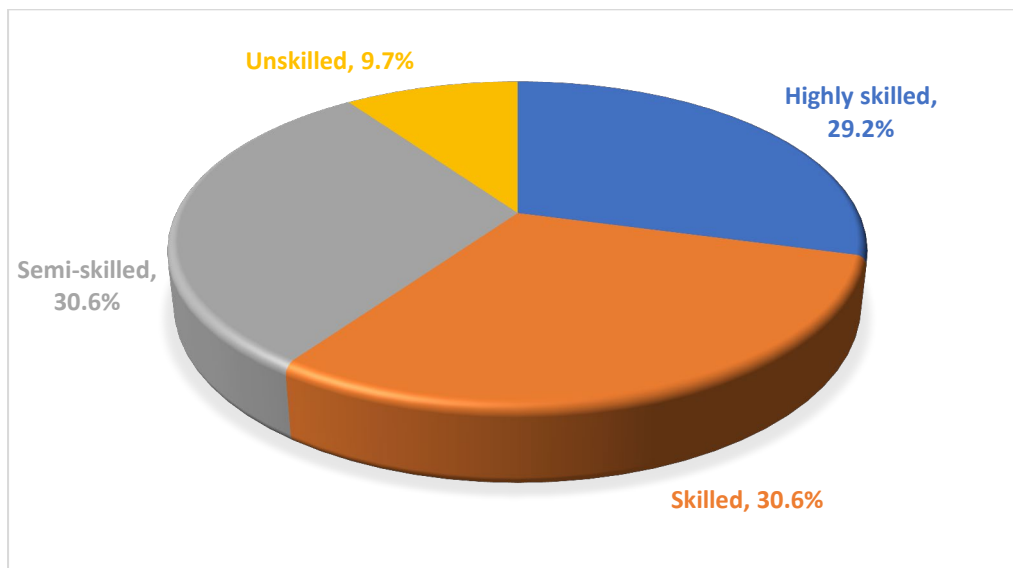
Source Pye Tait survey 2020

All surveyed permanent and seasonal employees in Northern Ireland's Irish frier sector are UK residents.

Skills

Employers in the fish frier sector regard around 60% of their permanent staff as being highly skilled or skilled, with 40% regarded as unskilled or semi-skilled. Survey respondents claim that all their seasonal workers are semi-skilled.

Figure 34 Permanent staff by skill level in Northern Ireland's fish frier sector.

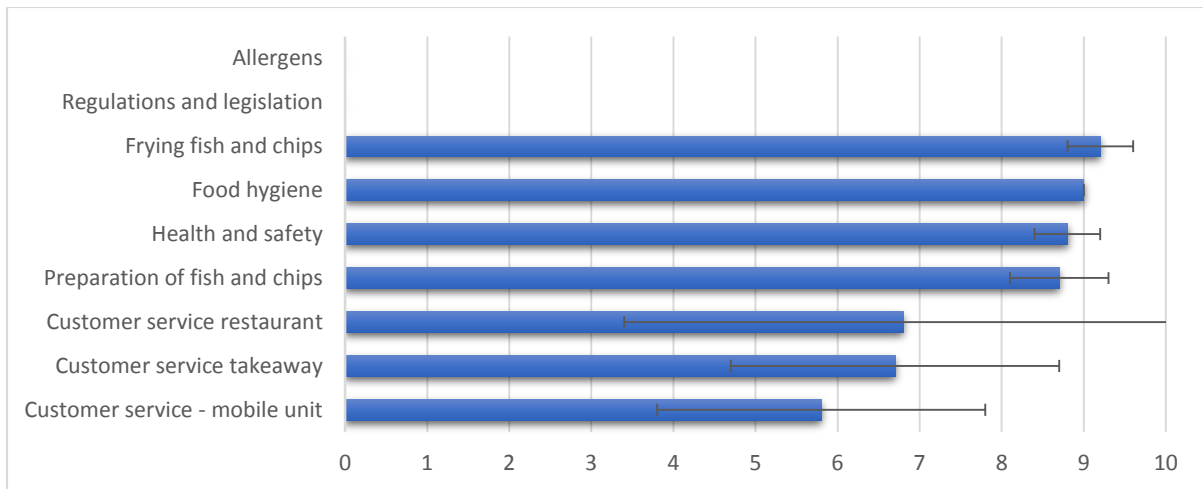


Source Pye Tait survey 2020

I think the sector is viewed a little bit different over here than in the rest of the UK. The rest of the UK associate the fish and chip industry as a career path and young people get into it. In Northern Ireland however there doesn't seem to be that same association of it even though it's a skilled job.

Fish frier, Northern Ireland

Figure 35 Current skill level in Northern Ireland's fish frier sector

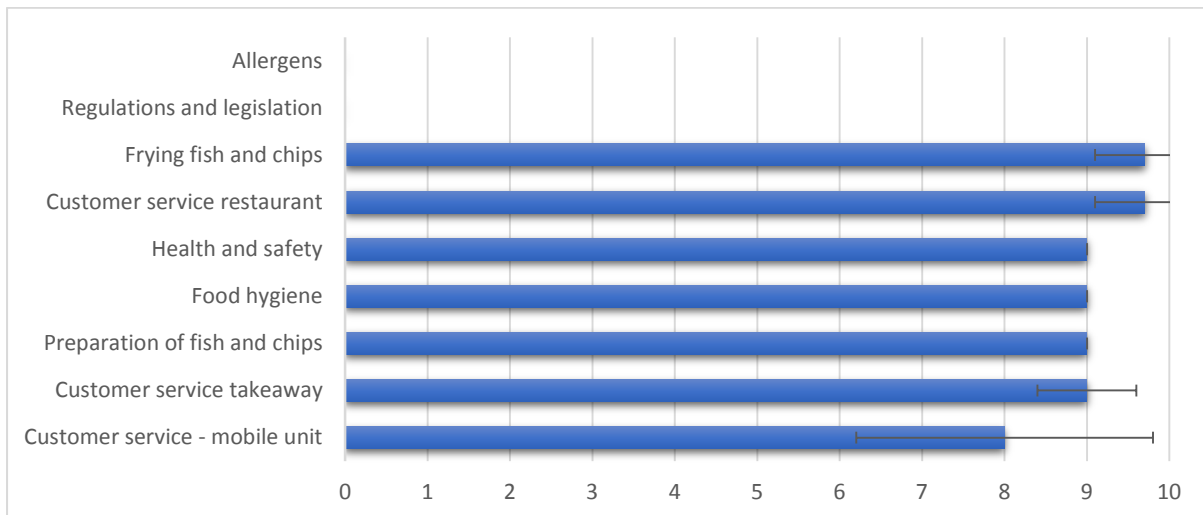


Source Pye Tait survey 2020 The black arrows indicate the measure of the standard error of the mean

Employers regard their current operative workforces as being good to very good in skill terms. All skills scored over six except customers service for mobile units. Frying fish and chips was the highest rated skill, scoring just over nine out of ten. Employers were unable to score for allergens and regulation and legislation skills.

Customer service for mobile units, restaurants and takeaway businesses are considered to be the most in-demand skills for the future of the sector but all of the listed skills (excluding allergens and regulations and legislation) scored over five – that is employers believe that the demand for these skills will increase. (Figure 36)

Figure 36 Future demand for fish frier skills in Northern Ireland

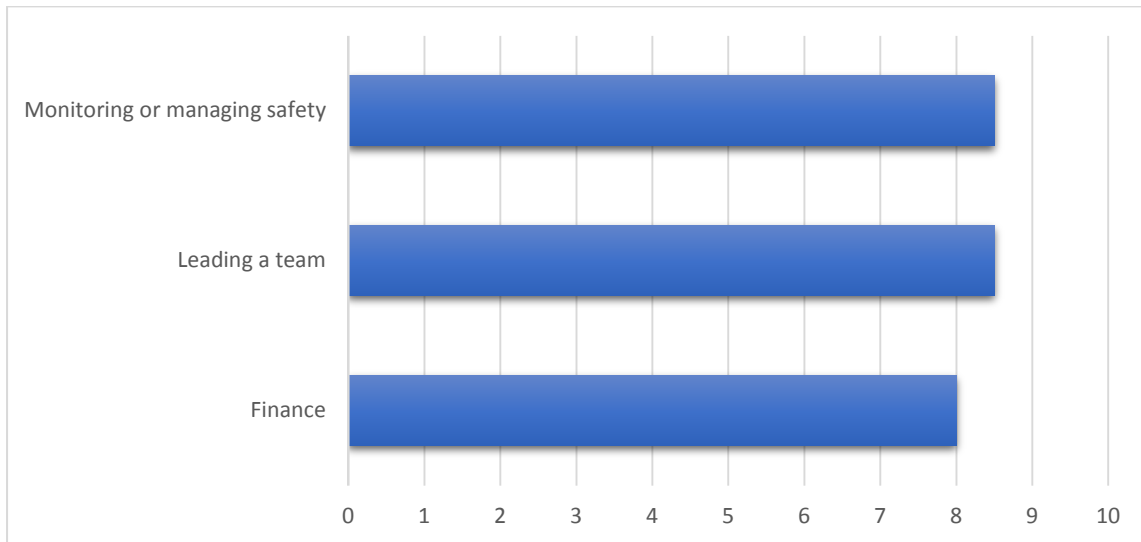


Source Pye Tait survey 2020 The black arrows indicate the measure of the standard error of the mean

Respondents were unable to score all the skills provided in the survey for supervisors and managers, however they scored Monitoring or managing safety, leading a team and finance skills eight or above (very good). (Figure 37)

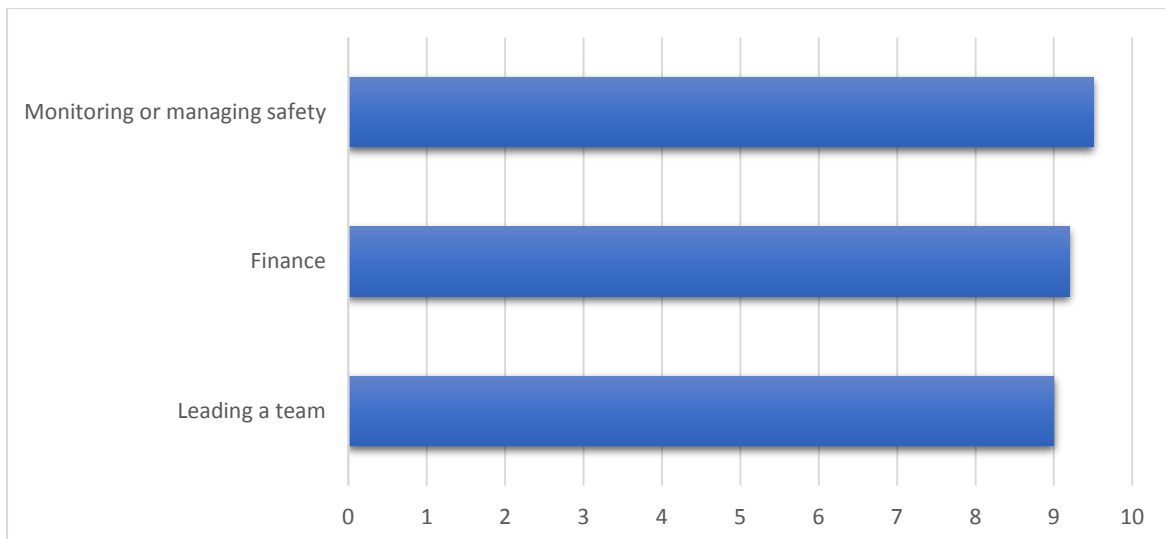
Again, respondents only offered ratings on three skills with respect to future demand, monitoring or managing safety, leading a team and finance skills all scored nine or above indicating that these current skills will face increasing demand in the future. (Figure 38)

Figure 37 Current skill level of supervisors and managers in Northern Ireland's fish frier sector



Source Pye Tait survey 2020

Figure 38 Future skills demands for supervisors and managers in Northern Ireland's fish frier sector



Source Pye Tait survey 2020.

Training

Survey respondents stated that the majority of training is delivered on the job by senior staff or business owners. This is partly due in part to the fact that there are not many fish frying providers based in Northern Ireland.

However, the National Federation for Fish Fryers (NFFF), based in Leeds, states that they can travel to deliver training on-site as part of the NFFF In Shop training course as well as offering distance learning. As part of the bespoke In Shop training course an approved trainer will spend six hours at a fish and chip business, meaning trainees will be taught in a familiar environment without having to travel to Leeds, England.

The following courses are offered by NFFF as distance learning:

- Fish frying skills qualification – distance learning with on site assessment which covers frying skills, food hygiene, health and safety
- A distance learning customer service course

Levels 2 and 3 Fish Frier apprenticeships are offered by Southern Regional College. However, one employer said they were unaware of any fish frier apprenticeships available in Northern Ireland indicating that these apprenticeships are not well publicised to professionals working in the sector.

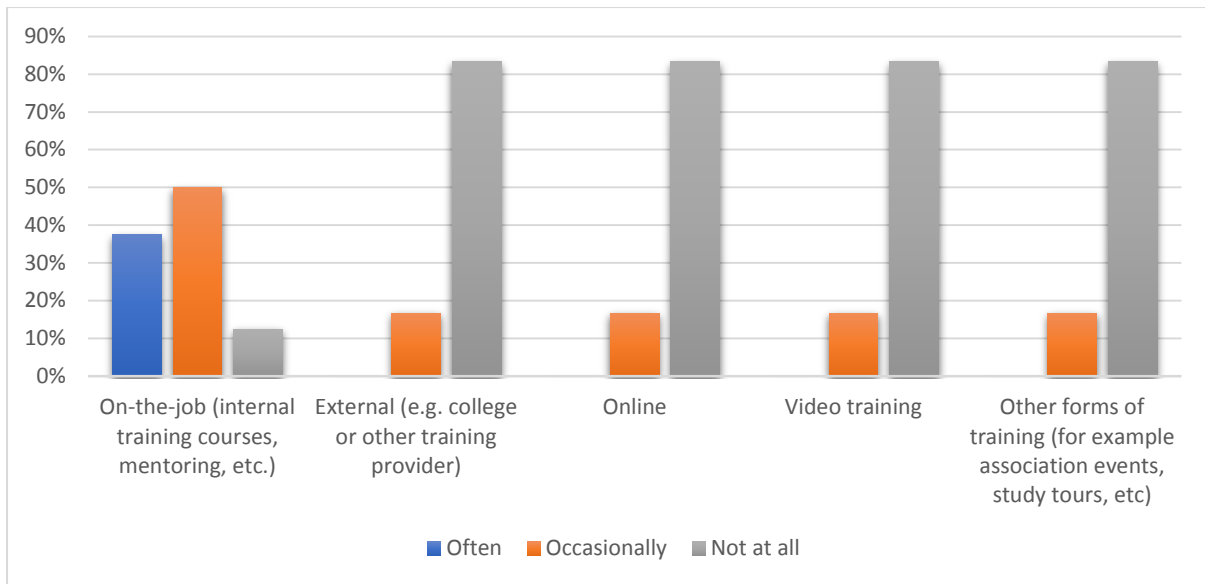
To my knowledge, information or indeed apprenticeships in fish frying in Northern Ireland are non-existent. This I feel, through catering departments, could be heavily promoted and encouraged.

Fish frier, Northern Ireland

KFE, based in Market Deeping, England, offer a range a training courses at their KFE School of Frying Excellence however they are able to offer a one-day training one-to-one Excellence Course which can be delivered on-site at a fish frier's premises. The on-site course is an alternative for those who wish not to travel – 'the advantage of this is that the trainer can be on hand during your opening day if required to give you the peace of mind required.'¹⁴

¹⁴ <https://www.kfeltd.co.uk/wp-content/uploads/2019/12/KFE-Training-Brochure.pdf>

Figure 39 Use of different types of training for permanent staff in Northern Ireland's fish frier sector



Source Pye Tait survey 2020

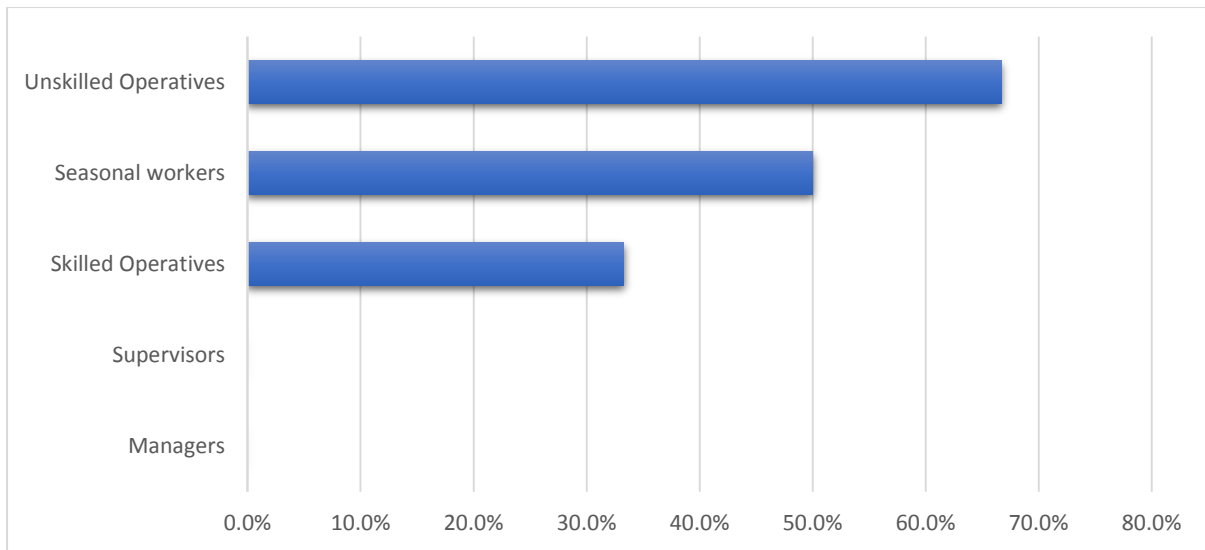
Figure 39 shows the extent to which different types of training are used by employers for permanent staff. On-the-job training is used often or occasionally by almost 90% of employers; external, online and video training are not used at all by over 80% of employers. For seasonal staff, all training is delivered on-the-job.

Recruitment

The recruitment picture for the fish frier sector is supported by responses to a number of questions. Numbers of vacancies over the past year and the past three years show that skilled and unskilled operatives and seasonal staff are the most common vacancies.

The most common difficult to fill vacancies (i.e. those taking three months or more to fill) are for unskilled operatives followed by seasonal workers and skilled operatives. (Figure 40)

Figure 40 Difficult to fill job roles in Northern Irelands' fish frier sector



Source Pye Tait survey 2020

Employers spoke of the difficulties of finding unskilled staff, there were suggestions that people perceive the sector as being low status and unskilled.

*Don't know whether it is that less locals are making themselves available for jobs.
Mind set as well that that type of work is below me. Everything must have degrees*

Fish Frier, Northern Ireland

Employers facing difficulties recruiting skilled staff spoke of recruiting those willing to learn and training them in-house.

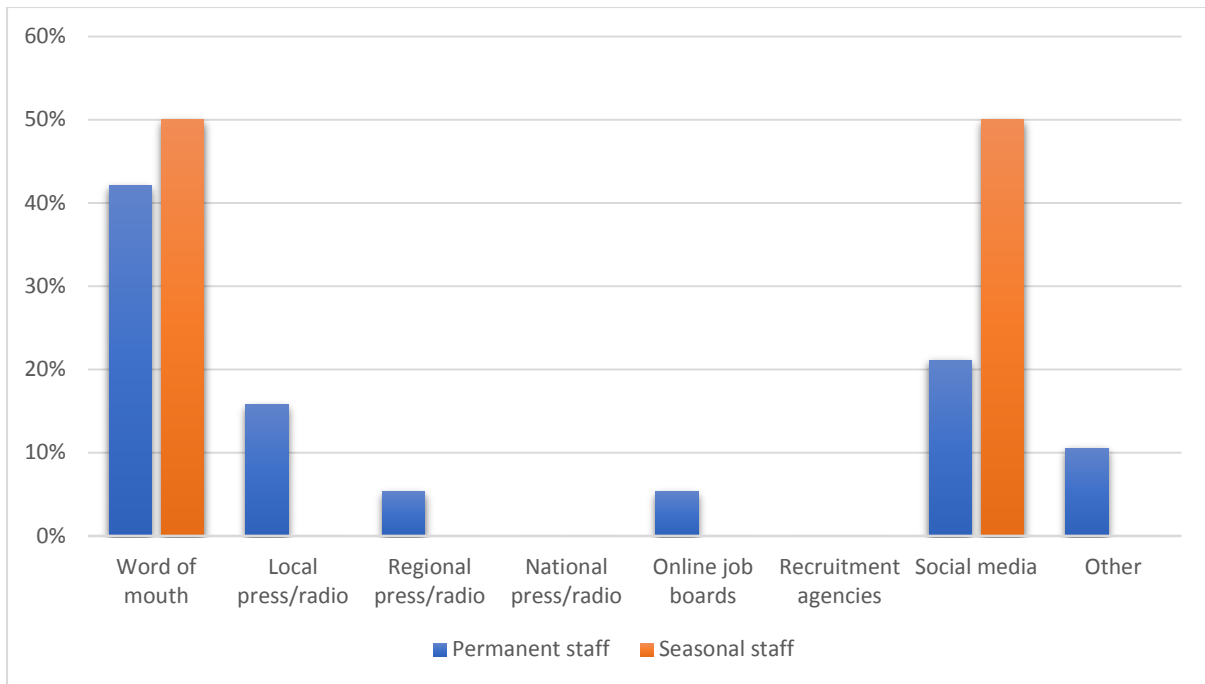
I hire attitude and teach the skill. Can't ever change attitude.

Fish Frier, Northern Ireland

Fish friers tend to use word-of-mouth to recruit both permanent and seasonal staff but social media has become more important and is used more frequently than local press or radio. (Figure 41)

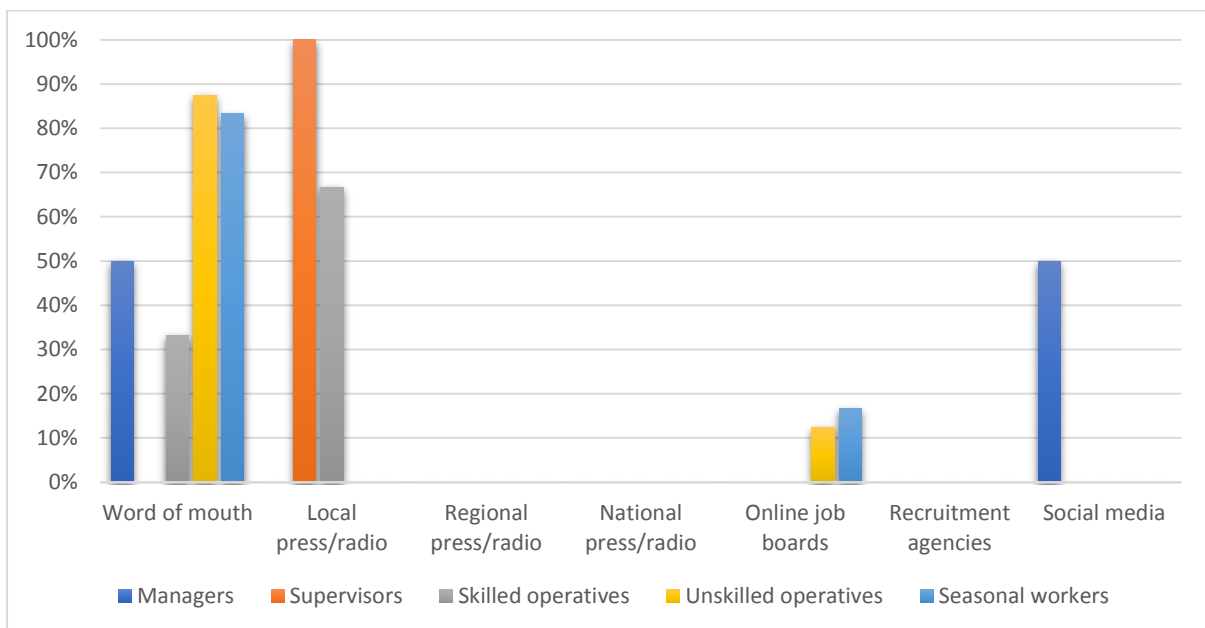
Surveyed employers use word-of-mouth for all roles other than supervisors where they tend to use local press or radio. Skilled operatives are also recruited by local press or radio. Social media is used for managerial roles.

Figure 41 Recruitment methods used in Northern Ireland's fish frier sector



Source Pye Tait survey 2020

Figure 42 Preferred recruitment methods by grade of staff in Northern Ireland's fish frier sector



Source Pye Tait survey 2020

Processing

Introduction

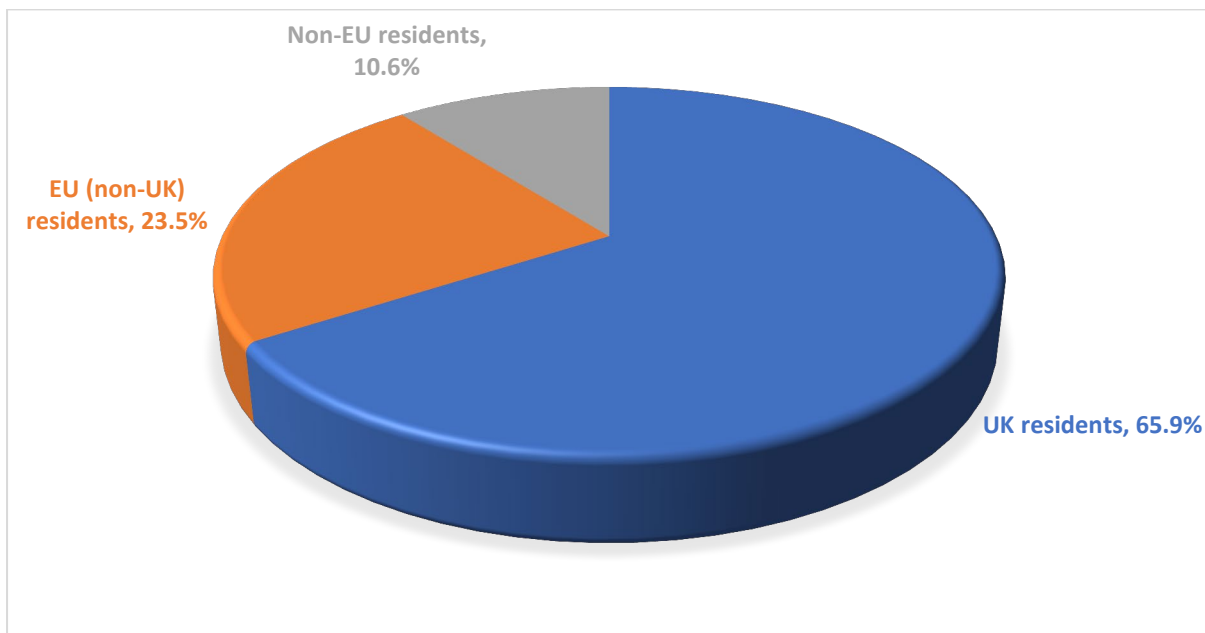
Fourteen processor employers completed the survey, thirteen of these are primary processors.

96% of staff in surveyed businesses are employed on a permanent full-time basis with the remainder employed on a permanent part-time basis. Survey respondents in the processing sector did not employ seasonal workers at the time of the survey.

The ratio of part time to full time employment is roughly the same for men and women.

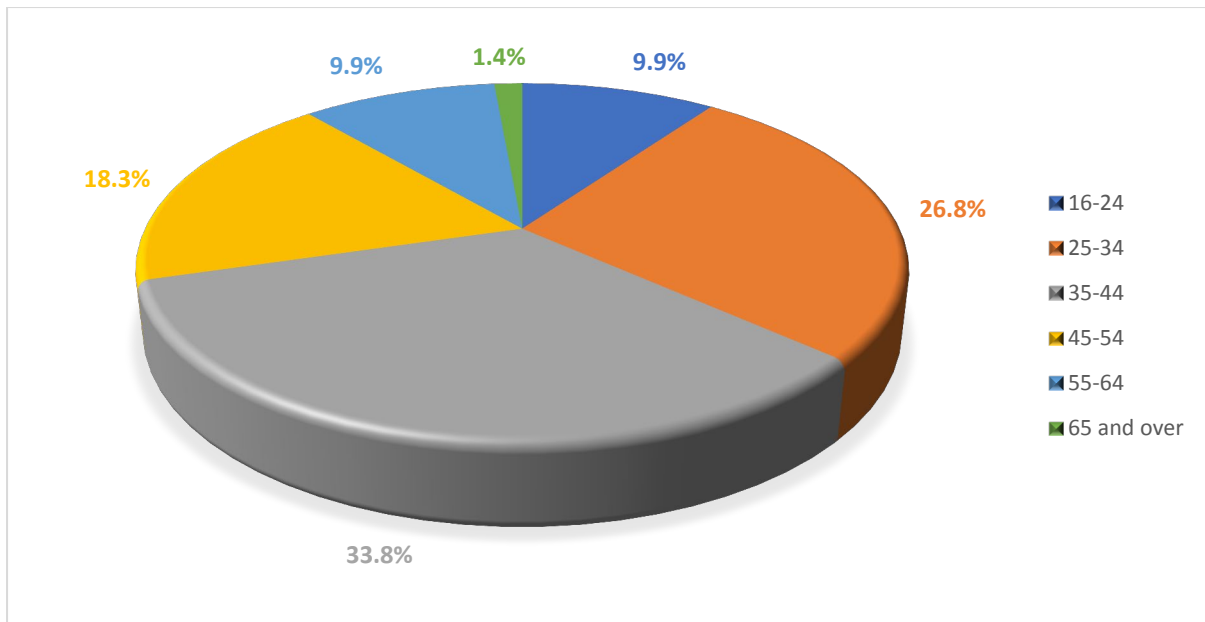
Surveyed processing businesses rely on non UK residents for a third of their permanent staffing. (Figure 43)

Figure 43 Residency of permanent processing staff in Northern Ireland



For the entire UK workforce, the proportion of employed people who are over the age of 45, is 41.3% (2019), for surveyed processing businesses in Northern Ireland this is around 30%. The age profile for the sector appears to be youthful. (Figure 44)

Figure 44 Age profile of processing staff in Northern Ireland

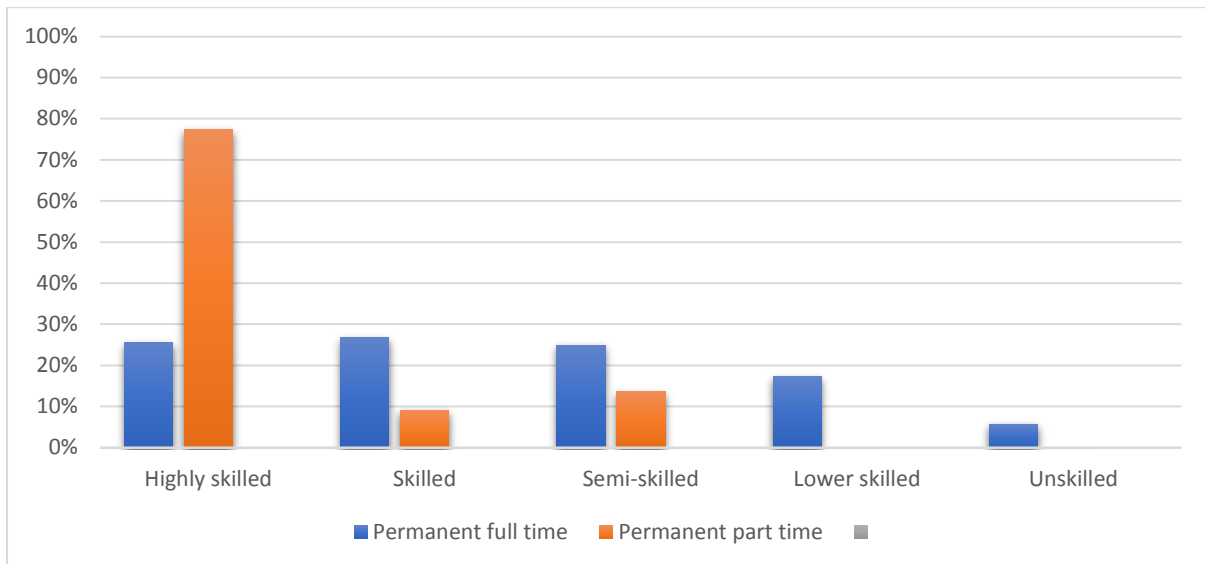


Source Pye Tait survey 2020

Skills

Employers regard just over half of their permanent full-time staff as skilled or highly skilled. This figure rises to around 87% for permanent part-time staff, though numbers of part time staff covered in the survey were much lower.

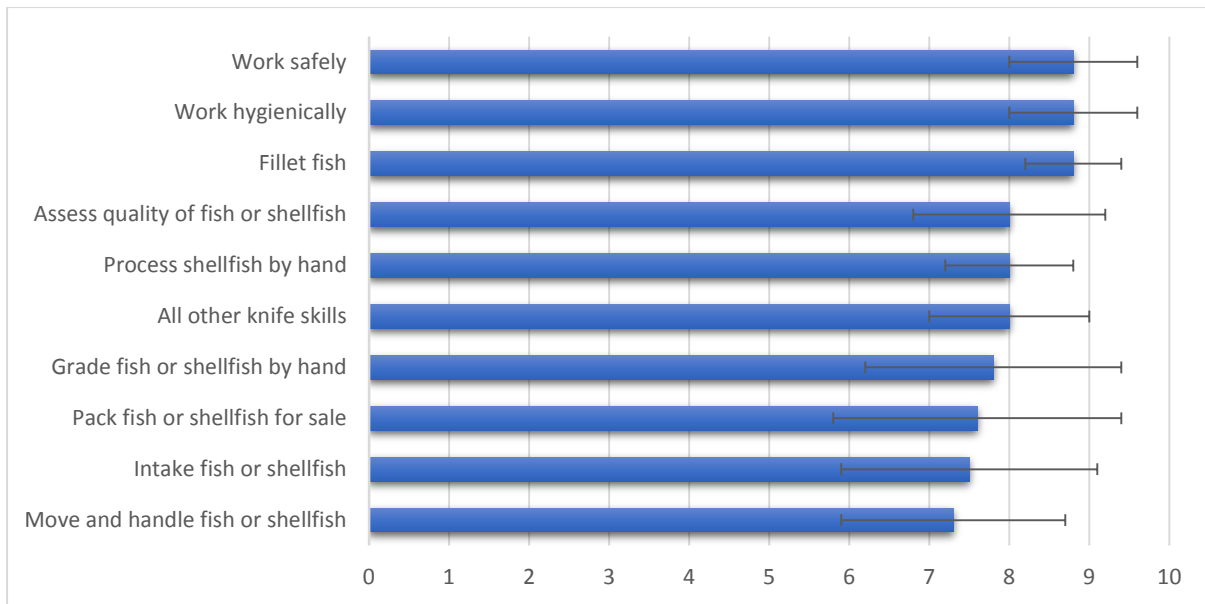
Figure 45 Skill level in Northern Ireland's processing sector



Source Pye Tait survey 2020

Processor respondents were unable to identify skills gaps in their workforce with the majority of employers stating that they did not experience skills gaps.

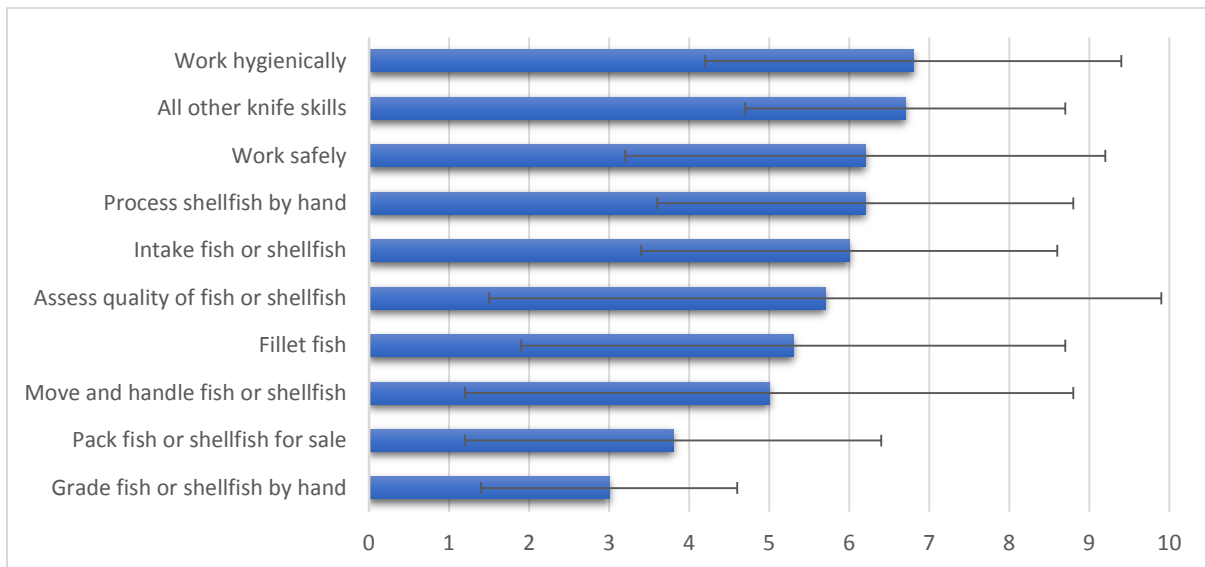
Figure 46 Current skill levels of primary operatives in Northern Ireland's processing sector



Source Pye Tait survey 2020. The black arrows indicate the measure of the standard error of the mean

Current skill levels of primary operatives in the sector are regarded as very good (the majority are rated eight out of ten or above). Future demand for these skills is seen as generally increasing (i.e. scoring more than 5) with the exception of skills involved in moving, handling, packing and hand grading shellfish. (Figure 47)

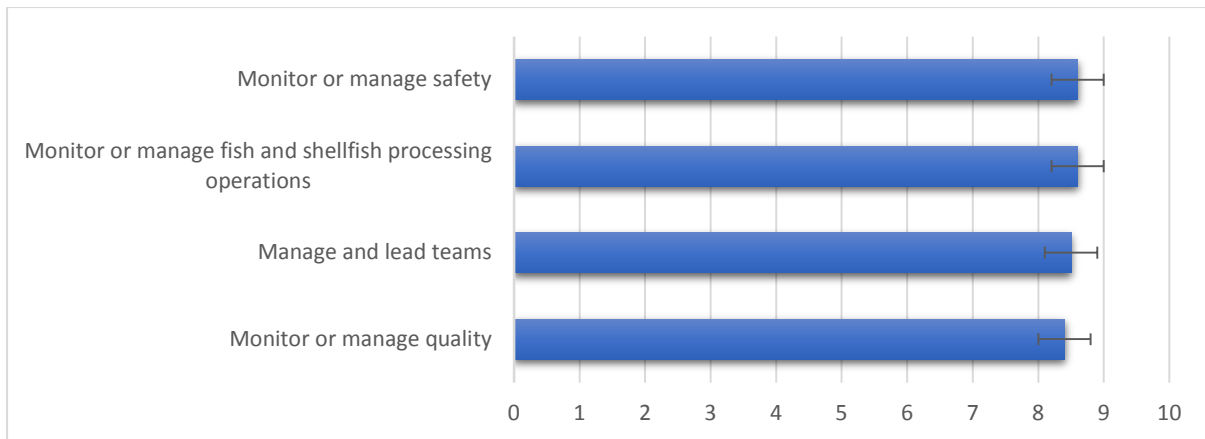
Figure 47 Future demand for primary operatives' skills in Northern Ireland's processing sector



Source Pye Tait survey 2020. The black arrows indicate the measure of the standard error of the mean

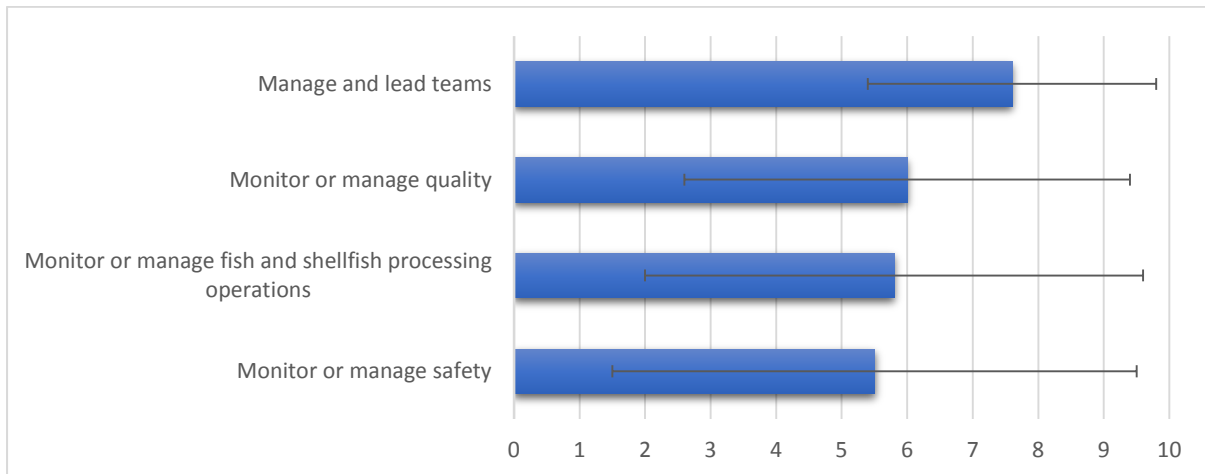
The current skills of primary supervisors and managers are felt to be very good and respondents feel that there will be increased demand for their skills in the future. (Figures 48 and 49)

Figure 48 Current skill levels of primary supervisors and managers in Northern Ireland's processing sector



Source Pye Tait survey 2020. The black arrows indicate the measure of the standard error of the mean

Figure 49 Future demand for primary supervisor and managers in Northern Ireland's processing sector



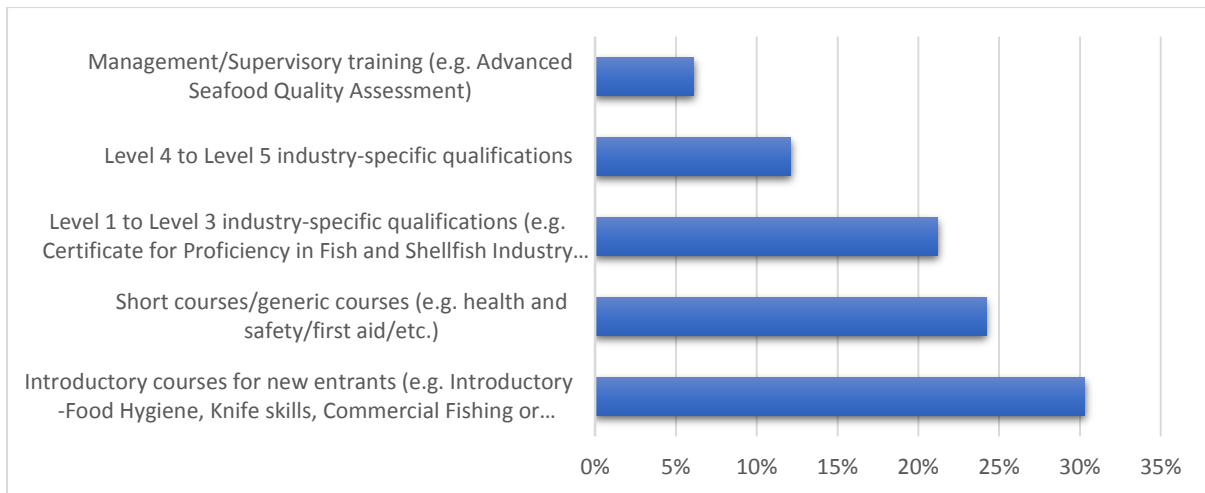
Source Pye Tait survey 2020. The black arrows indicate the measure of the standard error of the mean

Training

In specialist terms, processor training is mainly concerned with fish filleting and shellfish care and preparation. The expense involved in providing fish for training, (which unless the provision is offered at a registered food business has to be consigned to waste) is a barrier to provision of training. Much of the specialist training is conducted in-house.

Figure 50 illustrates the sorts of training undertaken by processors over the past year by type. Just over 30% of those courses undertaken are the introductory courses for new entrants.

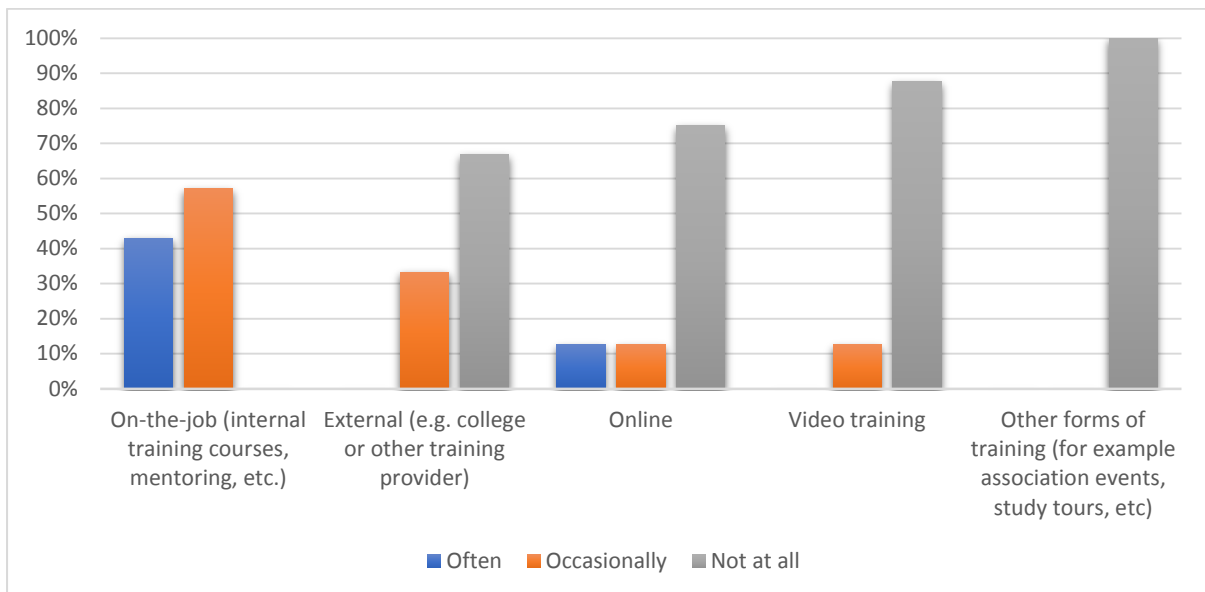
Figure 50 Courses undertaken in past year in Northern Ireland's processor sector



Source Pye Tait survey 2020

The majority of training in the sector is conducted in-house, all surveyed employers train on the job often or occasionally. A third of employers use external training occasionally, though none use it often. Online training is used often or occasionally by a quarter of surveyed employers. Video training is used occasionally by just over a tenth of employers. (Figure 51)

Figure 51 Use of different types of training for permanent staff in Northern Ireland's processing sector



Source Pye Tait survey 2020

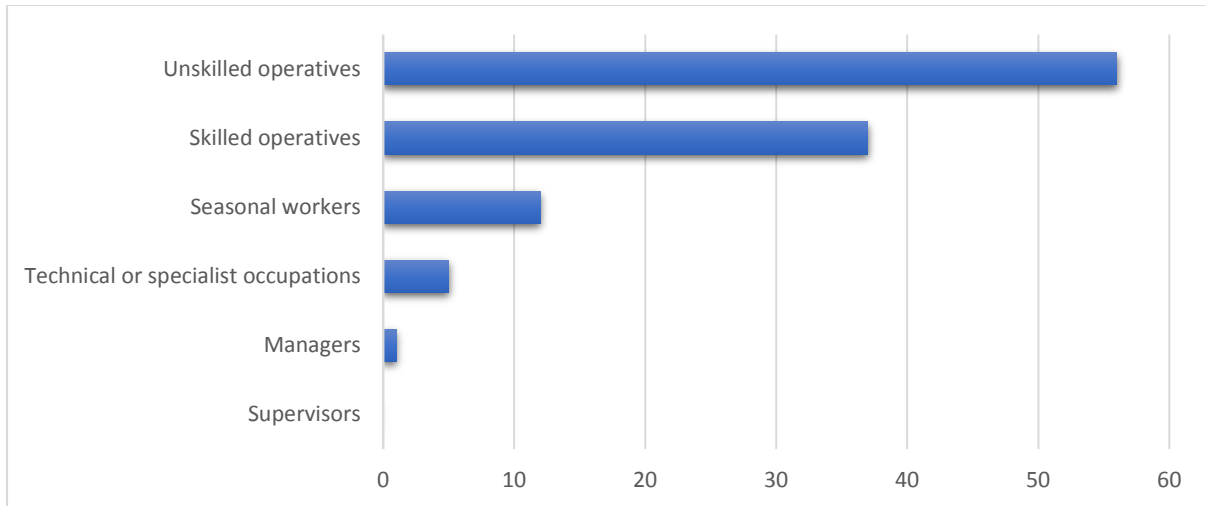
As in other sectors some employers are reluctant to train staff because they believe that trained staff will leave before they have recouped their investment.

We are reluctant to take on trainees because they don't stay after you have invested time and money in training them

Recruitment

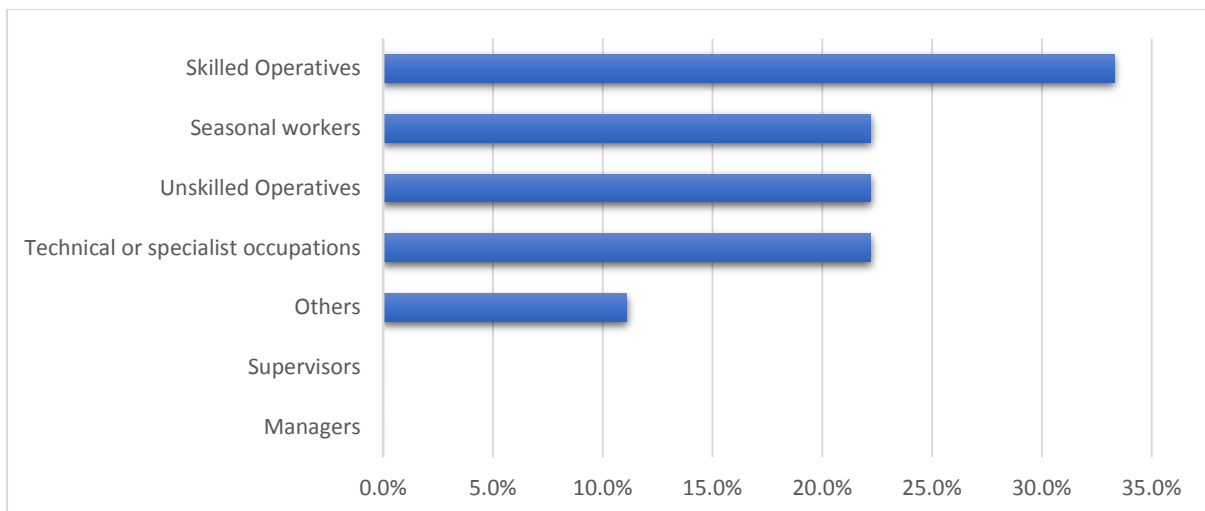
Surveyed employers reported 111 vacancies over the past three years from a total surveyed staff of 285. (Figure 52) This represents an annual staff turnover of 13% which is slightly below the national average for all industries.

Figure 52 Number of vacancies over past 3 years in Northern Ireland's processing sector



A third of surveyed employers found skilled operative roles difficult to fill, i.e. taking three months or more to recruit (Figure 53)

Figure 53 Vacant roles difficult to fill in Northern Ireland's processing sector



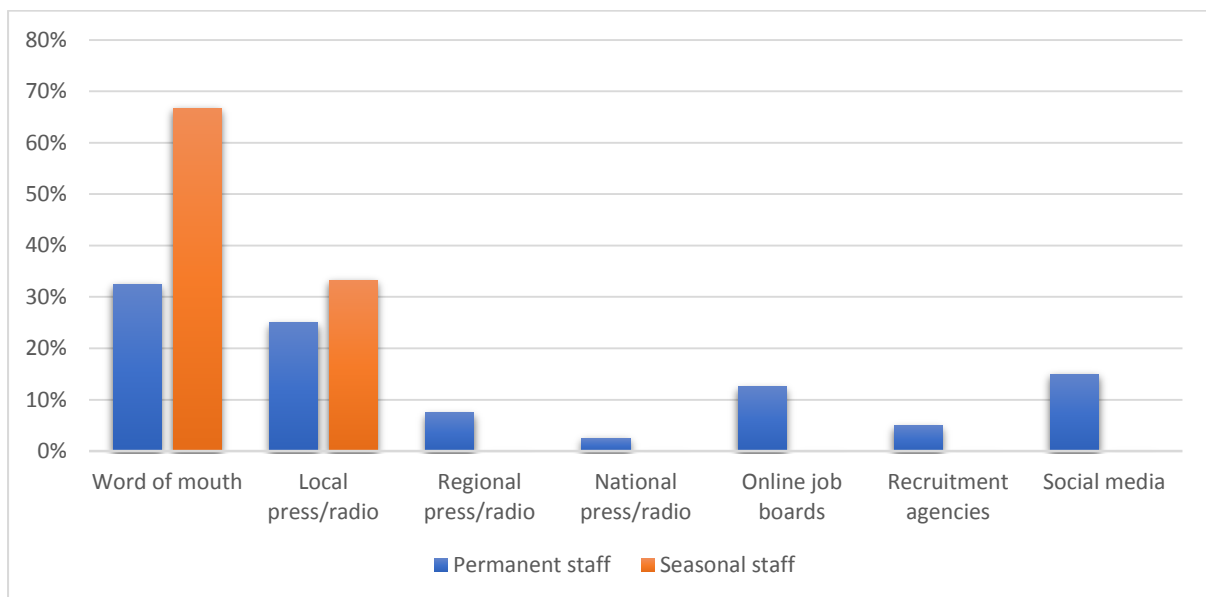
Source Pye Tait survey 2020

In common with other sectors there is a general feeling among employers that careers in processing do not appeal to young people.

Honestly don't know what can be done to attract younger people. It's been a big issue for long time. fishing industry, viewed as a dead-end job, especially on fishing ports. You don't work hard at school you'll end up in a fish factory.

Processor, Northern Ireland

Figure 54 Recruitment methods in Northern Ireland's processing sector

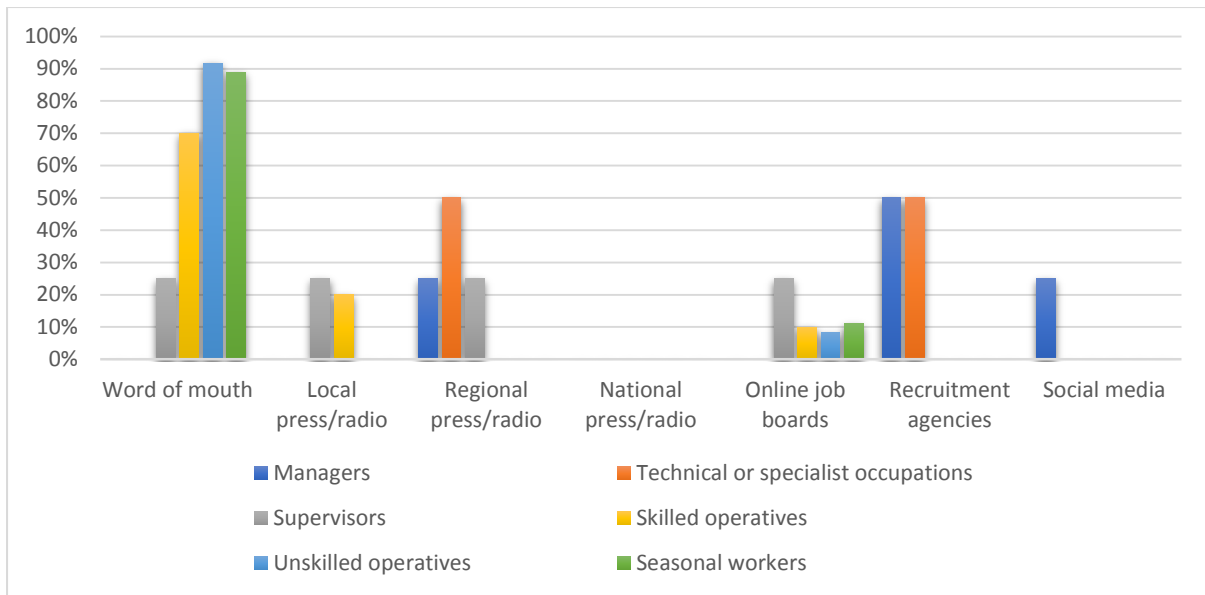


Source Pye Tait survey 2020

Word of mouth is the most preferred method of recruitment of permanent staff in the processing sector used by all about a third of employers. Employers use a wide variety of recruitment methods for permanent but only use local press/radio and word of mouth for seasonal staff recruitment. (Figure 54)

While word of mouth is used relatively often, employers use a wide variety of recruitment methods and have specific methods for different types of staff. (Figure 55)

Figure 55 Preferred method of recruitment by job role in Northern Ireland's processing sector



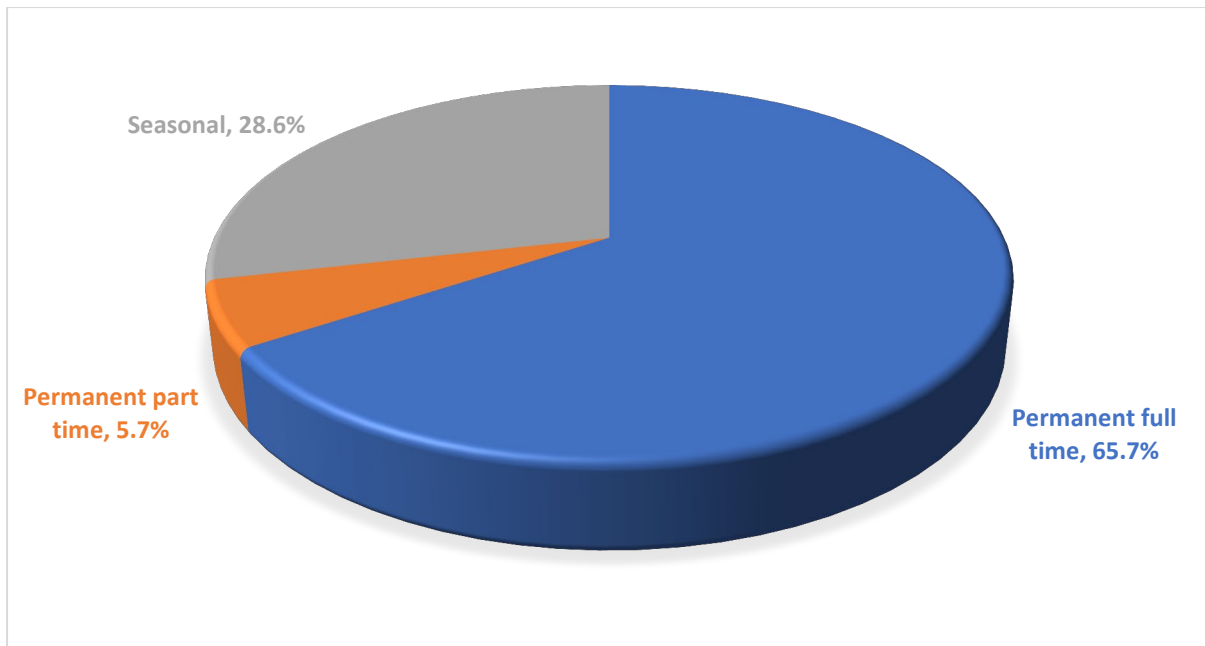
Source Pye Tait survey 2020

Retail

Introduction

Seven retail fishmongers took part in the telephone survey, others participated in depth interviews and nominal groups. About two thirds of staff in surveyed businesses are permanent full-time employees. (Figure 56)

Figure 56 Retail staff by mode of employment in Northern Ireland



Source Pye Tait survey 2020

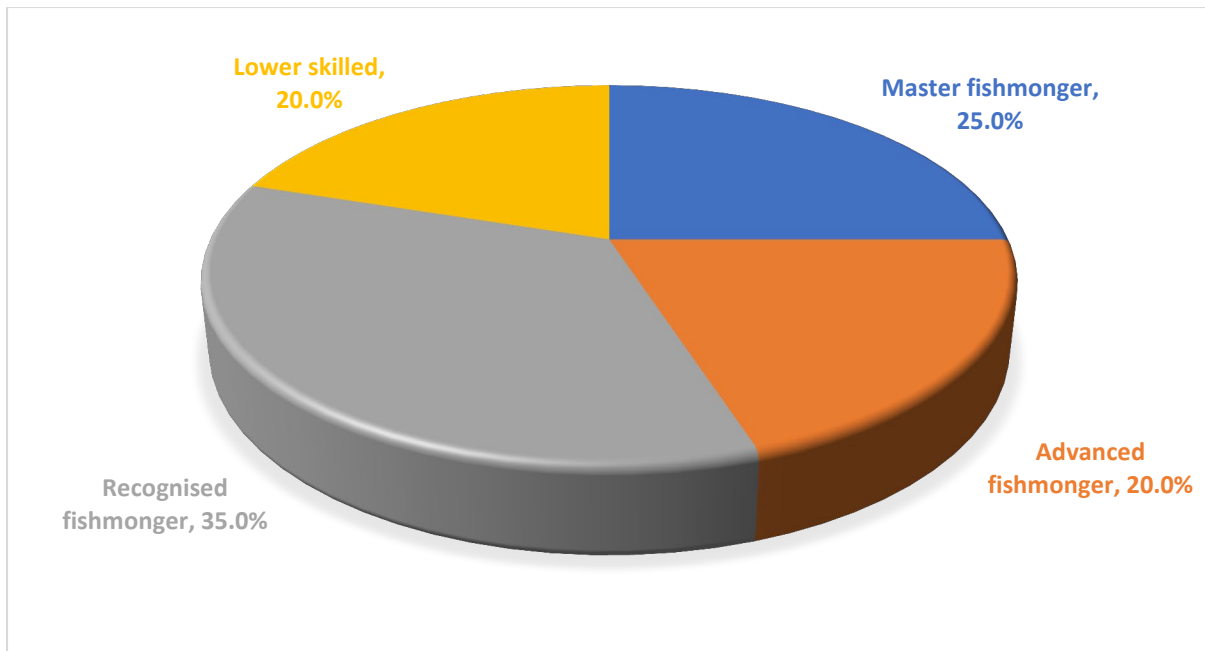
Just over 70% of the permanent staff are male. Employers were unable to state country of residence for 30% of staff, but the remaining 70% are UK residents.

Skills

The retail sector requires a specialised mix of high food skills and management and retail skills.

Three levels of top skill are used in the sector: recognised fishmonger, advanced fishmonger and master fishmonger. Employers claim that 80% of employees are in these categories. (Figure 57)

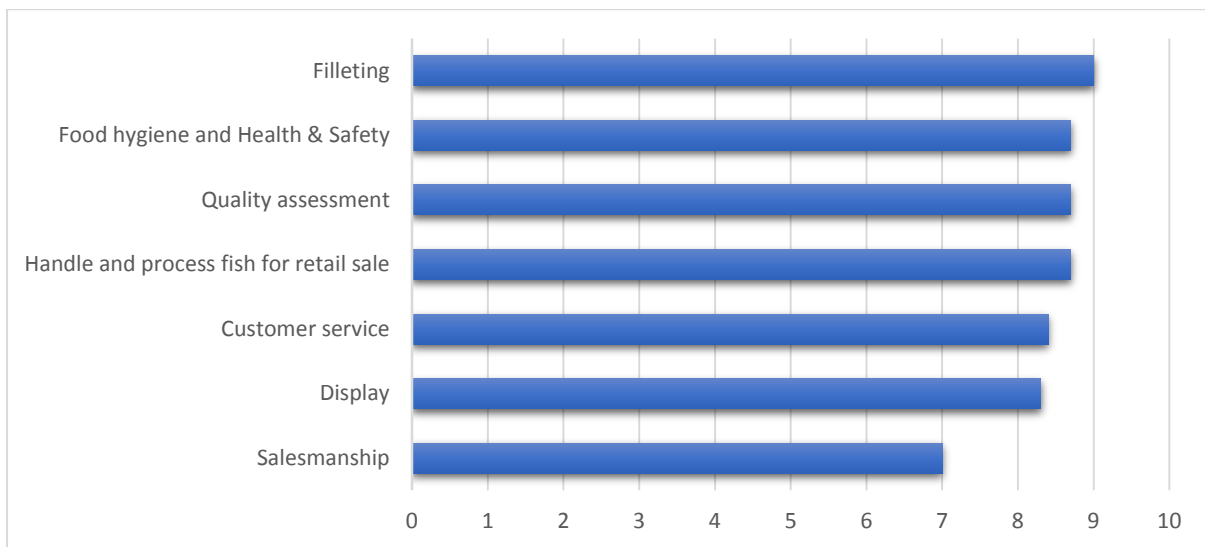
Figure 57 Permanent retail staff by skill level in Northern Ireland



Source Pye Tait survey 2020

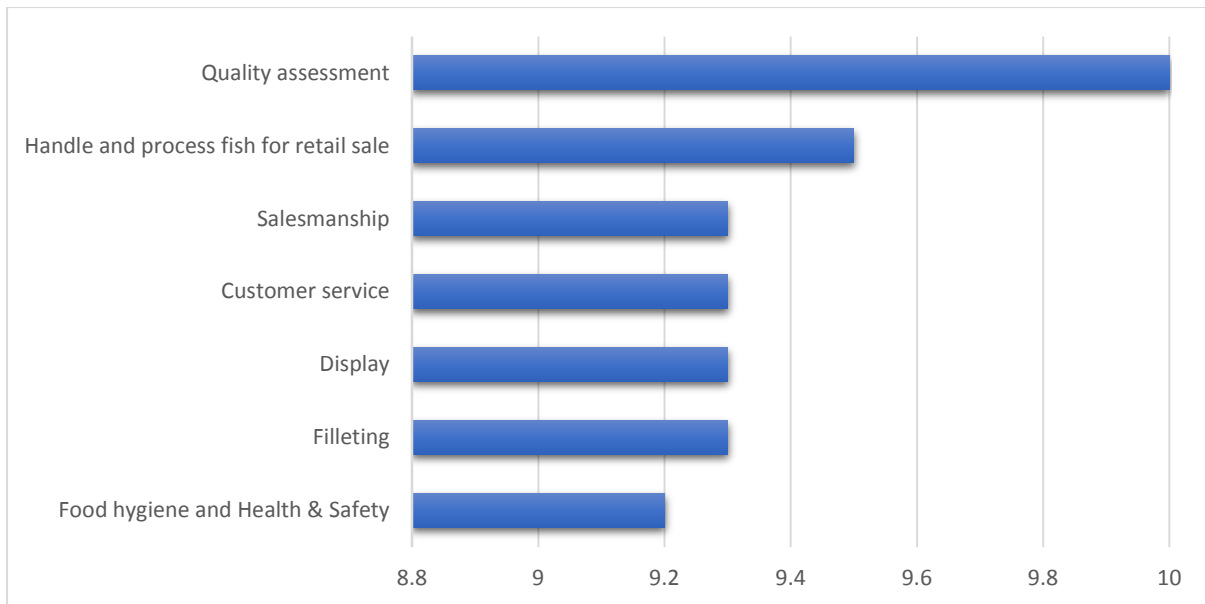
Employers rate current skills of their operative workforce as very good i.e. above eight out of ten, apart from salesmanship (Figure 58). The future demand for all skills is perceived to be significantly increasing (Figure 59).

Figure 58 Current skill level of retail operative workforce in Northern Ireland



Source Pye Tait survey 2020

Figure 59 Future demand for operative retail skills in Northern Ireland



Source Pye Tait survey 2020

Training

Intermediate and advanced apprenticeships are available in Fish and Shellfish skills as part of Northern Ireland's Food and Drink apprenticeship framework. These apprenticeships are delivered by two Seafish-approved apprenticeship Providers in Northern Ireland: Southern Regional College and Belfast Metropolitan College.¹⁵

South Regional College, lists modules in the level 2 apprenticeship as:

- Maintain workplace health & safety in food operations
- Maintain workplace food safety standards in food operations
- Maintain product quality in food operations
- Lift & handle materials safely in food operations
- Store goods and materials in food operations
- Carry out task hand-over procedures in food manufacture
- Control hygiene cleaning in food operations
- Deal effectively with waste in food operations
- Understand how to maintain workplace health & safety in food operations
- Understand how to maintain workplace food safety standards in food operations
- Work effectively with others in food operation.¹⁶

¹⁵ <https://www.seafish.org/article/apprenticeships-for-northern-ireland#:~:text=The%20two%20Seafish%20recognised%20Apprenticeship%20Providers%20in%20Northern,industry%20so%20please%20contact%20them%20about%20your%20needs;https://www.nidirect.gov.uk/sites/default/files/publications/food-and-drink-level-2-framework.pdf>

¹⁶ <https://www.src.ac.uk/courses/course?code=20/21-FT-RF-P1472KE>

The Fish and Shellfish Industry Skills apprenticeship is a flexible qualification that can meet the needs of a broad range of people working in the seafood industry. The apprenticeship is made up of over 135 units covering almost all activities in seafood industry, from hygiene to oyster purification, to smoking to fishmongering (candidates must only complete between 10-12 modules to qualify). The apprenticeship is therefore suitable for processors, fishmongers, those who work with shellfish etc.¹⁷

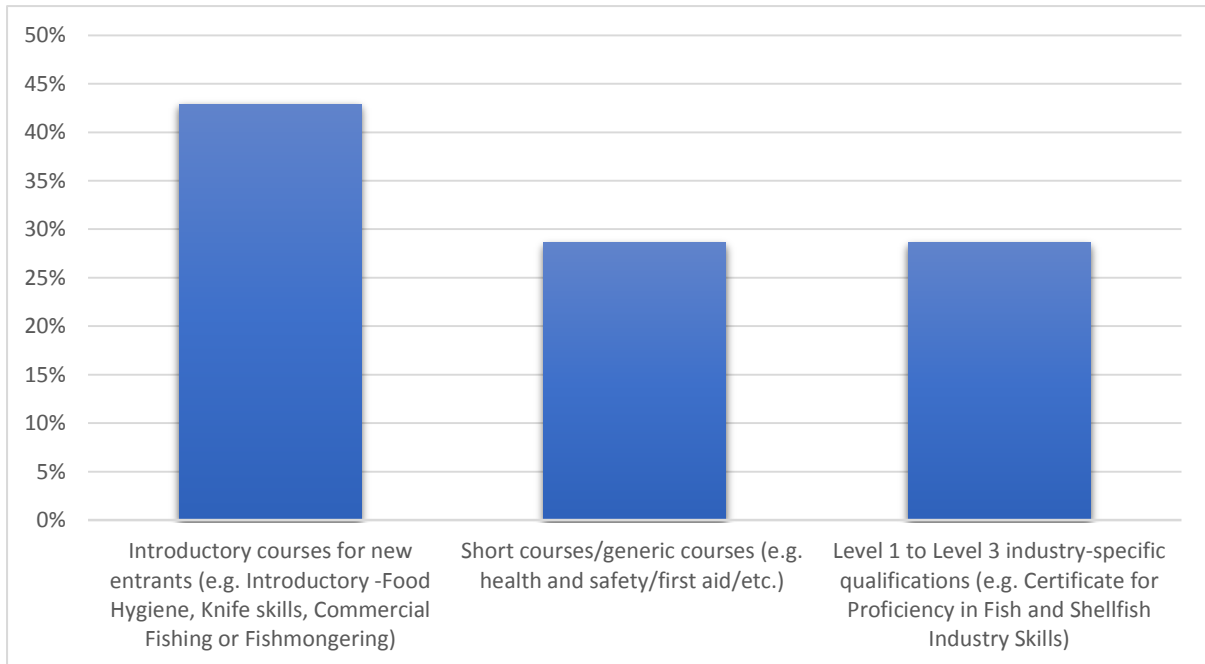
Master fishmonger and independent trainer Hal Dawson offers private training courses in manual fish filleting, Safe Knife Handling and an Introduction to Fish Handling and Filleting Skills.¹⁸

¹⁷ <https://seafoodacademy.org/pdfs/leaflet-page-fsis-flexible-approach.pdf>

¹⁸ <https://www.irelandfish.com/services.htm>

Most training over the past year has been for introductory courses. (Figure 60)

Figure 60 Training undertaken in Northern Ireland's retail sector

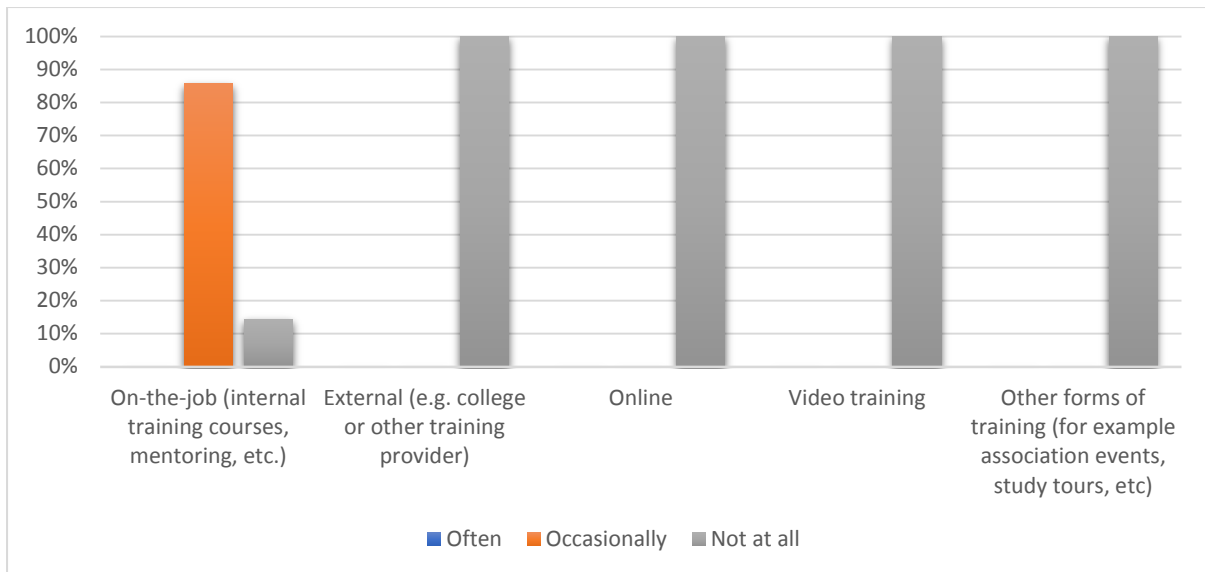


Source Pye Tait survey 2020.

Surveyed employers were unable to identify skills gaps in their businesses, though recently some have recently changed their business models in response to Covid-19 and had been exploring click and collect, and websales training, with some receiving training from technology suppliers.

The only significant mode of training among surveyed employers is on the job. (Figure 61)

Figure 61 Main training approaches in Northern Ireland's retail sector



Source Pye Tait survey 2020

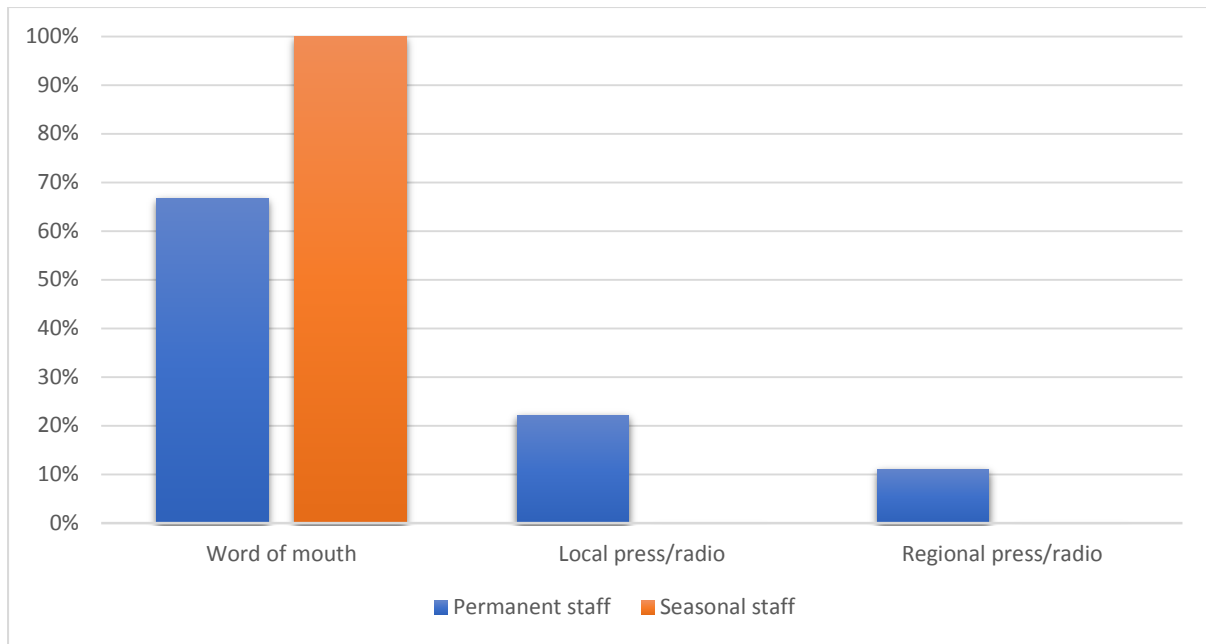
Recruitment

Respondents reported 17 vacancies in the past three years in total from a workforce of 35, a turnover rate of 16% p.a. compared to the UK average of 15%.

The majority of the vacancies were for seasonal staff, followed by fishmongers. All employers who have had fishmonger vacancies found these difficult to fill i.e. taking three months or more.

Word of mouth is the main method of recruitment for permanent staff, and the only method of recruitment for seasonal staff. (Figure 62)

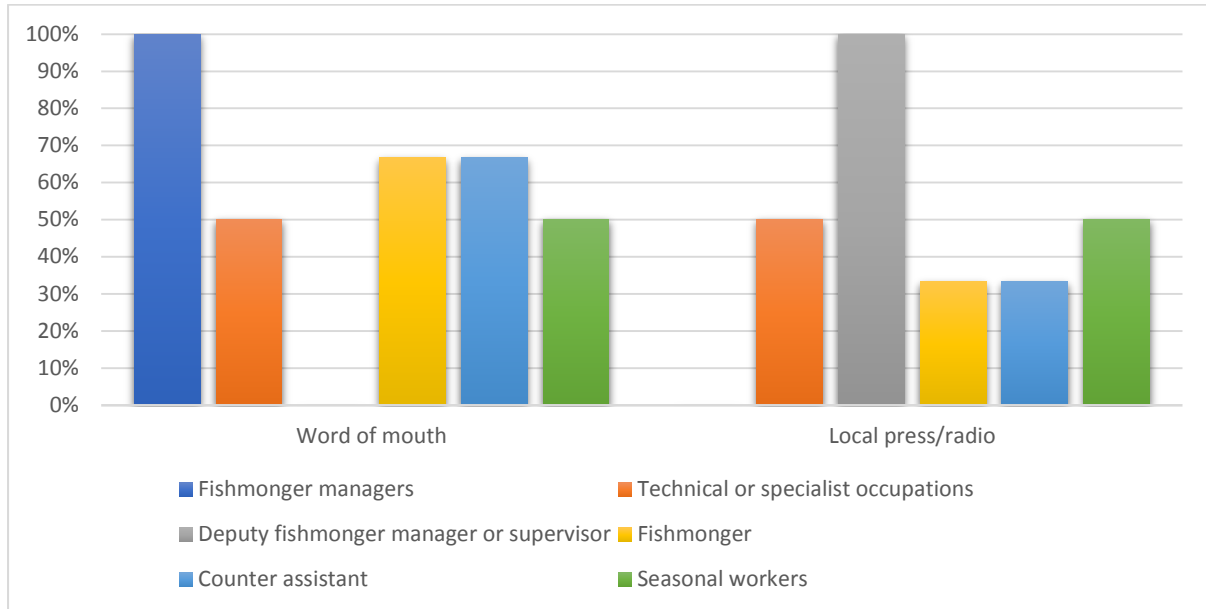
Figure 62 Recruitment methods in Northern Ireland's retail sector



Source Pye Tait survey 2020

Employers use a combination of word of mouth and local press/radio for different levels of staff (Figure 63)

Figure 63 Preferred recruitment methods in Northern Ireland's retail sector



Source Pye Tait survey 2020

Employers were asked about barriers to recruitment but were reluctant to name specific barriers.

Covid-19

The UK was put into a stringent lockdown on 23 March 2020 to control the spread of the Coronavirus. Most of the retail and hospitality sectors were immediately closed. This included restaurants, pubs, hotels and 'non-essential' retail. Schools were also closed. Supermarkets, which remained open saw a wave of panic buying and had difficulties keeping pace with the increased custom. In response, a few supermarkets closed fresh fish counters in order to use the staff to re-stock shelves.

Pye Tait's fieldwork in Northern Ireland, including a telephone survey of employers in aquaculture, catching, processing, fish frier and retail started on 26 March and ran until early July. Primary data across a wide section of the industry were, therefore, being collected as the impacts of the Covid-19 virus were developing.

Initial Reaction

The early reaction across the Northern Irish seafood industry was one of deep shock, particularly in retail and fish frying where most businesses closed their doors. Aquaculture businesses and catchers saw an immediate fall off in demand as restaurants and hotels ceased ordering and export markets were closed. Similarly, processors whose main markets were in hospitality or schools saw an immediate drop in business.

Employers in all sectors put recruitment on hold, laying off staff, concerned that their businesses would not survive the pandemic. Expansion plans and staff training immediately slipped down the list of priorities and employers who had been working on opening up new export markets ceased or postponed that work.

We found that there was wide awareness in the industry of the furlough scheme (whereby the Government pays 80% of the earnings of furloughed employees) but this was not launched until 20 April. The comments below are from telephone interviews during lockdown. They illustrate the sense of the enormity of what was happening and the scale of the impact of the virus on certain businesses in Northern Ireland.

I work by myself as a crab fisherman. My main customers fishmongers, hotels and restaurants are all closed.

Catcher, Northern Ireland

We have had to ground all boats for the moment. So, all self-employed deckhands and skippers are not working

Catcher, Northern Ireland

Have been looking to take on salespeople and expand the fish wholesale side of the business. This is on hold because hotels and restaurants are closed

Retailer, Northern Ireland

Financially I am about to go under. Any support from the government would be helpful

Aquaculture Northern Ireland

Adapting

As the Coronavirus crisis deepened, processors and fishmongers were reporting difficulties in obtaining supplies of fish.

Businesses in Northern Ireland began to take up Local Authority business support grants of £10,000,

In early April Fisheries Minister Edwin Poots announced a £1.5m support package for Northern Ireland's fishing industry. Grants were paid according to vessel length subject to the following conditions.

The vessel must be a fishing vessel registered in NI;

The vessel must normally be active during the period March to May;

The vessel must have had fish landings of at least £10,000 in 2019;

Vessels of overall length 28m and over are not eligible.

In late May a support package for aquaculture in Northern Ireland was announced

“The aim of the emergency package is to help this sector to continue its work in growing, harvesting, shipping and delivering to customers all over the world and help the sector to be sustainable and profitable in the long term.”

Edwin Poots Fisheries Minister

The support fund of up to £360,000 is in the form of a grant payment, covering the three-month period - 1 March to 31 May 2020 based on the income lost from sales of aquaculture products due to COVID-19. Average monthly sales over the past three years for each business are used as the baseline.

The Business Interruption Loan Scheme was set up to provide loans of up to £5m with no interest due for 12 months.

Similarly, the Bounce Back Loan Scheme was set up to ensure that the smallest businesses can access 100% government backed loans of up to £50,000, with no interest or repayment obligations for the first 12 months.

Interviewees indicated the above measures would be a short-term fix. At the same time many employers were continuing to furlough all or part of the workforce.

However, after the initial shock of the Coronavirus, Northern Irish businesses started to adapt and innovate in order to survive. Fishmongers, catchers, and processors began to operate home delivery services or, where they already did this, to expand them.

Fish friers began to operate click and collect services. Some fish friers were also having to learn processes for accepting electronic payments, both to support click and collect operations and to

avoid handling cash in future counter sales. We spoke to fish friers who had started operating home delivery services, but there were concerns that margins wouldn't support this.

Stakeholders reported that some larger fishing vessels were tied up for the duration, but smaller vessels, supplying a mainly local market, were carrying on fishing. Smaller catchers were suggesting they might take up fish processing training to enable them to sell direct in the future. There were other areas of optimism:

I had to close the takeaway side on the business but now I am very busy with click and collect home deliveries

Fish Frier, Northern Ireland

Nevertheless, a minority of employers in all sectors told us that they would need grant funding to enable their businesses to recover from the pandemic.

Financial support for having to close business is the biggest concern. We supply sea fish and shellfish to both the retail, restaurant and wholesale trades. We need money to make ends meet.

Processor, Northern Ireland

The Legacy

There is absolutely no doubt that the Covid-19 pandemic will leave a deep and lasting legacy. There are businesses that may not survive the disruption and others that may fail during the recession which is predicted to follow it.

Many businesses have run down any cash reserves during the course of the pandemic and struggle to stay in business. Many others will have loans to pay off. There are fears that business failures may affect these companies in the near future and will have impacts up the supply chain. Some hotels and restaurants may never re-open. Demand may change, businesses supplying 'luxury' seafood e.g. lobsters and oysters might take longer to recover than others. Equally business models may change.

I believe that there will be more on-line shopping in the future. We will need to keep developing and updating our website.

Retailer, Northern Ireland

Expansion plans and staff training may well be put on hold for some considerable time as businesses try get to grips with the "new reality".

Before Covid-19 we were looking to grow the fish processing side of the business which would have required taking on more people with fish processing and wholesale experience.

Processor, Northern Ireland

The New Reality

No one, not even the government, can predict what the world will look like in the next twelve months, or the next two to three years. The pandemic has had impacts and has set in train changes which will cast their shadow over the future of the seafood industry in many different ways.

There will, of course, be many business failures and redundancies. But there will also be businesses which have not only learned to adapt to the situation but which will take those lessons into the future to build bigger and better (but different) businesses.

While fish friers and retail were badly hit, the lasting impacts may well be greatest in the processing sector where social distancing and the need for extreme care with physical production facilities may create the need not only for innovative thinking but drastic changes to the way in which productivity is maintained and improved.

In many ways the Coronavirus has led to an acceleration of change in the industry, with a move towards click and collect and online sales, home deliveries, home working, and an accelerated adjustment to and adoption of new technology. These are likely to stay in place and change the way the industry operates in profound ways.

Businesses that have successfully innovated during the pandemic appear to have been those which used new technology to leverage home working and communications. They are also those which have close relationships with their customers and were able to keep in touch, rapidly publicise home deliveries, quickly develop online sales and click and collect, often through social media and effective websites.

As a result of Coronavirus, the UK is predicted to move from a period of almost full employment to possibly 3 million plus unemployed. Hence the available labour pool that the seafood industry can recruit from will be much larger.

Several retail chains have already announced redundancies; high calibre people with the digital skills forward-looking seafood retail and fish frier businesses need, will be on the jobs market. These people may be key to driving these sectors' digital future.

Following redundancies in manufacturing, processors will find people with shortage skills e.g. engineering will be available. Similarly, those businesses looking for unskilled operatives will have a wider talent pool to choose from, and existing staff will be less likely to leave. High calibre industry changers will bring new ideas to the seafood industry and a wealth of skills.

There will also be a new pool of younger employees as Covid-19 has a disproportionate effect on younger age groups; more than half of the 33,000 extra unemployment claimants recorded in Northern Ireland since the Covid-19 lockdown in March are under the age of 35¹⁹.

The recovery from Covid-19 will be against a backdrop of the UK's exit from the EU. It is not possible to predict the outcome of Brexit negotiations with certainty. There is likely to be growth due to increases in domestic fishing quota which could be accompanied by tariff or other barriers limiting exports to the EU alongside retaliatory tariffs restricting EU access to the domestic market.

¹⁹ July 2020 Northern Ireland labour market survey

The prospect of growth is a powerful lure to potential employees, all sectors should capitalise on this; recruitment efforts aimed at newly redundant industry changers should stress the opportunities in the post-Brexit seafood industry.

The availability of training to enable smooth transition from other industries would also be an attraction for those considering a move into the seafood industry.

Covid-19-Related Recommendations

Perhaps the most pressing things that the industry will have to deal with over the next 12 to 24 months will be the adaptation to new ways of working. This is for two reasons – firstly because the continued presence of the virus may necessitate such methods, but mainly because they offer greater efficiencies and higher productivity.

We would therefore recommend specific Covid-19-related action to:

1. Support and underpin business development in terms of managerial and financial training.
 - Offer new or additional marketing courses to help businesses adjust to social media, online sales, and online communications;
 - Develop and offer new courses in customer relationship management;
 - Train businesses in the effective use of a web presence including SEO and website analytics;
 - In England, KFE already provides click and collect training. This type of training needs to be introduced to help N.I. businesses across the seafood industry to help reach wider audiences.
2. There should be a focus on developing remote training resources including online courses, webinars, podcasts or live internet training and other e learning tools.
3. In the rapidly changing situation, accurate and easily accessible information is key. There is a requirement for resources which translate government and official guidance on e.g. social distancing and approved ways of working so they are relevant to each sector of the industry.
4. Training should be adapted to enable industry changers to transfer to the seafood industry. This may be e.g. short courses for engineers moving into processing or just more effective mentoring aimed at operatives from other industries.
5. The industry should develop messaging, which predicts post EU-exit growth. Employers should be encouraged to use this to appeal to high calibre industry changers.

EU-exit

To an understandable extent the issue of the UK's exit from the EU has been overshadowed by the advent of the Covid-19 pandemic. The UK's exit from the European Union, which we joined as the European Economic Community (EEC) in 1973, is due to be formalised in December 2020. The exact effect of our departure on the Seafood industry is difficult to predict, but no sector will be unaffected; fishing quotas, the availability migrant labour, and trading terms for imports and exports are all currently uncertain.

Becoming an independent coastal state after Brexit will give the UK the right to decide who fishes in our waters and on what terms

Defra spokesman

All sectors face uncertainty, but it is likely that Northern Ireland's catching sector will be most affected. Increased quota could lead to the Northern Irish fleet being able to land more fish, but equally Northern Irish vessels could be banned from entering Irish and European waters.

There is uncertainty at the time of writing as to what will happen regarding the movement of labour between the European Economic Area and the UK.

Across the UK fishing vessel crews consist of about 15% non-UK nationals. In Northern Ireland this is 60%, with approximately half of those being from inside the EU. Stakeholders suggest that without this source of labour the sector in Northern Ireland would collapse.

Our survey of processors in Northern Ireland found a heavy reliance on migrant workers, a quarter of staff are EU residents and 10% non-EU residents

As things stand the approach seems to be moving towards a "points-based" system which will permit suitably qualified professional and workers who are filling a shortage situation to enter on working visas. However even in the latter category it seems likely that there will be a requirement for at least Level 3 skills.

Since completion of the research, the Migration Advisory Committee has recommended that deckhand roles on vessels of 9 metres and above should be regarded as Level 3 and be added to the shortage occupation list.

Our research found a good deal of qualitative and anecdotal feedback along the lines discussed above but in answer to specific questions about the impacts of the UK's exit from the EU almost all sectors were clear that it has had and will have no, or minimal, impact on business. Reticence about future implications for the industry could be due to uncertainty about the final terms of the UK's exit from the EU, combined with a tendency for employers to adopt a 'wait and see' attitude while focusing on immediate issues.

Our depth interviews with employers, stakeholders and trainers echoed the feedback from the survey, however one processing employer in Northern Ireland was concerned about the impact 'once we have got over corona virus, 80% of our business will disappear overnight due to Brexit'.

It is also important to recognise that labour is not the only concern of the seafood industry where the UK's exit from the EU is concerned. The terms of trade between the EU and the newly independent UK are of great importance. The most likely outcome at present appears to be a return

to the international trade rules as established by the World Trade Organisation (WTO). This will require the payment of standard duties on all trade between the EU and UK. There is a chance however that a more sensible approach will be agreed – but probably not by December 2020 – which will move towards a free-trade agreement between the two.

The departure of the UK from the EU was always regarded as desirable by the catching sector, which has experienced severe problems from EU fishing quotas and common rules for fishing areas, Under the Common Fisheries Policy (CFP) EU countries have access to each other's waters, except for twelve nautical miles from coastlines (the internationally accepted "Territorial Waters").

A further issue is the way in which the UK's exclusive economic zone (EEZ)²⁰ will be interpreted. The definitions and rules are complex but, broadly, the EEZ extends out for 200 nautical miles and theoretically the UK could keep all such waters for its own fishing fleets in a similar way to the Icelandic approach. This issue is yet another unknown at the present time but exclusive access to a 200 mile sea-zone around the UK would make a significant difference to the catching sector and would have positive implications for associated sectors such as processing, fish frying and retail.

EU diplomats have made it plain that this is not something they would wish to see and that everything in future negotiations is linked (i.e. that they wish to see the UK being flexible on such matters if the UK wishes to have flexibility in access to EU markets in other industrial and commercial sectors.

For example, restricting EU access to UK waters could lead to retaliatory action on UK fish exports to the EU. Exports and imports of seafood products within the EU Single Market are currently without tariffs and involve minimal paperwork. Northern Ireland exports 36% of its catch to the EU²¹, Export tariffs and bureaucracy could hit European exports; but freedom from European restrictions could present opportunities to open up far Eastern export markets.

In the absence of alternative markets, any action by the EU to impose tariffs on exports may have wide reaching effects on the Northern Irish industry. Similarly, any increased documentation will impose costs on the industry, and subsequent delays at Border Inspection Posts could make some seafood exports impossible. Also, Northern Ireland will face increased bureaucracy when trading with the rest of the UK, the 'border in the Irish Sea'.

Tariffs or other action to limit exports to the EU could be followed by the UK government imposing tariffs on EU exports of fish to the UK. This would see the sector catching more fish, having limited or different export markets, and a potentially an increased domestic market. The industry would be faced with the marketing challenge of switching domestic consumers from imported species to those caught in domestic waters; together with the challenge of seeking new export markets.

The outcomes of diplomatic negotiations during 2020 (and beyond) are unknown but it is very clear that the seafood industry will have to prepare itself for a number of different results and that

²⁰ The EEZ, prescribed by the 1982 United Nations Convention on the Law of the Sea, is an area of the sea over which a sovereign state has special rights regarding the exploration and use of marine resources, including energy production from water and wind. The "territorial sea" gives full sovereignty over the waters, whereas the EEZ is a "sovereign right" below the surface of the sea.

²¹ 2018 House of Commons [Report](#) 'Brexit and Northern Ireland: Fisheries

preparing for new export markets, a degree of growth and increased bureaucracy are very sensible approaches which will be advantageous regardless of the UK-EU outcomes in the negotiations.